

AUTOMATED SERVICES COMMITTEE MINUTES

December 17, 2002

PRESENT (voting): Marcia Middleton (APL); Nancy Pieri (BETH)
Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols-
Randall (GUIL); Judy Felsten (RCSC); Carol Reppard (TROY); Karen
Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Rawdon Cheng, Peter Kowalski

9:05 a.m. – Meeting called to order by P. Ritter, Chair.

I. Minutes

Minutes of the November 26, 2002, meeting were accepted as written.

II. Automation Services Report - Karen Nuckolls

She noted that no one is able to access the server due to the production load taking place at this time.

She acknowledged all of the work of the Implementation Team members (Marcia Middleton, Richard Naylor, Pat Nonamaker and Pat Sahr) for their assistance with mapping codes in *epixtech*. Mapping is translating the DRA database into *epixtech* structure and codes. It is a very time consuming process, especially since use call numbers in their own unique way. If an item is not mapped correctly, it will default to "unknown" when circulating and so will not be credited to the appropriate area for statistics. The Implementation Team is seeking the highest level of accuracy when the items are circulating. After migration, it will be possible to pull up all of the remaining "unknowns" and correct them.

She explained that during this production load, no more **deletions** should be done in the database because these **will not** be reflected in the gap load that will be done 10 days prior to the "go-live" date. If items are deleted in the current database after the production load, they will then have to be deleted again in the final database.

MOTION: G. Sacco moved that the ASC request that member libraries postpone any deletions until after the go-live date. N. Pieri second. Unanimous.

However, **withdrawals** can continue to be done because these **will** be updated in the gap load.

M. Middleton asked how on-order records will be handled? K. Nuckolls responded that they will be handled the same way that they are now.

R. Cheng noted that the final database will be loaded on the UHLS server at *epixtech* and then shipped to UHLS.

K. Nuckolls reported that the Gates Training was taking place at UHLS and Rob Carle, UHLS Trainer, was attending those sessions as well as traveling almost every day to member libraries to conduct training.

III. Technology Department Report - Rawdon Cheng

R. Cheng discussed the need for a policy regarding spam mail. He has asked people to send him anything that they consider spam so that he can create a filter for it in the email.

Consensus that R. Cheng should create/find some definitions of spam mail and draft a policy for discussion by the ASC. The policy should include:

- a statement regarding who has the authority to block or unblock mail
- suggestions as to what types of material should be blocked
- what user-level blocking will be available
- the policy should be fairly liberal in order to allow users to increase blocking levels

R. Cheng noted that “unsubscribe” to some junk emails only makes it worse because it adds a specific email address to their list.

M. Middleton noted that publishing individual staff email addresses on a website makes it possible for robots to find these addresses and send spam mail.

IV. Migration Update

G. Sacco asked if all of the libraries would ‘go-live’ simultaneously on January 23rd? R. Cheng responded that the libraries will come up one-by-one. All of the libraries will use PC Reliance prior to the ‘go-live’ date and then one at a time will upload their own circulation information when R. Cheng notifies them to do so.

The libraries will probably 'go-live' in circulation order. M. Middleton noted that the Implementation Team members have not yet been trained on PC Reliance because they need a database to work with.

The Implementation Team will develop a 'go-live' schedule that will be sent out to the libraries. It will probably take about three days to bring all of the libraries onto the new system since each one requires a separate gap load. The Team is waiting for further information from *epixtech* regarding the time that it takes to load each library.

P. Nonamaker asked if the libraries that are still circulating manually want to go-live soon? P. Ritter reported that it is his understanding that CAST and VAFL don't expect to begin circulating on Jan. 23rd.

G. Sacco asked if "frequently asked questions" that have been used to publicize migrations by other Systems could be obtained from the Horizon listserv. K. Nuckolls will request the information and forward it to G. Sacco for compilation.

G. Sacco suggested that in February there should be a Systemwide meeting for venting and celebration. She would like all library staff members to be able to see the "big picture," not just the area for which they are responsible. To achieve this, she suggested that the System sponsor an annual education meeting (with food) on System technology.

Discussion. P. Ritter noted that it would be better to divide this into two sessions: the first would be a celebration when everyone is on the new system. The second would be an educational session to discuss questions and concerns about the new system; people would send in questions in advance of the meeting so that the Implementation Team members, and others, would be able to develop an agenda and make some preparations.

Consensus to table this discussion until the next ASC meeting when more information will be available.

P. Nonamaker noted that the Implementation Team members are meeting with all of the Advisory Councils in order to bring them all into the bigger picture. She noted that discussions at these meetings have extended beyond the issues normally dealt with by the Council members.

G. Sacco asked if any parameters have been established regarding who can make changes to or customize the new system. P. Nonamaker noted that the ASC will have to decide how and when to implement the new features of the system. At this point, the goal has been to make the functions as similar to DRA as possible and then when everyone is comfortable with that, changes can be made and exciting new features implemented.

G. Sacco wanted the ASC to pass a motion not allowing the local libraries to make any changes until the system has been functioning for a certain amount of time. M. Middleton noted that there are policy codes imbedded in the software that have been input by K. Nuckolls and so no one can do any customizing until she allows it.

J. Felsten asked the following questions:

- **when will the member libraries first see the new iPac?**
Probably in mid-January.
- **will local holdings be the first items to be displayed on the screen?** *There is a box to check for local holdings - it is a choice made by the individual doing the searching.*
- **will Syndetics be available at the 'go-live' date.** *Yes.*

C. Reppard asked if Syndetics would be included on the StaffPac?
No, only on the iPac for public use.

R. Naylor noted that a couple of weeks before going live, member library staff should begin practicing with the database so they are well prepared to come up.

R. Naylor suggested that the Implementation Team should develop a checklist for the libraries as they prepare for their 'go-live' date. This list would check that the new software has been loaded on all machines and would give a time schedule of any other things that need to be done immediately prior to the date.

10:30 AM Meeting adjourned.

NEXT MEETINGS:

Tuesday, January 7, 2003	9:00 AM at UHLS
Tuesday, January 28, 2003	9:00 AM at UHLS

Heidi A. Fuge
12/17/02

AUTOMATION SERVICES REPORT

DECEMBER 17, 2002

HORIZON MIGRATION

Inputting Codes and Parameters

Karen, along with some UHLS staff, is continuing to copy Circulation exceptions into Horizon from our DRA circulation policy files.

At the same time, Karen, Pat Nonamaker, Pat Sahr, Richard Naylor & Marcia Middleton are working with member library Horizon codes that did not map ("unknown" code), correcting and adding additional "views" for each call no. configuration as necessary.

My grateful thanks to the above for their "above and beyond the call" of Imp Team duty for helping me with this process, which can be tedious, a challenge, and mystery solving all rolled up into one!

Migration Schedule

As with any migration schedule, one learns to "roll with the punches." Grant Pearson, our Migration Team programmer, has been working closely with Rawdon on beginning the production load. The order of loading is: authority records; bibliographic records; and item records. The authority load began on Friday afternoon and is continuing even as I write this report. He will then make available to the ImpTeam a copy database for corrections, and begin the bib record load. At his recommendation, I sent out a message on Friday asking libraries to quit withdrawing and deleting items (books, videos, etc.) from their collections. This also applies to barcodes, which should not be changed (relabeling items). Any deletions during the production load will not be reflected in the new database.

Additions and changes, however, *can* take place. These include changes to item records and original cataloging into UHLAN. The "gap load," so called because it covers the 'gap' between the main dataload and the Go Live date, will take care of adding these to the main database.

Implementation Team Meetings

11/26: The Team agreed to meet with the following advisory councils: Adult Services (12-11); Resource Sharing (12-18); Youth Services (12-20); Database (1-9-2003).

12/3: Several libraries had asked about PR for Horizon. An e-mail was sent out listing several sites to check for examples of announcements. While January 23 may be the Go Live date, it is not the Grand Opening date. Grant said that he considers 95% an ideal mapping ratio. At last count, we had about 82%.

12/10: Team discussed several questions Marcia had listed about mapping. In one conclusion, it was decided to copy back the DRA Shelf Location into the *Shelf Location* field, and only leave the call no. prefix in the *Call No.* field. Upon examination, many mapping unknowns appeared because of changes in call no. practice over the years ("PB" & "PBK"), and in those libraries that did not send in code spreadsheets. These are being worked on, one by one, divided among Imp Team members. However, items with an "unknown" status can circulate. Discussion of the Pull (request) list in Horizon and how it is handled.

Complete notes from the Implementation Team meetings can be found on the UHLS Intranet.

TRAINING

Horizon Circulation

Local Horizon training is right on schedule. Rob is a "Travellin' Man," training on Circulation at several libraries so far. The Intranet contains circulation exercises for library staff, and he recommends that member library staff practice basic procedures whenever possible using the Horizon training database.

Gates Grant

Rob & Sara are taking part in the Gates Grant workshop at UHLS on December 17. Training will follow at member libraries between March and June of 2003.

Technology Dept Report

Dec 17, 2002

Migration

- Production load started on Dec 10;
- Authority records were uploaded and are being processed;
- Bib records were uploaded on Dec 14;
- Item records will be next;
- Patron records and transactions are last to be loaded.

SPAM mail

- We have been receiving messaged from users which they considered as spam;
- UHLS has no policy on email use for member libraries. Each library has its own policy;
- There is no spam policy in place;
- Current objectives are blocking email with sexual nature and are from well known spam sites;
- We created rules as requested by users.

We should have a spam policy so users know what we block and what we do not.