

**AUTOMATED SERVICES COMMITTEE
MINUTES**

January 7, 2003

PRESENT (voting): Marcia Middleton (APL); Nancy Pieri (BETH); Joe Makowiec (BRUN); Patricia Nonamaker (EGRN); Barbara Nichols-Randall (GUIL); Judy Felsten (RCSC); Carol Reppard (TROY); Karen Nuckolls (UHLS); Lorraine Smi (VOOR)

(Non-voting): Rawdon Cheng, Tim Burke

9:00 a.m. – Meeting called to order by P. Ritter, Chair.

I. Minutes

Minutes of the December 17, 2002, meeting were accepted as written.

II. Automation Services Report - Karen Nuckolls

She reviewed her written report. (See pages)

IT IS IMPORTANT TO NOTE THAT NO CHANGES, ADDITIONS or DELETIONS can take place in the patron database after January 9th.

IT IS IMPORTANT TO NOTE THAT NO CHANGES, ADDITIONS, DELETIONS OR BARCODE RE-LABELING can take place in the UHLAN bibliographic database after January 12th.

The databases will be in production mode. They can still be viewed, and circulation can still take place but it will be a situation of "look but don't touch."

On January 9th, the Implementation Team will meet with the Database Advisory Council to discuss migration issues and offer training on adding item records.

Discussion regarding the training dates at the member libraries. K. Nuckolls will check with R. Carle regarding the schedule for training Valley Falls. (NOTE: Valley Falls has been trained)

III. Technology Department Report - Rawdon Cheng

R. Cheng reported that J. Koppel and P. Kowalski will be out at the member libraries for the rest of the week installing PC Reliance and instructing staff members on how to use it. All of the libraries should be finished by Friday, Jan. 10th. An icon will be placed on the computer desktop and with a double click, staff members will be able to run PC Reliance. R. Cheng noted that the Tech staff are making it as easy as

possible. He will also be sending out simple instructions on how to use the program. Existing data will be added to each library's information in PC Reliance on a daily basis. At the end of the last business day preceding Jan. 23rd, libraries must upload the data on PC Reliance into the UHLS server in order for R. Cheng to process it and prepare it for the new system. During the actual "go-live" time, UHLS staff members will contact each library as they are moved over to the new system.

R. Cheng will send out an email to <UHLANusers> with a list of the libraries that will be brought onto the new system on January 23rd.

IV. Other Business

AS OF JANUARY 17th, THE INFORMATION ON DRA WILL NO LONGER BE ACCURATE. The DRA software will be destroyed as soon as possible following the migration to *epixtech*.

B. Nichols-Randall asked the following:

- will the withdrawn materials that are still listed in the DRA database be purged before being transferred to *epixtech*?
No - the data has already been transferred. In addition, some of those records are associated with patron records and purging would delete the fine information. When the information has been transferred to the *epixtech* system, it can be reviewed and edited much more easily.
- in the Chapter-A-Day program, there are links to material in the UHLAN database. How will patrons be notified during the period when the database is unavailable?
K. Nuckolls will check with M. Fellows but there will be a message, beginning January 8th, on the Web2 Interface notifying users that the system will be unavailable during the migration period.

P. Ritter reported that R. Cheng is working on the year-end statistics that are necessary to produce the 2004 UHLAN charges. The actual 2004 charges and estimated 2005 charges will be sent to the member library directors by the end of the month.

The Implementation Team will be meeting on January 14th and the 21st. They will determine if it is necessary for the ASC to meet before the next scheduled meeting on January 28th.

9:50 AM Meeting adjourned

NEXT MEETING: Tuesday, January 28th at 9:00 AM at UHLS.

Heidi A. Fuge
1/7/03

AUTOMATION SERVICES REPORT

JANUARY 7, 2003

HORIZON MIGRATION

Inputting Codes and Parameters

Karen, along with some UHLS staff, is continuing to input Circulation exceptions into Horizon from our DRA circulation policy files. Circulation “points” were also added for PCReliance usage. Cataloging workforms for NEWCAT records (used for on orders) have been entered.

Pat Nonamaker, Pat Sahr, Richard Naylor, Geoff Kirkpatrick (BETH) & Marcia Middleton have completed working with member library Horizon codes that did not map (“unknown” code), correcting and adding additional “views” for each call no. configuration as necessary.

Thanks for all of your help!

January 3 was the cutoff date for these additions/corrections, and with a mapping rate of about 97%, Grant Pearson, our data consultant and load coordinator, believes this is a very good number.

As of January 2, Grant had loaded over 1 million items into the Production Load of the bibliographic database.

IMPORTANT:

1) At the *close* of library business on Thursday, January 9, ***no changes or additions or deletions to the patron database can take place.*** This means using “dummy” cards (labeled “patron 1, patron 2,” etc.) will be the norm until the Go Live date of January 23 (Thursday).

2) At the *close* of library business on Sunday, January 12, ***no additions, changes, deletions, or barcode relabeling can take place in the UHLAN bibliographic database*** (i.e. bibliographic records OR item records).

A detailed memo on the above will be sent out today, January 7.

Implementation Team Meetings

12/17: The Imp Team discussed authority records, server issues, on-the-fly & Uncataloged items, and PCReliance installation.

12/18: The Imp Team met with the Resource Sharing Advisory Council and discussed the migration and answered questions.

12/20: Members of the Imp Team met with the Youth Services Advisory Council to discuss migration issues.

1/6/03: PCReliance installation schedule was discussed; server will arrive Jan.9, along with Tim Hyde of *epixtech*; a report of Uncataloged items will be run; timeline for stopping all additions & changes to patron and bib database was set up.

TRAINING**Horizon Circulation**

UHLS has scheduled local circulation training classes through January 20th, 2003. By this point in time, 24 libraries, branches included, will have received training. Ten member libraries have made their facilities available to accommodate training for nearby libraries. As of January 8th, 110 UHLS member library staff will have received local training. This is in addition to the number of UHLS member library staff trained by the *epixtech* trainers in late October and early November, 2002.

Bethlehem Public Library trained its own staff, and also offered its facility for UHLS for training. Menands and Schaghticoke will still need to be scheduled, and Castleton will be trained in early February.

There is a Database Advisory Council meeting this Thursday at 9 am at UHLS. Members of the Implementation Team will be discussing migration issues, and training will be provided on the basics of adding item records in the cataloging module.

Karen and Rob will be visiting libraries to train on the basics of adding items to the UHLAN database with Horizon within the next few weeks. They will be calling to schedule these visits.