

**AUTOMATED SERVICES COMMITTEE
MINUTES**

January 28, 2003

PRESENT (voting): Tim Burke (APL); Nancy Pieri (BETH); Carol Trager (BRUN); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols Randall (GUIL); Judy Felsten (RCSC); Barbara Kubli (STEP); Paul Hicok (TROY); Karen Nuckolls (UHLS); Lorraine Smi (VOOR)

(Non-voting): Rob Carle, Rawdon Cheng, Sara Dallas, Geoffrey Kirkpatrick, Jonathan Koppel, Peter Kowalski, Marcia Middleton, Carol Reppard

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

NOTE: epixtech has changed its name to Dynix and the new name will be used throughout these Minutes.

I. Minutes

Minutes of the January 7, 2003, meeting were accepted as written.

II. Automation Services Report - Karen Nuckolls

No written report - open discussion.

P. Nonamaker reported that the RoadRunner problem seems to be resolved.

P. Ritter reported that the UHLS T1 line had been down over the weekend and Verizon was working on it on Monday. R. Cheng was here all night on Jan. 27th to try and resolve the problem.

B. Kubli commended K. Nuckolls for still being able to laugh following all of the problems with migrating to the Horizon system during the past week. She asked if there was a mechanism in place at UHLS for keeping track of the problems as they are reported and reviewing them to determine if there is any pattern to them? K. Nuckolls noted that the technical problems are referred to R. Cheng; J. Koppel noted that R. Cheng takes careful notes when problems are being reported and software patterns are also being noted.

B. Nichols Randall asked what else needed to be done? Why were UHLS staff at this meeting instead of working on resolving the situation with Dynix? Was only one staff member assigned to solve problems? P. Kowalski noted that everyone in the Tech Services Department was working on processing data in order to bring the libraries up on Horizon.

R. Naylor requested a status report. K. Nuckolls noted the following:

- the security issues have been extremely frustrating to resolve and Dynix was unable to access the system due to the Verizon/Internet being down and so Kathy Cunningham (Dynix) could not work on the files to correct the problem.
- she just learned that there was a problem with the maximum fines entered for the libraries - there has to be a unique borrower code for each library. She was not told this before.

B. Kubli asked if the PC Reliance data can be trusted? R. Cheng noted that there might be a problem with PCReliance. Once the information has been uploaded to UHLS, it will be difficult to do a second upload within a short period of time since PC Reliance remembers the information and will not allow the second upload to overwrite the first.

Discussion regarding the fact that items might have been checked in but it doesn't show this on the system when uploaded from PCReliance to Horizon. Libraries will have to carefully check any overdue notices that were printed while they were using PCReliance - the items might have been returned and the notices might be incorrect.

NOTE: it was suggested that, in the future, if the system is down and libraries must use PCReliance for circulation, they should only do check-outs and wait to do check-ins until the Horizon system is back online.

P. Ritter explained that many of the problems UHLS is currently experiencing with the Horizon system are related to that fact that we are a system with multiple independent entities with multiple, non-standardized rules. In addition, Dynix sent many of their staff people to the ALA Mid-Winter conference and therefore they weren't available when needed.

Discussion regarding continuing on DRA while the problems with Dynix are sorted out. The current contract expires at the end of January.

MOTION: B. Kubli moved to continue DRA for another month. P. Nonamaker second. R. Naylor amended the motion to add that DRA will be continued *unless the iPac is corrected by January 31st*. B. Kubli and P. Nonamaker accepted the amendment.
Unanimous.

Discussion regarding the way in which the information might be maintained, in the most patron-friendly manner, while switching back and forth between DRA and Horizon. The problem is the status of the items relating to check-ins and check-outs. R. Naylor noted that he would rather lose a little money in fines instead of incorrectly telling a patron that they have something checked out to them when it has actually been returned.

Consensus to forego fines in order to reach the most correct database possible and allow the Implementation Team to handle the situation in the most patron-friendly manner.

C. Trager suggested that Dynix should be told to do what the software is supposed to do.

Discussion regarding the request list, especially as it applies to new items at this time.

MOTION: T. Burke moved that if the libraries get a request for an item from another library, they should either honor that request or make the item non-request. N. Pieri second. Unanimous.

B. Kubli and S. Dallas will work on an email to be sent to all of the libraries explaining this decision.

B. Kubli asked if it was possible to shorten the patron registration? G. Kirkpatrick noted that the following are the fields that must be entered to register a patron (further information can be entered at another time):

- location
- borrower type
- name
- barcode
- 2 stat classes

M. Middleton noted that the Implementation Team is working on making the above-mentioned fields the first ones on the patron registration screen.

C. Reppard asked when the database purge of withdrawn items would take place? K. Nuckolls will check with Dynix at the Implementation Team meeting today.

III. Technology Department Report - R. Cheng

(written report)

Migration

1. Processing PcReliance data files

All PcReliance data files from the gap load week are processed. There are Exception Reports which users should view. As of this time, we have yet to figure out how to allow library staff to view the reports. It is a Horizon security issue.

2. Connecting to the server

There are numerous complaints about connections to the Horizon server. It happens to many libraries connected to UHLS via Internet. We believe we have found the cause. I will send the report out Dynix support team to confirm our findings.

Some 56k libraries experience delay in connecting to the server. When Horizon client opens up, it will download approximate 500KB of data to the workstation. Each function such as CKI/CKO will also download different size of data to the workstation. The workstation will then process the data before the user can perform the selected function. This is when the user will see the spinning hourglass. The download speed is determined by the available bandwidth at that instance. The processing power of the computer will affect how fast the data are "digested" It is difficult to predict how long it takes to open up the Horizon client.

In a random test on a Monday night from a 56k site, a Celeron PC with 1.7GHz 256MB RAM took 1:37 to open up the client and 1:50 to launch CKI.

3. Overdue/Request pickup notices

The printing of overdue/pickup request notices is different from that in DRA system. It is a two step processes. Different batches are created for each location prior to the printing. It is a cumbersome process. Since we will be using Eric Graham's procedure in generating notices, UHLS will do the process in the meantime. There will be an one day delay from the time notice are generate to libraries receiving those notices.

4. Circulation Reports

Horizon comes with adhoc reports but it takes a long time to execute any of those. It is not recommended to use them. UHLS has purchased 30 licenses of EasyAsk. Each library will receive a copy to install. The installation CD will be distributed to each library via courier with instructions. The CD also has a copy of PcReliance and Horizon client, so library will have two copies of those applications. UHLS will sign up multiple iLearn sessions with Dynix (formerly epixtech) to provide training on EasyAsk to train every library. Each session can accommodate 10 students. iLearn uses combination of web technology and telephone to connect students and teacher. Students can be trained at multiple locations at the same time; therefore, library staff can be trained in their own library. The training date will be announced later.

Circulation reports: libraries who want to access the reports on their own, rather than have them printed by UHLS, should contact R. Cheng.

5. Using PcReliance in the future

A guideline will be given to libraries about using PcReliance in the future. It will provide procedure when to use it, how to notify UHLS staff, and when to clear the existing data.

M. Middleton asked if, in the future, if a library goes offline and has to use PCReliance for circulation do they need to wait until UHLS calls them before going back online with Horizon? R. Cheng did not know at this time and will get back to the libraries with an answer.

6. Passing on Horizon quick tips

I will discuss this idea with Tech Advisory Council members whether it is practical to set up a listserv type of newsgroup to exchange tips in using Horizon application. It is not intended to discuss circulation or cataloging questions but the use of the application itself. Some possible topics: changing font colors/size, changing default profiles, changing security by local administrators.

Other Tech issue

Spam mail policy

It is still being drafted. I have received some suggestions from users and have done research on the Internet. A draft will be sent to this committee in Spring.

LIST OF ITEMS TO BE CONSIDERED:

- Reserves/local requests
- Fine reports
- Checkout/checkin
- Overrides
- Receipts
- Pull list
- Change routines to overlay PCReliance checkins

11:00 AM meeting adjourned.

NEXT MEETING: Tues., February 25th at 9:00 AM at UHLS.

Heidi A. Fuge
1/28/03