

Resource Sharing Minutes
December 18, 2002 Meeting Notes

Attendees: Sue Dague (EGRN), Lorraine Smi (VOOR), Jean Marie Cole (GUIL), Dawn Geurds (EGRN), Jo-Ann Benedetti (UHLS), Geoff Kirkpatrick (BETH), Amy Williams (TROY).

Implementation Team Members: Pat Nonamaker, Phil Ritter, Marcia Middleton, Karen Nuckolls.

The Implementation Team had asked to meet with the Advisory Council to discuss the upcoming migration to epixtech. We went over the timeline and schedule. Following is a list of items to be aware of over the next few weeks:

- The Imp Team will prepare a checklist for everyone to use before the Go Live day.
- Before January 10, create several “dummy” patrons (for example “GUIL Test Patron#1) to use during the period between 1/10-1/23, when adding new patrons won’t be possible. If you use barcodes for ILL items, set up “dummy” ILL items in advance, also.
- On January 20, stop using DRA and start using PC Reliance, the circulation backup software. Its okay to look at DRA, but don’t touch! At this time, do patron requests/holds on paper. There will be no access to patron accounts on the web, either. After 1/23, there will be an exception report with any holds that were missed.
- When the delivery bags arrive, Geoff recommends that you check in on PC Reliance the items that are your own library’s. Don’t check in dropped books - just put them in the bag with a dropped book slip. Any other items, hold onto for 3 days and check them in after 1/23.
- On January 23, after 9:00 PM, one library at a time will “go live.” Based on circulation, the information from PC Reliance will be uploaded. It will take 2-3 days to do all of the libraries. Libraries will only need to do paper check-outs from the time between when Rawdon calls the member library to upload and he calls back to tell them their data was successfully uploaded and they can start circulating on Horizon.
- Some epixtech terms: PAC LOCATION = Your own library
BORROWER LOCATION = Borrower’s home library
ITEM LOCATION = Permanent owning library
BORROWER TYPE = Adult, juvenile, X-class, etc.
I-TYPE = Loan periods
- Training database - it’s okay to experiment with it; Test database - don’t touch, just look!
- The new system will be “out of the box.” Changes to customize it will be made later, after everyone has a chance to get used to it.
- The Pull List: To avoid duplication of effort, a schedule of when each library will do its list will be developed. The ASC, Directors and Resource Sharing Advisory Council will need to work this out, because it has staffing and delivery implications.
- Multi-piece check in: epixtech does not ask Yes or No if the correct number of pieces are there. Assign the item another status (such as Repair or Missing) so that it will not show up as Available.
- Take a look at the IPAC link on the Intranet to see Syndetics, which has book jacket images, Tables of Content, genre, series information, etc.
- A KidsPac will be coming later, as will customization of the UHLS IPAC.
- There are still questions about c-flies and uncataloged items.
- The Serials and Acquisitions modules will be added next year.

- At the March meeting, we will discuss patron registration and the most important “out of the box” screen details that need to be changed.
- Questions? Email the Implementation Team at impteam@uhls.lib.ny.us.