

**DRAGON User's Group Minutes**  
**Wednesday, March 25, 2004**  
**Lincoln Library, Springfield**

**I. Meeting called to order**

Nancy Huntley called the meeting to order at 9:35 a.m.

**II. Introductions**

Nancy asked everyone to introduce themselves.

Door prizes were handed out for various categories; e.g. library who has already trained their staff on all modules of the new Horizon system, etc.

RPLS staff led the group in singing the "Going Live" song.

**III. Approval of minutes**

A motion was made to approve the January 14<sup>th</sup> Users Group Meeting minutes; motion was seconded and carried unanimously.

**IV. Committee Reports**

Database Standards – Karla Johnson

- new OCLC pricing takes affect July 1, 2004; after our go-live date (4/22), still a ten week period of time OCLC records can be added at the current rate
- question was posed to the DB Standards Committee concerning the certification process we currently have in place and how our migration to Dynix will affect it; everyone will be grandfathered in at current level; DB Standards Committee will review the process this Fall, following the statewide cataloging guidelines as documented in the *Statewide Cataloging Standards of the Illinois State Library*
- Committee is aware there are some issues concerning cataloging standards from Dynix that need to be addressed
- next meeting is Friday, March 26<sup>th</sup> at 9:30 a.m. at RPLS; if you have anything that needs to be addressed, contact Karla; everyone is welcome to attend meetings

Technology – Shelley Koehler

- Committee met twice; discussed Horizon/Dynix problems (hope all issues have been resolved); Pat Burg discussed digitization
- next meeting is May 4<sup>th</sup> at 9:30 a.m. at RPLS, after the go-live date; will have had an opportunity to see how the new system is doing and get feedback

Policy – Linda Meyer

- Committee met February 24<sup>th</sup>; assignment was to look at Dynix's out-of-the-box 30 day default of record retention/item retention; after reviewing the process and it's affects, the Committee's recommendation was to set the item retention period at 30 days (to accept the default); the Governing Board approved the recommendation; only **ITEM** retention, **NOT** patron retention, has been approved; concerns regarding patron privacy were fully addressed
- patron record retention for the Home Services module **ONLY WILL** be retained
- beginning in May Committee will meet monthly on the third Wednesday
- next meeting is May 19<sup>th</sup> at 9:30; will begin revising policies; anyone interested, please contact Linda

Q. Can you clarify "item retention"?

R. Item will show previous patron; can only do it through the item record, **NOT** via patron record and **ONLY** at the supervisor/administrator level. There will be no possibility for patron information retention; will only access the previous patron, not three or four patrons back; will be a great help in tracking down lost parts to multi-part item(s), those responsible for recent damages, etc.

## V. RPLS Report

Paul –

- 29 days to go-live date
  - general background information:
    - a. on-going process – RPLS staff has been filling in hundreds of tables, many are out-of-the-box, but some have been customized; some we have done more than once in an effort to fine-tune; will continue working with the various tables
    - b. getting computer room ready for new equipment/system; worked with Steve Look to install a new rack and cleaned up area
    - c. on-going communication with Dynix - weekly conference calls including Jo, Paul, Sue and Terry, plus our project manager and any additional Dynix staff dealing with specific issues; also multiple daily calls regarding specific issues; those involved with Train the Trainer Program also were involved in the live WebX sessions; lots of interchange with Dynix
    - d. Provo people are working on the preparation of our production server; they call it staging
  - important dates/information to remember:
    - a. 3/31 - production server is being shipped from Provo; arrive in Decatur in two days
    - b. 4/6 - field engineer to install production server; installed by 4/7
    - c. 4/12 - **stop** using DRA for anything except circulation; do checkins and checkouts only
    - d. 4/12 through 4/15 - Dynix will extract bib, item and patron data from DRA/SIRSI (gap tape), then will load information into production server
    - e. 4/19 - **stop** using DRA completely (go-dead date for DRA), and start using PC Reliance if you want to, for off-line checkouts **only** (strictly your choice if you use it); PC Reliance disc with complete instructions will go out
- Q. What will patrons see if they go to the patron access catalog during this downtime?
- R. No decision has been made when our current patron catalog will go down, but a message on the webpage will let people know we are temporarily down.
- f. 4/22 – go-live date
  - g. 4/22 and 4/23 - will have Dynix staff at RPLS to help with problems/questions; not the end of the process; many aspects of the new system will continue to be fine-tuned; a work in progress
- Q. When do we point our PCs to the production server?
- R. The pointing process is simply changing the IP address in Sybase; actually won't be switching over until the morning of 4/22; whole process will only take moments; information on the IP address will be made available as soon as we receive it.
- Q. On April 12<sup>th</sup>, what is meant by "circulation"; what will be allowed?
- S. All functions needed to circulate; more detailed instructions will go out prior to 4/12.
- Q. Will DRA still be accessible after 4/19?
- R. Still being discussed; more detailed information will go out prior to 4/19.
- h. reports - history won't transfer over to Dynix, just the current stats; will work out timing on running all reports against information in DRA system, including year-end reports

Doris –

Marketing strategy:

- "from 1965-75 my father was an advertising manager for the K-Mart Corp.; he passed on some wisdom: 'if a family can survive building a home, they can survive anything'; this migration process reminds me of that process; go to those who have been through this before"
- GET HIP Campaign (Horizon Information Portal); Dynix will send CD with graphics for use in library to develop for patrons, also graphics to use in-house for promotional things; e.g. transfers, buttons, t-shirts, etc.; order form on back of song sheet with pricing

information; as information is made available, it will be posted on the webpage in PDF format

- as you develop this, try to make it as fun as possible; enjoy the process, get people to laugh at themselves

E-mail:

- e-mail addresses with the Alpha1.rpls.lib.il.us extension have been changed over to the new mail server; good news - no change to e-mail address, bad news - typo in information from ICN that caused no mail for several days; if any problems, report them to Doris ASAP
- accounts for each library based on Dynix code have been set up; codes are on the webpage; if using PC Reliance during downtime, use those accounts to send your checkout files to; once those accounts are used for our purposes, libraries can continue using them among themselves for communication
- if you are not a member of the RPLS LLSAP listserv, Doris copied you over to the new server; if you aren't subscribed, get subscribed
- the General listserv stayed the same, but commands to subscribe to or send to changed
- training issues are reported through the listserv as well as news about Dynix and system status; the need to communicate is a cooperative effort
- patrons will have to go to a new URL once we migrate; if old one is posted anywhere, those will have to be changed; detailed information will go out as soon as received
- can drop the mail2 from e-mail address when reporting your address
- HIP t-shirts will be available by 4/22 if ordered by 3/31; will go in delivery by 4/19
- to test new server, we will go back and send out something on it; this one will not let you duplicate the same address; the only people moved over were those we knew for sure were live on old system; new one is web-based.

Jo –

Train the Trainer Program:

- began four months ago
- 26 people received training from Dynix and have been going out and/or training in-house; six each in Acquisitions and Serials, serving as point people; three in Reserve Book Room
- hit a bump in the road - had to convince Dynix we needed training manuals after we were 2/3 the way through the Train the Trainer Program; participants did a wonderful job bringing it all together; had a massive session to trim manuals down; thanks to all those involved in process; tremendous effort from all involved
- everyone should have been contacted by their trainers by now

Packets:

- should have received by now containing cd with PC reliance (optional to use) with instructions (to be used for checkouts **ONLY**, even though it says checkins - won't pull up holds or blocks)

Q. During three days of downtime, can we just send books back to the home library; simply put them in delivery to that home library and let them check them in?

R. Yes.

- PC Reliance will continue to be our offline backup for checkouts **only**, if you choose to use it, but we will never be able to use it as a checkin tool

Q. The Reserve Book Room module – can it be used by any type of library?

R. Yes.

- also in packet, Dynix Horizon 7.3 and 7.3.1 revised instructions for the staff client; these are completely revised to include the Help Center, the upgrade to 7.3.1 and how to get it, and the OCLC z39.50 file to pull over OCLC records only on machines that will be doing cataloging
- if you already have the staff client installed and pointed to Yoda, start on page 7; if not, start on page 1

- **don't** toss your CDs away; you're getting new instructions, not a new CD; when we go live, instructions will point to the new server, but the process is the same, so keep CD
- you can delete or not delete Yoda (first practice server we started with) out of Sybase; if you never got it in, don't worry, just start with page one in the instructions

General questions:

- Q. Codes will change to seven-letter alphabetical code; can we continue using current routing slips?
- R. Yes, for the time being. Libraries are still required to fill out the rest of the label; old rules still apply; only one box will change.
- Q. Receipt printers print a label of sorts. Can we use those instead of routing slips?
- R. Will turn that over the Policy Committee. In the meantime, use the existing routing slips.
- Q. What is the status of receipt printers?
- R. Steve Look is checking into, hoping to get together a group order. We will follow up with Steve and post the information as soon as possible.
- upgrades need to be on all computers; do steps 1 and 2 on all PCs; do step 3 on staff workstations only where cataloging will be done

## VI. Unfinished Business

Technology Committee – Diane Yeoman

- Committee met January 8<sup>th</sup> to discuss new fee structure; proposed changes at the January User's Group meeting
- current fees are assessed for *full*, *pac* and *search* usernames and for *database manager*
- proposal is to change *full* to *login*, change *database manager* to *access fee*, eliminate *pac* and *search* usernames, increase *login* by \$50.00 (from \$600 to \$650) and *access fee* by \$50.00 (from \$450 to \$500)
- with changes for 2004-05, the Computer Development Fund balance at the end of the year will be \$18,700; future costs if we change again have not been looked at, but will have to be considered down the road in 2005-06
- motion was made to accept the proposed changes; motion was seconded; passed with 50 yes votes, one no vote and one abstained vote; changes will go into affect July 1, 2004
- fee structure was based on prior year's full username count; if any changes in number, contact RPLS

## VII. New Business

None

## VIII. Announcements

- Springfield College in Illinois is leaving LLSAP and joining ILCSO.
- Acquisitions module training/usage will proceed, but there is a hold on the Serials module due to a number of questions, but will proceed with it at a later date.
- Plan on attending this afternoon's OCLC meeting at 1:30.
- Next User's Group will be in July; specific time, date and location will be announced at a later date.
- Governing Board will meet at RPLS on April 1<sup>st</sup> at 9:30.

## IX. What's New at Your Library?

- RO – Everyone is invited to cheesecake and a tree planting in Linda Shaw's memory on April 22<sup>nd</sup>; goes hand in hand with the Together We Read Program.
- Sign up for the April 30<sup>th</sup> seminar at RPLS; consider it an opportunity to share and gather and meet with one another; lots of interesting sessions: looking at past and future, digitization, etc.
- Effective April 5<sup>th</sup> Lincoln Public is limiting their hours of operation.

- As of April 1<sup>st</sup> Lincoln Library will be down to 58 staff; also limiting the Sangamon Valley Collection access hours.
- Windsor's referendum passed.
- Rochester's referendum passed.
- Matt Wilkerson recently got married; congratulations to Matt!

Nancy adjourned meeting at 11:20 a.m.

### **Database Numbers**

288,905 patron records  
813,738 bib records  
2,723,807 item records

### **Attendees and Summary**

Unfortunately, not everyone signed the attendance sheet. Below is a list of those who did. Following that is a list of the contracts represented during the roll call vote, so each library listed there had at least one representative at the meeting.

Becky Wilson, Herrick Public Library  
Kathy Harvey, Michael Victor II Art Library  
Dorla Reavis, Divernon Township  
Kathy Goleman, Divernon Township  
Shirley Shaw, Taylorville Jr. High  
Nina Wunderlich, Taylorville Elementary Schools  
Amanda Murphy, IL Supreme Court Library  
Tim Moody, Richland Community College  
Suzy Saunders, Lovington Public  
Lisa Spracklen, Marrowbone/Bethany  
Gisela Motzkus, Illinois Department of Transportation  
Betty Lou Hicks, Hanson Professional Services  
Pam Ewing, RPLS  
Eileen Curry, Windsor  
Marlene Wirth, Sullivan High School  
Janet Hicks, Pana Library  
Pam Langhoff, Lincoln Library  
Julie Wullner, Lincoln Library  
Nancy Huntley, Lincoln Library  
Lois Morse, Lincoln Library  
Karla Johnson, Effingham  
Amanda Standerfer, Effingham  
Chet Brandt, IL ECI Clearinghouse  
Bobbi Benning, Athens  
Terry Moreland, RPLS  
Joan Rhoades, Vespasian Warner/Clinton  
Paul Johnson, RPLS  
Jo McLain, RPLS  
Bev Obert, RPLS  
Doris McKay, RPLS  
Ann Adkesson, Warrensburg  
Marsha Burgener, Atwood-Hammond  
Thea Chesley, IL Dept. of Public Health

Karen Coleman, Windsor High School  
Theresa Cripe, Cerro Gordo  
Deb DeJarnette, Lincoln Public  
Stephanie Edwards, Weldon  
Harry Gaylord, IL Supreme Court  
Mary Kleinschmidt, Petersburg  
Nancy Kruse, Rochester  
Sharon Lowry, Okaw Valley High School  
Mary Lee Melhorn, South Macon  
Colleen Mitchell, Sullivan  
Carol Moore, Decatur Public Schools  
Ellen Murray, IL Association of School Boards  
Shelley Perry, Illiopolis/Niantic  
Alice Reed, Blue Mound  
Jane Schmidt, Abraham Lincoln Presidential Library  
Ruth Shasteen, Neoga High School  
Dorothy Siles, Taylorville  
Nancy Simpson, IL EPA  
Anita Walters, Sherman  
Carol Waterman, Taylorville  
Lori Weaver, Weldon  
Amy Jo Williams, Cerro Gordo  
Susan Wood, Sullivan  
Diane Yeoman, Mason City

Argenta-Oreana PLD  
Athens Municipal L  
Atwood-Hammond PLD  
Marrowbone PLD  
Bethany Okaw Valley CUSD #301  
Blue Mound Memorial LD  
Hope Welty PLD  
Chatham Area PLD  
Vespasian Warner PLD  
Richland Community College  
Decatur PL  
Decatur SD #61  
Divernon Township Library  
Helen Matthew Library  
Forsyth PL  
Herrick Township PL  
Illiopolis/Niantic PLD  
Lincoln College  
Lincoln PLD  
Lovington PLD  
South Macon PLD  
Mason City PLD  
Mt. Zion PLD  
Moweaqua PLD  
Central A&M CUD #21  
Mt. Pulaski PLD  
Neoga School District  
Pana Carnegie-Schuyler Library  
Petersburg PL  
Rochester PLD  
Shelbyville PL

Sherman PL  
Lincoln Library  
Hanson Professional Services  
IL Association of School Boards  
IL Dept. of Public Health  
IL Dept. of Transportation  
IL Early Childhood Intervention Clearinghouse  
IL Environmental Protection Agency  
Abraham Lincoln Presidential Library  
IL State Museum  
IL Supreme Court  
Springfield Art Association  
Elizabeth Titus Memorial Library  
Sullivan CUSD #300  
Taylorville PL  
Taylorville CUSD #3  
Barclay PLD  
Weldon PLD  
Williamsville CUSD #15  
Windsor Storm Memorial PLD

Submitted by Terry Moreland, Secretary