

Strength in Partnership Preliminary Program

The program is not complete or closed. This draft has been posted to inform prospective participants of the presentations that are planned. Users of *epixtech* products are welcome to submit program proposals to <http://www.woodbridge.lib.nj.us/conference.htm>

General Sessions

Both CODI and HUG will hold membership meetings. The meetings will be scheduled at different times so clients who have membership in both HUG and CODI meetings, and *epixtech* staff may attend both meetings. Programs will run at the same time as the membership meetings for conferees who do not wish to attend but there will be no Dynix-only programs during the CODI meeting no Horizon-only programs during the Horizon meeting.

epixtech will hold two general sessions. The first thing at the conference will be a company update with Jack Blount, CEO and other senior company staff. Later in the day, *epixtech* will present a general session featuring information about iPac 2.01 and beyond; Horizon 7.2 and beyond; ILL; and DigitaLink. Leadership of the Development Office will meet with CODI members to discuss Dynix development at the CODI Business meeting.

Board Meetings

Sat Nov 9th 5 - 7 PM HUG budget meeting
Sun Nov 10th 9 - 12 PM HUG Board
Sun Nov 10th 9 - 12 PM CODI Board
Sun Nov 10th 12 - 5 PM Summit
Sun Nov 10th 6 - 9 Board members hold for possible meetings
Thur Nov 14th 8 - 11 Joint Conf Meeting

Programs for all users

The members of HUG and CODI have enthusiastically taken to the conference theme. The largest number of proposed programs is designed to appeal to users of both Dynix and Horizon software.

<p>Principles of Authority Work and Authority Record Creation</p>	<p>This program will present an overview of the theories and principles involved in the creation of authority records. In the course of this presentation we will discuss personal names and series records. Included will be the reference sources to be consulted, the types of cross references to be made, and the proper construction of headings. The section on series headings will also discuss the use of series decision fields. Attendees at the session are encouraged to bring examples of headings that pose problems in their local catalogs. The session will not discuss the foibles of Horizon or Dynix but will focus on the creation of the data and the MARC coding involved. Anaclare F. Evans, Ph.D., DALNET, Detroit MI</p>
<p>Thin is In</p>	<p>Thin client in libraries - For Dynix and Horizon libraries. Change everything from one location, no more pc repairs and upgrades! Diane Hamilton - Cape May County Library Brian Bates - Polk County Library Robert Karatsu - Rancho Cucamonga Public Library Ginny Magisano - Stark County District Library</p>
<p>A Couple of clicks, millions of picks - the URSA experience</p>	<p>The focus of the presentation will be on our experiences with implementing the URSA software and how the project is progressing. It will include how the software works, what it does for our member libraries and their patrons and how we implemented the project, including information on training and publicity. Lauren Stokes, Beth Watson, Tampa Bay Library Consortium</p>
<p>ipac 2.0+ Accessibility: Configuring iPAC for maximum sight and physical accessibility</p>	<p>This session will preview ipac 2.0 ADA Accessibility, and what steps and style sheet adjustments are necessary to make the interface robustly ADA-compliant. Specific navigational techniques and products will also be discussed. Susan Johns, Pittsburg State University</p>
<p>Customizing iPac 2.01 at the Smithsonian</p>	<p>The Smithsonian has installed six copies of ipac 2.01. During beta testing and production implementation of iPac 2.01 we have found ways to customize our iPac beyond what system administrative tools provided. Our presentation will cover how to create customized indexes and how to make customized changes via XSL files. Ching-hsien Wang, & Randy Arnold Smithsonian Institution Research Information System, Office of Chief Information Officer</p>
<p>Paraprofessionals in the Cataloging Department: trends, issues and training</p>	<p>Focuses on the increasing use of paraprofessional catalogers and the implications this trend has on the cataloging department and the quality and quantity of work performed. The paraprofessionals skills and training needs will also be addressed. Barbara Glackin, Pittsburg State University</p>

<p>Using the Horizon Acquisitions Module with K-12 Schools</p>	<p>On July 15, 2002, Loudoun County Public School System created its first purchase order using the Horizon Acquisitions Module. This presentation will look at how and why K-12 schools should consider implementing the Horizon acquisitions system and the experiences we have had to date in piloting an interface between the acquisitions module and FAMIS, the automated accounting system used by Loudoun County. LCPS is a former Dynix customer who migrated to Horizon on August 1, 2001. Currently we are ordering for 38 elementary schools, 9 middle schools, and 7 high schools. Lisa M. Shacklette, Loudoun County Public School System Maria McCaffrey and/or Paul Johnson, <i>epixtech</i></p>
<p>DigitaLink: The DALNET Beta Test Experience</p>	<p>The presentation will provide an overview of DigitaLink based on a DALNET beta test of the product. Metadata structure, data creation and migration issues will be addressed, including a comparison of one digital library application (The University of Detroit Mercy Shipping Database) as it was executed in Horizon and DigitaLink. Leo Papa, Systems Librarian, DALNET</p>
<p>Where did you learn THAT! Three librarians discuss staff training</p>	<p>How three libraries answered the important training questions: What training is needed? Who needs it? Who is going to teach it? How are they going to do it? Alice Dupuis, Miami-Dade Public Library, Miami FL Ginny Ray, Wichita Public Library, Wichita KS Caren Soltysiak, Vernon Area Public Library District, Lincolnshire IL</p>
<p>The System Administrator's Handbook: where to go when you have lost your marbles</p>	<p>If you were struck by lightning tonight, how would someone manage to run your system? What should you have in a handbook for the System Administrator. Also what should you list for your own use right now for those days when your brain seems to take a vacation and you need to do something complex. Marge Freeman, Cochran Library, Sweet Briar College, Sweet Briar VA</p>
<p>Lock your PAC's down and manage them from your desk</p>	<p>How one multi-branch system "mass produces" a PAC configuration, protects it from hackers and klutzes, and troubleshoots it across a wide area network using common software tools. Al Carlson, Hillsborough County Library System, Tampa FL</p>
<p>Getting Your Stuff Back: Debt Collect in Dynix and Horizon</p>	<p>Get the latest on the new Horizon Debt Collect module from both sides of the operation. Eileen Kontrovitz, SA from Ouachita Parish Public Library, who has used Debt Collect with both Dynix and Horizon, gives the library perspective. John Goodyear, Manager of Information Services at Unique Management Services, gives the collection agency perspective. Eileen R. Kontrovitz, Ouachita Parish Public Library John Goodyear, Unique Management</p>
<p>Cataloging : what do real public libraries do?</p>	<p>A discussion of how public libraries create really usable MARC records for their online catalogs. Julie Blackwell. Poplar Creek Public Library. Streamwood IL</p>

Data, Ho!: Using ebook devices and PDAs to carry the Library's collection with you	I've developed a Recall process for our staff where our collection information can be stored as word documents in e-book devices (I have a hiebook) or (possibly) on PDAs. This allows us to do large media buys (Video/DVD/CDs etc.) without having to carry around giant stacks of printouts. With an AV collection that's already reached over 5500 items, that's a big help. Nancy Kersten, Green Hills Public Library District, Palos Hills IL
Look, Ma, No Cables!: Creating a Wireless Training Lab	A regional CODI meeting and Computers in Library conference provided combined inspiration for creating a wireless lab at Green Hills. I'll share all the planning, grant work and physical work that went into making this real for us. We know have the ability to teach small groups about computers and the internet, and can do intense Dynix training with staff members in a more suitable environment. Nancy Kersten, Green Hills Public Library District, Palos Hills IL
Spine Label Printing System	Program will describe a new system for printing spine labels using Horizon and Dynix. This label printing system produces a customizable durable label that is easily read and offers libraries the printing functionality and options they have always wanted. Cheryl Walters, Utah State University Carl Hull, Computype James Taylor, <i>epixtech</i>
Keeping the vandals at bay	Learn what tools you need in order to send information securely and to build your own low-cost firewall using Linux and Open Source software. A discussion of how SSH (Secure Shell) and Linux firewall tools have been used to secure the Westminster Public Library network from mischief-makers. Eric Sisler, Westminster Public Library, Westminster CO
Linux Program	(specifics forthcoming) Eric Sisler
ILL: Is it your library's best kept secret?	A show and tell session about how libraries using URSA and RSS are promoting ILL within their communities. Annette Milliron, North Bay Cooperative Library System Duryea H. Callaway, DALNET
Going the Extra MiLE	Michigan Library Exchange(MiLE)...a success of technology, marketing, and public relations' plans as indicated by library staff and library users. Duryea Callaway, DALNET, Detroit, MI
Interlibrary Loan: Fee or Free	An exploration of the cost of ILL with and without an ILL management tool. Annette Milliron, North Bay Cooperative Library System, Santa Rosa CA
ILL@your library	A discussion of the future virtual catalogs and interlibrary loan. Where do we want the software to be in 2 years, 5 years....? Annette Milliron, North Bay Cooperative Library System, Santa Rosa CA
Getting the Best from Support	Pointers from <i>epixtech</i> on how to maximize contacts with Support. <i>epixtech</i> staff
Technical Review - iPAC Application Development	An in-depth discussion of of where iPAC is going, what are the priorities, why are some functional deficiencies not getting the attention they "deserve", etc <i>epixtech</i> staff

Programs for Dynix users

Always look on the bright side of life	Migration pitfalls and experiences from the newly migrated. Eileen Kontrovitz, Ouachita Parish Public Library
Doppelganger Buster: Using Recall to Identify Duplicate Records	Richard Lewis has created a new style of Dictionary Item to identify records with duplicate information. John Hurley explains the dictionaries and their application. John Hurley, Woodbridge Public Library
Fun with your laser printer	How to print spine labels with your laser printer. Mary Novak, Franklin Public Library Sue Holbrook, Germantown Public Library
You've got the keys to the server room, now what!?! Information for new system administrators	This will be a program for people new to administrating Dynix. We will include information about how to log a request to <i>epixtech</i> , utilities that you need to know, just a hint of recall that will get you through until you can take that class, unix commands that help, and what is a load profile, among other things. Lots of really good information. Susan Johns, Pittsburg State University Steve Orton, <i>epixtech</i>
Out of the Box	Description of Dynix - Horizon upgrade at the William T. Cozby Public Library. Library did minimal profiling, customization, and set-up work. We started using IPAC, Serials, Acq, etc. with default settings and made only minor tweaks. We've been on Horizon since April 2001. Connie Moss William T. Cozby Public Library, Coppell TX
Transferring Invoice Data to Peoplesoft: a Workaround solution	The New York Public Library has developed an in-house means of transmitting data from our acquisitions office to our accounting office's Peoplesoft system using Recall and Microsoft Office products. A demonstration of this process will be provided. Michael Ciccone Head, Materials Acquisitions The New York Public Library
Ask the Database Janitor: finding your dirty data and cleaning it up	A practical guide to using recall to find problem data in the Acquisitions, holdings and bib files then generating reports to clean it up manually or using Dynix utilities to clean it up automatically. Vicki Teal Lovely, South Central Library System, Madison WI
Heavy Hands on the Keyboard: Sledgehammering Data out of Dynix	Are I-Descriptors indecipherable? Do F Correlatives make you say Fuggedaboutit? Here are some simple, barbaric ideas to break open the treasure trove of data hidden in multivalued attributes. John Hurley, Woodbridge Public Library

Programs for Horizon users

<p>Inventory in the trenches -with a PERCON and a wireless laptop</p>	<p>The presenters will discuss the nuts and bolts of an actual inventory using a PERCON and a laptop with wireless access and discuss all involved processes. Of particular significance is the fact that one of the presenters comes from a public library setting while the other is from an Academic Library. Pradeep Lele-North Harris College Library, Houston TX Linda Gambrell - Montgomery County Memorial Library System – Conroe TX</p>
<p>Out of Horizon</p>	<p>There's no doubt that the complexity of the Horizon system empowers libraries to achieve most of their goals. But not every library is alike and must be treated like that While Horizon developers are focusing on 80% of the libraries needs, others are trying to address the missing 20%. Customizing outputs (whether in reports or statistics), exporting and importing data are the major issues. But why does it need to be done by IT people? The answer is: It doesn't. We'll see how library staff and IT staff can partner with the right tools like Microsoft Excel, Word and Access. Basic SQL and Horizon table structure knowledge is recommended but not necessary. Luis Filipe Domingues, Catholica University, Lisbon, Portugal</p>
<p>Other duties as required: System administration for the rest of us</p>	<p>In smaller libraries of all types, Horizon system administrators often wear several hats. Three librarians from smaller libraries (a public, college and community college library) will share their experiences balancing their different responsibilities, offer survival strategies, and invite audience participation. Sara Aden, Assistant Library Director/Computer Systems Manager, North Platte Public Library Anna Barnard, Cataloger/Horizon System Administrator, Samuel Merritt College Charles Crawford, Library Operations Manager, Tacoma Community College</p>
<p>Extracting Information from MARC Records</p>	<p>Description of Program: Using SQL to extract data from bib and authority records. Includes</p> <ul style="list-style-type: none"> Short Review of Basic SQL select statements (tables, columns, column types, primary keys) * Simple Pulling of Text from a Bib Tag * Authority and Non-authority tags (different between bib, fullbib, and auth tables) * Pulling text from a specific subfield * Pulling text from multiple tags (self joins) * Pulling information from fixed tags (e.g., the leader tag) * Paul Jensen's stored procedure * If time permits, creating a temporary table (to create an attractive report or for importing into Access) <p>Tammy K. Baker, Ohio Historical Society</p>
<p>Using BIMPORT in Horizon</p>	<p>The program describes the implementation of BIMPORT at Joyner Library at East Carolina University. Ann Carol Stocks, Electronic Resources Librarian, Assistant Head, Systems, Joyner Library, East Carolina University</p>

Managing Serials in Horizon	<p>Effective use of the serials module. Come to this introductory session and learn the ins and outs of the serials module. Ever wondered what a particular field actually does? Ever been confused and discouraged? Bring your questions (or answers) to the session and we'll answer as many as time allows. This session will be complemented by breakout #7, "The Ins and Outs of Prediction". James Mouw, University of Chicago</p>
Technical Review - Horizon Architecture, the Big Picture	<p>A discussion on database independence, 3-tier architecture, etc. What does it all mean? epixtech staff.</p>
Technical Review - Horizon Application Development	<p>An in-depth discussion of where Horizon is going, what are the priorities, why are some functional deficiencies not getting the attention they "deserve", etc. epixtech staff</p>

Chat Sessions

There will be a series of informal sessions to discuss Dynix and Horizon modules and their application.

Module Chat Sessions

The users of each Dynix and Horizon will meet separately to discuss their best ideas for application and improvement of the software and systems related to the various modules. Planned sessions include:

Acquisitions

Circulation

Cataloging

RPA

IPAC & WebPAC, Community Resources

System Administration

Serials

Hidden Commands and Utilities

epixtech Programs

epixtech has issued this preliminary schedule. Programs on the schedule are subject to change or cancellation depending on availability of presenters.

General sessions

epixtech President Jack Blount looks forward to welcoming customers in the “Company Update” general session. He will talk about his background and vision for the direction of *epixtech*. Jack will be joined by Ty Brown, SVP for Global Operations, in talking about the focus on global customer operations.

Julian Critchfield, CTO, and the Product Management team will present a general session on development plans for Dynix, Horizon Sunrise, iPac, and ConnectLib products. The session also covers the latest improvements to the beta testing and product design process.

epixtech representatives also support the HUG and CODI user group meetings as they discuss initiatives and enhancements processes.

***epixtech* New Products Track—This track includes demos and discussion of new products or services available to customers. Programs are usually repeated more than once for scheduling convenience.**

- **iPac Add-ons** (Kid’s iPac, Spanish iPac, Enriched Content, Consolidated Searching, etc.)
- **DigitaLink** –the comprehensive solution for building a digital library
- **iSelect and iRequest** –the newest ILL solutions
- **DebtCollect for Horizon** –graphical version of the popular Dynix interface to send patron accounts to Unique Management for materials recovery services
- **iLearn and CBT** –the newest versions of Web-based training and CBT training
- **Professional Services** –description of the types of services available through this team
- **Reciprocal Borrowing** –the ability to exchange patron records for circulation, even with a separate ILL system
- **N2H2 filtering** –solve your Internet filtering problems

***epixtech* Dynix to Horizon Track –This track provides an update on the migration process and comparisons with Dynix. Programs are usually repeated more than once for scheduling convenience.**

- **“How do I do...?”** naming specific Dynix functions and showing their equivalent in Horizon
- **Migration process** –overview of the process of data migration and system implementation including the new Go Live and preinstall using iLearn training
- **Design differences** –How do the database, item types, borrower controls, etc. differ?
- **Planning your move to Horizon** –How do you prep your data, your staff, and your public?

ILL mini-conference (Tuesday, November 12) **NEW this year******

- **iSelect and iRequest** –the newest ILL solutions
- **“A Couple of clicks, millions of picks—the URSA experience”**
- **ILL@your library**
- **ILL: Is it your library's best kept secret?**
- **Interlibrary Loan: Fee or Free**
- **NCIP standard** –what is it and why do we need it?
- **Reciprocal borrowing** –how does NCIP enable intersystem loans
- **User group meeting** for all *epixtech* ILL customers

Getting the Best from Support

Pointers from ET on how to maximize contacts with Support
Ty Brown Break into SA, iPAC....

Technical Review - Horizon Architecture, the Big Picture

A discussion on database independence, 3-tier architecture, etc. What does it all mean?
Tom Creighton.

Technical Review - Horizon Application Development

An in-depth discussion of where Horizon is going, what are the priorities, why are some functional deficiencies not getting the attention they "deserve", etc.
Jolynn Halls, Horizon Product Manager

Technical Review - iPAC Application Development

An in-depth discussion of where iPAC is going, what are the priorities, why are some functional deficiencies not getting the attention they "deserve", etc
Shelley Neville, iPAC Product Manager

Exhibitors

We have received commitments from eighteen exhibitors and we expect more. The exhibitors underwrite the conference with fees they pay for space and by sponsorships they provide. Sponsors names are indicated in bold print.

3M Library Systems, Inc

A-R&B Associates, Inc.

Baker & Taylor

Bibliotheca RFID Library Systems

Brodart Co.

Checkpoint Systems, Inc.

epixtech, Inc.

Ingram Library Services, Inc.

ITC Systems

Library Technologies, Inc.

Marcive, Inc.

Muse Global

OmniPrint, Inc.

Rasmussen Software, Inc

Syndetic Solutions

Telus Enterprise Solutions

Unique Management

Veicon Technology, Inc.

www.mmm.com

www.btol.com

www.bibliotheca-rfid.com

www.brodart.com

www.checkpointsystems.com/library/index.asp

www.epixtech.com

www.ingramlibrary.com

www.itcsystems.com

www.librarytech.com

www.marcive.com

www.museglobal.com

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www.anzio.com

www.syndetics.com

www.telus.com

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