DALNET Project Managers Meeting
May 4, 1998, 1:00 - 3:30 p.m.
Wayne State University, Purdy Library, Simons Room

Agenda

1.   **Introductions and Approval of Agenda**   **1:00 - 1:15**

2.   **NOTIS LMS**   **1:15 - 1:30**
   a)   LMS 6.3.1 update (Anaclare Evans)
   b)   LMS 6.4.1 project/installation plans (Louise Bugg)
        over Memorial Weekend May 22 - 25
   c)   GTO via TCP/IP project update (Anaclare Evans)

3.   **MDAS Migration/InfoShare Project** (Jim Green)   **1:30 - 2:00**
   a)   InfoShare database options
   b)   Z39.50 to First Search for Cinahl

4.   **DALNET Collection Development Committee report**   **2:00 - 2:15**
   (S. Patterson, chair)
   a)   Input to MDAS database migration planning
   b)   Free trial results for databases
   c)   Other

5.   **Horizon Planning**   **2:15 - 3:00**
   a)   New Horizon workstation requirements (attached)
   b)   DALNET Database Structure recommendations
        (Option diagrams attached)
   c)   Task Forces being recommended to the Board (attachment)
        *Project Managers will be asked for nominees to serve by
        May 8th.
   d)   Migration Schedule
   e)   Individual institution tasks (to be distributed)

6.   **Other**   **3:00 - 3:30**
   a)   WSU PROFS service ending 9/30/98
   b)   Reports from DALNET libraries project managers

NEXT MEETING: June 1, 1998, 1:00 - 4:00 p.m.
                              WSU Purdy Library, Simons Room

L. Bugg/cmz
4-29-98
DALNET.19

DALNET Project Managers Meeting
May 4, 1998, 1:00- 3:30 p.m.
Wayne State University, Purdy Library, Simons Rm.

Present: D. Adams, K. Binkowski, J. Brennan, L. Bugg, N. Bulgarelli, A. Evans, J. Flaherty, J. Green, J. Houser, C. Mudloff, J. Murray, S. Patterson, B. Riester, M. Sheble, J. Trzeciak, K. Tubolino, D. Zyskowski

1. Introductions and Approval of Agenda

   Becky Riester was filling in for Julia Davis, who will be the Project Manager from Walsh College.

   No additions to the agenda.

2. NOTIS LMS

   a) LMS 6.3.1 update

   We are now able to print bills. We will be starting with January bills. Let Anaclare know if you don't want them by May 8. Anaclare will check institutions to see about printing – does WSU have enough mailers of the right type? We need to decide what to do about the pre-January (July-Dec 1997) bills. Anaclare will poll the institutions and compile the different options desired. We do not yet know how long the bills will take to run.

   WSU has loaded all current staff into the patron file.

   b) LMS 6.4.1

   LMS 6.4.1 is scheduled to be put into production this Memorial weekend. The current plan is to begin on Saturday evening and run through the night into Sunday morning. We plan to bring the system down at 6:00 on Saturday night. It is likely we will be able to bring the system up at the regular time on Sunday morning, but there is a chance of being a little late. DALNET staff will be notified on the list and hotline (313/577-4195).

c) GTO via TCP/IP

Ana will work on it as time permits. We are not sure how long it might be before she can get it working.

3. MDAS Migration/InfoShare Project

Jim passed out a handout listing various options for migrating two MDAS databases: ERIC and CHNL. Previously it was believed that these were good candidates for InfoShare implementation but after obtaining price quotes we are reconsidering.

The group agreed that using PACLink to connect to ERIC and CNHL through OCLC FirstSearch (available at no charge through the AccessMichigan program) appears to be a more attractive option than InfoShare at this point in time. The group also agreed not to proceed too quickly with InfoShare, but to continue with a thorough study of all the options.

Which criteria are most important. DPL – price #1, hook to holdings No.2. BH – full text.

The DALNET Collection Development Committee – is working on developing a formal procedure for database selection, including detailed criteria, and that would apply to InfoShare databases as well as other DALNET shared databases.

4. Collection Development Committee

a) Input to MDAS database migration plans.

The Collection Development Committee is compiling a list of various options for the MDAS databases and will make recommendations to the Project Managers.

b) Free trial results for database

Grolier? No interest was expressed in Grolier after the free trial earlier this year. There is also little or no interest in another Wilson Web trial at this time.

c) Other

MD Consult – a web-accessible database containing full text from medical books and journals. It is targeted to individual physicians, who may subscribe for about $35.00 month. Nancy Bulgarelli reports she was quoted $150,000 for BR, which is much too rich for their blood. There is substantial overlap with HRC and/or Ovid full text. It is not hooked to Medline. BH, HH, BR, UDM, expressed interest in a trial. WS may also be interested.

5. Horizon

a) Workstation requirements (handout).

The latest version of workstation minimum requirements for Horizon was handed out. The general recommendation for new purchases is to buy bigger, more powerful machines as funds permit; the minimum requirements should be used to assess whether currently owned machines will work for Horizon.

b) Database structure options (handout).

Option B+ incorporates features that are under development for several Horizon sites including Cal State. Grouping libraries in databases, if possible, is also recommended.

May 13 – Board meets to consider this recommendation.

c) Horizon Task Forces

Naming conventions – This is the most pressing issue, and this task force will begin work immediately. Chair—Sue Homant of UDM. Donna Roe UDM, Anaclare, Cindy Yonovich WC, Rex Dotson, DP. By May 18 they need to recommend how to collapse the location codes from 8 to 7 characters. Another issue is how the codes and long names will look in the PAC. The long names which Horizon can display are longer, so there is an opportunity to make them better; the task force will probably devise general guidelines rather than strict rules or actual names.

Jan Sheppard will be the Ameritech liaison for the task forces. She will be here the week of May 18 with Valerie Chase. They would like to meet with all these groups that week. Harry Masek and Louise will split follow up duties with the teams. The task forces will report to the Steering Committee. Their assignments will become clearer as Jan works with them during the week of the 18th. All these meetings will take place at UDM McNichols campus.

d) Migration Schedule

UDM by Fall, WS, DP, plus BH by March, 1999. Tasks have been scheduled. Small UDM test database of bib records being built at Waterloo right now. They are building indexes and testing it now. If it goes well we will create a larger test database with all types of records .

We will freeze NOTIS at a certain point.

We want to go with the B+ model by the time WS, DP and BH are added.

UDM is implementing WebPAC.

e) Individual institution tasks

UDM Horizon Implementation task list (handout). These are the tasks UDM is working on right now. UDM is sharing this internal document, as it may be helpful to other libraries in their planning efforts.

One issue is how to indicate in LUIS which libraries have migrated and how to find and use their Horizon OPACs.

WSU is forming committees to work on our Horizon migration (handout). DPL also is doing something similar, forming committees right now to start working on Horizon-related issues.

6. Other

a) PROFS/CMS

PROFS will be turned off (really this time) on 9/30/98. While the e-mail function has been disabled since December, 1997, several other functions have continued to be used, including telnet, gopher, and web

clients, and calendaring (WSU only?), so users of those functions will be affected by the shutoff.

b) OU Luncheon

OU lunch on June 2, thank you to DALNET. (invitation distributed).

7. News from member libraries

WA -- Walsh is asking for applicants for Gloria's position. Director, 3 support staff.

VA just about ready to go fully online for NOTIS circulation. Majority of patrons are in there now. Collection is barcoded. But dedicated circuit is not connected.

OC -- Judy – 5 new PCs in dept. Last to come up on TCP/IP. IP ranges up and running a while ago. Maybe going over to OCLC for cataloging. UDM will have OCLC transfer when they are up with Horizon. North Central visit -- they got an "exemplary service" evaluation for the libraries. New position for library systems, not posted yet, not going to make it in time for July 1. Two jobs, one tech services acq and cat and one systems.

WC -- Most of their wiring done and being tested, their MIS has a plan but haven't shared it. Three new PCs ordered. Not installing NT right now, must be Win 95 now. When they implement the whole network, they'll put in the Win NT.

DR – barcoding ongoing. DMC are next to do circulation.

HH – quiet

BR – quiet

BH – The library had the only Internet line; now they are sharing their T1 hospital wide. They had to migrate off their Novell server to an NT server. Put a firewall in. Took 8 days to do what was predicted to take 3 hrs. Internet line down about a day total. Debbie is working on the corporate Internet plan, coauthoring it. Accreditation inspection for the hospital, library and hospital both got rave reviews.

UDM – Memory upgrades for PCs took 5 months to get. Meeting with Computing Center people on hardware requirements. They want to roll over leases to higher PCs.

OL – Trying to get Windows NT, outside County standard. NT has better system security and reliability. Legal Resources on CD ROM, they got money to upgrade the CD network. They need bigger computers to handle resources on the CD ROM network. Purging records, will it be done before migration? We have never purged bibliographic records from NOTIS. We can leave the ones marked for deletion behind in conversion to Horizon, but it is recommended to purge them before migration.

DIA– Printing labels off OCLC label printing program. Working well. Negotiations with the City as far as the T1 line that goes to the building for Dream System. DIA's status changed and they are not City employees now.

DP – RFP out the door for wiring , vendor conference on May 14. 3 or 4 branch manager slots posted internally this week, external posting coming soon.

VA – Al Gore supposed to be in the area this Friday, John Dingell hospital dedication this Friday. May be security.

NEXT MEETING: June 1, 1998, 1:00 - 3:30 p.m. at WSU, Purdy Library, Simons Room

Notes by,
Jim Green
May 20, 1998

Horizon Hardware / Software Requirements

January 1998

Introduction

Horizon is a true client/server system with the client workstation running the Horizon application programs and the server running the database server software. This document describes the compatibility and recommended system requirements of the Horizon application, including both the client workstation and the database server.

A certification table is provided to show the compatibility of Horizon's current release, Version 5.0 and recommended database server configurations. The performance and responsiveness of the server hardware described in the table is certified by a team of benchmark engineers.

Since individual library needs vary, you are encouraged to work closely with Ameritech Library Services staff to configure a high performance system which meets the needs of your library or consortium.

Horizon Workstation Hardware Requirements

The specifications outlined below are for PC workstations that will run the Horizon system client software. For specification requirements for the server component of the Horizon client/server system, see the section **Horizon Server Hardware Requirements**.

Horizon Workstation requirements:

- ☐ Microsoft Windows 95 or Windows NT Workstation 4.0 operating system
- ☐ 486 processor minimum (Optimal performance on Pentium based processors with 100 MHZ or faster CPU)
- ☐ Memory (RAM) Requirements:

Horizon Workstation Type	Windows 95 RAM Requirements	Windows NT Workstation RAM Requirements
PAC Station (minimal)	16 MB	32 MB
PAC Station (optimal) Staff Station (minimal)	32 MB	40 MB
Staff Station (optimal)	48 MB	64 MB

- ☐ 100 MB free disk space (minimal)
- ☐ Network Interface Card (Intel or 3 COM recommended)
- ☐ SVGA monitor and adapter
- ☐ Mouse or trackball pointing device
- ☐ CD-ROM drive - 2x minimal
- ☐ Floppy drive

Horizon Server Hardware Requirements

Horizon tests selected database servers to provide an optimal server configuration. To receive Ameritech Library Services recommendation, a server must meet requirements for performance criteria, scalability, and reliability. Other optional configurations are available to meet higher levels of reliability, availability, and redundancy. Basic requirements are outlined below:

- ☐ UNIX Server or NT 4.0 Server
- ☐ Network interface card
- ☐ RAM Requirements vary by server type and data size
  (Contact Horizon Sales for configuration information)
- ☐ Disk Requirements vary by library size
  (Contact Horizon Sales for configuration information)
- ☐ Number of Processors vary by library requirements
  (Contact Horizon Sales for configuration information)

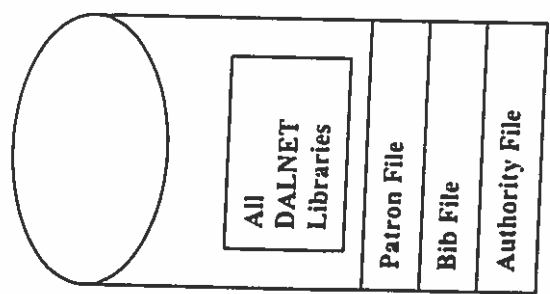*Horizon, Server, and Sybase SQL Server Compatibility*

Server	Operating System	SQL Server Version	Horizon Version 5.0
*HP 9000/800	HP-UX 10.20	Sybase 11.0.3	X
*Pentium Pro	Windows NT 4.0	Sybase 11.0.3 (requires Service Pack 3 for NT 4.0)	X
		MS SQL Server 6.5 (requires Service Pack 2 for NT 4.0)	X
*IBM RS/6000	AIX 4.3	Sybase 11.0.3	X
*Sun	Solaris 2.6	Sybase 11.0.3	X
DEC Alpha	Digital Unix 4.0	Sybase 11.0.3	X

* These servers are tested periodically to ensure that they meet the performance requirements of Ameritech Library Services.
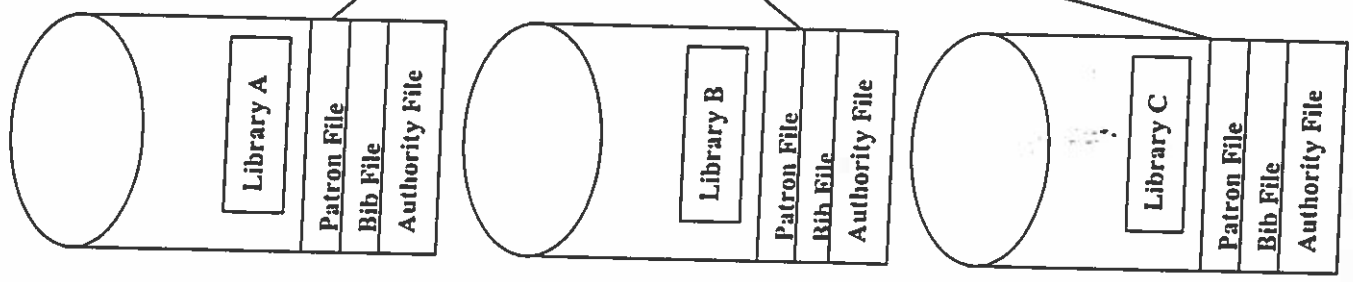
Option A
Single Shared Database

All DALNET Libraries

Patron File

Bib File

Authority File

Option B
Individual Databases

Library A

Patron File

Bib File

Authority File

Library B

Patron File

Bib File

Authority File

Library C

Patron File

Bib File

Authority File

Option C
Grouped Databases

Group A

Patron File

Bib File

Authority File

Group B

Patron File

Bib File

Authority File

Group C

Patron File

Bib File

Authority File
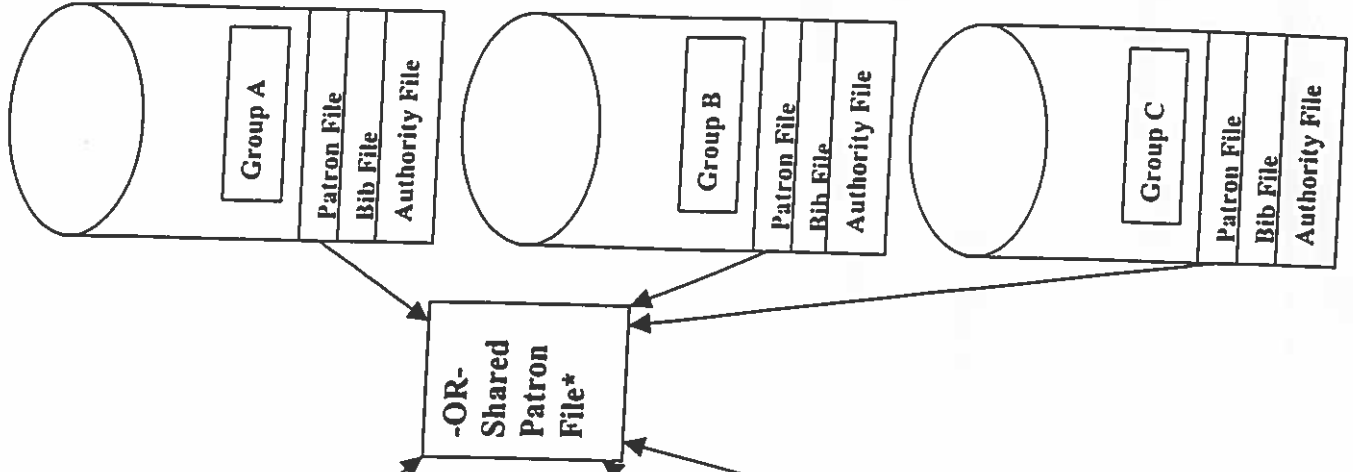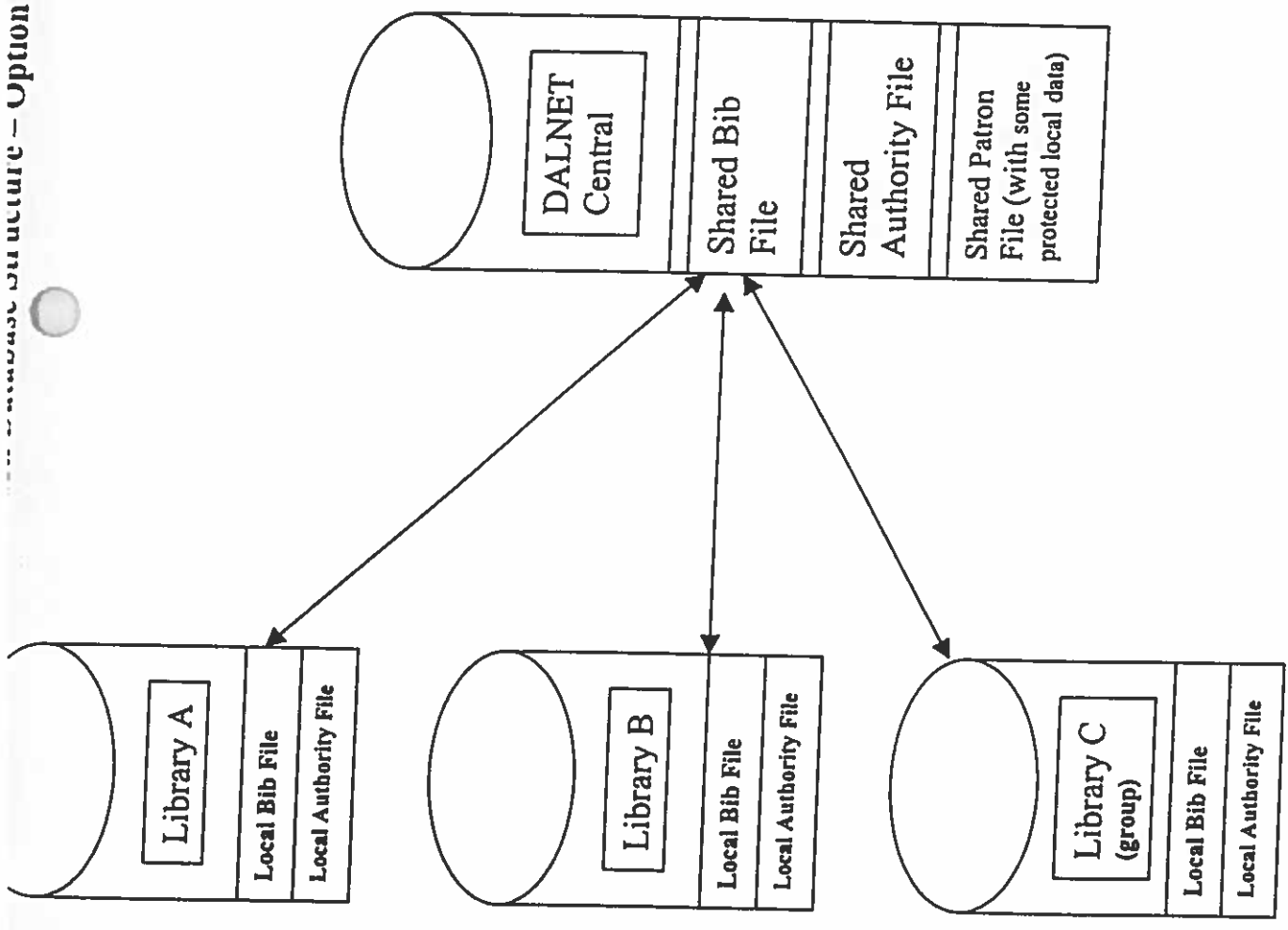
-OR-
Shared
Patron
File*

*Note: In either option B or C each library or group of libraries could have local patron files *or* could share a combined patron file.

DALNET
Central

Shared Bib
File

Shared
Authority File

Shared Patron
File (with some
protected local data)

Library A

Local Bib File

Local Authority File

Library B

Local Bib File

Local Authority File

Library C
(group)

Local Bib File

Local Authority File

RECOMMENDATIONS FOR DALNET TASK FORCES

The DALNET Database Structure Task Force recommends that the Steering Committee create several working groups, or task forces, to implement Horizon database Option B+ as soon as it is approved by the DALNET Board. Due to the timetable for the University of Detroit Mercy's Horizon implementation, one task force needs to be created immediately--the one to recommend naming conventions for Horizon location and collection codes and descriptions.

1.   **Horizon Indexes**   **Completion needed in 2 months**

This task force would be responsible for recommending the Horizon indexes to be created in common in order to provide consistent searching across all databases. Their task would include developing the MARC maps for those search and authority indexes for STAFPAC access. The goal is a base set of indexes used by all databases plus some special indexes from which individual libraries can choose. The indexes include browse indexes, key word, union ID numbers, inverted lists (ISBN, ISSN, LCCN), and call number lists.

2.   **WebPAC Design**   **Begin immediately and continue throughout migration**

The task force would develop an overall design for DALNET's WebPAC and guidelines for individualized WebPACs among DALNET libraries. Their assignment would include integration of Z39.50 accessible databases such as DALNET's NOTIS, MDAS, and InfoShare databases as well as other non-DALNET databases.

3.   **Naming Conventions for Collections   Begin immediately with completion May 22**

The task force would be responsible for recommending consistent naming conventions for DALNET's Horizon location and collection codes along with the descriptions that display in the online catalog. This needs to be done before the University of Detroit Mercy inputs its codes the week of May 18.

4.   **Cataloging/Authority Design   Briefing week of May 18, work during summer/fall**

This task force would be responsible for working with Ameritech on the development of the union catalog and union authority/resource databases. They would provide input to the Sunrise Project. They would review and update DALNET's database standards for the Horizon databases and propose master record concepts for the union database.

5. **Statistics Coding**   **Completion needed in 2 months**

This task force would be responsible for developing common statistics coding to enable DALNET-wide data collection and reports. Common reports done by DALNET institutions need to be considered, such as IPEDS. Areas to include are item statistical classes (Istats), borrower statistical classes (Bstats), and call number ranges (for all classification types).

6. **Shared Patron Database**   **Completion needed in 2 months**

This task force would be responsible for recommending the additional fields DALNET needs on its shared patron records, considering parents names and addresses, student ID numbers, etc. The current DALNET patron record standards need to be reviewed for Horizon. Patron record import and matching criteria need to be recommended.

7. **Horizon STAFPAC Views**   **Completion in Fall 1998**

This task force would be responsible for designing the union catalog views and displays for Horizon STAFPAC for DALNET. The union catalog would be put in place after the University of Detroit Mercy's migration to Horizon.

8. **Horizon System Administration**   **Completion in Fall 1998**

This task force would be responsible for recommending which aspects of Horizon system administration would be handled by the individual DALNET libraries and which would be the responsibility of DALNET central site staff. Areas to be considered are logon Ids and passwords, Horizon profile table input and update, day's end procedures, and reports.

CONCLUSION

The members of the DALNET Database Structure Task Force spent two very productive days together learning about DALNET's Horizon database structure options and deliberating on each one. They received much input from the 50 attendees at the discussion session on April 22 as well as emailed comments afterward from three of the attendees. Detailed notes from their working sessions have been written and are available to the Steering Committee, as needed, to supplement this report.