

DALNET Project Managers' Meeting
Wayne State University, Undergraduate Library
Community Room
Monday, November 1, 1999, 1:00 - 4:00 p.m.

Agenda

1. 1:00 - 1:10 p.m. Introductions and review of agenda
 Current Project Managers' roster (to be distributed)
2. 1:10 - 1:25 p.m. **NOTIS Shut Down Plans--L. Bugg**
 - Deadline to request reports and "downloaded" files
 - SNA circuits for dumb terminals
 - Availability during holidays
3. 1:25 - 1:35 p.m. **DALNET Collection Development Committee--L. Bugg**
 Advice requested by the Board re. need for this Committee
4. 1:35 - 2:00 p.m. **Horizon Implementation Update--S. Muir, DALNET Project Leader**
 - Library migrations
 - Serials prediction pattern sharing
 - DALNET's enhancements
 - Horizon software testing and acceptance
 - RSS implementation plans
5. 2:00 - 2:15 p.m. **Horizon Authority Database Management--F. Krempasky**
 Update on work being done to better manage our Horizon authority databases until the shared file is available
6. 2:15 - 3:00 p.m. **Horizon Central Site Update**
 WSU, J. Trzeciak
 - a. Performance; firewall installation; WebPAC 1.3 testing; Test server plans; Horizon 5.2 release
 - b. DPL, N. Skowronski
 - c. Server administration; DALNET Help Desk services
 - d. DALNET frame relay network support
 - DALNET Webmaster position
7. 3:00 - 3:15 p.m. **DALNET Outreach Report--D. Callaway, DALNET Outreach Coordinator**
 - DALNET Information Hub Video
 - Update on outreach initiatives

8. Information Hub Development--L. Bugg
3:15 - 3:45 p.m.

Discussion (carried forward from September meeting)
of process to put in place to achieve our goal of
developing an Information Hub with local information
resources

9. Other Issues
3:45 - 4:00 p.m.

- a. DALNET Online System Y2K letter update
- b. Horizon Software license agreement to be signed
by DALNET members
- c. Other matters arising

NEXT MEETING: January 10, 1999, 1:00 - 4:00 p.m.

L. Bugg/cmz
10-28-99

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Monday, November 1, 1999, 1:00 P.M. - 4:00 PM

Minutes

Present: B. Bett, N. Bulgarelli, M. Dow, C. Eames, J. Flaherty, G. Libbey, D. Murphy, M. Sheble, J. Shepard, W. Cromwell-Kessler for N. Skrowonski, J. Trzeciak, K. Tubolino, D. Zyskowski; L. Bugg, D. Callaway, A. Evans, F. Krempasky, A. Lim, S. Muir, P. Jose.

Excused: D. Adams, J. Brennan

Absent: K. Binkowski, M. Campbell, D. Drobnay, L. Lewis, C. Mudloff.

1. Those present introduced themselves. The Project Managers' list was circulated for corrections and to check off attendance. The agenda was reviewed and matters relating to collection development were moved to the next agenda item.

2. Collection Development Committee Report. L. Bugg reported that the committee's report was faxed to DALNET Project Managers on 29 October 1999. The committee has not disbanded, but with the activities of the Michigan Library Consortium, there seems to be little need for the committee. Michigan Library Consortium will seek consortium pricing for any source that is requested by one library. The DALNET committee will be distributing a survey on the databases to which each library is subscribed. One of the main functions of the DALNET Collection Development Committee will be data gathering, but they will stay at the ready in case they are needed. The need for the Committee will be reviewed in 6 months.

3. Louise Bugg reported on the plans for shutting down NOTIS.

- All requests for special printed reports from NOTIS must be submitted by 15 November 1999. Requests should be submitted to Anaciare Evans or Adriene Lim.
- Each library needs to identify the telephone circuits used by the SNA network and make arrangements to have them turned off, if you have not already done so. Codex modems currently installed at the WSU Computing Center will be removed and returned to each DALNET institution.
- NOTIS will be available through the WSU Holiday closure. L. Bugg will be communicating the date when staff functions will be discontinued, when public access will be shut down, and when staff look only access to NOTIS will end.

Please buy +
re-distribute.

4. Scott Muir presented the Horizon Implementation Update.
 - a. All group 3 libraries are now live and the group 4 libraries are coming along. DPL's date is unofficial but they will be up before December 23rd.
 - b. The various listers housed at DPL have been moved to WSU, please note the new addresses. Everyone who was subscribed at the old address is now subscribed at the new address.
 - c. It will be possible to share serial prediction patterns when we get to release 5.3. We could get a file to share now, but then we'd have to delete what we don't need.
 - d. A. Evans distributed a document prepared by D. Paldan and K. Bursick, which contains samples of the more common serials predictions.
 - e. Enhancements: A stress test is planned for WebPac 1.3 in early November. If this goes well, then other DALNET libraries will be migrated from 1.2 to 1.3. A response time study is being undertaken. A firewall has been ordered for the Wayne State server to attempt to prevent future break ins. We are beginning to analyze problems to determine if they are things that can be fixed or potential enhancement requests. DALNET staff and Ameritech staff are working on the best approach for upgrades as they are now handled sequentially and are PC based. We need to have more tasks run on the server as they run faster there. The Shared Patron file is back to the point where it started, except it uses the Social Security number. The file, as designed for use elsewhere, may or may not work for DALNET. After a conference call with Ameritech we now know why some of the unexpected things happen in the authority and bibliographic files. The Children's OPAC Task Force has begun to meet and is developing specifications. The Indianapolis/Marion County Public Library may be interested in working with us.
 - f. Software Testing: This is on hold until DPL comes live. Wayne State University, UDMercy, and others may also be involved.
 - g. RSS Implementation Plans: OCLC has agreed to meet ISO standards and so will be compliant with RSS. Decline will continue to work on compliance. The servers are on site and DALNET staff will likely begin working on RSS after the New Year.
 - h. Tape Loading to OCLC—still being tested at WSU.
 - i. WebPac upgrade: each library will require several weeks to upgrade. There will be another WebPac class in November.
5. Horizon Authority Database Management: Fran Kremasky reviewed the known problems. The subfield v can be imported but there are management and display issues. In order to avoid problems the subfield v must be changed to subfield x before the record is imported. Subfield v is a problem because the subfield is used in several places with a different meaning in each place. We have discovered that tag changes do not occur in bibliographic records when the tag is changed on an authority record. So if a heading is changed from a corporate body to a geographic heading or vice versa, overlaying the authority record does not change the tag associated with the heading on the bibliographic record. Some fields are skipped when records are loaded. Some tags are changed on loading. We are examining options and

considering what should be done until we have the union catalog and authority file.
F. Kremasky has developed a list of reports that can be used to maintain the individual databases. We need to identify training needs and error reporting strategies.

6. Horizon Central Site Update:
a. J. Trzeciak reported that WSU is investigating response time issues. In part, slow response time is said to be related to the large size of the WSU file. Ameritech has suggested that we build some super-indexes to improve response time. We need to test the effect of the new indexes and their related MARC maps. The Update Statistics program needs to be run regularly to aid in a number of jobs and improve response time. The Firewall is on order. WebPac stress testing will be done against the new indexes, not the old ones. Work will begin on the 5.2 upgrade after January.

b. Willy Cromwell-Kessler reported that DPL's hardware is mostly ready. New Vision staff is working on completing the internal DPL network and then will work on the remaining pieces. The network/hardware pieces that are not in place will not affect DPL's go live date.
c. L. Bugg distributed copies of C. Cherewick's resume. Ms. Cherewick has been hired as the temporary LAN/WAN administrator. She will work with getting the Frame Relay network in place and will be meeting with DALNET sites beginning 11/8/99.
d. Webmaster position. L. Bugg asked for candidates for the position, which is still open at DPL.

7. DALNET Outreach—D. Callaway
Greenfield Village/Henry Ford Museum has requested a financial proposal. They are interested in working with DIA on the presentation of image materials. We could hear from them in a few weeks.
Schoolcraft College has reviewed the proposal and is awaiting approval from their information technology person.
Marygrove College has not yet made a decision.

The information breakfasts have begun and the first one went well. There were many good ideas. The idea that is closest to being able to being implemented is the development of a community health events calendar and support group database.
The marketing video committee of M. Wheeler, A. Simmons, D. Shreve, G. Bosler, D. Callaway, and L. Bugg have completed their assignment. Copies of the video are available for each library. The video was shown to those at the meeting.

8. Information Hub: We need to continue to develop ideas for the Information Hub. At WSU, B. Lessin is spearheading the movement. WSU is considering a project to digitize images of costumes. UDMercy has grant funding to expand the Great Lakes Shipping database. The Woodward Avenue project is on hold pending funding by LSTA.

9. Other issues
- a. Louise Bugg distributed an updated copy of the Y2K letter.
 - b. DALNET libraries were reminded that the software license agreements must be signed and returned.
 - c. Libraries that have "gone live" need to sign off on their production data base loads.

NEXT MEETING: 1/10/2000 1:00 PM to 4:00 PM at Wayne County Community College, Downtown Campus.

Summary minutes by,

Anaclare Evans

1/3/2000

October 19, 1999

To: DALNET Project Managers

From: Jenny Nolan, Chair, DALNET Collection Development Committee

At the first meeting of this year, October 11, 1999, MaryAnne Nagler was elected new Chair of the committee. The committee proposes to meet on an ad hoc, as needed basis in the future, having completed the procedures and prepared a statement of DALNET's role in future electronic resource Acquisitions. Those items are enclosed with this letter. The Committee has found itself somewhat overtaken by events. With the emergence of the Michigan Library Consortium as an active force in procuring consortial agreements to purchase electronic databases, the committee has found its charge to overlap with MLC. MLC has drafted an RFP that is expected to greatly increase competitive bidding, by bidding out data and interface components separately, and opening up the bidding process to providers who have not previously participated.

It is the opinion of the committee that DALNET should not compete with the Michigan Library Consortium for pricing. In so doing, MLC's power to negotiate pricing is diluted. The diversity of the DALNET libraries makes it unlikely that a majority of libraries will want to subscribe to one database. For an example: last year's free trial of Expanded Academic resulted in one library wanting to subscribe; the trial of Electric Library had the same result. For Ovid's Cinahl database, two were interested. This is not the stuff of purchasing power. If the vendor is offering consortium pricing they should offer better pricing to more libraries, i.e., through MLC.

DALNET and MLC representatives have agreed to maintain open communication on database acquisition requests and plans. Over the past year, the chair of the DALNET Collection Development Committee has participated in the MLC Academic Group Licensing Advisory Committee, which makes recommendations for MLC database trials and purchases. MaryAnne Nagler will be joining this group, effective immediately. The Dalnet Collection Development Committee has plans for conducting a survey this fall that would compile a list of the electronic resources of the DALNET member libraries. Although such a survey was conducted previously by the committee, the response was minimal. Collation of the results was postponed until further results were obtained.

The committee would like to ask that the project managers support the new survey. With participation, the DALNET libraries can help each other. The Survey should define for us the databases we have in common, and give the DALNET libraries a chance to see what other libraries in the system are subscribing to.

DALNET's Role in Future Electronic Resource Acquisitions

The Collection Development Committee views the future role of DALNET within the electronic resources environment as being one of facilitator in acquiring shared statewide agreements, of supplemental negotiator for databases not under consideration by the Michigan Library Consortium and of independent negotiator.

The current electronic resource environment is highly volatile for a number of reasons:

- ◆ Many vendors are exploring new ways of pricing their electronic databases;
- ◆ Some vendors, accustomed to dealing with one institution type (i.e., public libraries), are experiencing difficulties in adapting to the needs of other institutional types;
- ◆ Price quotes for a particular resource may vary by vendor representative, or by pricing structure (i.e., FTE v. simultaneous users), so that an institutional agreement may be more advantageous than a consortial agreement;
- ◆ The Internet and WWW have created opportunities for a library or consortium to partner with other institutions regardless of geographic boundaries; as a result, acquisition efforts by individual libraries, as well as consortia, have overlapped.

As a result of this unstable environment, library administrators must be vigilant in pursuing all licensing possibilities in order to identify the most advantageous agreement for their institutions. At present, DALNET's role has been to act as one more consortium entering the confusing fray of the licensing world.

However, as the electronic resources environment evolves into a more stable arena, the licensing process should become simplified. Ideally, then, the Michigan Library Consortium (MLC) will act as primary negotiator for most electronic resources: because MLC represents a statewide effort, it should be able to provide greater opportunities for individual libraries to purchase electronic resources by partnering with many diverse and sometimes geographically distant institutions. MLC has also been working with other state consortia to provide an even larger purchasing pool for selected databases. In this capacity, DALNET can assist MLC by, in effect, by representing a large and diverse set of institutions.

Until that time, DALNET should keep its role as a purchasing unit. There is a role for DALNET to investigate pricing for databases that MLC will not be offering, and if an MLC offer is too expensive, to inquire about DALNET pricing. DALNET should not set out to undercut MLC's bargaining power by withdrawing DALNET's purchasing power from MLC.

Procedures for DALNET Electronic Resources Trials

1. An opportunity to pursue an electronic database is presented to the DALNET Collection Development Committee (CDC) through contact with vendors, either initiated by the vendor or by a member of the CDC. The member institution suggesting the database should have already contacted the Michigan Library Consortium to see if they are offering group pricing. If MLC is offering consortium pricing, the institution should follow up with MLC. If MLC does not offer a subscription to a desired database, the committee will consider the database.
DALNET institutions that are not represented on the CDC but are interested in pursuing a group license for a particular database will forward pertinent information regarding that database to the Chair of the CDC.
2. If any 3 or more DALNET member institutions are interested in pursuing a trial, the CDC will contact the vendor and initiate a free trial period. The DALNET office will be notified of the trial by the DALNET office liaison to the CDC.
3. The CDC will notify the designated liaison from each institution about the free trial, including the trial period and access methods (i.e., IP address, password, etc.).
4. The CDC will distribute an electronic resources evaluation form to each collection development liaison, along with any documentation that is available for the product. Institutions are required to complete and return this formal evaluation to the CDC within one week after the trial period ends. At this time, institutions must determine whether they are interested in pursuing a group license.
5. Based upon evaluation results and interest from at least 3 libraries, the CDC will then forward to the DALNET office a list of interested member libraries, and the name of the contact person at the vendor. The DALNET office will then pursue group licensing for the product.
6. Within two weeks from the time that the recommendation is forwarded, the DALNET office will negotiate with the product vendor and respond to the CDC, and to those interested in subscribing, with a status report on the negotiation process.

RETURN TO: Jenny Nolan
 University of Detroit Mercy
 McNichols Library
 FAX: 313-993-1780

**EVALUATION FORM
 For DALNET Trial Databases**

Please return the completed form to the Collection Development Committee by: MAY 10, 1999

Name: _____ Institution: _____
 Database Tested: _____ date: _____

**1. DO YOU WANT TO SUBSCRIBE TO THIS DATABASE: SHOULD DALNET
 NEGOTIATE A PRICE FOR YOUR CONSIDERATION?**

YES NO

The DALNET Collection Development Committee would appreciate it if you would fill out the rest of this questionnaire. It may also be useful for your records.

Please rate the database on a sliding scale on the following areas (if needed, attach additional pages):

	1	2	3	4	5
2. Coverage/currency of database:	poor				excellent
3. Search interface:	poor				excellent
4. Ease of use/navigation:	poor				excellent
5. Availability/usefulness of help screens:	poor				excellent
6. Appropriateness for your institution's patrons:	inappropriate				very appropriate
7. Stability/Reliability/Ease of access:	poor				excellent
8. Does this product's coverage/value overlap a product (i.e., a print version) held by your institution that can be canceled?					

Yes

No

To: DALNET Project Managers
RE: Documented Authority Problems in WSU's Database
Date: November 1, 1999

Documented Authority Problems in WSU's Database

1. In the dataload, some 008 fields were truncated, making the "matching" of those records in overlay problematic. Upon deletion, some of the records with truncated fields remain, forming ghost or phantom records in the database.
2. Horizon does not support the |v subfield in 6xx fields.
-The system will accept the |v on import, but they cannot be added manually. The |v's index as a comma instead of as a subfield. When an authority record with a |v is being imported into the system to overlay an existing authority record, the match points for overlay are ignored (such as the LCCN number) and the record will overlay the "root" authority record. This means the root authority no longer exists and all bib records under that root authority will now be indexed under the root term plus the |v term.
3. Horizon does not match non-Roman characters correctly and often creates stubs for authority records with diacritics.
4. The merge and global change features do not allow for the automatic correction of MARC bibliographic tag fields when merging authority records. (i.e.: 650 to 651 tags).
5. In the import, creation and storage of MARC authority records the following problems can occur:
-Some authority records don't overlay because they're not marked "multi-use." (We cannot expect a name authority record to overlay an existing authority record for the same name in our system that is coded for subject usage until the record in the system is changed to "multi-use.")
-Many of the |wma or |wme fields were stripped out of authority records on load
-Because the system does not allow for duplicate headings, if we have the incorrect heading in the system, and we load the correct heading, the 4xx |wme(a) field will be modified by the system to a 5xx field.
6. Because Horizon does not always operate in real-time interactive mode, authority records and bib records can be edited and changed and the changes do not occur in real-time. We often have to set aside changes and search at a later time to determine if the change has taken effect.
7. Horizon will change subject headings to the correct heading, but only the "root" authority record will be changed. Any subject headings with subdivisions will have to be changed manually through the global change process.

Interim Management of Authority Problems

The DALNET Union Catalog/Authorities Task Force held a conference call with Ameritech representatives on October 29, 1999 to discuss authority concerns and the progress with the Shared DALNET Authority Database. Sunrise will correct the |v subfield problem (as well as the |w, |x subfields). The Sunrise system should also allow for improved normalization strings so fewer subfiles will be generated. Horizon 5.3 will allow invalid headings to occur in the database so that conflicts will exist and tags won't be changed from 4xx fields to 5xx fields.

In the meantime, authority problems grow daily as bibliographic records are added to the database. This causes problems for all DALNET member libraries, as staff time for manual clean up is limited. The staff at WSU are still analyzing problems and searching for workable solutions. The following is a list of interim procedures that WSU is using in handling authority problems:

1. Reports with Reports
 - Reports on new subfiles added to the database weekly in order to correct tagging, spelling, and spacing errors. This report can also be used to determine new subject headings and subject subdivisions added to the database.
 - Duplicate LSC# subject heading reports (can be run for medical headings as well).
 - Duplicate series and name headings in the database.
 - |v fields found in bibliographic records.
 - Incorrect heading use codes.

2. "Dupau" report from Ameritech. Currently being tested by WSU Systems and TS staff. This may merge duplicate authority records and save the expense and time of having staff merge records manually. Ameritech is sending specs on this program so WSU can better analyze its use and functionality.

3. Bib-Auth-Invalid Audit Table
 - WSU staff is currently analyzing this table for determining authority records that have striped and changed 4xx fields. F. Kremasky will inform DALNET Libraries of the progress and feasibility of using this table for retrospective and on-going authority maintenance.

If you have any further questions or need authority assistance, please feel free to contact Fran Kremasky, DALNET Database Management Team, at ag3412@wayne.edu or 313-577-6439.

F. Kremasky
11/99