

DALNET Steering Committee
April 9, 2001
WSU Purdy-Kresge Conference Room
(Parking available at DPL)

Review of Agenda, Minutes February 12,2001 (Sanders) ✓ March 5, 2001 (Bacsanyi)	8:30-8:45
Review of March 23 <i>epixtech</i> meeting (Piper)	8:45-9:45
RPA working group	9:45 -10:15
Horizon Enhancements Authority loader Horizon features 7.0 and beyond	10:15-10:45
IHDC Update	10:45-11:15
Announcements Location for next meeting	11:15-11:30
Minutes: Emahiser	

May 7
at MCC

DALNET Steering Committee
April 9, 2001
Wayne State University

Present: K. Bacasanyi, M. Sheble, G. Libbey, S. Muir, J. Flaherty, K. Sanders, M. Piper, J. Emahiser

Minutes

Minutes from February 12, 2001 were approved.

Review of March 23rd Meeting with epixtech's Representatives

M. Piper highlighted points from the meeting and subsequent communications.

- Turnover at epixtech has been a contributing factor for causing delays in the delivery and support of their products.
- An improved communication strategy is needed between Dalnet and epixtech.
- The certain portions of the original partnership agreement were reviewed.
- Three on-site visits per year of epixtech personnel, as stipulated in the original partnership agreement.
- A new written agreement and clear timeline is needed.
- Dalnet could re-negotiate priorities in relation to the new agreement and timeline.
- epixtech has agreed to commit one fulltime programmer to meet Dalnet's needs.
- epixtech has asked Dalnet for the top priority development.

Priority Setting Timetable

- Steering Committee needs to develop a list priorities and rank them.
- Priorities list presented to the Board.
- Board approval on priorities prior to April 23, 2001 epixtech visit.
- Present top priorities to epixtech.

Selection Criteria for Setting Development Priorities

M. Piper suggested that the S/C keep focused on what objectives are achievable within a six month time frame. Criteria included:

- Enhancements are already underway and planned for release.
- Developments that are unique to Dalnet.
- Large impact on member services and/or marketing for both Dalnet and epixtech.
- Realistic timeline expectation.
- Customer need(s), large vs. small institutions.
- Function dependency upon other features of the system.
- Money Dalnet owes.
- Hardware requirements.
- Achievable and a win-win situation in a short time frame.

Development Priorities

No.1 I-Pac with broadcast searching.

- Broadcast searching is specifically stated in the contract, May, 1997.
- Children's OPAC is dependent upon I-Pac.
- On site installation, an epixtech programmer present for 2-3 days.
- High impact on member services and marketing

No.2 Shared patron database

- Impacts everyone across the consortium, regardless of size.
- Selling point for epixtech.
- Is in the original contract.
- Dalnet is withholding funds for delivery.

No.3 Union Catalog/Shared Authority File

- File would be unique to Dalnet, and a selling point for epixtech.
- All members would benefit, regardless of size.
- Is in the original contract.
- Withholding funds for delivery, largest amount owed.
- Are there hardware requirements?

No.4 Children's OPAC

- Impact on member services, especially for one of Dalnet's largest members.
- Is in the original contract.
- Dalnet is withholding funds for delivery.

Other development concerns.

- Remote patron authentication. Funds being withheld for delivery.
- Media booking.
- Sharing of serials predictions.
- Reserves module.

Contractual Horizon Enhancements Reviewed

S. Muir reviewed the following report:

DALNET ENHANCEMENTS SUMMARY REPORT

April 5, 2001

1. Patron Database Enhancement Project Plan

The DALNET Board approved *epixtech's* proposed solution using NCIP (NISO Circulation Interchange Protocol). *epixtech* has sent DALNET "Preliminary DRAFT" functional specifications now under review by the Circulation Committee. More detailed specifications will be sent in a few weeks.

2. Remote Patron Authentication Enhancement Project Plan

Discussions on this enhancement are underway. DALNET and *epixtech* are refining DALNET's Statement of Needs. Leo Papa, UDM, is leading a working group looking at this product. Three sites, UDM, OCC, and MCC have expressed interest in implementing the un-enhanced version of this product now and *epixtech* has agreed to allow them to do that. *epixtech* currently plans to deliver the additional functionality in Horizon release 8.0, due out on May 2002.

3. Shared Authority File Enhancement Project Plan

DALNET believes that there are three components that are integrally linked: 1) the Resource Authority file/Union Catalog enhancement, 2) problems with the original data-load, e.g. duplicate authority records in the databases, and 3) the need for an authority loader that complies with national standards. A conference call was held on March 15 to discuss strategies for addressing these needs. Negotiations on how to proceed are continuing. *epixtech* currently plans to deliver the additional functionality in Horizon release 8.0, due out on May 2002.

4. Children's OPAC Enhancement Project Plan

DALNET is working with *epixtech* staff to test and install iPAC. The Children's OPAC Task Force is in the process of identifying screens from other WebPAC and iPAC sites to use as models for a children friendly iPAC. Task Force will review *epixtech's* comments about iPAC and incorporate information from the Search Engine Task Force report into a needs statement.

5. Ad-hoc Reports Security Enhancement Project Plan

The Finance Committee has approved payment on this enhancement as delivered by *epixtech*. *epixtech* has agreed to document the solution.

6. Integrated Booking Module Enhancement Project Plan

DALNET forwarded to *epixtech* the list of additional functionality required. *epixtech* currently plans to deliver the additional functionality in Horizon release 8.0, due out on May 2002. Bruce Bett, Macomb Community College, was selected to work with *epixtech* as the product develops.

7. Interlibrary Loan Document Delivery Enhancement Project Plan

The LSTA grant for ILL sharing between DALNET, TLN/OWLS, and SLC has been funded. *epixtech* and DALNET will work together to identify the best *epixtech* ILL product for DALNET to implement, taking into account the LSTA grant timeline.

Prepared by
Scott P. Muir

Other enhancement news.

- 6.0 release has been delivered and is currently being tested at WSU. This enhancement will solve the |v problem and other bug fixes. 6.0 needs to be in place for the installation of I-Pac and the Union Catalog/Authorities File.
- Ad-hoc reports security enhancement has been delivered, accepted and payment has been authorized.
- I-Pac should be added to the Dalnet Enhancements Summary Report." I-Pac needs to be operational for broadcast searching and the Children's OPAC.
- ILL Document Delivery enhancement is missing links with OCLC and Docline.

Authority Loader Requirement

R. Call submitted the following written report.

Several months ago the Steering Committee set four requirements for final acceptance of the Horizon software. They were 1) broadcast searching, 2) functionality promised with iPAC, 3) functionality promised with Horizon 6.0, and 4) an authority loader that works. I would like for us to come to some agreement about a definition of what a working loader is. A DALNET working group dealing with the issues of database clean up and the union catalog/resource authority file came up with the following definition.

Horizon Software Acceptance: Authority Loader Requirement

A. National level authority records need to be loaded into any DALNET database without data change or data corruption to the records.

1. This goal can be accomplished by using the matching algorithms & retention of local fields and record consolidation found in the "Resource Authority File Matching Overlay Algorithms" issued from the Shared Union Catalog Group dated December 15, 1998.

2. This goal can be accomplished by using the NACO normalization standard available at: <http://www.loc.gov/catdir/pcc/naco/normrule.html>

B. This requirement is tied into the following items in Rider H: 1.8

1.12.1-1.12.2

2.4.2

4.1-4.2

4.5-4.8

4.10-4.12

4.16-4.17

This will require that *epixtech* changes the way they handle the loading of subfield v's, subfield w's, 4xx and 5xx fields, and improvements in the handling of duplicate authorities.

Can we agree to this definition as well?

If you have specific questions about this, please post back to the list. Randy Call will clarify any questions or concerns.

The Steering Committee agreed that the definition presented would be the official one used.

7.0 Preview

The Horizon Sunrise 7.0 Preview report dated March 8, 2001 was distributed and reviewed.

Horizon Sunrise 7.0 Preview

8 March 2001

Horizon Sunrise 7.0 is currently in beta testing in anticipation of its May 31, 2001 release. This release will incorporate a number of the Circulation module features you've been waiting for, as well as providing a single staff interface. With libraries worldwide awaiting the release of *epixtech's* Horizon 7.0, here is a preview of some of the features you can expect to see.

General

Day End Optimization

The suite of Day End Processing utilities have been reviewed and optimized to speed processing time an average of 30% or more.

Win95 Staff Client Support

Most staff applications will now function under Windows 95. Win95 support is limited to regular Windows codepage limitations as experienced in Horizon version 5.3 and earlier.

MARC data mapped to list/edit windows

Bibliographic or authority data can now be mapped to list and edit windows. An example of this enhancement might be mapping title and author to display on the item edit window which previously only displayed the bib#.

Circulation

Request fillable by any item

In Horizon 7.0, the system will automatically fill a request with another available item at that pickup location even if another item is already in transit to fill that request.

Change request parameters after a request is placed

Request parameters such as pickup location can be modified prior to fulfillment.

Borrower Information Check on Request

When staff place a request for a patron, the patron's address, or other notification method is displayed. Also, requests can be suspended for later reactivation. For example, a patron leaving on vacation may ask that her request be suspended during that time and that she keep her place in the queue with the request not being filled until she returns.

Hold Expiration Date on Block Detail

The system-calculated hold expiration date is now displayed on the hold block detail window.

Delete Request from Pull List

The last location reviewing the pull list may now delete a request directly from the pull list if it is clear that no location will fill the request at any time in the present or future.

Cluster hold capability

Release 7.0 expands the ability to prioritize hold request fulfillment from a two-level priority cluster hold capability to a 255-level priority capability.

Cataloging

Bib Headings Not Controlled

Cataloging staff can choose if the text they are inserting in a 650 tag, for example, becomes a system-generated authority record under authority control or is simply kept as uncontrolled text.

Authority display reflects control

In Cataloging, authority-controlled text is underlined whether the focus is on that tag or not.

Authority \$w preservation

Subfield w is retained for See and See Also references.

Record ownership designation on bib_control/auth_control

Record ownership notation can be made or, if present on the records of a new customer, retained for later use.

MARC Holdings load/save/export

MARC Holdings records can be loaded into a table and kept for later use.

Z39.50 Cataloging

In Staff PAC, the ability to search Z39.50 targets and save them in Cataloging or modify and save them to the local Horizon database.

Acquisitions

Fund Hierarchy Save

A pre-requisite project for fund management enhancements targeted in forthcoming releases.

Separate Tech Services Databases

Separate technical services databases working in conjunction with the central production database allow for a great amount of separation, security, and control between processing centers. This allows consortium members to retain separation of acquisitions-related data while still participating in the central production database for cataloging, circulation, and other functions.

Staff PAC

Keyword browse in Unicode (Available only on NT/2000)

Allows searchers to browse the keywords of an index and see international characters properly sorted.

Other

Austral/Asian enhancements

Various enhancements specifically tailored to the needs of Horizon customers in Australia and Asia.

Horizon Sunrise 7.2 (December 2001)

Sunrise Launcher

The Sunrise Launcher provides a process-driven leading interface approach that is customizable by user and not constrained to a workstation. User can be anywhere in the library and the customization follows the user to any workstation.

Acquisition Session Defaults

Acquisitions Session Defaults enables easy management of purchase orders and purchase requests, where a significant amount of the user input is automatically generated for each document.

Record Ownership

Record Ownership in Cataloging allows you to edit and manage your records and allows users to search for them.

MARC Editor

MARC Editor and its interfaces provide for word-processor style MARC editing, including the dialog bars for diacritics, MARC Syntax, Validation and spell checking.

Other enhancements

Horizon Sunrise 7.2 will also include major projects for Acquisitions, Serials, and enhancements designed to streamline processes at the circulation desk, along with NCIP capability.

Horizon Sunrise 8.0 (May 2002)

Database Independence

Database Independence will be introduced in Horizon 8.0 and will allow users to use the database of their choice.

N-tier Technology

N-tier technology allows users to choose along a continuum a thick or thin client. This will enable libraries greater flexibility in determining system speed and configuration.

Test Server Databases

S. Muir presented the following report.

DALNET automatically redirects WebPAC from the Production server and Production databases to the Test server and Test databases when three or more hours of downtime have elapsed or are anticipated on a Production Server. We send out a notice informing sites that this change has occurred. We also encourage sites to try all ReportSmith reports in their Test database on the Test server, prior to running it in the Production environment. To that end, it is advisable that we keep the databases on the Test server reasonably current.

Option 1:

We therefore recommend the following regular schedule for updating each member's Test database to keep all databases on the Test server within one month of currency:

Week 1: UDM, OCC, MCC, WCCCD

Week2: Beaumont, Botsford, DIA, DMC, HFMGV, OCLL, VA, Walsh, Shipping, and Slide

Week 3: DPL and Highland Park

Week 4: WSU

We will plan to copy the databases as early as possible in the week, but other priorities may conflict with this. We request a minimum of one weeks notice to NOT replace your Test databases. Please post your request to DHMT. If you request that the database not be updated, then the next update will occur the following month. We will post the completion of the updates on DHMT.

Option 2:

The member sites are responsible for keeping their Test database current, per written request to DHMT. A minimum of one week's notice is required, although prior requests and other work may require additional time to complete your request. Please try to limit this to one update request per month. We will post the completion of the update on DHMT. Note that DALNET will need to update Test databases prior to installing new releases and or completing other upgrades. We will provide one week's notice on DHMT.

IPAC:

DALNET staff need to determine the ramifications of iPAC and updating the databases on the Test Server.

Scott P. Muir

4/3/01

The S/C discussed both options, most of the members preferred option 1.

IHDC Update

- IHDC has received 19 proposed projects.
- The Committee is developing criteria for evaluating the projects. Some of which include the following:
 - Is the material cataloged in some manner.
 - The subject/contents of the collection. It's uniqueness.
 - Sustainability.
 - Open or closed collection.
 - Size of the collection.
 - Format.
- The Committee proposed starting with one or two projects.
 - Creating a more elaborate checklist.
 - Creating a process by which the projects can have a numerical weight assigned.

- Present the process and criteria to the Board for approval.

Next Meeting

The next meeting will be held on May 7, 2001 at 8:30am. The location will be Macomb Community College.

Minutes:

Joan A. Emahiser