

epixtech Academic Focus Group

March 8, 2000

Notes

I. Other sites present

- A. **Iowa State:** use "high availability" with Sun E450's and shared, mirrored disk arrays.
- B. **Cal State U, Chico:** use WebCT for Web courses on campus; they are digitizing with the help of another vendor; they migrated from Innovative.
- C. **U Chicago:** they said that with programming expertise, sites can be more independent and solve more of their own problems/needs; they use Marcadia to buy records; they have batch jobs from epixtech to manage data input; they have SQL cleanup programs; they only can do 2 Marc dataloads at a time because of "deadlocks"; they use X12 online claiming; they use email notices with Hz 5.1.2 and have posted instructions on their Website; they do load authority records.
- D. **UT, Dallas:** they use smartcards for patrons; they reported problems tracking money in circ module without an audit trail.
- E. **MacMaster:** they use a second server to run database maintenance jobs on a copy of the database.
- F. **Johns Hopkins:** they said that the Sybase was ending support for the version they were using on June 30th.
- G. **Utah:** they reported their version migration/upgrade times were very long, e.g., 4 to 5 days! They have a thumbnail tool (TIFF file?) for their digital content.

II. Horizon areas needing epixtech attention for large academic sites/consortia

Here is the list of areas the group brainstormed after the morning's discussions:

- A. **WebPAC/iPAC (was everyone's unanimous no. 1)**
- B. This group includes areas with high numbers of votes:
 - 1. Acquisitions module
 - 2. Improve batch processes and re-indexing
 - 3. Focus on documentation
 - 4. Technical documentation
 - 5. Union catalog/shared files
 - 6. Balance of client/server tasks for efficiency
- C. The rest of the areas listed:
 - 1. RBR and e-reserves
 - 2. WebPAC statistics
 - 3. Training, especially technical and for upgrades
 - 4. Need knowledge of large sites on epix staff
 - 5. Preservation of data
 - 6. Deal with metadata
 - 7. Keep up with standards, incl. MARC and Z39.50
 - 8. Workflow streamlining
 - 9. System limits

10. Multiple databases and server configurations
11. Security too open
12. Need to copy bibs and share records across libraries
13. Disaster recovery planning
14. Scalability
15. Support for database administration issues
16. Improved batch loading
17. Help with performance issues
18. Provide better/more technical specifications and details
19. Interoperability with campus systems
20. Improve communication with large customers
21. Share batch jobs, SQL cleanup jobs across large sites

III. epixtech Product Information

- A. New strategies—iLibrary and ASP (application service provider)
 1. iLibrary adds personalization for users (“my library” concept) with a portal for patrons to customize their own views. This will be done with a “wrap around WebPAC” that epix hosts.
 2. ASP model is for epix to be the host site and run customers’ Horizon systems for them on servers at the vendor’s offices.
- B. Sunrise—new directions
 1. Unicode moves to the client; no database upgrade required; in fact, epix will NOT provide support to go to a Unicode database; supports import, display and edit of bibs and authorities; Windows 2000 font interoperable.
 2. August 2000 release includes: Unicode client; updated Windows interface across all modules; new launcher (a subset of the full Sunrise launcher)
 3. A “white paper” will be sent out to explain in the next week.
 4. May 2001 release: cataloging module; will need to convert bib and authority tables and indexes.
- C. iPAC information
 1. Utah is testing the new indexes on Sun servers.
 2. IPAC is an upgrade to WebPAC and will take care of the license for ProIndex software.
 3. IPAC server: CGI application under Web server like Apache; ProIndex can run on the same machine or different with a port ID to communicate; can point at several different ProIndex indexes, e.g., for broadcast search; the ProIndex indexes are 1/3 the size of the bib database; best to put iPAC on a separate server from WebPAC and then switch over.
 4. Z-server will be a client of ProIndex rather than going directly against the database; not sure if this will be in first release of iPAC.

Louise Bugg
 April 25, 2000



March 15, 2000

Dear Focus Group Participant:

Thank you for being part of the *epixtech* Academic Focus Group last week. We appreciate your candid feedback as we work together to serve the needs of the academic community.

Some highlights and key points from our discussion are summarized in the following paragraphs:

Collaboration - Academic libraries are being required to collaborate in a variety of new ways. Different types of databases need to have common interfaces, various disparate systems must interface with each other, and large volumes of data from a variety of sources must be loaded into catalog or other types of databases. To address these needs *epixtech* systems must be open and adhere to current industry and library standards.

e-everything - The campuses are readying everything for the Web or other digital form. Universities are moving course material to the Web in the form of electronic reserves and are undertaking distance learning initiatives which will grow in the coming years. The e-everything environment is accompanied by an attendant set of challenges including authorization and authentication issues.

Patron empowerment applications of all types are important to academic libraries with a goal to provide more services, more quickly and with a savings of staff time. These applications must not only be bug-free, they must "shine" as there is no longer an intermediary between the patron and the information or desired task.

Some of the areas that you would like to see *epixtech* attend to:

Customer Support, Communication and Documentation - Large academic libraries have staffing to run the system, tweak the system and ensure it runs efficiently. Horizon customers require more technical documentation, an academic training session on tuning and tweaking for the large site. Libraries need additional information on release contents and technical requirements well before release date. We discussed the best way to provide a forum for sharing local developments, discoveries and "how-to" information.

Specific Horizon Problems - Fix bugs particularly in software destined for public use. Improve operator security at a task level to accommodate workflows in large libraries and at consortia.

Optimize for large site operation - The huge volume of activity and number of libraries (consortia or departmental libraries) makes this an issue that is not a concern for smaller installations. *epixtech* should consider carefully the balance of client operation vs. server operation and the effect on response time and workflow at large sites. Needs of outlying libraries in the consortia setting must also be considered.

Acquisitions, including serials and binding should be addressed to improve both online workflow for high volume operation and batch processes. Loaders for acquisitions data

should be provided (aka VITLS to NOTIS folks) to streamline processes and minimize staff intervention.

Security concerns for the larger sites are magnified. Greater control at operator and library level (for consortia) is desired in the Horizon system.

WebPAC - concentrate on WebPAC, iPAC and all Patron Empowerment applications to ensure they are reliable and "really shine". Work on electronic reserves and Reserve Book Room.

Other items of guidance:

***epixtech* vision** - communicate vision and involve large academic libraries in the planning from early stages.

Delivery - improve track record for delivery on commitments. Be sensitive to the planning needs at the customer sites and the impact of late releases on library staff. Work on union catalog.

Should you have further thoughts on our discussions at any time please feel free to send them on via phone or email.

Each and every one of us on the *epixtech* team thanks you wholeheartedly for traveling many miles to join us and investing a day of your very valuable time with us in Chicago.

Sincerely,

Linda Scott Zaleski
Product Manager