

DALNET PROJECT MANAGERS MEETING

May 1, 2000

Macomb Community College South Campus
J Building, Room 229

Minutes

Present: B. Bett, MCC; K. Binkowski, DIA; G. Bosler, MCC (part); L. Bugg, WSU/DALNET; D. Callaway, WSU/DALNET; W. Cromwell-Kessler, DPL; M. Durivage (for K. Tubolino), VA; C. Eames, DMC; J. Emahiser (for N. Bulgarelli), Beaumont; A. Evans, WSU/DALNET; F. Krempasky, WSU/DALNET; A. Lim, WSU/DALNET; C. Mudloff, DMC; S. Muir, DALNET; D. Murphy, Walsh; P. Orr, HFMGV; L. Papa, UDM; K. Sanders, DPL; M. Sheble, OCC; J. Shepard, DPS; J. Trzeciak, WSU/DALNET.

Excused: D. Adams, Botsford; D. Zyskowski, OCLL

Absent: J. Brennan, DMC; N. Bugarelli, DMC; M. Campbell, DMC; M. Dow, DMC; D. Drobny, DMC; J. Flaherty, WCCCD; L. Lewis, DMC; K. Tubolino, DMC

- 1. Introductions:** Patricia Orr, Henry Ford Museum & Greenfield Village, the newest DALNET member was welcomed to her first Project Managers meeting. Those present introduced themselves. Pat distributed a brochure about the library.
- 2. OWLS/DALNET/Library Cooperative of Macomb LSTA Grant:** The LSTA Grant proposal was submitted on Friday, 28 April 2000. This grant requested \$125,000.00 for the development, installation, and operation of a World Wide Web based interlibrary loan system for the six counties served by the three cooperatives. D. Murphy reported that at least fifteen letters of support were attached to the grant proposal, far more than anticipated. The soonest we will know if the grant request is approved will be September 2000 with funding, if available, to begin in late 2000 or early 2001.
- 3. ILL Software:** DALNET would like to move ahead with the installation of a web based ILL system and is evaluating two products from *epixtech*, the Resource Sharing System (RSS), and URSA. The pros and cons of RSS and URSA will be the focus of the Systems Staff meeting on Friday, 5 May 2000 and the Steering Committee meeting on Monday, 8 May 2000. While RSS and URSA are currently separate products, plans are underway at *epixtech* to merge the two products. URSA is web based; it runs in a Unix environment, specifically on a Sun; it has a rudimentary interface with OCLC and WebPac and improved integration with Horizon is scheduled for Horizon release 6.0. RSS is windows based and will require a staff client; it does interface with OCLC and Horizon/WebPac; and an improved interface with circulation is planned for Horizon v. 6.0. Louise Bugg will distribute the price quote for both products with the minutes.

DALNET will be bringing the core functionality of Horizon and either RSS or URSA to the grant project. TLN brings their van delivery system and Web Z interface.

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4. DALNET Committee Reports:

- a. **The Database Standards Committee:** requested approval for the Minimal Level Record and the Summary of Holdings Standards. Project Managers achieved consensus that the documents be sent to the DALNET Board for approval. F. Krempasky will provide copies for distribution at the Board meeting on May 8th.

- b. **Collection Access Committee:** J. Bosler arrived later in the meeting. (1) A. Evans reported that the shared patron file enhancement was crucial to the development of a plan for academic reciprocal borrowing. An agreement regarding academic reciprocal borrowing has been approved by the Committee and was distributed to Project Managers as a draft. The report will be presented to the Board. (2) The Collection Access Committee will be monitoring the LSTA grant, if approved and funded, to determine the effect the grant will have on reciprocal borrowing. If the reciprocal borrowing agreement is approved, and the Horizon shared patron database is ready, a test will be done during the Fall 2000 semester. (3) Jerry reported that the Committee is also working on a recommendation to the Board about Z39.50 links for libraries and individuals using citation management software. There was support for opening Z39.50 access to DALNET's Horizon databases, however, there can be no promise of staff support for technical problems with such linkages.

- c. **Cataloging and Authorities Task Force:** The task force has had several meetings to consider ways to handle the number of authority control issues with Horizon. The lack of a shared authority file is only one detriment to quality databases. After enumerating what are considered the worst problems, A. Evans and R. Call met with a number of authority control vendors at ALA Midwinter. The vendors asked for a written description of our problems and a sample of records. The written description will be a Request for Information, which is a non-binding request for vendors to respond indicating those problems they might be able to repair. W. Cromwell-Kessler will distribute a clean copy of the current version of the Request for Information and Project Managers were asked for their comments in one week. F. Krempasky is collecting an electronic file of problem records to provide for the vendors. *epixtech* is aware that DALNET is doing this and any responses will be shared with *epixtech* in order to verify that we really will be improving our database.

Walsh College reported some issues with display that are believed to be related to record size. Records that are very large often display (in release 5.1.2) with truncated data fields. A. Lim will follow up.

Walsh College also suggested that we look at the title *Who's Not Working and Why* by Frederick Pryor. Staff at Walsh enhanced the bibliographic record by adding a book review. It was suggested that DALNET staff consider mounting a file of book reviews with links to bibliographic records, e.g. with URLs in the 856 tags. This will prevent issues related to the size of the bibliographic record. The Database standards Committee was asked to make a recommendation on this.

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5. Update from the Central Site

- a. **DALNET Help Desk Report:** W. Cromwell-Kessler distributed a first attempt at collecting monthly statistics. Suggestions are welcomed. Efforts are underway to give the Help Desk staff more training so they will be able to answer more questions directly and not need to refer as many questions. The Help Desk staff is also to receive training so they will be able to trouble shoot what appear to be telecommunications problems.

- b. **DPL**—Kerry Sanders reported that candidate interviews for the DALNET Webmaster position are being scheduled for May 10th. Tim Cromer from NuVision Technologies will provide temporary web support until the permanent staff member is hired and trained. K. Sanders reported that DPL has at least one qualified candidate for each of the DALNET positions. WebPac queries should be phoned in to the Help Desk so that they are logged and can be tracked. It was suggested that a form be developed so the desired changes are clear to the individual who is actually updating the WebPac screens.

- c. **WSU**—Jeff Trzeciak reported that George Marck has been promoted and will be filling the vacancy created when Ana Fidler left DALNET. Dody Fox will be retiring effective May 10th. This will result in two vacancies needing to be filled.

A meeting was held with the service team from Sun regarding our service agreement. DALNET staff received escalation procedures and a number of issues have been clarified.

Horizon test databases are currently updated only on request. DALNET technical support staff is looking for ways to automate this process.

Firewall Support Plans—DALNET is investigating the feasibility of contracting with Intelligent Connections for training for the local technical staff and for a limited amount of testing and evaluation for the Firewall 1 software.

WebPac Template Update Strategy—The firewall has blocked open access to the WebPac server and blocked the ability of libraries to update the look and features of their own WebPacs. We are considering opening access by IP address or some other means. Until such plans are in place, please email G. Marck with specific requests (ac8550@wayne.edu). Questions about WebPac should be logged at the Help Desk.

TeamQuest performance monitoring software has now been installed on all DALNET servers.

6. **The Training Schedule:** for the next round of training classes was distributed. The self registration database has been updated and is available. This current document proposes three rounds of basic Horizon training each year scheduled near the

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beginning of each academic term. There is a brief description of each course to help staff select the classes they need and to give the prerequisites for each session. A new course "Cataloging Lite" was added this time. "Cataloging Lite" is a basic introduction to creating bibliographic records. Similar courses on other aspects of cataloging and authority work are being considered. Project Managers recommended a session relating to Bimport. [n.b. the Cataloging Lite session was held with 10 participants].

7. Steering Committee Report

- a. **WebPac plans:** The two additional NT servers needed for broadcast searching have arrived. It is planned that broadcast searching should be available to the public by mid-July. IPac is the new name for the new WebPac and will include new index structures that improve response time. A server is currently being configured for iPac for DALNET. One concern is the initial incompatibility with RSS and URSA.
- b. **Website Development:** DALNET will be making greater use of its password protected website for the posting of minutes, rosters, and the like. DALNET may also be creating an intranet that will be run behind our firewall.
- c. **Horizon 5.3 Migration Plans:** The client CDs have arrived. G. Marck and T. Turner will update the WSU test server in the next few weeks. After the DALNET staff has had an opportunity to test the new release, the client software will be distributed. All databases will be migrated in test before we do the production servers. We are planning on having all of the databases migrated to release 5.3 by late summer. Documentation is available on the *epixtech* website. The ID is 5971cs and the password is dalnet. Consortium members may download and print as many copies of the documentation as they need.
- d. **Horizon capacity and disaster planning:** DALNET staff, *epixtech* staff, and representatives from Sun will be meeting to discuss how best to optimize the central site hardware to handle future growth, new releases and their demands, and planned enhancements. At the same time we will be considering the most effective strategies for recovering from system failures.
- e. **Recognition of Committee Service:** S. Muir requested input from the Project Managers on how best to recognize the various staff members in DALNET libraries that have served and continue to serve on the various committees and task forces. Does DALNET need to do anything? Would a letter or certificate be appropriate. The majority of those present seemed to indicate that a letter would be appropriate.
- f. **Horizon Functionality Acceptance Testing:** Payment for dataload services is made at the time the production loads are accepted. Libraries in Groups 1, 3, and 4 accepted their dataloads. Group 2 libraries are still working with *epixtech* to identify, diagnose and correct dataload problems. Members in groups 1 and 2 have returned their completed Horizon functional acceptance testing documents to

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DALNET where they will be compiled into a single document and sent to *epixtech* .

8. **Outreach Report:** D. Callaway reported on the status of six potential new DALNET members. The majority of the sites are still pending because of factors internal to the various organizations. A one-page update report was distributed.

Our original marketing plan followed the concepts outlined in the Ameritech grant proposal. It is now time to develop a new marketing plan that includes information providers that are not libraries. D. Murphy suggested that we consider applying for grant funding that would enable us to target a very few information providers to learn what kind of information is needed for funding requests.

9. **Information Hub Development Committee Report:** S. Muir reported that the vision/concept statement for the hub culled from the minutes of the committee's retreat is being sent to the Board for approval. The subgroup working on history and the arts is planning to sponsor a breakfast in late June. The Health Task Force met on 4/28 to plan a pilot project of a calendar of health events with links to additional sources of information. Their next meeting is scheduled for 5/19. They are off to a good start. There are some other task forces that are being recommended to the Board.

10. ***epixtech* Focus Group:** L. Bugg reported on the one day Focus Group she attended in Evanston that was aimed at large libraries that use Horizon. This group identified some needs specific to large sites including hardware and software. An outline of L. Bugg's notes was distributed at the Project Managers meeting.

11. **Summer Meeting:** After considerable discussion, it was decided to have a summer term Project Managers meeting on 7/17/2000 in the Community Room of the David Adamany Undergraduate Library on the WSU campus.

NEXT MEETING: July 17, 2000, 1:00 –4:00 p.m., WSU Undergraduate Library Community Room

September 11, 2000, 1:00 –4:00 p.m., possibly Botsford Hospital with Walsh College as the fallback.

Summary notes by,
Anaclare F. Evans, Ph.D.
June 5, 2000