

ALNET Steering Committee  
WSU Purdy/Kresge Library  
June 15, 1998

Present: K. Bacsanyi, L. Bugg, J. Flaherty, J. Houser, P. Jose, M. Sheble  
Excused: D. Adams

#### 1. Meeting Minutes

Corrections were made to the draft of the Minutes of June 1, 1998.

The schedule for Ameritech sessions at ALA will be sent at a later date.

#### UDM Migration Update

L. Bugg distributed an updated schedule. Ana Fidler completed the bib and authority file extracts. Great progress has been made on the profile and they are now working on Circulation tables which is turning out to be a time consuming task. WSU staff (Charlotte Steffani and Anaclare Evans) will help out with keying in the Circ exceptions. UDM indexes have been loaded and they will try to include DALNET-wide recommendations that last week of June. It is still unclear whether UDM will start will start with 5.0 or with 5.1. The Acquisitions module would be best to start in 5.1, however it may be necessary to look at all options and examine workload requirements. Information is needed on the status of 5.1. UDM staff wants to include Acquisitions in the migration schedule. In the middle of July a decision will have to be made. Training will be conducted in mid July for Cataloging, Authority, Circulation, and Staff Pac. It will be a three day session and Anaclare Evans will attend as well as someone from Detroit Public Library. UDM will have six staff in training. The second wave of training needs to be scheduled for other DALNET members (DPL, WSU, and Botsford).

#### DALNET Network Advisory Task Force

J. Houser will present a draft of the charge and suggest membership of the Task Force at the next SC meeting. He is recommending a two tier system with one tier serving in an advisory capacity which would recommend policy. A service standard document needs to be drafted that will set standards for the system for uptime, downtime, and notification procedures. This policy document could be brought to the local sites and given to the network and telecommunication staff. Currently the contract has mention of a very broad policy but that needs more specificity. A policy document will be drafted and passed on to the Board to be included in the contract.

J. Houser will also bring to the committee a draft of some of the recommendations for a Kids Catalog.

Committee Discussion—Before hearing the reports, the Committee discussed the document of the DALNET HORIZON Indexes Task Force Report on Qualifications. The committee was most concerned about item 6 and the statement that the "Union Catalog indexes had to be a conglomerate of indexes, encompassing all possible indexes used by DALNET members". Some committee members did not think that this

was the case and clarification was needed. It was the hope of many members that there would be more searching capabilities in HORIZON than is available in NOTIS. Architecture and hardware considerations are important factors in this equation. J. Houser of DPL states it is imperative to DPL that access to the special collections in their libraries was an important feature for their public.

#### DALNET Task Force/Committee Reports for Horizon

##### DALNET Circulation Standards Committee

##### Recommendation re: Itypes/btypes

Anaclare Evans presented the recommendations of the committee.

##### Btypes (borrower codes)

All codes are case sensitive and will be lower case. The SC committee recommended that the length of the codes be extended to include all four digits for patron data extraction purposes. The following formula is recommended:

First two digits for institution/next four digits for category/last character for institution which can be locally defined.

The Circ committee will revisit the Macomb University Center Codes, and will group all codes by broad type. UDM will also conform to this pattern and will redo their list (with assistance from DALNET staff). Anaclare will report back to the committee by July 13. Some of this work maybe completed by our June 22 meeting and can be accomplished by email.

##### Itypes (kinds of materials)

All Itypes are case sensitive and will be lower case. The number of types can vary greatly by library depending on the number of policies libraries have.

A reference category needs to be added. The code will follow the same pattern: 2 characters for institution, 4 characters for types (which will be grouped) and the last digit will be a wild card.

It is anticipated that this list will be fluid and new additions may be made, because of all the changes that may occur in resources particularly electronic resources. A system has to be designed to let individual libraries add categories to the list that will conform to standards.

#### DALNET Indexes Task Force

##### Recommendations re: Indexes

Moody, Lim, and Selberg presented their rationale for a core base of indexes and included both staff and public lists of indexes. They were told to pare down the lists because of response time considerations and were told by Ameritech staff that there should be a maximum of 50-70 indexes. In their report of the List of Chosen Indexes 6/12/98 it is their understanding that the Union Catalog must be of conglomerate of all indexes (every possible index used in the DALNET system.) There was confusion on the definition of broadcast searching and how many indexes were appropriate for the system design. For WebPAC thirty indexes were the recommendation. Scott Landen a programmer recommended using restraint. Response time is affected by the number of indexes in the system. He indicated that most libraries have 15 indexes. John Hopkins,

a Horizon site, is paring down the number of their indexes. Call number searching is currently not available because Z 39.50 standards do not allow for call number indexes from item records in WebPAC. However they are advised that this will be possible in the future.

In the Indycat catalog, call number searching is listed as Coming Soon.

The keyword search default is AND, the Boolean searches available are OR, NOT, AND. There is no limiting by field. Limits must occur from MARC mapping. Limiting can be done by a pull down menu box. If you want to do a combination search, fields must have an index.

### #3 Qualifications

The committee had to eliminate browse index searches for different formats. They are important searches for the public but the limited number of indexes recommended forced the committee to consider them luxuries. However, these format types can be accessed via keyword searches and limits by format. Another suggestion from Ameritech Staff was that for some of the proposed indexes, reports could be run instead. In addition a library can have a number of WebPACs. They may be designed as needed for different user groups.

J. Houser indicated that the public service needs are most important in the design of a system, and public service needs should be given top priority, even if staff needs had to be compromised.

The committee recommended 36 staff indexes, and 22 + 3 (juvenile) for the Public.

The UDM list of indexes included conference proceedings.

Both committees have major questions that need to be addressed.

1). J. Houser had a different view of the number of indexes that could be used. He drew a scheme of the architecture of the union catalog and individual libraries and their own indexes in the light of his understanding of client server architecture. A central question is where is the processing done. Is it at the central processor or at the local client. That will affect the number of indexes individual libraries can have.

2). What is available in the WebPAC version 1.3?

3). Must there be a staff index for every public index?

4). Do we need public indexes for records we don't want the public to see.

Suppressed records are in the combined MARC maps—what do they hook on? NOTIS has suppressed fields, where is that function in Horizon? Is it a separate index or a condition? In Horizon, MARC is not stored on the system, data is stored in tables, fields.

5). There are major questions regarding the architecture and hardware that is proposed for the system. What is needed to insure an adequate number of indexes and appropriate response time for the system?

The SC committee thanked the committee for their hard and timely work. Details were identified and questions raised that have major implications for the design of the Horizon system for DALNET needs.

Key Ameritech staff must be brought together for a conference call to get answers to these questions. It is proposed that a conference call occur at the next Steering Committee Meeting on June 22. Committee members from the Horizon Indexes Task Force are also invited to the meeting.

#### 6. WebPAC Implementation

L. Bugg distributed minutes from the WebPAC Committee. L. Bugg will invite Ameritech's WebPAC experts to visit so that training can be provided to UDM staff. Communications must be made with the Benchmarking team so that DALNET knows what type of machines we need to implement WebPAC.

Members of the Board, P. Breivik and M. Auer, have made contacts with Lana Porter and Mr. Eason about the need for more information and communication to serve DALNET needs and particularly the needs of UDM to be up live in September for their public. Major issues of architecture, hardware needs, number of indexes, and WebPAC have become critical. If need be the SC may have to propose to the Board that in order to meet the needs of our public we may have to propose ways to save money. Possibilities include: reexamining the need for INFOSHARE, decrease the number of servers for RSS and others.

L. Bugg passed out RSS Training Videos to members of the SC Committee.

Item 5 and 7 on the agenda will be discussed at the next meeting.

Our next meeting will be at WCCC. 8:30—11:30. J. Flaherty will fax directions and arrange for equipment for a conference call to Ameritech offices in Provo, Utah.

Minutes by: Karen Bacsanyi 6/17/98  
Draft distributed to DALNET Steering Committee