

DALNET STEERING COMMITTEE
MINUTES 9/28/98 Meeting

Present: L. Bugg, D. Adams K. Bacsanyi, J. Flaherty, J. Houser, H. Masek, M. Sheble

Absent: P. Jose

Guests: R. Call, A. Evans (Cat/Auth Task Force)

1. Agenda and minutes of 9/14/98 approved.

2. UDM Update

a. Outstanding Issues: Patron database did not migrate properly though test indicated it would. One instance: Multiple library card patrons caused problems. Fix, such as an extract which could overlay, is being sought; but for now only manual fix. Acquisitions/Serials: UDM staff working on predictive pattern, but there is a slow learning curve. Can't check-in without predictive pattern set, unless set up "non-predictive" for given item. Sheble says Acq/Ser is well designed, but hard to learn. UDM's NOTIS records are now not updated, but can't mask from public unless suppress view. UDM does not have staff to do this.

b. ReportSmith: Two copies will be in L. Bugg's office the afternoon of 9/28/98; hopefully Sybase also. R50 and R40 not sent. (H. Masek will be on vacation for two weeks, but will try to be sure all matters keep moving.) Question: Can ReportSmith print Serials List? Not sure; but J. Houser reminds us it is SQL type so should be able to print once a program is set up for this.

c. Frame Relay: UDM needs new wiring to connect to frame relay. Job should be done by next week.

H. Masek info: Some minor bugs in 5.1 reported by Randall; hopefully OK in about two weeks. WebPAC 1.3 no firm date. Houser would like copy of beta WebPAC 1.3 so sees how it works (backroom testing). Masek will look into.

Sheble reports item records won't automatically generate from bib unless 049 field created. Call Number must be manually transferred because cannot cut/paste bib/item record. The UDM staff who need this auto generation are not catalogers. H. Masek and L. Bugg will look into this and also consult Paul Johnson in Provo whom Jan Shepard says is the contact. She is in Provo at this time and could discuss problem with Johnson. Clearly, this problem must be solved before DPL and WSUL begin inputting records.

3. Product Enhancements

a. Patron database: March 1999 acceptable. F. Young contact.

Authentication: March 1999 - we need to know how it works. H. Masek will find out who is assigned to this. Will ask B. Easton, then give us an options list. We may well need now to set up RSS Task Force, especially if authentication comes out of RSS. L. Bugg asks where does authentication come out of, WebPAC or RSS?

Shared Authority dates are to be established 10 working days after 9/22 meeting with Cat/Auth TF (see 3.b. below).

Children's OPAC: SC needs to immediately set up Task Force with first charge to establish guidelines for Children's OPAC which would then be transferrable to other OPACs later. Questions: How is Ameritech going to package this? Where will it reside: enhanced WebPAC?, Separate Search

Engine? Is Earl Boyce in charge of Children's OPAC He did indicate that Ameritech had licensed CARL's Children's OPAC and converted it for DYNEX use. But CARL's is a standalone product; however, we could look at its features for our product creation needs. We need a Focus Group for input and a Small Development team. Focus Group might consist of WCCC's Cindy Yonovich (Flaherty will ask her); One of DPL's children's trainers for the Internet, Jennifer Zimmer (Houser will ask); WSU Library School's Carol Doll who has done research in this area and may be a valuable faculty resource (K. Bacsanyi will ask). Focus Group might make field trips to "Kid Cats." H. Masek will get with E. Boyce and let him know, among other matters, Children's OPAC must work off entire database, unlike CARL. L. Bugg will give report to Board on Children's OPAC and need for Task Force.

Ad-Hoc Management and Statistical Reports: wait on Task Force creation.

Booking Module: wait on Task Force creation.

ILL/Doc Deliver: needs Task Force now. D. Adams will draft a charge.

3.b. Shared Authority File Enhancement: R. Call and A. Evans gave report from 9/22 meeting with E. Boyce and J. Shepard. Completion dates are to be established 10 working days after meeting, which would be 10/6/98. The White Paper, "HORIZON/Sunrise Union Cataloguing Overview and Philosophy," was distributed to SC members. L. Bugg indicated the "Non-Disclosure Agreement" was signed and sent to WSU lawyers who believe it's probably OK. L. Bugg attended whole meeting, H. Masek some.

R. Call then reported: "Fun Day" because where Ameritech is and wants to go matches our desires. Diagram 1, Stage 4 - the "full blown" - is where Ameritech wants Sunrise to be, but there will be a phase-in so that this stage will not be ready by March '99. It will be in beta then and to be ready by Summer/Fall '99. What will be available for March '99 will be Diagram 3, Stage 2 with create ability, but manual search. Possibly, a "backroom beta" of Diagram 2, Stage 3 might be possible. The way this works is if one tries local and gets no match, then it automatically matches against Resource Authority File.

So, March '99 we will have a Union Cat but software for command to move local bib to union and software for Holdings file in Union with a hot link won't be there. Ameritech's original conception was cataloging would be done at union level and sent to local cats. There are a variety of links possible which Ameritech is working on conceptually, though some were actually worked on at the 9/22 meeting.

Three dates, then: Mar/Apr '99 Diagram 3, Stage 2
Sept '99 Diagram 2, Stage 3
? Diagram 1, Stage 4

Need to propose Stage 4 date to Ameritech. Dec '99?

Discussion:

Current "unlinked" will become "fast-adds" in Horizon.

Any record not wanted to be shared can be suppressed.

Stage 4 will offer local to union cat and ftp to OCLC in one step because this is one file.

Assumption is the default will be one's own catalog, but eventually will have hot link from Union Cat to local database.

To keep track and revise search, can cut/paste if one keeps search string up.

However, CAT/Auth TF recommends not to turn on Union Cat for public because it would be confusing. Wait until "hot link" is available.

Stage 3 by Sum/Fall '99 will include Z39.50 link to OCLC.

Stage 3 is also Real Time.

Stage 2 is Batch Processing, another reason to turn it off until "hot link" is available.

How can Cat/Auth TF assist Ameritech? Testing, reviewing specs, "backroom testing," development group discussions. Need to discuss: what do we want in Union Cat as opposed to local, what fields in Union Cat as opposed to local.

Won't have field security for deriving until RSS is available.

Do "Fast-Adds" transfer automatically, or are they trapped until checked-in?

When will record security be available?

Cat/Auth TF assumes our wants will be met by 5.2 enhancement. Ameritech appears to agree.

Sunrise will be HOR 6.0 with beta test Spg '99, Sum/Fall production. Authority Control Headings will be stored in both Bib and Auth records. But, then need additional step for "global change." Will this be automatic? Not sure.

L. Bugg will give Board an overview statement re: Database Structure with three deadline dates for Stages and how Cat/Auth TF will assist.
R. Call will draft presentation with L. Bugg.

4. Information Hub Showcase for ACRL, Apr '99

a. Discussions still at Dean/Lana Porter level. SC needs to become informed from them of their expectations.

b. Info Hub demo projects.

Some in place: WSUL Dean and Directors using Net Publisher to do demo project; so need to get it up and running.

UDM intends to move on Architectural digitizing project.

But, not much is in place, and SC needs a Project Team.

Discussion ensued re: possible projects: URL links to local servers but that demands URL servers with capacity and speed. Net Publisher has searchable Index Records. Images could be cataloged with URL to where reside, e.g. small collection of Burton images from DPL. A WSUL project, Small Business Development Center Reports, is in progress with Dee Calloway which brings up the issue of how Net Publisher handles full text, how does it help one navigate in full text? M. Sheble has some evaluations of Net Publisher, though dated. We could look at their web site. SEMCOG info is also full text and we know they have already expressed a desire to have it online with DALNET.

H. Masek will get Net Publisher documentation. M. Sheble will get evaluations.

Further discussion ensued. What are Ameritech's expectations and what demos do they want? The Grant Proposal has no money for staff or materials.

Some more ideas: Simply linking record to outside image(s); "Subject Resources" is in WebPAC design so what about those we now have on web, e.g. Disability Library? Put out call to all DALNET libraries to indicate what they have, are, or could develop. Put catalog record in Horizon for whatever we have linked to web, i.e. catalog own web-based resources. Do we need policies/standards to handle this? Cataloging Standards indicates the "how" of cat not the "what." So Cat Standards does need to develop policies and timetables for Electronic Resources by March '99. But who is to figure out policies on "what" Electronic Resources can/will/should be put on?

L. Bugg, at Board agenda item on Enhancements, will brief Board members re: Info Hub Demo Projects.

c. Schedules for WSU, DPL, Botsford Migrations.
Botsford: H. Masek will get profile copy. A. Fidler can analyze record discrepancies, e.g. upper/ lower case sensitivities. D. Adams will meet with A. Evans to see what she needs, and get Horizon client. EXCEL spreadsheets developed from paper worksheets are used for eventual input. DPL will also get Horizon client from A. Evans. Problem: Horizon currently will not migrate subfield K for LOCATION; but DPL has all subfield K mapping for LOC. Ameritech may have something already to fix this, or, if not, must promptly develop a fix.

5. DALNET Horizon Task Forces

a. New Task Forces on Board agenda for approval with names later: Technology Policy, Acquisitions, Serials. (Tech Pol names: P. Jose for Board, L. Bugg for SC, J. Houser, others?)

b. Membership Changes.
WebPAC Design needs rep (OCC?) and chair. Chair should know html so TF doesn't get bogged down in matters which knowledge of html could solve. Ask Mary Galvin (of DPL) to be interim until hiring of webmaster. CAT/Auth: leave as is, though lost one. Current members doing job very well.

c. Task Force reports outstanding.

As indicated on agenda.

d. Joint Meeting of Task Forces.

No time, where overlap, consult one another via e-mail. However, SC recommends Chairs exchange minutes.

e. WebPAC Items.

* Guidelines (attached to agenda): What initial screens will be used? Currently, too much variety, confusion which Guidelines do not address. Also, need to have seamless searching.

DALNET Web pages currently not approved by DALNET, but now being done by A. Lim with sometimes approval by L. Bugg. Webmaster will help set guidelines. Software is available for web page approval/posting. DALNET will need to decide on "approvers." J. Houser will load software for test.

* Links to WebPAC on DALNET homepage. All need WebPAC training.

6. * DALNET/Ameritech Launch 10/21/98.

Still no clear plan for demos of DALNET as "information hub."

* Need final input from SC members from Project Leader interviews.

* Next meeting 10/12/98 at Wayne County Community College District Administration Building, 801. W. Fort St., 5th floor, to your left, Board of Trustees Conference Room (same as before), 8:30-12:00. Parking available as before (see map enclosed).