DALNET Single Database Task Force
Issues Identified for Review by DALNET Board of Directors
April 11, 2005

The following issues were identified by the DALNET Single Database Subcommittees and Task Force for review by the DALNET Board of Directors. These issues were selected for review because they meet one or more of the following criteria:

- impact public services
- require more than routine changes in operations for member libraries
- require significant start-up work or ongoing work changes for DALNET employees

Issues are organized alphabetically by functional area/subcommittee.

Acquisitions
Vendor File: The common acquisitions/serials vendor file will need to be reviewed. Obsolete entries need to be deleted and institution-specific entries need to be identified with unique codes.

Fund Codes: Fund codes will need to be identified with institution-specific codes to ensure libraries work only with their institution's records.

Cataloging
Record Ownership: It is not practical for any one institution to have exclusive rights to modify specific bibliographic records in the database. More specifically, serial title changes make record ownership impractical. The key to ensuring the viability of the bibliographic database will be security authorizations that limit access to appropriate member library employees.

Bibliographic Standards: Libraries will be required to follow DALNET-wide database standards. This will include adding institution-specific designators to hyperlinks for subscription resources. It will also include moving local cataloging practices to item note field.

Authorities: A decision will need to be made about providing authority control for the merged database in relation to:

- cleanup of existing authorities
- budgeting for ongoing authority loads and associated tasks

Circulation
Unique Patron Identifiers: A user-friendly coding scheme will need to be devised to ensure unique identifiers for patron records. The solution may include using a combination of institution code plus institutional ID in the second_id field. Ideally, this scheme should be transparent to the user, since some institutions use the second_id in patron records to authenticate patrons for subscription resources.

Check-in Capabilities: Libraries will be able to check-in items that do not belong to them. Options to ensure timely return of books that are checked-in at the incorrect location include:

- Member libraries will run reports on "in transit" items each month and pull/route items that do not belong to them to the home institution.

- The "in transit/send to…" message will be set to display for 15 seconds to ensure circulation staff have a chance to review the message.

Michigan Library Exchange (MiLE): There is some uncertainty how MiLE operations will change in the merged database environment in relation to the following issues:

- Requests: Patrons may need to search the DALNET union catalog and make requests from member libraries before entering requests in MiLE. Patrons are blocked from making MiLE requests when their local library owns an item, and in the merged environment, MiLE may consider any item owned in the DALNET union catalog as a locally owned item.

- Request Review List: The review list may reflect items requested from all libraries in the union catalog. This would create a need to centralize the initial review of the file each day, and send relevant requests to individual libraries.

- Direct Request: There is some question about how/if Direct Request will work with a union catalog.

Horizon Information Portal (HIP)

Browse indexes: Keyword indexes can be scoped to the individual institutional level, but browse indexes cannot be limited to specific locations. When patrons search in their home library HIP using a browse index, they will retrieve a list of items at all locations. If libraries do not find this acceptable, several options are possible:

- Libraries may choose to be somewhat "Google-like" and decline to offer browse searching on their public HIP. The merged database HIP will provide browse searching comparable to what can be offered by default in individual HIPs, so browse searching will be readily available.

- Libraries could model themselves after other Horizon consortia and allow scoping to unique locations when individual records are selected from browse searches. Patrons could then see items available at other institutions through their home HIP.

Enriched Content (Syndetics): A decision needs to be made on whether to offer Enriched Content and/or what features to purchase. The cost to offer all features is approximately $20,000 annually.

Security

Centralizing Security Maintenance: Providing appropriate security authorizations to employees of member libraries is essential to all Horizon operations in a merged database environment. Horizon security is flexible but complex. Recommendations are made to:

- centralize security setup and maintenance in the DALNET office
- require password changes on a routine basis

Reports: ReportSmith reports can tap the entire merged database and will need to be scoped with parameters to ensure only home library information is tapped. Potential problems can be held within an acceptable range if:

- Reports are written and generated by the project manager at each institution or a specific alternate.

- Reports are generated only during specific hours when DALNET employees are available to troubleshoot.

Serials

Following review of a numerous issues, the subcommittee finds serials control and check-in should work well within the merged database environment.

Recommendations

The Task Force and Subcommittees recommend moving forward with the merged database, adhering to the timeline proposed during the December, 2004 Board of Director's meeting. None of the issues identified in this document are prohibitive and the benefits of the merged database outweigh the disadvantages of changes that will be required to operate in the new environment.

Submitted By: Single Database Task Force
Steven Bowers (DALNET)
Mary Carr (Mt. Clemens General Hospital)
Anaclare Evans (DALNET)
Lois Grogan (MCC)
Elizabeth Lindley (Oakland County Law Library)
George Marck (DALNET)
Sara Martin (University of Detroit Mercy)
Mary Ann Sheblé (Oakland Community College)
Jackie Wrosch (DALNET)