DALNET PROJECT MANAGERS MEETING
WSU Undergraduate Library, Community Room (3210)
November 2, 1998, 1:00 – 4:00 p.m.

AGENDA

1. **Introductions and review of agenda** — **1:00 – 1:10 p.m.**

2. **NOTIS Library Management System** — **1:10 – 1:30 p.m.**
   a. Authority record standards
      Attachment: Database Standards Committee meeting minutes, September 17, 1998
   b. UD Mercy records in NOTIS
   c. NOTIS and Year 2000 compliance
      Attachment: letter to Nancy Bulgarelli
   d. PACLink connection changes (attachment)
   e. Link between NOTIS and Horizon

3. **DALNET Collection Development Issues** — **1:30 – 2:00 p.m.**
   a. Report from Collection Development Committee—Jenny Nolan, UDM, Chair
   b. Hospital library representative for Collection Development Committee

4. **DALNET Resource Sharing Issues** — **2:00 – 2:30 p.m.**
   Report from Collection Access Committee—
   Jerry Bosler, MCC, Chair

5. **Horizon Migration** — **2:30 – 3:30 p.m.**
   a. University of Detroit Mercy update—Mary Ann Sheble
   b. DPL, WSU and Botsford updates—J. Houser, J. Trzeciak, D. Adams
   c. DALNET Migration Checklist (attached)
   d. Progress report from Catalog/Authority Design Task Force—A. Evans
      Attachment: Memo from Task Force to Steering Committee, September 29, 1998
   e. Report from DALNET Steering Committee—
      L. Bugg—Horizon Task Forces (updated list to be distributed)
      --Product enhancement teams
   f. Horizon ILL/Document Delivery Task Force (proposal attached)
   g. Information Hub Showcase for ACRL in Detroit, April 8-11, 1999
      -- ideas for subject resources
      -- ideas for digitized local collections
   h. Briefing on DALNET's frame relay network—J. Houser

6.	**DALNET Office Staff Update**	**3:30 – 3:35**
7.	**News from DALNET libraries—DALNET Project Managers**	**3:35 – 3:55**
8.	**Wrap-up** Plans for next meeting	**3:55 – 4:00**

NEXT MEETING: December 7, 1998, 1:00 – 4:00 p.m.

L. Bugg/cmz
10-28-98
dalnet.9

Distributed 11/18 pm cmz

DALNET PROJECT MANAGERS MEETING
WAYNE STATE UNIVERSITY
DAVID ADAMANY UNDERGRADUATE LIBRARY
COMMUNITY ROOM
November 2, 1998 1:00-4:00 p.m.

Minutes

PRESENT: Debbie Adams, Botsford Hospital; Jerry Bosler, MCC; Louise Bugg, WSU/DALNET; Nancy Bulgarelli, Beaumont Hospital; Marilyn Dow, Hutzel and Children's Hospitals; Daria Drobney, Rehabilitation Institute; Anaclare Evans, WSU/DALNET; Jim Flaherty, WCCC; Dave Murphy, Walsh; MaryAnne Nagler, OCC; Jenny Nolan, UDM; Teresa Prince, MCC; Jeff Trzeciak, WSU; Karen Tubolino, VA

ABSENT WITH NOTICE: Barbara Platts, Beaumont-Troy; MaryAnn Sheble, UDM; Diane Zyskowski, OCLL.

1. **Introductions and review of the agenda:** Those present introduced themselves. The agenda was approved as issued.

2. **NOTIS Library Management System**

   a. **Authority record standards**. DALNET standards for NOTIS require authority records only when a heading new to the database requires references and/or notes. The Database Standards Committee has recommended that this policy be continued even though Horizon will require an authority record for every heading. Until your library has migrated to Horizon you should maintain your current practices.

   b. **UD Mercy records in NOTIS.** UDM records in NOTIS reflect increasingly out of date status information. The DALNET Office was considering suppressing these records in LUIS, but UDM asked that they not be suppressed at this time because of some searching glitches in Horizon. The records will continue to be available in both public and staff modes for a while longer. DALNET staff will look into making the information on the LUIS screens state that UD Mercy records are not up to date and that users need to search for them on Horizon. Some suggestions included adding a note on the first screen, changing the item status in some way, or changing the UDM long name in LUIS.

   c. **NOTIS and Year 2000 Compliance.** L. Bugg distributed copies of a letter written to Nancy Bulgarelli at Wm Beaumont, Royal Oak stating NOTIS and all of its underlying components will be year 2000 compliant. At the recommendation of those present, the letter will be readdressed to "Dear DALNET Customer" and resent to all DALNET libraries.

   d. **PACLink connection changes.** A list of the new addresses to access former NOTIS libraries was distributed. We have removed the PACLink connection with

those libraries who that have migrated from NOTIS to another system. At this time, each of the library catalogs are web accessible. DALNET will be reconstructing a link to LCAT because of special considerations between Wayne State, Michigan State, and University of Michigan. The link to the MathSci database at University of Michigan has also been discontinued.

e. **Z39.50 links between NOTIS and Horizon.** DALNET Office staff has made creating the Z39.50 link between Horizon and NOTIS its highest priority. After that has been completed, the reverse link will also be made.

f. A. Evans reported that the Patron Accounting File Archive had been successfully run and the job deleted 1.4 million closed records from the file. Also, over the past weekend, the Merged Headings Index was successfully regenerated and now the index and the headings on bibliographic records are synchronized.

3. **DALNET Collection Development Issues**

a. **Report from the Collection Development Committee, J. Nolan, Chair.** The new chair of the committee reported that under her leadership, the committee has met twice. The main focus of these meetings has been to address matters related to subscriptions for online databases as the files are moving from MDAS to web access. For the majority of the index/abstract databases now on MDAS, access will be moved to access via Access Michigan/First Search. Other subscriptions may be obtained through the Michigan Library Consortium (MLC). Offers, estimates, and pricing information is available from the Michigan Library Consortium listserv. The committee has been investigating pricing for an Ovid subscription for CINAHL and the NURSING COLLECTION. CINAHL pricing for 19 simultaneous users is $41,424. Pricing for the NURSING COLLECTION, also for 19 users is $85,405. The NURSING Collection includes the following journals in full text:

Advances in Nursing Science
AJIC (American Journal of Infection Control)
AORN Journal
Dermatology Nursing
Heart & Lung: Journal of Acute & Critical Care
(January/February 1996-forward) continues Heart & Lung:
Journal of Critical Care
Heart & Lung: Journal of Critical Care (1995) continued in Heart
& Lung: Journal of Acute & Critical Care
Image: Journal of Nursing Scholarship
Journal of Advanced Nursing
Journal of Clinical Nursing
Journal of Emergency Nursing
N & HC: Perspectives on Community (January/February
1995-March/April 1997) continued in Nursing &

Health Care Perspectives
Nurse Researcher
Nursing & Health Care Perspectives (May/June 1997-forward)
continues N & HC: Perspectives on Community
Nursing Management (RCN Publication)
Nursing Standard
RN

Some, but not all, of these titles are also in Health Center Reference Academic. Ovid and MLC do not have an agreement, so DALNET would need to negotiate this access directly with OVID.

Another index under consideration is MLA Bibliography. WSU, UDM, and MCC have been accessing MLAB from the University of Michigan. The subscription expires in December so alternative pricing will be obtained and appropriate notice given to the University of Michigan to whom we link to access this database.

Almost all of the Wilson files are available on Access Michigan/First earch, but there are three files that are not. The three files are Essay and General Literature Index, Cumulative Book Index, and Wilson Biography.

The Galenet subscription will expire on 12/31/98. Busi/Comp has been cancelled since the information is available via Access Michigan/First Search. ERIC will be cancelled effective 1/1/99(also available in Access Michigan/First Search).

DALNET is obtaining pricing for access to Wilson files and CINAHL for six months to allow for an orderly transition to First Search and/or Web access to the files for those libraries who need it.

A second role the Collection Development might play is that of determining which locally available resources can be provided for others. That is, what local special collections are available in a digitized form or are available to be digitized that DALNET might make available to others. The role of the committee would be to help DALNET identify resources and to identify what would be required to make the resources available (money, technology, etc.). The committee could also recommend the direction these services should take.

b. **Hospital Representative to the Collection Development Committee.** Nancy Bulgarelli volunteered to serve.

4. **Collection Access Committee, Jerry Bosler, Chair.** This committee has been revived after a several year hiatus from activity. J. Bosler provided copies of the charge to the committee which may need some updating to removed obsolete product names. The basic charge is still usable. The last activity of the committee

was to prepare the DALNET Access Directory, a tool which is still useful but which may need some updating. The focus of the committee will be to develop the DALNET ideal for interlibrary loan and shared patron access to the various collections in DALNET member libraries. There are a number of issues to be decided such as fee vs. free, the use of Michicard, and record keeping (statistics). WSU has already agreed to lower some of its fees and to provide greater access to guest borrower cards from academic libraries. The first step for the committee will be to determine what data it needs and to get that data.

Jean Gilbert was volunteered to be the hospital representative to the Collection Access Committee.

The next meeting of the Collection Access Committee is 20 November 1998 in the WSU Purdy/Kresge Library Conference Room.

5. **Horizon Migration**

a. **University of Detroit Mercy Update.** In Mary Ann Sheble's absence, A. Evans reported that UDM staff met with Jan Sheppard on Friday morning to review UDM's concerns. The number of concerns is quite low and many problems were eliminated when UDM updated to the latest release of the Horizon client software and began using WindowsNT on their PCs. Some of the issues might be local (for example, is the clock on the server set correctly), some are related to data migration (items checked out in NOTIS and not pulling the correct due date, fines, and notice information), some could be bugs (indexes not working as defined), and some might require special programming (such as a filter for loading bibliographic records). Label printing is also not working properly at this time. The list of concerns is being reviewed by Jan Sheppard in order to determine what action needs to be taken.

b. **DPL, Botsford, and WSU Updates.** A. Evans reported that DPL staff met with Jan Sheppard and Val Chase, Ameritech staff, on Oct. 27-28, to review their profile and to resolve some profiling issues. Debbie Adams, Botsford Hospital reported that she had met with Jan Sheppard on 10/29 to review her profile. A. Evans had met with D. Adams the previous week to review some basic definitions and various statistical reports which the DALNET office had provided. D. Adams expressed her appreciation of all of the hard work done by the various committees in providing the DALNET standards for the data in the tables. J. Trzeciak reported that WSU has completed most of its tables and that WSU has a test bibliographic and authority database in place.

c. **DALNET Migration Checklist.** A. Lim developed a document listing steps which the DALNET libraries can take to prepare for migration. In the ensuing discussion, it was suggested that a pre-migration briefing be held later this fall for those libraries which are in the next group following WSU, DPL, and Botsford.

d. **Catalog/Authority Design Task Force.** A. Evans reported for chair R. Call that the Task Force had met with Jan Sheppard and Earl Boyce from Ameritech. Our

model (presented at the last PM meeting) was reviewed and compared with Ameritech's development plans. Our plans were amazingly similar. The Task Force, via the Steering Committee, sent a report to the Board with recommended target dates for various phases of the enhancement. A copy of the report was distributed with the agenda.

e. **Report from the DALNET Steering Committee, L. Bugg.** L. Bugg reported that the Steering Committee has been focusing on the enhancements needed for the full implementation of Horizon for DALNET. The proposal for a Task Force to deal with Interlibrary Loan and Document Delivery will be going to the November DALNET Board meeting. This group will be looking at the Resource Sharing System (RSS) and how it will interface with both the Horizon files and with OCLC and Docline. The proposed members of the task force are Jerry Bosler, MCC (community colleges), C. Gilham, UDM (academic), D. Callaway (WSU), a DPL representative to be named, and a hospital representative (D. Drobny volunteered).

The Children's OPAC Design Task Force is also being proposed to include two DPL representatives and Carol Doll, from WSU Library and Information Science Program who has done research in this area. Some of the enhancements from the Children's OPAC are expected to be useful for other OPAC users.

The Booking Module promised is to be a joint development effort with Ameritech and DALNET. The proposed Task Force to create DALNET's specifications for this module will include Sharon Phillips, WSU Media Services director, Jim Flaherty from WCCC, and a representative from UDM, possibly their media services director.

The Cataloging/Authorities Design Task Force has been working and met with Ameritech representatives. A non-disclosure agreement has been signed so DALNET can participate in the development process.

The Shared Patron record group, chaired by Fran Young, UDM, met during the summer to propose selected fields to be included on the patron records. In late October, the task force met with Jan Sheppard to learn just which direction Ameritech was going and to determine what would be needed for DALNET to be successful. The ALS proposal separates some of the pieces of the patron record so that parts are shared and parts are kept locally. During the discussions, issues of patron empowerment, RSS, and patron authentication were mentioned as areas related to the patron record which needed to be addressed.

Technology Issues Task Force. This group, to be chaired by John Houser, DPL, has as one of its first assignments the preparation of a briefing for information systems' staff in various DALNET libraries to explain the frame relay network planned for DALNET libraries. Project Managers were asked to identify who from their institutions would need to be included.

planned for DALNET libraries. Project Managers were asked to identify who from their institutions would need to be included.

f. **Horizon ILL/Document Delivery Task Force.** See above.

g. **Information Hub Showcase for ACRL in Detroit.** DALNET libraries need to identify their Web-based subject resources that can be included in the showcase for ACRL. If any library has anything which could be included, please notify L. Bugg.

h. **Briefing on the Frame Relay Network.** J. Houser. L. Bugg announced that a briefing on the Frame Relay Network for information systems' staffs of the various libraries will be held later this fall.

6. **DALNET Systems Office Staff Update.** Interviews for the DALNET Systems Librarian position last held by Jim Green are being scheduled.

A verbal offer and written confirmation have been mailed to the proposed candidate for the DALNET Project Manager position and we are awaiting a response.

The Webmaster position description at DPL has been written. As soon as the service agreement between WSU and DPL for the help desk has been signed, the position will be advertised and filled.

7. **News from DALNET Libraries.** Wayne County Community College is now developing a Horizon Project Plan for the college. Walsh College expressed a desire to get some basic NOTIS information so as to begin their migration process. Oakland Community College has posted the position created with the retirement of J. Murray. Also OCC reported that they are now an OCLC library. Macomb Community College is in the process of filling a systems/project manager vacancy. The libraries which will follow WSU/DPL/and Botsford have expressed an interest in getting the necessary reports and documents to begin their profiling process.

8. The next meeting is scheduled for 7 December 1998 from 1:00 PM to 4:00 PM.

Summary notes by,

Anaclare F. Evans

Afe/

OCT 1 9 1998

DALNET Database Standards Committee, September 17, 1998, 9:30 - 12:30
SEL 15, Wayne State University

Present: R. Call (DPL), R. Dotson (DPL), B. Ho (WSU), A. Lim DALNET/WSU), D. Roe (UDM), Theresa Shen (WCC)

Meeting minutes

1. DALNET Office updates - A. Lim

   A. Lim spent a few minutes providing the Committee with updates Regarding Horizon implementation, including advising members about the new DALNET website section devoted to Horizon implementation information (ID and password to access the section are available from Betty Franks at 313-577-4022). Copies of the migration schedule and various Task Forces' recommendations regarding indexes, naming conventions, ISTATS, etc., were distributed.

2. Presentation by the DALNET Cataloging/Authorities Task Force on their model database for Horizon - R. Call

   In his one-hour presentation, R. Call explained the design for a full-blown, option B+ functionality. The recommended design sequences were discussed. The constraints associated with each stage were outlined. Many thanks to R. Call for his excellent presentation.

3. Discussion of recommendations re authority standards to be followed in the interim, as libraries prepare for Horizon

   The Committee recommended that regular maintenance of authority files should still be maintained by Authority Central. LCSH activities will be continued. Corrections to bibliographic record headings will be done for all libraries, except for UDM and OU (Oakland University records will be purged, and UDM's online catalog is frozen as of August, 1998). For access information see the web site. Correction reports should still be sent to Authority Central.

   For current DALNET standards, the Committee will look into the Minimal-level Standards for Bibliography and Provisional Record Standard. The responses received regarding the latest proposed Minimal-level Standards included: revision should include specification of system requirements; it is not 'minimal enough' for materials in languages for which catalogers do not have expertise. In response to those suggestions, the Committee will investigate Horizon's Partial Preliminary Records and other alternatives.

   For the required presence of authority records for every heading in Horizon database, the Committee has recommended maintaining the current DALNET practices, i.e. names, personal and corporate, and uniform titles require authority records only when the heading requires references and/or notes per DALNET Standards.

4. Electronic resource record standards

WSU has just started a pilot project to develop policies and guidelines for handling electronic resources. These include issues of acquisitions, licensing, IP address and/pr password control on access, cataloging, url maintenance, holding control, OPAC, etc.

WSU will share with DALNET libraries their experience. If there are similar projects within DALNET libraries, please share your considerations with the DALNET Committee.

Committee members agreed that we should continue to discuss this topic at the next meeting.

5. CLARR

CLARR's Import/Export function was explained. Handouts were distributed. DALNET libraries that are interested in installing the software should consult the package. If assistance is needed, please contact DANET office System Office, Anaclare Evans (313)577-4002.

6. Next Meeting

Next meeting will be held on October 14, 1998, SEL 15, WSU

Notes by Birong Ho

ne State University
University Libraries
Technical Services Division
5048 Gullen Mall
Detroit, Michigan 48202

(313) 577-4033
FAX (313) 577-3615

October 8, 1998

Ms. Nancy Bulgarelli
Library Director
William Beaumont Hospital
Library Information Services
3601 West Thirteen Mile Road
Royal Oak, Mi 48073-6769

Dear Nancy:

This letter is to confirm our telephone conversation about the DALNET Online System and its Year 2000 compliance. The DALNET Online System uses NOTIS library management system software licensed from Ameritech Library Services. This software runs on an IBM 9121 mainframe computer that uses MVS and CICS operating system software along with third party software for system operation. The Z39.50 server for NOTIS runs on an RS6000 using AIX software.

DALNET is running NOTIS LMS Release 6.4.1 as modified by Ameritech for Year 2000 compliance. The CICS version 4.1 used on the IBM 9121 is also Year 2000 compliant. We are scheduled to install an upgrade of the MVS software to OS/390 in late December 1998 which will bring MVS into Year 2000 compliance. It is my understanding that the MVS upgrade will also ensure that all other third party software is also compliant. We are also scheduled to upgrade the AIX software on the RS6000 to be Year 2000 compliant during 1999.

DALNET has just begun its migration to Ameritech's Horizon library information system. Our contract for this new system has a warranty that the licensed software and equipment is Year 2000 compatible.

If you have any other questions about Year 2000 compliance of the DALNET Online System, please let me know.

Sincerely,

Louise Bugg

Louise Bugg
Director of DALNET Online System

LB/cmz

NOTIS PACLink (Z39.50) Connection Changes

A. Z39.50 Links to non-DALNET libraries OPACs (CATALOGS)

1. **Eastern Michigan University (ECAT)**
   - link was discontinued when EMU migrated to Voyager. Their OPAC Web address for Web Voyager is: http://portal.emich.edu
2. **Western Michigan University (WCAT)**
   - link was discontinued when WMU migrated to Voyager. Their OPAC Web address for WestCat is: http://www.library.umich.edu
3. **Michigan State University (LCAT)**
   - link is still active to their NOTIS catalog; expect them to deactivate NOTIS this fall as they complete their migration to Innopac. Their OPAC Web address for MAGIC2 is: http://magic.msu.edu

   DALNET staff will be testing a Z39.50 link between NOTIS and MSU's new catalog this fall.

4. **Oakland University**
   - There is no Z39.50 link between NOTIS and Oakland University's Voyager catalog. Their OPAC Web address for Voyager is: http://sailaway.kl.oakland.edu

B. Z39.50 Links to Index/Abstract Databases

MATH

The link to the MathSci database at the University of Michigan was discontinued in September 1998. WSU licensed users can access the WWW version called Math SciNet from the WSU Electronic Indexes and Databases page on the Libraries' Website.

L. Bugg/cmz
10-29-98
dalnet.10

DALNET MIGRATION CHECKLIST

Fall 1998

Some staff members at DALNET libraries have asked for a complete checklist of preparatory steps that may be taken now to ease the transition from NOTIS to Horizon. As you will probably notice, some of these steps have appeared in past issues of *DALNET Data,* but all recommended steps are collected here to create a convenient checklist for you to use. Now is the time to clean up errors, update information, and mark for deletion any records not needed in the new Horizon system!

GENERAL:

- Continue to document changes in practices that may alter the answers given on your institution's Data Analysis Survey (completed in December 1997).
- Review your existing NOTIS locations, sublocations, and their corresponding classification codes, so you can see if any revisions or corrections are required before your data migrates to Horizon. If you need a report showing your existing codes, please contact the DALNET Office and ask for the "Location Count" report.
- Continue to collect between 300-500 NOTIS/LUIS printouts of sample bibliographic and authority records for use in your test database during conversion. (See article in Spring/Summer 1998 *DALNET Data* for more details.) It's best to maintain a list of these record numbers and descriptions in a file that may be converted to ASCII format.
- Keep informed about recommendations issued by DALNET Horizon Migration Task Forces and approved by the DALNET Steering Committee. Recommendations have been approved for MARC maps, standard indexes, naming conventions, borrower types (B-types), item types (I-types), and statistics codes. This information is available on the DALNET website in a password-protected area. To obtain the ID and password, please contact Betty Franks at 313-577-4022 in the DALNET Office.

ACQUISITIONS RECORDS:

- If your library uses the NOTIS Acquisitions Module and has a long list of fund codes, you may wish to review your existing fund codes now and start devising a list of corresponding seven-character codes that will be used in Horizon. Larger libraries may wish to use the pattern established by UDM, DPL, and WSU, with the following 2/1/3/1 breakdown:

  1st-2nd characters=building or agency
  3rd character=format*
  4th-6th characters=discipline or equivalent
  7th character=at discretion of library.

Checklist
Fall 1998

*Designated format codes for 3rd character are: 1=monographs/2=standing orders/3=periodicals/4=media/6=electronic resources

Examples are as follows: WSU's Purdy/Kresge discretionary fund for ethnic studies becomes fund code "PK1eth" --- with WSU choosing not to use the last character. UDM's Monographic Budget for English becomes fund code "MC1engb," with UDM using "b" as the last character to mean "Regular Budget."

BIBLIOGRAPHIC AND AUTHORITY RECORDS:

- Catch up on backlogged authority work and database corrections so that headings are as consistent as possible. This will help cut down on unnecessary "stubbies" in Horizon. ("Stubbies" are system-generated authority records in Horizon.)

COPY HOLDINGS RECORDS AND ITEM RECORDS:

- Review your existing copy statement subfield "k" data, so you can see if any revisions or corrections are needed when you move to Horizon. If you need a report showing these existing codes, please contact the DALNET Office and ask for the "Subfield K" report.
- Review your "I" (In-Process) classification codes on copy statements to see if any corrections are needed. Reports showing "I" class codes may be requested by contacting the DALNET Office.
- Begin to input the call number information on copy statements that duplicate call number information in a preceding copy statement, if this has not already been done. Implicit call-number codes in NOTIS will likely not convert to the new system, so the call number area should **not** be left blank.
- Link as many unlinked item records as possible to avoid unnecessary "fast adds" in Horizon. ("Fast adds" are system-generated bibliographic records that are created when there is no bib record associated with an item record.)
- Mark for deletion all unwanted item records and update any item conditions (e.g. "missing," "lost," etc.) possible. Deleted item records will be purged.

CIRCULATION:

- Analyze and review your existing circulation policies for desired revisions (e.g. loan periods, fees, etc.), so that you are prepared to input updated criteria into your new Horizon system. Although it is a lot of work, writing your circulation policies down on paper will be most helpful when you complete your new Horizon tables.

Checklist
Fall 1998

- ☐ Consider reviewing your older outstanding bills and fines to see if any of these can be forgiven in NOTIS. For larger libraries, this may mean designating a certain date before which all bills will be forgiven and noted as such programmatically in NOTIS. For smaller libraries, this may mean forgiving some bills manually in NOTIS. "All Bills" reports may be requested by contacting the DALNET Office.

COURSE RESERVES:

- ☐ Mark for deletion any unnecessary unlinked item records associated with Course Reserve Statements. These records may be ascertained by obtaining an Unlinked Item Record for your library from the Systems Office.

Please contact Anaclare Evans at 313-577-4002 or via email at AA4424@wayne.edu for any reports you need.

M E M O

DATE.....September 29, 1998

TO.....Horizon Steering Committee

FROM.....Union Catalog/Authorities T.F.

SUBJECT..... Design Recommendations Summary

The following recommendations flow from a September 22, 1998 meeting with Ameritech Library Services, ALS, Sunrise project team leader, Earl Boyce. This Task Force feels confident ALS's Sunrise project will eventually deliver the full blown, Option B+ functionality DALNET wants. The accompanying report, "Sunrise Design Considerations" contains more detailed information about Sunrise functionality and scheduling.

1) ALS's schedule for delivering Sunrise functionality is roughly what this Task Force expected it to be. **We recommend DALNET accept ALS's schedule with one addition to be discussed below.**

2) In summer, 1999 ALS plans to deliver the first Sunrise version of Horizon. It will include automation supported authority control as envisioned in Option B+ plus a Union Catalog less fully functional than Option B+ wants. **We recommend DALNET implement this version's authority functions, but not the Union Catalog.**

3) Two additional functions are necessary to make this first Sunrise Union Catalog into Option B+. One is to automatically move bibliographic records from local catalogs to OCLC and/or the Union Catalog. The other is a "hot link" between Union Catalog institution codes and holdings and status in DALNET member library local catalogs. Both functions must perform in "real time". Both functions are part of ALS's plan for Sunrise. **We recommend negotiations for the date these enhancements will be delivered to DALNET start from the point of view of the enhancements being ready in December, 1999.**

4) DALNET needs to be involved in testing and commenting upon the developing Sunrise version of Horizon. For DALNET to participate, ALS requires a non-disclosure agreement between DALNET and ALS. **Pending the outcome of legal review, we recommend DALNET sign this agreement.**

M E M O

DATE.....September 29, 1998

TO.....Horizon Steering Committee

FROM.....Union Catalog/Authorities T.F.

SUBJECT.....Sunrise Design Considerations

This report contains recommendations from the Task Force. Recommendations are in a larger type size and are bold faced.

The following recommendations flow from a September 22, 1998 meeting with Ameritech Library Services, ALS, Sunrise project team leader, Earl Boyce. This meeting was ALS's initial response to this Task Force's August 21 "Design Proposals" memorandum. Louise Bugg, Harry Masek and Jan Sheppard also attended this very productive meeting.

Almost all functionality DALNET wants in its "Shared Authority file" (also called the Option B+ vision) is planned for ALS's Sunrise project. The attached white paper, "Horizon/Sunrise Union Cataloging Overview and Philosophy", outlines ALS's Sunrise vision.

ALS's schedule for delivering this functionality is roughly what this Task Force expected it to be. **We recommend DALNET accept ALS's schedule with one addition to be discussed below.**

ALS's schedule is within the time frame in DALNET's contract with ALS:

1) For April, 1999, ALS can deliver a Horizon version corresponding to the attached "Diagram 3, Stage 2".
   * This is the current Horizon system plus a Resource Authority File with no automatic links to bibliographic records.
   * The Resource file is searched manually.
   * Authority records are manually exported to the local authority file of each DALNET member.
   * Authority records are added to the Resource file through batch loading of files of authority records and by creating new records individually in the Resource file.
2) For summer, 1999 ALS plans to deliver a new Horizon version corresponding to the attached "Diagram 2, Stage 3+". (This version goes to Beta test approximately March, 1999.)
   * This is automation supported authority control using the Resource Authority File as originally envisioned in this Task Force's attached design proposal, "Diagram 2, Stage 3".
   * Movement and matching of authority records is "real time".

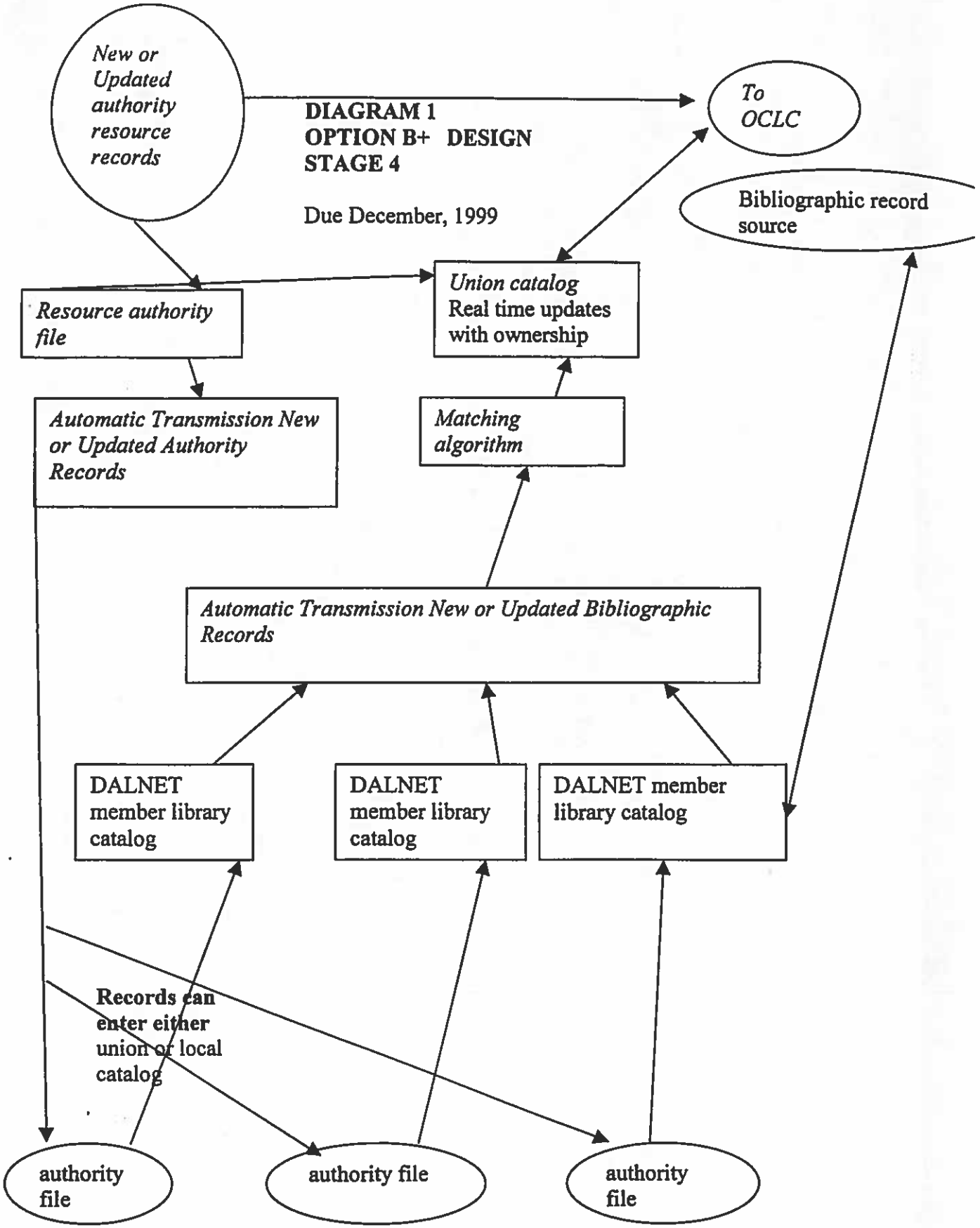
* It also includes a Union Catalog less fully functional than envisioned in this Task Force's attached "Diagram 1, Stage 4".
* This Union Catalog:
  1) assumes cataloging is done in the Union Catalog, not in the individual DALNET member's catalog and moves from Union Catalog to member library catalog via batch processing,
  2) has no programming underway for a mechanism to catalog locally and automatically move bibliographic records to OCLC and/or the Union Catalog, although this functionality is part of the Sunrise vision,
  3) has no programming underway for a mechanism to "hot link" the Union Catalog's institution code to detailed holdings and status in DALNET member library catalogs. (Again, this is part of the Sunrise vision, however.)

We recommend DALNET implement this version's authority functions, but not the Union Catalog.

3) For a yet unscheduled date, the functionalities mentioned above to automatically move bibliographic records from local catalogs to OCLC and/or Union Catalog and to "hot link" Union Catalog institution codes to holdings and status in local catalogs.
   * Movement of bibliographic records is "real time".
   * The "hot link" between holdings is "real time".

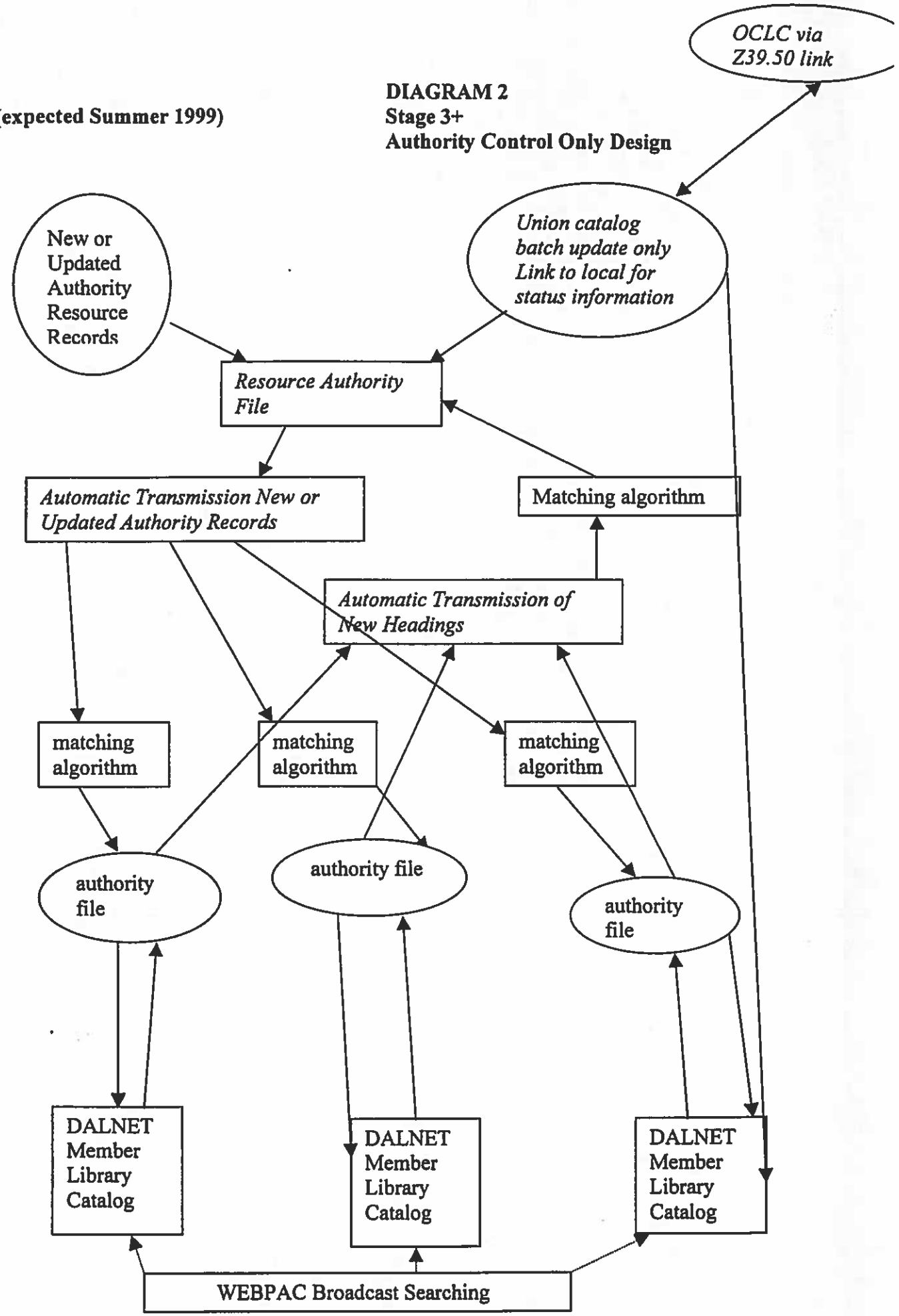
We recommend negotiations for this date start from the point of view of these enhancements being delivered to DALNET December, 1999.

ALS and this Task Force feel DALNET needs to be involved in testing and commenting upon the developing Sunrise version of Horizon. This involves participating in a Sunrise specific listserv and limited participation, "back room" type testing of prototype software. For DALNET to participate, ALS will require a non-disclosure agreement between DALNET and ALS. **Pending the outcome of legal review, we recommend DALNET sign this agreement.**


New or Updated authority resource records
To OCLC
DIAGRAM 1
OPTION B+ DESIGN
STAGE 4
Due December, 1999
Bibliographic record source
Union catalog
Real time updates with ownership
Resource authority file
Automatic Transmission New or Updated Authority Records
Matching algorithm
Automatic Transmission New or Updated Bibliographic Records
DALNET member library catalog
DALNET member library catalog
DALNET member library catalog
Records can enter either union or local catalog
authority file
authority file
authority file

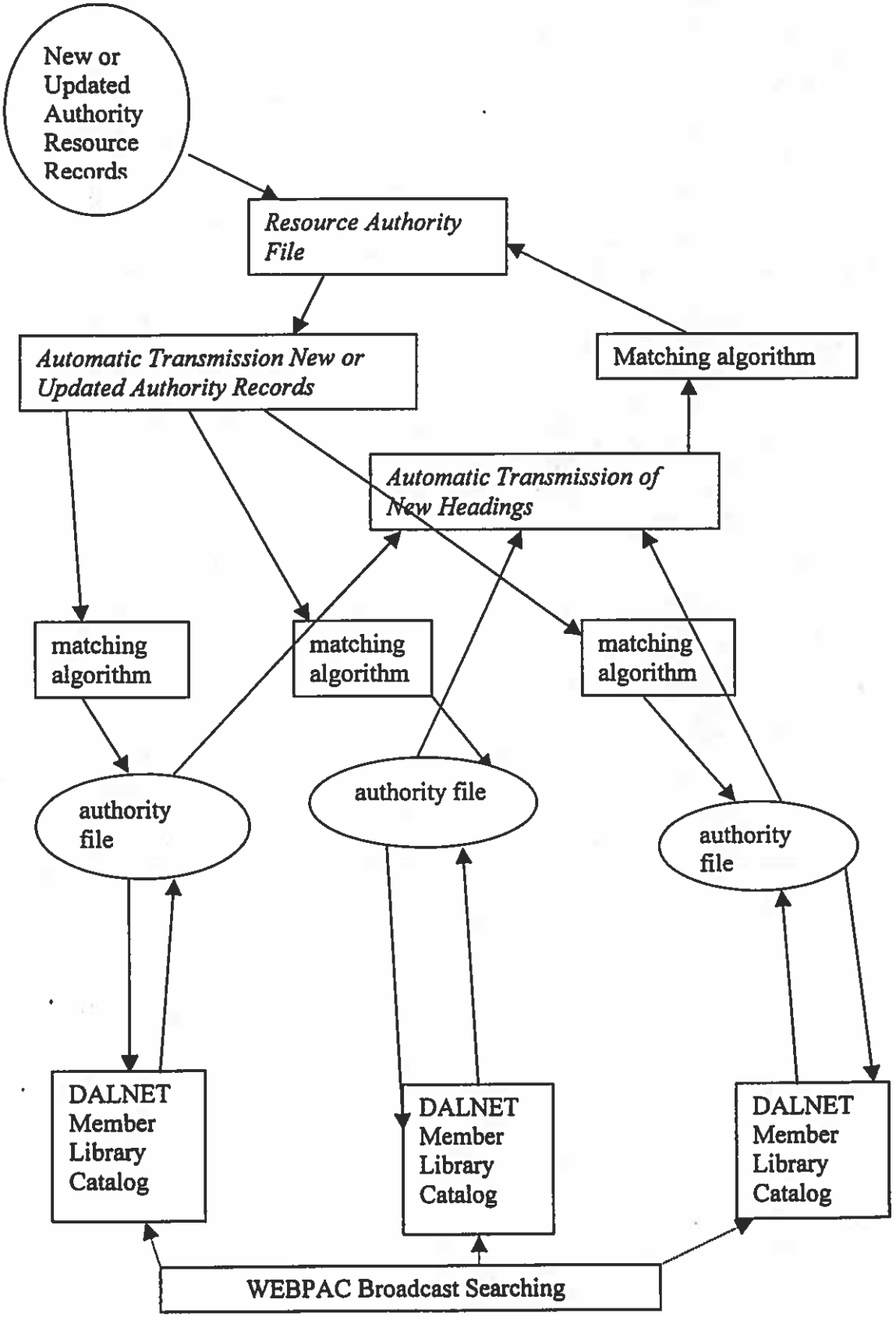
(expected Summer 1999)

DIAGRAM 2
Stage 3+
Authority Control Only Design



(expected Summer 1999)

DIAGRAM 2
Stage 3
Authority Control Only Design



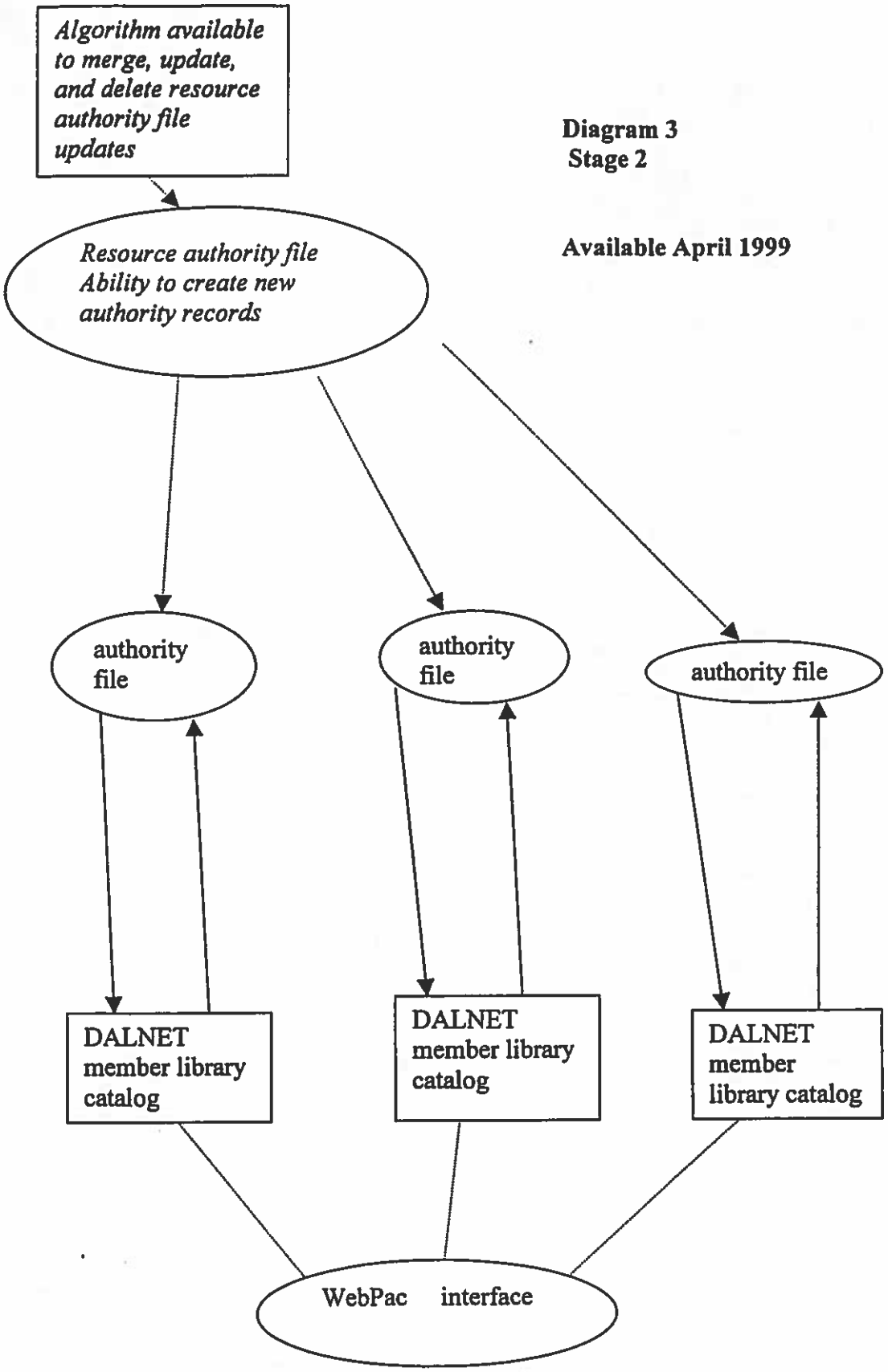
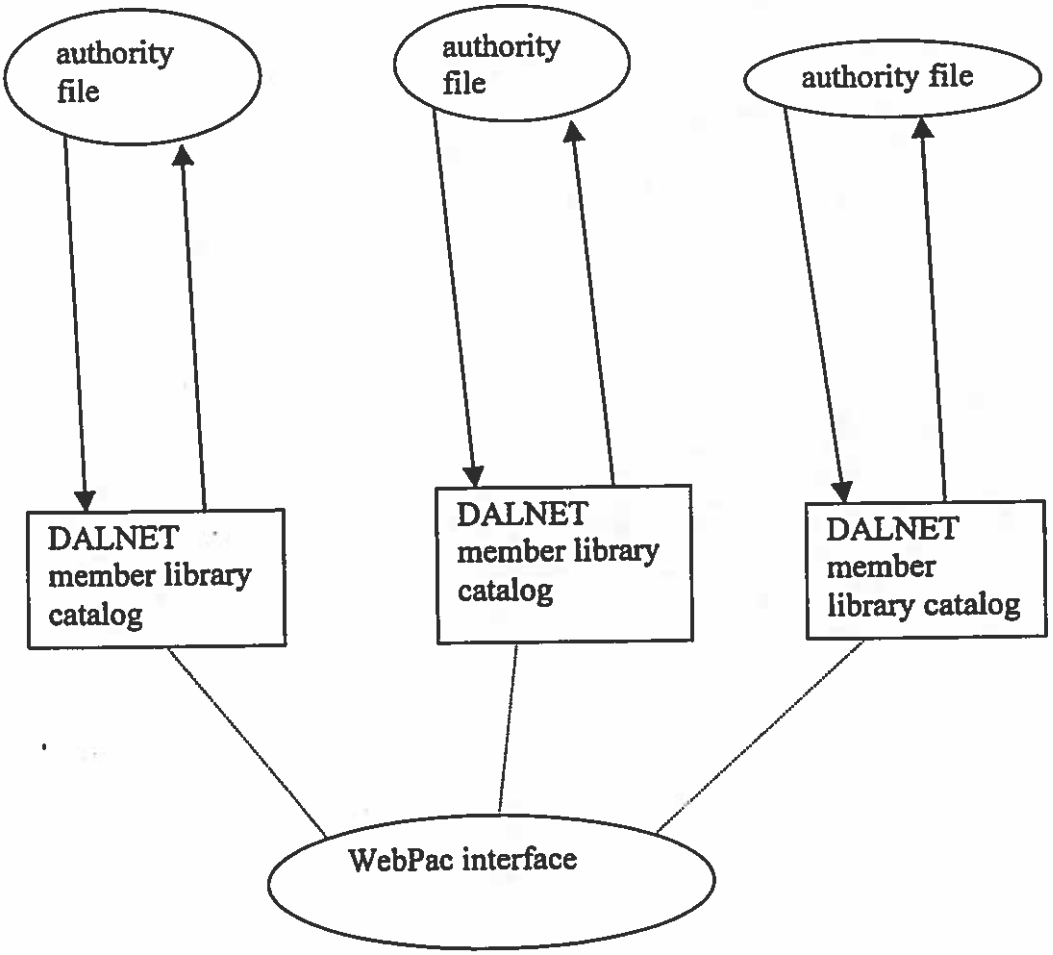

Algorithm available to merge, update, and delete resource authority file updates
Diagram 3
Stage 2
Available April 1999
Resource authority file
Ability to create new authority records
authority file
authority file
authority file
DALNET member library catalog
DALNET member library catalog
DALNET member library catalog
WebPac interface

DIAGRAM 4
Stage 1

This is the configuration currently in effect (9/98)



DALNET HORIZON ILL/DOCUMENT DELIVERY TASK FORCE

Proposed Charge

The DALNET Steering Committee recommends that an ILL/Document Delivery Task Force be created and charged as follows:

1. To review and propose procedures for handling Interlibrary Loan and Document Delivery among DALNET libraries using the Ameritech Resource Sharing System (RSS).

2. To propose content of WebPAC screens that enable RSS capabilities for DALNET library users.

3. To review and propose procedures for using the RSS system in communicating with outside systems (for example, OCLC and DOCLINE).

4. To provide feedback to Ameritech on enhancements to the RSS system given our multi-type consortium environment with patrons having variable privileges from library to library.

Proposed Composition of the Task Force

It is recommended that the Task Force be composed of representatives from the University of Detroit Mercy, Wayne State University, Detroit Public Library, a community college library, and a hospital library, with one representative also serving on the DALNET Collection Access Committee, if possible.

10/19/98
cmz
dalnet.8