

DALNET Steering Committee  
October 8, 2001  
Detroit Public Library

Present: R. Call, D. Calloway, J. Flaherty, L. Papa, M. Piper, S. Muir (Chair)

The Meeting was to include discussion of the DALNET Horizon Assessment, including incorporation of any unfulfilled requirements of Rider "H" into the assessment results and recommendations. Due to lack of time, as well as limited attendance, the Rider "H" discussion was deferred to the next Meeting.

Addressing the Horizon Assessment results, collated and presented by D. Calloway, the Committee began outlining categories under which issues and concerns might be presented and demonstrated to epixtech, in a meeting to be held before the end of this year. A number of broad yet, to some extent, overlapping categories quickly surfaced:

**System Administration:** The idiosyncratic data structures and menu systems used by Horizon require a high level of expertise to manage the product. A large investment of time would be involved in developing this expertise under the best of circumstances, however, only minimal training and poor documentation is available. This is particularly evident in troubleshooting and trying to determine what caused a certain problem. A lot of trail and error are involved. Troubleshooting is not intuitive and takes considerable time to resolve problems.

- **Data Integration:** Problems range from an inability to link certain modules, e.g., Acquisitions and Serials, to problems posed by modules that can be linked, such as Acquisitions and Cataloging. In some cases it is not possible to delete certain, because of data linked in other tables or modules, yet clear-cut methods for removing the links is not prescribed. The reverse is often true that data has to be updated in multiple places (WSU).
- **Workflows:** Workflows issues include problems manipulating data, such as the number of windows that needed to be opened or the number of clicks required to execute certain functions within cataloging. Other examples include the need to send an item derived from one module to another, i.e. from the search module to cataloging, in order to perform certain processes or functions.
- **Display:** When one updates or changes a display on the local workstation this change is not permanently stored, staff become frustrated having to keep changing the displays. In some cases it is impossible to see the data at the bottom of the screen without moving to a non-standard resolution (e.g. 800x600).
- **Report Writing:** There is no report writing function built into the Horizon modules. The process of using third party products, and distributing run-time versions of reports to staff, is cumbersome and the Horizon Data structure make it difficult to construct many reports. It is often difficult to link bibliographic data,

such as authors and titles, with subject headings. Execution of reports utilizes a high level of system resources (often crashing) and is extremely slow. There is not an ability to easily store reports within Horizon that staff can run. They must logout to run reports. Competitors offer this capability. There is also concern that reports can offer conflicting information.

- **Documentation:** Documentation is poorly written, unclear, incomplete, and sometimes even incorrect. DALNET-epixtech training and support structure exacerbates this shortcoming.
- Font used for Unicode present a major readability problem

As the Committee focused on the modules by which the Assessment Survey was organized, specific issues and problems that surfaced were identified and discussed:

#### Circulation

- ☐ **The circulation calendar does not appear to be integrated with loan periods. “Closed-days” are not identified (as are Holidays) when system calculates date due and fines for materials. E.g. library needs option to have it to loans calculate for “business days”.**
- System does not check patron record expiration date when calculating dates. (WCCCD)
- **Information about source and destination of items “in-transit” is lacking. An option to manually or automatically track in-transit items, including routing information, is desired.**
- **Circulation reports cannot be printed for an individual borrower, or stopped-restarted based on a field variable, such as User ID, User Name, etc. Also cannot print multiple copies (e.g. print dialog box) (WCCCD.)**
- ☐ **The circulation module lacks the ability to prescribe finer grained passkey service/security levels with optional supervisor override. (WSU)**
- Need for unique Users. (UDM)
- Circulation history tracking is insufficient.
- Adjust billing too limited. Cannot add replacement values. (DPL)
- Request button should interact with loan periods, e.g., should not display for non-circulating materials. Some requests (holds) seem not to go away after they are removed/deleted.

## Cataloging

- Authority records and control normalization problems have already been explicitly identified. Show this problem in WSU or DPL PAC
- Navigation of cataloging module, i.e., mouse-clicks and number of windows as well as interface with other modules such as acquisitions and serials, is cumbersome. Productivity has slowed since navigation and data entry in graphical environment is much slower than in character-based systems (WSU). The use of macro keys would be beneficial.
- Full MARC implementation is desired as is improved ability to navigate bib-display and edit screens, i.e., via tabbing.
- Would be better if it parallel OCLC on a one-to-one basis.

## Acquisitions

- Several DALNET sites have declared this module to be so poor they will not use it. One uses an Excel spreadsheet instead.
- DPL has lost productivity in acquisitions, had added numerous staff to maintain same workload,

## Stability

DALNET is experiencing stability problems with telecommunications and Horizon. Error messages are not always clear

Dec's assignments, Determine what was meant by:

SQL

Barcode validation in circulation

Bib edit in cataloging

A Special Meeting has been scheduled for 8:30 am, on Friday, October 18, at UDM. The Committee will continue discussing the Horizon Assessment, including the Acquisitions, Serials, OPAC and System Administration modules. Priorities for the epixtech meeting (between November 12-16 or after Thanksgiving) will also be discussed. Tasks and responsibility for developing Horizon Problem Scenarios, which will be demonstrated to epixtech during that meeting, will also be determined and assigned.

Due to the HUGM Meetings, which will be taking place on November 5, the next regularly scheduled Steering Committee meeting will take place at 8:30 am, on Monday, November 12, at Botsford Hospital.

Minutes prepared by L. Papa