

DALNET/Horizon
Cataloging/Authorities Design Task Force
Minutes
August 5, 1998

Present:

R. Call (DPL/Committee Chair), A. Evans (WSU-Dalnet Office),
A. Lim (WSU-Dalnet Office), D. Kittendorf (MCC)

Minutes:

Reviewed minutes from 7/22/98.
After minor changes made, redistribute in Rich Text Format.

Option B+_design (See attached Diagram A)

- * When fully implemented, this design will meet DALNET's expectations for Option B+ functionality.
- * This design needs software that does not now exist:
 - 1) Automatic movement of new/revised bibliographic records from library catalogs to union catalog,
 - 2) A bibliographic record matching algorithm,
 - 3) MARC field, indicator, and subfield level Bibliographic record consolidation,
 - 4) The resource authority file,
 - 5) Automatic movement of new/revised authority records from resource authority file to local authority files.
- * Design assumes detailed holdings and status information not shown in Union Catalog.
 - 1) The most common complaint Task Force members hear from front line staff and users is having to deal with too many holdings.
 - 2) To be useful, status information has to be accurate and timely: how fast will Horizon update at Union Catalog level?
 - 3) Can Horizon move only item information between catalogs?
 - 4) Does this create security issues? We don't know enough about what Horizon can and cannot do in/to a shared item file.
 - 5) If holdings are at the Union Catalog level, why also have catalogs for each DALNET member? WebPAC produces location specific displays.

Why Option B+?

- * Union catalog to make searching easier for Public Service staff and users.
- * Automated authority control to make catalogs more consistent, increase the number and type of headings under authority control, and free Technical Services staff to do what isn't being done now.

- * We are trying to make one design satisfy two needs that are independent of each other.
- * Given broadcast searching in Horizon, if the Union Catalog does not have holdings and status information, why have a Union Catalog?
 - 1) Broadcast searching could be better because it gives the searcher more control over how many/whose bib records and holdings respond
 - 2) Broadcast searching works better where authority control is more standardized and more consistent
- * Automated authority control is a more important objective for DALNET than creation of a union catalog.

Authority Control Only design (See attached Diagram B)

- * Authority control is a two step process:
 - 1) First step is between local catalog and local authority file (current Horizon functionality).
 - 2) Second step is between local authority file and resource authority file
 - 3) Second step results:
 - a) full authority records automatically replace stubby records in local authority files
 - b) authority records updated in the resource file automatically replace authorities in local files
 - c) stubby records not replaced by full become candidates for NACO work
- * By removing Union Catalog, this design allows WebPAC to do what WebPAC does best, broadcast searching of keyword and browse indexes for author, title, subject, series and ISBN.
- * This design needs software that does not now exist:
 - 1) Automatic movement of lxx headings from local authority files to resource authority file
 - 2) ?? Modifying the matching algorithm in current Horizon functionality that matches bibliographic headings to authority records ??
 - 3) The resource authority file
 - 4) Automatic movement of new/revised authority records from resource authority file to local authority files.

Concerns about Authority Control Only design

- * Stubby records have to be in resource file as well as in local authority file(s)?
- * Needs pointers between each resource authority file record and all local authority files matching against that record.
 - 1) Each time resource file record overlaid, revised authority record must be downloaded to local file(s).

- 2) Don't download all pointers in resource file record to each local authority file receiving the resource file record.
- * By removing the union catalog, this design makes deriving bib records for cataloging purposes more difficult, if possible at all.
- 1) Deriving possible if we give each DALNET member search level access to all other DALNET members' StaffPACs?

Next two meetings set:

August 14th in DPL's Meeting Room A, 9:30 A.M. - Noon
August 19th in WSU, Science & Engineering Library's
room 15, 2:00 - 4:30 P.M.

Respectfully submitted,
J. Randolph Call
8/7/98

DIAGRAM A Option B+ Design

Italics = Software that does not exist now

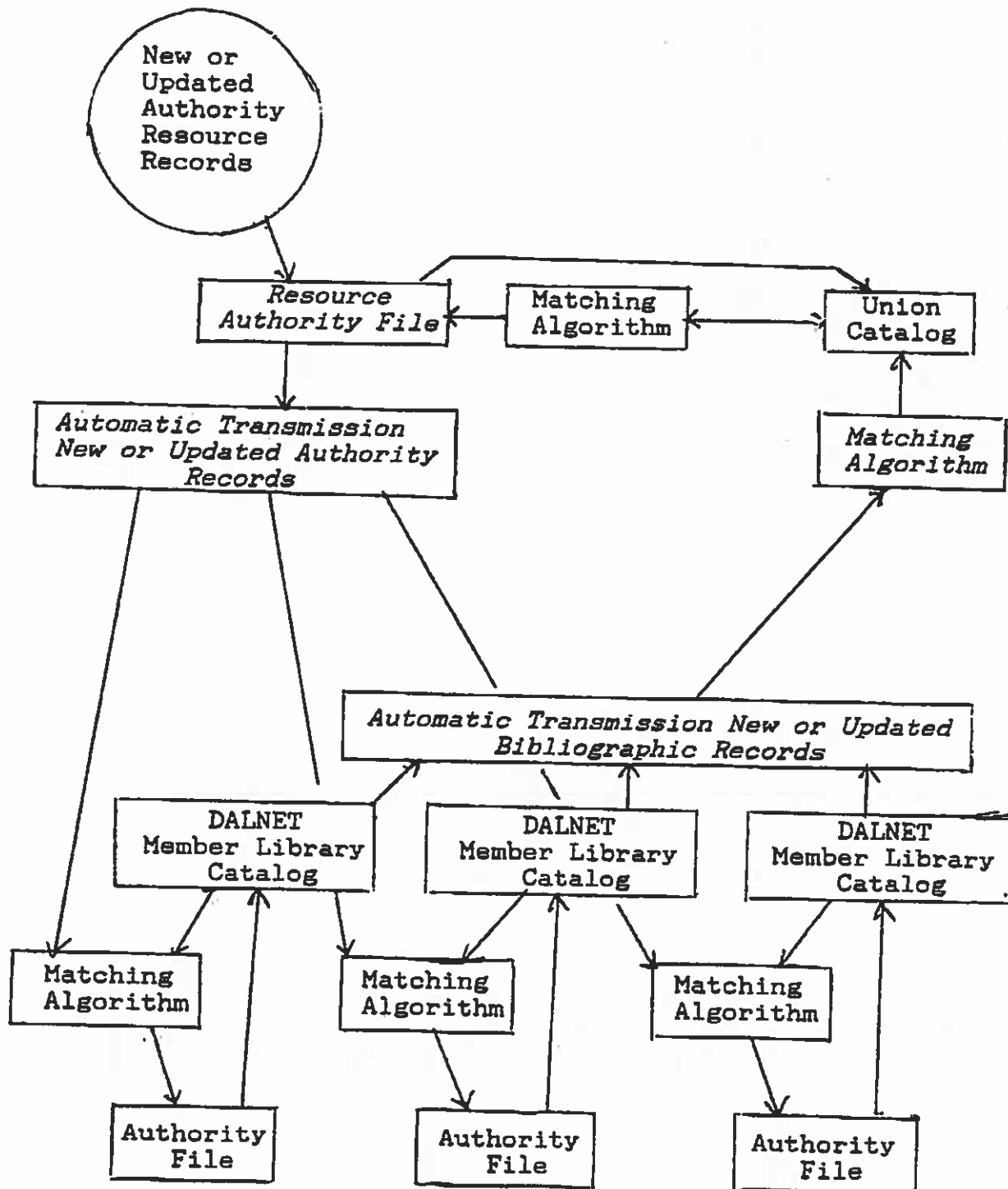
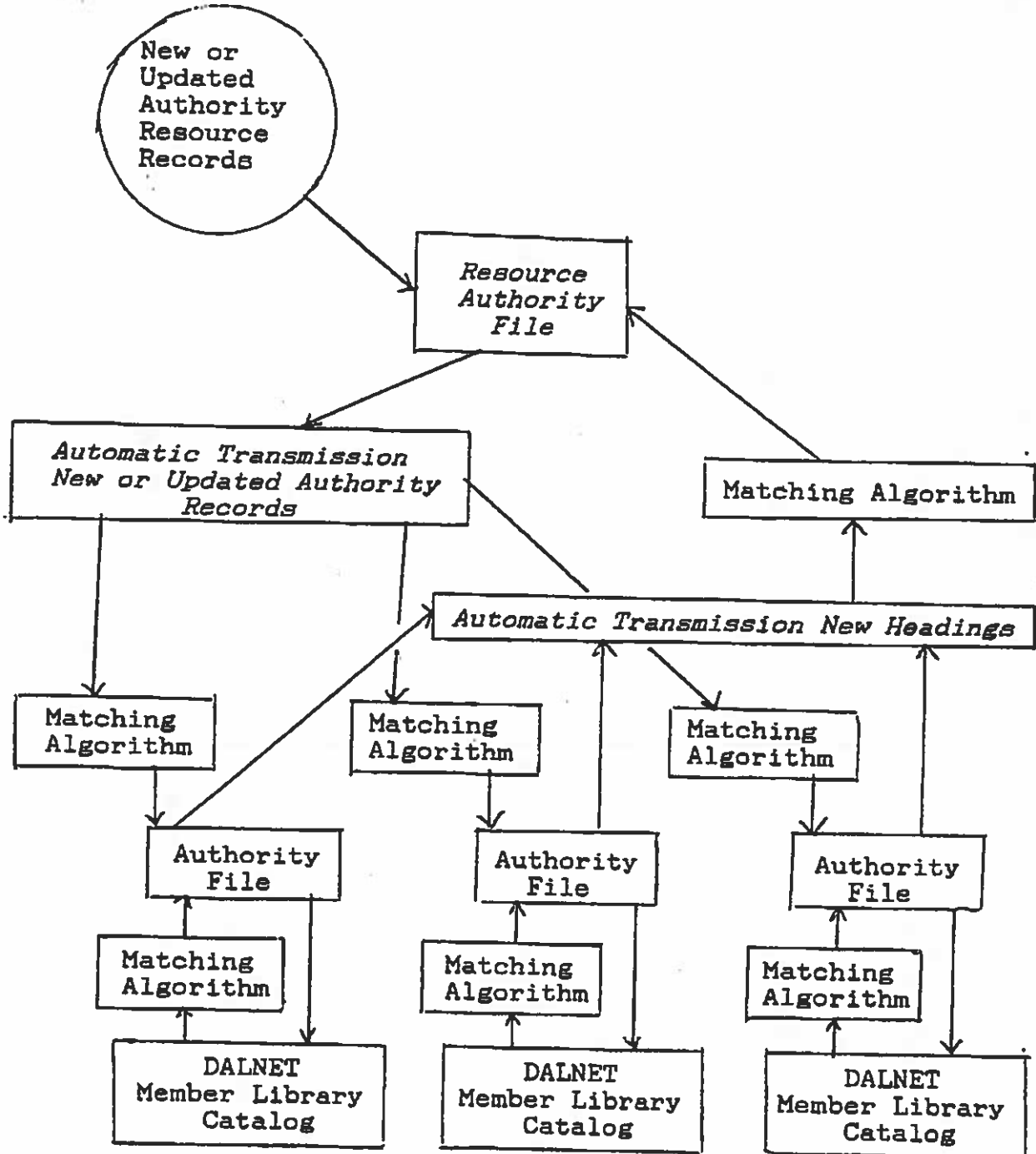


DIAGRAM B Authority Control Only design

Italics = Software that does not exist now



RIDER K

PRODUCT ENHANCEMENTS

AMERITECH and THE USER agree that certain enhancements must be made to the Horizon 5.1 version of the Licensed Software before it will meet the needs of the DALNET member libraries. These enhancements are described more fully in a memorandum from Jim Wilson to Lana Porter dated May 9, 1997, a true and correct copy of which is contained in the Proposal dated May 16, 1997. AMERITECH and THE USER agree that they shall cooperate in the specifications, creation, evaluation, and testing of the following product enhancements. AMERITECH shall retain sole ownership of all product enhancements. The parties agree that the first three of the following enhancements must be incorporated into Horizon 5.1 prior to its implementation at the DALNET libraries.

AMERITECH currently has targeted May 15, 1998 as the release date for Horizon 5.1. This release will be a date sensitive and not a content sensitive release. As such, the following enhancements may not necessarily be contained in Horizon 5.1 on its target release date.

1. **PATRON DATABASE ENHANCEMENTS (May, 1998)**

DESCRIPTION: Enable DALNET libraries to share a single patron record for users with differing circulation privileges at multiple libraries. The goal is to be able to manage patron privileges in a consortium environment when they vary from library to library.

2. **AUTHENTICATION SYSTEM FOR USERS (May, 1998)**

DESCRIPTION: Provide an authentication system for users who belong to multiple user groups with access to different databases, whether locally housed or remotely accessed via Web or Z39.50 interfaces..

3. **SHARED AUTHORITY FILE (May, 1998)**

DESCRIPTION: Enable DALNET libraries to use a single, shared authority file efficiently in a multi-institution configuration, with appropriate display of references in location-based catalogs.

4. **CHILDREN'S OPAC (November, 1998)**

DESCRIPTION: Develop a children's OPAC client that is an easy-to-use graphical interface for children, which includes the following features: a set of librarian-designed canned searches, spell-check-ing, ranked retrieval sets, and concept searching.

5. **AD-HOC MANAGEMENT AND STATISTICAL REPORTS (December, 1998)**

DESCRIPTION: Enable staff at DALNET libraries to easily run their own ad-hoc management and statistical reports with minimal central site support and without seriously impacting system performance.

6. **INTEGRATED BOOKING MODULE (March, 1999)**

DESCRIPTION: Add an integrated booking module for use with Horizon. Include full patron empowerment and staff management features.

7. **ILL/DOCUMENT DELIVERY SYSTEM (July, 1998)**

DESCRIPTION: Enable handling document requests from patrons with variable privileges in a multi-type consortium environment, with interfaces for both the OCLC and DOCLINE interlibrary loan systems.