HORIZON IMPLEMENTATION
UNIVERSITY OF DETROIT MERCY LIBRARIES/MEDIA SERVICES

I.   GENERAL PLANNING (3/98)

    A.   Photocopy and distribute relevant Horizon documentation to L/MS administrators

    B.   Distribution of proposed timeline for Horizon implementation to all L/MS personnel

        1.   Profiling

        2.   Module testing

        3.   File migration

        4.   Training

II.   HORIZON PROFILING (3/98-4/98)

    A.   Planning (G. Libbey, M. Sheble, F. Young)

        1.   Read documentation and mark sections by service unit impact

        2.   Meet and discuss how to involve L/MS personnel in profiling decisions; recommendations to M. Auer

    B.   Decisions

        1.   Meet with personnel in each service units to educate them re: Horizon profiling (M. Sheble)

        2.   Appoint a cross-service unit group to deal with issues that directly impact multiple service units (M. Auer)

        3.   Review all Circulation policies during profiling process (B. Nelson, B. Reppert, F. Young)

        4.   M. Sheble will attend all meetings and will complete final Horizon tables

        5.   Responsibilities for scheduling profiling meetings/leading meeting discussions:

       (a)   Reference services (G. Libbey)
       (b)   Technical services (M. Sheble)
       (c)   Circulation (F. Young)
       (d)   Cross-service team (M. Sheble)

    6.   Photocopy relevant Horizon documentation and distribute prior to each meeting (M. Sheble)

D.   Profile Review (4/98)

    1.   L/MS - policy decisions (M. Auer, G. Libbey, M. Sheble, F. Young)

    2.   DALNET - identify system-wide decisions and compile list (A. Evans, M. Sheble, L. Bugg)

    3.   Ameritech Library Services (J. Sheppard)

E.   UDM Profile Revisions for DALNET-Wide Consistency

    1.   Identification of parameters/table values

       (a)   Based on 4/22 and 4/23 recommendations, revise list (A. Evans, M. Sheble)
       (b)   Distribute to DALNET libraries?? (L. Bugg)

    2.   DALNET/Horizon Migration Task Force assignments for review/recommendations for consistency in parameters

       (a)   Include UDM representation through recommendations of department heads, when feasible

    3.   Based on Steering Committee review of Task Force recommendations, revise UDM table values for DALNET-wide consistency

       (a)   Paper copy (M. Sheble)
       (b)   Values in Horizon client (A. Evans, J. Sheppard, M. Sheble)

F.   Input Profiles

    1.   First pass for bib indexing tests (J. Sheppard, M. Sheble)

    2.   All UDM tables (A. Evans, J. Sheppard, M. Sheble)

III. HORIZON TEST FILE: CONSTRUCTION (4/98)

    A. Meet to discuss organization (D. Roe, M. Sheble)

    B. Solicit input from all L/MS departments (D. Roe)

        1. Input values into spread sheet for internal tracking (D. Moody)

    C. Send NOTIS records numbers to A. Fidler (M. Sheble)

IV. HORIZON PROFILE TESTING (SMALL TESTFILES) (5/98-6/98)

    A. Obtain target date from Ameritech for testing

    B. Install Sybase and Horizon client on one workstations per department

    C. Draft "problem tracking" form and distribute to L/MS administrators and department heads for review (M. Sheble)

    D. Meet with L/MS administrators (M. Sheble) and department heads to organize for testing (M. Sheble, G. Libbey, F. Young)

    E. Revise "problem tracking" form and distribute to L/MS personnel participating in testing

    F. Two/three-day testing period

        1. Coordinators

           (a) Reference services (G. Libbey, F. Young)
           (b) Cataloging/Database Mgmt. and Acquisitions (M. Sheble)

        2. Review and analyze "problem tracking" reports (M. Auer, G. Libbey, M. Sheble, F. Young)

           (a) Communicate with Ameritech and DALNET (M. Sheble)

    G. Revise table values to resolve problems (J. Sheppard, M. Sheble) and re-test

V. HORIZON MODULE TESTING (SMALL TESTFILES) (TIMEFRAME TBD)

    A. Obtain target date from Ameritech for testing

B. Meet with L/MS administrators (M. Sheble) and department heads (G. Libbey, M. Sheble, F. Young) to organize for testing

D. Distribute "problem tracking" forms to L/MS personnel participating in testing

E. Two/three-day testing period

    1. Coordinators

        (a) Reference services (G. Libbey)
        (b) Circulation (F. Young)
        (c) Cataloging/Database Mgmt. (M. Sheble)
        (d) Acquisitions (M. Sheble)
        (e) Serials check-in (M. Sheble)

    2. Review and analyze "problem tracking" forms (ongoing basis) (M. Auer, G. Libbey, M. Sheble, F. Young)

        (a) Communicate with Ameritech and DALNET (M. Sheble)

    3. Revise procedures and table values (J. Sheppard) and re-test

VI. FINAL MODULE TESTING (7/98)

A. Process: Repeat process from small testfile testing; incorporate modifications based on experience. Require all L/MS personnel to participate in testing process.

B. Equipment: Install memory upgrades; setup new leases; install Windows '95 and Horizon software on all staff workstations; setup new printers and barcode scanners

C. Set-up "Works in Progress" public access workstations (1 per campus) with Horizon Windows or WebPac (O. Lee, G. Libbey)

    1. Co-ordinate publicity, training, feedback from L/MS patrons (G. Libbey)

D. Coordinate with DALNET Office (M. Sheble)

VII. EQUIPMENT UPGRADES (2/98-6/98)

A. General

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1. Inventory of all L/MS computers, printers, and barcode scanners; compile list (O. Lee, M. Sheble); Evaluate (M. Auer)

2. Prepare 1997/98 and 1998/99 budget for necessary equipment upgrades for Horizon implementation (M. Sheble)

3. Obtain budget authorization for new equipment (M. Auer)

B. Computers

1. Negotiate with UDM Computer Center for rolling over older leases to maximum Horizon specs (M. Auer, O. Lee, M. Sheble) (5/98)

2. Order memory upgrades (M. Sheble) and install (O. Lee, M. Sheble, S. Patterson) (2/98-5/98)

3. Order new leases (M. Auer) (5/98)

C. Printers

1. Identify printer needs through inventory list, and discussion with department heads and L/MS administrators (M. Sheble)

2. Investigate printer options; confer with L/MS personnel; order (M. Sheble)

D. Barcode scanners

1. Identify needs through inventory list and discuss with L/MS administrators (M. Sheble)

2. Investigate options; confer with L/MS personnel; order (M. Sheble)

E. Client software

1. Check Windows '95 license agreements and file with UDM computer center (O. Lee, M. Sheble)

2. Test and order Windows '95 security software for selected staff workstations and all public access workstations; install (O. Lee, M. Sheble)

3. Install Windows '95 on all staff access workstations (O. Lee, M.

Sheble)

    (a)   Arrange Windows '95 training sessions for L/MS staff (G. Libbey)

    4.   Monitor progress toward release of Windows '98 and when available, test (O. Lee)

VIII. INFRASTRUCTURE

    A.   Frame Relay

        1.   Meeting: AADS, UDM Computer Center, N. Kloiber, DALNET Office reps, M. Masek, L/MS administrators (3/98)

        2.   Meeting with UDM Computer Center personnel (M. Auer, M. Sheble) (5/98)

            (a)   Client (Windows '95 - possible migration date to Windows '98 and/or Windows NT)
            (b)   Windows '95 security software - site license
            (b)   Routers (placement, electrical work, timeframe)
            (c)   Questions from Computer Center for AADS
            (d)   IP stack or Instant Internet Box software for local apps
                (1)   Re-programming for network apps, e-mail, general MichNet access
            (e)   IP issues
                (1)   1 IP per router required
                (2)   1 IP for network printer
                (3)   Check L/MS IP range for accuracy
                (4)   Decision: fixed vs. dynamically assigned IPs
                (5)   1 IP for Web server

        3.   Purchase order to Ameritech for FR (M. Auer)

            (a)   Billing arrangements with Ameritech/notify UDM telecommunications coordinator (S. Wedberg, M. Sheble)

        4.   UDM Computer Center-AADS meeting for final arrangements for frame relay implementation

        5.   Installation and testing FR (outline TBD)

            (a)   Coordinate with WSU

B. SNA Communications Structure

    1. Notify N. Kloiber to cancel lines (M. Sheble)

    2. Notify A. Fidler to remove UDM from NOTIS (M. Sheble)

    3. Pull controller, display stations, barcode scanners (O. Lee, M. Sheble)

        (a) Contact other DALNET libraries to see if equipment needed
        (b) Take other equipment to UDM Computer Center for discard
        (c) Update L/MS equipment inventory lists

IX. WEBPAC DESIGN (outline TBD) (5/98-ongoing)

A. L/MS coordinators (G. Libbey, O. Lee, M. Sheble)

B. Coordinate with DALNET Office

    1. Infoshare links

    2. Temporary link to DALNET Union Catalog

X. RESOURCE SHARING SYSTEM (outline TBD) (6/98-8/98)

A. L/MS coordinators (M. Auer, G. Libbey, F. Young)

XI. HORIZON TRAINING (6/98-?)

A. L/MS Personnel

    1. Contact UDM Computer Center (G. Libbey, M. Sheble)

        (a) Training facilities
        (b) Permission to load Horizon PAC software
        (c) Schedule room

    2. Communicate with DALNET Office re: who will attend from DALNET (L. Bugg, M. Sheble)

    3. Select L/MS personnel to attend (G. Libbey, M. Sheble, F. Young)

    4. Organize L/MS "train the trainer" sessions (G. Libbey)

5.   Organize to promote use of self-paced training guides (G. Libbey, M. Sheble, F. Young)

6.   Follow-up training discussions in L/MS (G. Libbey)

   B.   L/MS Patrons (G. Libbey)

       A.   Students: Bibliographic Instruction

       B.   Faculty and Deans: Presentations and hands-on education sessions through L/MS faculty liaison program

       C.   User Leaflets

XII. REPORTS (8/98-1/99)

   A.   DALNET system-wide reports (ie. authority work, duplicate records, patron file)

       1.   Review recommendations from DALNET Task Force/Board decisions (M. Auer, M. Sheble)

       2.   Organize in L/MS for handling system-wide reports (G. Libbey, M. Sheble, F. Young)

   B.   UDM collection tracking reports and ReportSmith

       1.   Appoint L/MS Task Force for recommendations (M. Auer)

       2.   Review recommendations and assign responsibilities (M. Auer, G. Libbey, M. Sheble, F. Young)

       3.   Revise Horizon security authorizations (M. Sheble)

       4.   Training sessions (M. Sheble)

XIII. SERIALS CHECK-IN (timeline TBD)

   A.   Decision on shared responsibility for entering pattern data on both campuses (S. Church, L. Hopkins, M. Sheble, F. Young)

   B.   Training for creating pattern data (responsibility TBD)

C. Coordination with DALNET Office and DALNET member libraries for entering pattern data into Horizon (L. Hopkins, M. Sheble)

XIV. CATALOGING/DATABASE MANAGEMENT (timeline TBD)

A. Temporary arrangements for authority file work (prior to DALNET union authority file) (timeline TBD) (D. Roe, M. Sheble)

   1. Decisions (with DALNET Office) (D. Roe, M. Sheble)

   2. UDM workflow revisions (D. Roe, M. Sheble)

B. FTP holdings to OCLC

   1. Coordinate arrangements with MLC (and possibly, DALNET Office) (M. Sheble)

C. Government documents fileload

   1. Programming revisions (DALNET Office)

   2. Submit changes to OCLC via MLC (M. Sheble)

D. Other ...

   1. Decisions on cataloging adaptations for Horizon (such as e-resource cataloging and notes) (D. Roe, M. Sheble)

   2. Database cleanup projects (D. Roe)

XV. PATRON FILELOAD (6/98-9/98)

A. Information from Ameritech; coordinate with DALNET Office (M. Sheble)

B. Contact D. Dubuis (UDM Computer Center) re: reprogramming for new BTYPES and Horizon (M. Sheble)

XVI. COMMUNICATION DURING IMPLEMENTATION (4/98-ongoing)

A. L/MS

   1. E-mail updates (M. Sheble)

   2. Horizon newsletter (M.Auer, G. Libbey, M. Sheble, F. Young)

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B. University (M. Auer, G. Libbey)

    1. E-mail newsletters and announcements

    2. Presentations

        (a) Deans' meetings
        (b) New faculty orientation
        (c) New students - orientation sessions

    3. Campus Connections, student newspaper, etc.

C. DALNET Office (M. Sheble)

D. Ameritech Library Services (M. Auer, M. Sheble)

E. With other DALNET Libraries (L/MS Administrators, Task Force Members, DALNET Standing Committee Members)

    1. Updates at DALNET Standing Committee and Project Manager meetings, as requested

    2. L/MS department heads organize for post-implementation presentations for site-visits by other DALNET libraries

XVII. L/MS WEB SERVER (IMPLEMENTATION: 9/98)

A. Compile hardware and software specs (P. Misterovich, O. Lee)

B. Review specs and make decisions re: authorization server (M. Auer, M. Sheble)

C. Identify and order documentation (O. Lee, M. Sheble)

D. Order hardware and software (M. Sheble, S. Wedberg)

E. Setup/testing (O. Lee, P. Misterovich)

XVIII. REVISE L/MS HOMEPAGE (P. Misterovich, O. Lee, L/MS WWW Committee) (timeline TBD)

XIX. L/MS PROJECT PLAN (M. Sheble) (4/98)

A.   Review with L/MS administrators; revise as directed

B.   Distribute to L/MS personnel for review

    1.   Meetings with L/MS personnel to discuss (L/MS administrators)

C.   Route to L. Bugg for review

D.   Condense and route to other DALNET libraries, as requested

XX.   REVISE WORKFLOWS (8/98-1/99)

A.   Evaluate necessary changes in workflow to accommodate Horizon (department heads)

B.   Draft workflow plan and submit to administrators (department heads)

C.   Review plan (administrators)

D.   Implement plan, as approved/revised by administrators (department heads, departmental personnel)

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