

DALNET Horizon Implementation Planning Session March 6, 1998

Present: W. Easton, R. Jones, H. Masek--Ameritech Library Services; M. Auer, M. Sheble, F. Young, G. Libbey--University of Detroit Mercy; L. Bugg, A. Evans, A. Fidler, J. Green, B. Ho, A. Lim, G. Marck--WSU/DALNET; R. Call, J. Houser--Detroit Public Library

1. *Introductions*

Participants introduced themselves. The goals of the meeting were reviewed including: to develop an implementation plan for UDM's Horizon migration; to identify DALNET-wide decisions and issues; and to review the items and services purchased/licensed via the interim agreement.

2. *Review Interim Agreement*

Components include InfoShare software and an InfoShare server, a test server for Horizon with the base Horizon software, Sybase license, and ReportSmith license. This does NOT include RSS or NetPublisher.

ACTION: Bill will check on including WebPAC, perhaps as a free trial or test.

Also included is the dataload for UDM and training for UDM and key WSU/DALNET staff, as needed.

AADS frame relay network is a separate piece that was NOT included.

UDM intends to proceed with the frame relay.

ACTION: Harry will review the network component with Carl Christianson in Provo. He will also contact Jim Grant about the UDM frame relay consulting, pricing, etc., and about the WSU head end hoodup.

3. *Project Plan Framework*

Randall distributed copies of a generic Horizon implementation project plan and reviewed the tasks with the group.

Tasks:

(1) Profiling: UDM should begin now to complete the profile forms. After key decisions have been made about the database configuration and indexing, the profile forms can be modified.

ACTIONS: Randall will supply documentation to UDM for the profiling; Louise will give Mary Ann the DALNET copy to get started; the first pass through the profile should be done in about 1 month.

- (2) Pre-Installation Meeting: recommend that 2 UDM staff and 1 WSU/DALNET staff go to Provo for a 2-day pre-installation meeting. The profile will actually be keyed into the Horizon test server during those two days. UDM and DALNET will have about 10 days after this meeting to finalize the profile.

- (3) Horizon server: needs to be ordered and delivered to Ameritech offices in Provo. UDM and DALNET staff will be able to access the server with a demo Horizon system/database over the Internet. This should help with profiling decisions.
ACTION: Randall will get back with answers to questions about the server so the order can be placed soon.
ACTION: WSU will identify and prepare a site for the test server before it is shipped to the host site. Ameritech staff will need access to the server over the Internet.

- (4) Training: Ameritech trains a maximum of 8 people in hands-on sessions. UDM will have 8 people to be trained, so another training session will be needed for key WSU/DALNET staff plus some staff from DPL. Self-paced training manuals will be available for Horizon 5.0 in July/August 1998.
ACTION: UDM will identify/setup a training facility. WSU/DALNET will also identify a training facility.
ACTION: Randall will add to the project plan the technical training for DALNET central site staff for Horizon server administration, Sybase, and ReportSmith.
ACTION: Randall will provide 2 sets of Horizon 5.0 client software on CD-ROM for use by UDM and WSU/DALNET staff.

- (5) Functionality testing: Testing can begin as soon as UDM's test database is installed and continue until UDM migrates to production.

- (6) AADS: the frame relay network needs to be in place for UDM and the WSU central site by the time the CPU is installed at WSU.
ACTION: Randall and Harry will add this as a sub-project to the project plan.

- (7) Documentation: UDM needs copies of the documentation, as do key WSU/DALNET staff.
ACTION: Randall will provide an ID/password for access to documentation on the Ameritech Horizon Web site and will send 2 copies of the documentation to Louise.

DALNET-wide decisions needed:

The group identified several DALNET-wide decisions/issues to be resolved. They included: database structure and indexing options (basically need to choose between sharing a single bibliographic record or keeping multiple bibliographic records for the same title); locations structure; file migration strategies; Sybase and Horizon security; WebPAC "flavors" and management; StaffPAC display; Z393.50 links; cooperative program to create predictive checkin records.

ACTION: Bill will arrange a 1 or 2 day meeting soon of Ameritech experts Sam, Doug, and Paris or Brenda--with UDM and WSU/DALNET staff to discuss database options, indexing, and file migration strategies.

IBM consulting for WSU:

Louise informed the group about IBM consulting soon to begin for WSU to get help/advise on hardware and software requirements for Horizon as well as help setting up a UNIX shop for the WSU central site. The Ameritech contact recommended for this consulting project is Scott Landeen.

WebPAC v. Windows Pac:

UDM staff is very interested in using WebPAC for the user interface to Horizon. WebPAC functionality is not equal to the Windows PAC yet, but is expected to by the end of 1998. Areas lacking in WebPAC include patron empowerment, bookmarking, and saved searches.

ACTION: Randall will add a sub-project to the project plan for WebPAC implementation, after Bill determines if WebPAC software can be loaded on the DALNET test server for a trial.

Horizon enhancements:

Some Horizon enhancements agreed on for the DALNET Partnership need to get underway immediately, while the UDM migration is in process. Those enhancements include: patron file enhancements, authority file management for a consortium, and patron authentication. The other enhancements aren't as urgent, including OPAC (kids' catalog), booking module, and report security features for a consortium.

ACTION: Bill will schedule a 1 day meeting with Tyler Gringrich to work with UDM and WSU/DALNET staff on the enhancements.

InfoShare project:

The InfoShare project will be treated as a separate DALNET project. The project charter was distributed to DALNET project managers at their March 5th meeting. InfoShare will be linked to the NOTIS LMS initially and then linked to Horizon by the time UDM moves into production.

4. *Local Equipment and Network Planning*

Workstations: The Horizon client software runs on both Windows NT and 95. NT supports/will support Unicode for the ALA character set with diacritics. Horizon will be compatible with Unicode by Release 5.2 or 5.3, so NT is the recommended long-term strategy. Workstations running NT need to have 64 MB RAM, while those running 95 need 32 MB RAM. Both need 2 to 3 GB hard drive. This is a change in the recommended Horizon workstations.

ACTION: Louise will alert DALNET project managers to this change in workstation requirements.

Printers: for the days-end output a network attached printer is required; reports from ReportSmith and spine labels use pc-attached printers; date due, etc., slips use a receipt printer.

OCLC transfer: requires a PC connected to both Horizon and OCLC.

5. *Data Migration Planning*

The group reviewed the NOTIS files as configured by DALNET and discussed their migration to Horizon. DALNET has individual files and shared files. UDM's records need to be extracted three times for the migration--first for a test, then for "real", and finally a "gap" extract of records added, deleted, or changed since the "real" extract as it is put into production.

Individual files include: bibliographic and holdings records (MARC and copy); order, item records--both linked and unlinked; and fund and invoice records. UDM does monthly batch loads of OCLC GPO records for its depository materials.

Shared files from which UDM's records will be extracted include: authority; patron; patron accounting records; active item (check out); item condition (lost, missing, non-returned); item requests (holds, recalls), course reserve, and vendor records. As UDM's records migrate to Horizon, decisions need to be made for removing them from the shared DALNET NOTIS files. The authority file is updated with batch loads of LCSH records. Issues involved in managing two DALNET authority databases during the 2 year migration need to be identified and resolved.

6. *Project Teams/Committees*

Project Team for Ameritech: Randall, Harry, Bill and others.

Project Teams for DALNET and UDM: Until a DALNET Project Manager can be hired, Louise will serve as the DALNET PM, with help from the new Head of Systems at WSU Jeff Trzeciak. Mary Ann Sheble will serve as the UDM Project Manager.

DALNET Steering Committee: the DALNET Board will be appointing the Steering Committee at its March meeting. Margaret asked for assistance from the DALNET Partnership Team in review the candidates.

DALNET Committees/groups to participate in the critical planning meetings being scheduled will be recommended by the DALNET Partnership Team.

ACTION: Louise will schedule a meeting of the DALNET Partnership Team before the DALNET Board meeting.

ACTION: Randall will update the Project Plan with the additions and changes discussed before the DALNET Board meeting on March 25th.

Notes by,
Louise Bugg
March 20, 1998

LB/cmz

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