CODI 2005

ACHIEVING EXCELLENCE
MINNEAPOLIS

Conference Report
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This report is submitted to DALNET constituents as an overview of the information that was gathered at the 2005 CODI (Customers of Dynix, Inc.) conference. The report covers projected Release Dates for products, an overview of Horizon, HIP, and URSA, and ROOMS releases, and information on the future capabilities of specific Horizon modules. Questions about information contained in the report should be directed to DALNET staff.

Release Dates (All future dates are TENTATIVE)

HORIZON

8.0	September 2005	Alpha Testing at 10 sites as ASP model
8.0	December 2005	Beta Testing
8.0	March 2006	Tentative Release to new customers
8.1	Mid Year 2006	Beta Testing
8.1	June 2006	Tentative Release date
		(Current Horizon users must go to 8.1 not 8.0)

HIP

4.0	June 2005	(Release to new installations has been halted).
4.01	August 2005	(Also no longer available to new installations).
4.0-.01	September 2005	Bugs officially noted
4.1	October 2005	Beta Testing
4.1	November 2005	Possible Release
8.0	December 2005	Beta Testing
8.0	March 2006	Tentative Release to new customers
8.1	June 2006	Tentative Release date

HORIZON 7.X

Overview

- In 7.32 It is possible to only see specified locations codes/records in a merged database, i.e. it is possible to make it so that Library A can only see borrower type codes, item type codes, etc., that are coded for Library A. This is not possible for acquisitions in 7.X without custom programming.

HORIZON 8.X

Overview

The Horizon 7.X client is a fat client requiring lots of workstation memory and use of much bandwidth. The 8.X client is a much thinner client. The 8.X staff client launches from an Internet browser and is a Java 1.5 client. Both the client and the Java application are downloaded, i.e. no CD installation is required for staff or public machines. Connections use much less bandwidth.

In Horizon 8.X the "applications" work is moved from the client workstation to an applications server. This means a thinner client but an additional server. Web Reporter will also be a required element in 8.X, requiring another server. Total recommended servers would be four: Database Server, Applications Server, Web Reporter Server (Can be a small box, even a PC), and HIP/OPAC Server (outside of firewall).
We are reviewing all of our current servers to determine the best use of our servers for our Production and Test environments. Our DB server can use multipartitioning so that we may effectively be able to run more than one "server" application on it. In addition, some of our servers may be able to "re-purposed", i.e., with Horizon 7.4 we will not need all of our multiple HIP sessions, so we may be able to use one the current HIP servers for another function. As soon as we know more from SirsiDynix about requirements for servers, we will share that information with you.

Horizon 8.X is a complete rewrite of the product so the training needs with Horizon 8.X will be extensive. In many cases it will be best to "rethink" how the system is being used. The system is, in general, much more "feature-rich" than before and there will be many opportunities to use new features in library workflows.

The 8.X product uses "Inheritance" tier structure for almost all aspects of security and configuration. This means that almost any setting in 8.X can be system wide or broken down to each specific library, branch, collection, etc. A default "Parent" setting is "Inherited" by all other settings below it unless a different setting is assigned to the "Child." This allows system setup to be as simple and shared or as granular and specified as needed for a consortium.

8.X takes record ownership to almost all levels, including Items, Bibs, Authorities, Copies, Budgets, Processing Centers, Vendors, Patrons, and Searching. 8.X employs codes for each of these areas to keep them separated or shared as desired.

Migration paths to 8.X include the following: New Customers may come up on 8.0, Existing customers will have to wait for 8.1 because upgrade utilities for existing Horizon systems will not exist in 8.0. Existing Horizon customers may choose to upgrade from 7.3 to 8.X at one time but upgrade to 7.4 would have to take place in between.

Training for 8.X will begin in December. Customers are strongly encouraged to participate in the online sessions. Current users of Horizon 7.X will be able to understand general functions of 8.X but there are multitudinous new features.

Acquisitions

- Processing Centers, a new way of working that allows for greater flexibility for consortia
- In general, new features that allow interactions with Vendors at every stage of the process
- Greater security of Acquisitions records within a consortia

Cataloging and Authority Control

- SirsiDynix now offers a full suite of services for Authority Control, clean up, and maintenance
- The ability to import records is feature-rich now, with a much more granular ability to define rules and exceptions to loading and changing records on import
- The import profile is much expanded but made simpler to use
- The ability to create Marc Record Lists will allow more sites to create useful reports
- The ability to set Marc Editor preferences will allow each user to set up a view to will best adapt to their workflow
- The availability of a Marc Batch Editor
- The ability to batch create or delete items
- The ability to batch edit items
- The export profile is much expanded but made simpler to use
- A built-in URL checker

Circulation

- Patron name is separated into 5 fields: Prefix, First Name, Middle Name, Last Name, Suffix
- 1 Click to disable a patron account
- Patron accounts are accessible from the launcher, i.e. outside of the Circ module
- Different fields for a Borrower Record are shown depending on the Borrower Type selected.
- Borrower record has the ability to capture or import a patron picture or point to an image with a URL
- Linked borrower records, i.e. the ability to link a family of patrons, also the ability to link multiple accounts from different institutions for the same individual.
- Deposits (positive balances) can be maintained on a borrower record

- Separate preference setting for each type of notice that may be sent to a borrower, including options for print notice, email, phone, and SMS (Text messaging; not until 8.1)
- Batch Patron Editor in 8.0
- Batch Address Editor in 8.1
- Separate intervals defined for each notice sent, i.e. a separate time period can be defined in between each notice
- Pre-Overdue courtesy reminders (the ability to send a notice before an item is overdue)
- The ability to define which messages pop up for Check In
- Pop Ups for Check In can no longer be closed with a return/enter or accidental additional scan. The Y key must be punched (to indicate Yes)
- You can use Check In to complete an item on Order in Acquisitions to complete an item and cataloging for a shelf ready item.
- Dot commands (codes typed in a search bar to launch different tasks/windows)
- Keyboard shortcuts
- Ability to force an item to transit
- Ability to excluded checkin of an item from the wrong location
- Item Status editor
- Inventory Possible by Call Number range (not limited to an entire collection)
- Batch item editor with batch delete
- Ability to merge patron records (planned for post 8.0 release)

ERM (Electronic Resource Management) Module

- Not to be released until possibly 8.1
- Developed using the Digital Library Federation (DLF) ERM Initiative (ERMI) specifications, including the 50 ERMI data element types, with the capability of adding custom elements.
- Handles the following: Interface Information, Subscription Information, Package Information, Licensing and Use Terms/Agreements, E-Content, MARC BIB and Item Interfacing, built in A-Z.
- May later include a built in link resolver.
- OPAC display for Serials is based on Copy records
- URL is on the Copy record
- Can handle MARC/XML importing for data population of Bib and Copy creation/overlay/update
- Uses ONIX standard for Serial information import
- Has a built in Usage Statistics mechanism
- Has a built in URL checker (this is included in Horizon 8.X)
- There will be a December 7th, 2005 online SirsiDynix Institute one ERM. Individuals may sign up for this free webinar at: http://www.dynix.com/institute/seminars.asp

Security

8.X security uses the same "Inheritance" tier structure as the rest of 8.X, with the capability of also specifying differences for each user of the system. Almost any task in 8.X has a security privilege setting. For every privilege available, a security administrator can easily assign a user a YES, NO, or W/ APPROVAL.

Serials

- New calendar option for prediction patterns

Systems

- 8.X database will run on DB2, MS SQL, or ORACLE platforms. Sybase will no longer be supported for the Horizon product.
- 8.X is LDAP capable
- Horizon 8.X and HIP 4.X+ share indexing and both incorporate a new search engine, the open source Java-based Lucene search engine.

Web Reporter
- Allows for custom SQL queries.
- Can send SMS of/for report notification.

HIP 4.X – 8.X+

Overview

- Supports the ability to interface multiple databases (Horizon, Z39.50, Commercial Vendors, Digital Projects, etc.) from one HIP installation. Federated searching capability at an additional cost for translators.
- Horizon 8.X and HIP 4.X+ share indexing and both incorporate a new search engine, the open source Java-based Lucene search engine.
- Admin is part of the Horizon Launcher.
- All processes are on the HIP Application Server, including Indexing, Searching, XSL Processor, Z Server, and NCIP
- HIP securities and settings are based on the same "Inheritance" tier structure as Horizon
- Each portion of enriched Content can be turned off/on for each individual library, separately, by check boxes
- Definable external links/Open URLs
- Customizable Dictionary
- Search Thesaurus built on Horizon Database

- Most HIP configuration changes are instant, i.e. there is no longer a JBOSS to restart.

URSA 4.X+

Overview

- URSA 4.X+ is to be run on the ASP model for anyone using URSA.
- URSA is now bundled with RPA; RPA is not a separate purchase from URSA
- Reciprocal borrowing can be purchased as part of URSA or as a stand alone product.
- URSA uses NCIP (NISO Circulation Interoperability Protocol)
- Works with all major vendors using NCIP or custom maps for vendors that do not use NCIP (such as III)
- Authentication in 4.0 is only by User Name and Password; it is planned that with the release of HIP 4.1 the ability to use any patron data field for authentication will be restored. URSA is based on the HIP platform.
- Requires the installation/download of 1.5 JRE (Java Runtime Environment) for workstations but not for Patron access.

ROOMS (Context Management Product)

Overview

ROOMS, Sirsi's Context Management Product, now works with the Sirsi OPAC and the HIP OPAC. ROOMS currently uses Muse Global technology; SirsiDynix is reviewing Muse Global, WebFeet, and Central Search (SerialsSolutions) for the platform of the future ROOMS product. The METALIB platform from III will not be used.