

DALNET Single Database Timeline Report
Submitted by the Single Database Task Force
December 13th, 2004

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Background

In July of 2004, a task Force of the DALNET Project Managers Committee submitted a recommendation to the Board to merge the consortium databases into one single database. The Board approved this recommendation and charged a new Single Database Task Force (hereafter SDT) with organizing this effort. The Task Force was also charged with submitting a project timeline report to the DALNET Board on December 13th, 2004.

The SDT began meeting on October 6th, 2004. The Task Force generally meets every Wednesday morning at the University of Detroit Mercy McNichols Campus Library. The Task Force went through a planning process including review of Horizon modules, listing potential issues and effected libraries, developed a subcommittee charge and planning documents. From this process the following documents and project structure were developed.

Documents: (See attachments)

- Subcommittee charge
- Subcommittee structure and communication
- Sample subcommittee minutes form
- Single Database subcommittee resource list
- Single Database – consortium principles

Project Structure:

The Task Force created 6 subcommittees covering cataloging, acquisitions, circulation, cataloging/authority records, serials, public interface/searching and systems/security. Each subcommittee has a Chair and one member on the Task Force. The Task Force member acts as a liaison and fosters communication. Minutes are taken at each subcommittee meeting and submitted to DALNET for posting on their website. The Task Force reviews the progress reports from each subcommittee, identifies shared issues, and develops a strategy for addressing each issue. Taskforce recommendations are submitted to the Project Managers for approval. If approved, the recommendations are submitted to the DALNET Board.

Timeline

<u>Month</u>	<u>Task</u>
September 2004	Send out organizational e-mail to form Task Force (SDT)
October 2004	Task Force begins to meet
October 2004	Task Force develops plan for merging databases and timeline
October 2004	Task Force development of Subcommittee structure
November 2004	Form subcommittees and begin organization of work plan
December, 2004	Subcommittees begin to identify issues
December 1 st , 2004	Task Force submits Timeline Report to PM for online vote
December 13 th , 2004	Timeline Report is presented to DALNET Board
December, 2004	Sample merge of 2 databases for testing purposes
January 2005	Upgrade to Horizon version 7.32
January, 2005	Upgrade to HIP version 3.0
February 2005	Subcommittees finalize the identification of issues
March 1 st , 2005	Upgrade to Sybase 12.5
March 2005	Upgrade to Horizon version 7.4
March 2005	Upgrade to HIP version 4.0
April 1 st , 2005	Subcommittees identify standards that each library will use
April 1 st , 2005	Subcommittees submit solution proposal to SDT
April 15 th , 2005	Merge of all member library test databases onto test server
April – June 2005	Evaluation of identified issues and proposed solutions
June – Aug 2005	Final merge of all member library databases

Important Note: Implementation of new production server is highly recommended and should be done ASAP.

Key Developments:

- DALNET is working to implement a sample shared test database of 2 or 3 smaller databases to provide a means for each subcommittee to explore and identify issues in a “safe environment”.
- In the coming year, DALNET libraries will experience 5 to 6 upgrades. Sybase 12.5, HIP 3 and 4, Horizon version 7.32, 7.4, and 8.0.
- The current Test and Production servers are old and need to be replaced. The Single Database Task Force members would like to stress that having a robust and stable production server will be key to the success of this project.
- Issues of database preparation for the merge are being identified in the subcommittees. It is known that post merge work will require cleanup of the database and authority file records.

Current Project Status

Each subcommittee has been formed, they have met at least once, elected a Chair, formed procedures for taking minutes, set a meeting schedule, reviewed the subcommittee charge, reviewed planning documents, and begun identifying issues. Committee members and minutes are posted on the DALNET website.

Assumptions:

Horizon 7.4/HIP 4.0 is released by Feb 2006. Original Dynix release date was Dec 31, 2004, c
Horizon 8.0 is released by April 2006. The current release date from Dynix is Dec 31, 2005
Phase 1 Libraries refers to libraries opting in at current release 7.3.2
Phase 2 Libraries refers to libraries opting in after release and evaluation of 8.0
Libraries may opt out at any point prior to their Production Load

Completed By Task

Aug 2005	Continued testing of workflow issues in the sample shared catalog
Aug 2005	Continued development of standards and best practices documents
Aug 2005	Pre-merge tasks (see below)
Sep 2005	Test load of Phase 1 Libraries
Dec 2005	Testing of identified workflow issues, repeat until requirements met
Dec 2005	Testing of data integrity, repeat until requirements met
Dec 2005	Shared Catalog training
Jan 2006	Production load of Phase 1 Libraries
Mar 2006	Setup and Testing of 7.4/4.0 for Shared Catalog and Phase 2 Libraries
Apr 2006	Upgrade Shared Catalog and Phase 2 Libraries to 7.4/4.0
Jul 2006	Setup and Testing of 8.0 for Shared Catalog and Phase 2 Libraries
Jul 2006	Training for 8.0
Aug 2006	Upgrade Shared Catalog and Phase 2 Libraries to 8.0
Sep 2006	Pre-merge tasks for Phase 2 Libraries
Sep 2006	Test load of Phase 2 Libraries into Shared Catalog
Nov 2005	Testing of identified workflow issues, repeat until requirements met
Nov 2006	Testing of data integrity, repeat until requirements met
Nov 2006	Shared Catalog Training for Phase 2 Libraries
Dec 2006	Production load of Phase 2 Libraries
2007	Retrospective Authority Cleanup

PRE-MERGE TASKS

- Purge Inactive Patrons
- Get SS# out of Patron Record
- Add |z and |x to 856s
- Cleanup vendor file
- Delete 999 (NOTIS info)
- Overlay algorithm
- Add |5 to 590s
- Add |5 to 740s
- MARC Maps - review for customizations/changes to standard maps
- Develop plan for Intra-DALNET Requests (will no longer go through URSA/MiLE)
- Setup all codes (location, collection, etc...)
- Setup security
- Setup all HIP interfaces
- OCLC extract by location (test)
- Identify bibs with no items in current databases