

**DALNET Collection Access Committee
Oakland Community College
Royal Oak Campus
February 11, 2000
Agenda**

- 1. DALNET Academic Reciprocal Borrowing Agreement**
- 2. Z39.50 Connection: Oakland University Reciprocal Borrowing
OWLS Reciprocal Borrowing
Michicard Borrowing**
- 3. DALNET Participation: Members, Information Providers, Customers
Discussion of Affiliates**
- 4. DALNET Interlibrary Loan Agreements: Implementan of RSS**
- 5. New Business**
- 6. Old Business**
- 7. Next Meeting: Adjournment**

**DALNET Collection Access Committee
Oakland Community College
Royal Oak Campus
Meeting Minutes: February 11, 2000**

Present: P. Beavers, J. Bosler, A. Evans, J. Flaherty, G. Libbey
The meeting was called to order at 1:45 p.m.

DALNET Academic Reciprocal Borrowing Agreement

The DALNET Academic Reciprocal Borrowing Agreement was discussed in terms of implementing the Agreement as soon as possible. Most of the academic libraries involved already have by-lateral agreements or are Michicard signatories. Thus, reciprocal borrowing exists among most of the DALNET academic libraries. The Collection Access Committee would like to formalize a DALNET agreement to streamline onsite borrowing at DALNET academic institutions as well as to market this value added benefit to prospective DALNET participants.

However, one of the provisions of the Agreement is that there would be a shared patron database from which DALNET reciprocal libraries could evaluate whether a patron was in good standing. In many cases reciprocating libraries will honor a hold placed on a patron's record by another DALENT library.

There are a number of obstacles to a shared patron database. They are: 1) the need for a unique patron identification number e.g. social security number, 2) the attempt to agree on a unique patron identification number which is not the social security number, 3) the legal use of the social security number.

It was agreed that *epixtech* has the technology to provide a shared patron database if the social security number can be utilized. However, patron privacy issues and family privacy laws may prohibit the sharing of this information among libraries. In order to implement the unique patron identification, DALNET is waiting for an enhancement that will mask the social security number on patron records. DALNET is also waiting for a WSU in-house legal opinion.

A number of committee members confirmed that a U.S Government published pamphlet on the use of social security numbers states that if patrons do not wish to divulge their social security number, they can be denied service.

It was agreed that the participating libraries will consider implementing the Academic Reciprocal Borrowing Agreement under the auspices of DALNET at the beginning of the FALL, 2000 semester. Committee members were asked to consult with their respective institutions before a discussion at the next meeting. There was consensus that a shared patron database is necessary in order to implement the program effectively. It is accepted that onsite borrowing will be available among DALNET academic libraries free of charge.

Z39.50 Connection

Oakland University has asked for a Z39.50 connection with DALNET. Z39.50 technology offers the capability of a common interface using different systems as well as the ability to pass along selected data elements (MARC and patron record elements).

The committee considered the technological ramifications of Z39.50 connections. Ultimately, It was deemed more expedient to offer search access to the DALNET database via a Z39.50 connection than on an open Internet access line. Further, it was agreed that to circumvent overload conditions, all search access from non-DALNET libraries should be via a Z39.50 connection rather than from an open Internet line. A mixture of connections, i.e. some Internet and some Z39.50, was seen as too complex to manage. A disproportionate allocation of DALNET resources would have to be used on secondary clientele.

Onsite Reciprocal Borrowing

While a common interface among different systems is technologically possible, a separate issue is whether Oakland will be accorded onsite reciprocal borrowing privileges and under what circumstances. In allowing Oakland University reciprocal borrowing privileges DALNET will set a model for the Information Hub. An additional consideration is that DALNET has begun to work on a LSCA Grant with The Library Network, The Oakland-Wayne Library System and the Macomb Region of Cooperation. The grant is to provide Z39.50 access to all the libraries in these networks. Reciprocal borrowing protocols are an anticipated by-product of such a grant.

Onsite reciprocal borrowing among groups i.e. type of library: academic, special, and public was considered. Onsite borrowing among hospital libraries is rarely allowed but does occur in exceptional circumstances when doctors or hospital staff are involved. The law libraries do not normally circulate their materials off premises to anyone. The issue of free vs. fee for onsite borrowing to non-DALNET libraries was reviewed.

Interlibrary Loan / Horizon RSS

It is the understanding of the Committee that interlibrary loan borrowing among DALNET academic libraries will also be provided free of charge with the exception of WSU. WSU has agreed to charge a reduced rate @ \$8 per item borrowed. A mitigating consideration is that the new RSS software is supposed to have a load leveling capability. The participating institutions must first implement the RSS software to find out how it will work among DALNET libraries. A pilot project has been suggested with no fees so that an assessment of the software can be properly judged.

In addition, it has been recommended that OCLC IFM software should be used to maintain statistics and provide an accounting / bookkeeping function. In order for the IFM software to be used as a standard piece of operating software among DALNET libraries, each participating library must acquire this capability. If that were the case, a suggestion has been made that the U of M model could be used. U of M allows a certain number of transactions annually, free of charge per institution (50-100). Upon maxing-out, a library would be billed for additional transactions at a published rate. It is assumed that the RSS software will interface with the IFM software. The interface capability must be proven.

It was noted that interlibrary loan borrowing of journal articles among hospital libraries has been provided free of charge for many years. Similarly, on an informal, courtesy basis, law libraries frequently photocopy articles free of charge and send them to other law libraries upon request.

Questions to be Considered

Philosophically - in light of the SEMLOL Infopass Agreement, the By-lateral Academic Reciprocal Borrowing Agreements, the Michicard Program, and numerous formal and informal ILL Agreements, can DALNET members agree to provide free onsite and free interlibrary loan borrowing to each other based on type of library?

Can DALNET members provide free onsite and free interlibrary loan borrowing to libraries which are not members but which are connected by a Z39.50 connection and who wish to be part of the DALNET Information Hub?

Can a uniform agreement be crafted for Z39.50 libraries so as to allow onsite borrowing and interlibrary loan borrowing? Is a case by case scenario better?

If Z39.50 libraries are to pay a charge for onsite and / or interlibrary loan borrowing, what is a fair charge for them to pay? A transaction fee? A lump sum based on a projected formula? A stipend?

Librarians are in the business of assisting in the free flow of information and ideas. How can they best serve their profession and their primary clientele? Do publicly funded institutions have a responsibility to share their resources among scholars so as to improve the fluidity of information and thus, improve society?

DALNET Participation: Members, Information Providers, Customers.

Committee members were given a sheet entitled, "Detroit Area Library Network (DALNET) Collection Access Committee Talking Points," which was derived from the "DALNET Finance Committee Guidelines" Discussion ensued on type of member and whether to charge DALNET members, information providers or customers for onsite reciprocal borrowing and or interlibrary loan transactions. Conversation revolved around whether to create a new category of participant for Z39.50 libraries. The new category under consideration was: Affiliate. Using the term customer seemed to be preferred. A Customer is defined as one who buys services. The DALNET Financial Guidelines provide for: a commercial customer and a library customer.

It was noted that customers would have to pay for the installation of the RSS module in order to interface with the DALNET libraries for interlibrary loan. Charging an additional fee for each interloan transaction was considered.

In the context of building a viable information hub as well as providing regional and statewide library leadership, free reciprocal borrowing and interlibrary loan services were considered. Circulation and ILL statistics in all libraries have gone down because of electronic information delivery. The full text electronic databases are filling the need for information in many cases. In addition, patrons have many more options with which to learn and gather information. There are more formats: books, video tapes, audio tapes, CD ROMs, the Internet/WWW. There are many more access points: libraries, book stores, the Internet, television. Patrons do not rely exclusively on one medium or one access point

DALNET Interlibrary Loan Agreements: Implementation of RSS

Horizon's RSS Interlibrary Loan software will be tested by DALNET in April and is expected introduced into production by mid-June. Horizon is in the process of merging their RSS product with CSP and is expected to offer a more robust enhancement for patron use. Committee members were anxious to encourage DALNET members to use the IFM module of OCLC services to save time and money accounting for interlibrary loans

DALNET Access Directory

A revision of the DALNET Access Directory was requested. It is hoped to publish the Directory on the WWW as well as in print. Bosler will contact the new DALNET Web-master.

Next Meeting and Adjournment

The meeting adjourned at 4:45 p.m. The next meeting was scheduled for **Friday, March 10, 2000, 1:30 p.m. at University of Detroit Mercy McNichols Campus.**

**Detroit Area Library Network (DALNET)
Collection Access Committee
Talking Points**

DALNET Philosophy

The purpose of the DALNET / Ameritech Partnership Agreement is to create a partnership to develop and implement an open, integrated, library / information system as the central component of a regional information hub.

It is in the interest of the information hub to expand the Detroit Area Library Network. The types of participation in DALNET are: member, information provider and customer.

Participation in DALNET is open to profit and non-profit organizations as well as to academic, public, school and special libraries.

The advantages in adding participants to DALNET are: 1) richer databases, 2) better access to grants, 3) cost reduction based on the number of new DALNET participants, and 4) standardized information access for patrons.

Principles:

DALNET organizational assets include: the combined informational resources of the participants, DALNET member staff support, DALNET system resources, DALNET systems staff support, and the DALNET help desk.

The long-term financial viability of DALNET is a primary focus.

As a vital information access resource, DALNET will seek to cultivate new members, information providers and customers.

Members

Members of the Detroit Area Library Network are committed to create, through their partnership and shared effort, a model regional information hub.

Members shall be institutions, corporate entities or organizations, profit and non-profit, which are accorded all the rights and privileges of a DALNET historic member. In almost all cases, members will be libraries.

Members will be located in the seven county southeastern Michigan region comprised of: Livingston, Macomb, Monroe, Oakland, St. Claire, Washtenaw and Wayne Counties

A pre-existing consortium of libraries or other legal entities previously joined together for a common purpose shall join DALNET as a single member.

To make the regional information hub possible, members are expected to endorse a commitment to networking within the DALNET consortium. Specifically this means a responsibility to add to the DALNET database, to staff DALNET committees and to support DALNET initiatives, services and programs.

A member will have the right to vote at Board meetings. Only members will have a vote to approve or reject proposals made to the DALNET Board

Information Providers

Information Providers can be governmental, public, or private entities that have as their mission objective the dissemination of information to the general public. Because the information provided may come from a variety of sources, in a local, regional, state, national and global context, inclusion of this information will not be constrained by the DALNET / Ameritech Partnership Agreement which restricts full-members to the seven county, southeastern region of Michigan.

Information Providers furnish data which is loaded into the DALNET system.

There are at least two reasons for becoming an information provider:

- to provide or disseminate information, e.g. publicly available consumer information (consumer studies) or financial / support information (grant opportunities, grant proposal assistance.).
- to offer information services, e.g. organize information, web page access and links, digitize information, archival information.

It is acknowledged that every information provider will present a different set of circumstances in joining DALNET.

Customer

The customer is one who wishes to purchase the use of the resources and / or services provided within the DALNET structure. Any organizations or libraries which do not subscribe as members or information providers may purchase DALNET services. Use of resources means:

- access to the DALNET database for resource and information searches.
- on-site borrowing of monographs from participating academic and public libraries.
- access to Horizon's Resource Sharing System and interlibrary loan privileges extended by participating DALNET libraries. .
- participation in joint purchasing agreements for informational resources i.e. electronic journals.
- access to DALNET Systems Office consulting services for technological information access delivery.

The types of customer will vary based on the required services

Commercial Customer

An annual fee will be assigned to a commercial customer based on the size of the intended clientele and / or the intended use of the DALNET system.

Library Customer

A library customer will have resources to offer and share with DALNET members which will enhance the DALNET Im@gine Information Hub. Consequently, a library customer may be charged less than a commercial customer. This special consideration is provided so as to provide an enhancement to patron empowerment within the regional Detroit area.

The library customer may only participate in one or two modules of the Horizon product (e.g. RSS). The fees for a library customer may fluctuate from year to year based on the usage of the DALNET Im@gine system.

Provision for interlibrary loan access to DALNET libraries will also need to be considered, i. e. existing ILL agreements, free or fee agreements. A library customer will participate in reciprocal interlibrary loan services with those libraries who choose to associate. DALNET participants (i.e. members, information providers and customers) may create reciprocal interlibrary loan agreements among themselves. DALNET will attempt to coordinate collection access so as to encourage the free flow of information

DALNET

Table of Charges / Costs

Member Costs (to be borne by the participating member)

- **Capitalization of Horizon System:**
 - DALNET hardware
 - DALNET software (Horizon, Partnership enhancements etc.)
 - DALNET labor
- **Maintenance of Horizon System:**
 - DALNET systems upkeep and reports
 - DALNET labor
- **Hardware:**
 - in-house personal computers
 - printers
 - scanners (optional)
 - image server (optional)
- **Software: in house, (e.g. NT software)**
- **Data Conversion and Loading**
- **Internet Access: utility access**
- **Ameritech Documentation (more than one copy)**
- **Frame Relay (AADS) (optional)**

DALNET Costs (to be borne by DALNET)

- **Server requirements**
- **Data Conversion and Loading**
- **Record Loading**
- **Training**
- **Consulting**
- **DALNET Documentation**

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DALNET Collection Access Committee

Recommendation:

The Committee on Collection Access recommends to the DALNET Board that Z39.50 access to all unrestricted DALNET databases, including online catalogs, be enabled and instructions for connecting be published.

Provisions:

- 1) It should be understood that technical support will be provided by the DALNET Systems Office only to DALNET members for creating and maintaining their Z39.50 links.
- 2) Further, while Z39.50 access for searching unrestricted DALNET databases is being made available, there will be no automatic extension of onsite borrowing and interlibrary loan privileges at DALNET institutions beyond current borrowing and lending agreements.
- 3) Finally, those libraries that connect to the unrestricted DALNET databases using Z39.50 connections will be expected to adhere to the guidelines in the instructions for how to configure their access in the most efficient way for DALNET's servers.
- 4) It should also be understood that DALNET Z39.50 access should not be made available as a service until a permanent DALNET Web-master is hired so that person can put up a web-page with all of the technical information for each database, (i.e. server name, database name, attributes, etc.). Questions from non-DALNET libraries can then be referred to the web-page.

Making a Z39.50 Connection to WSU's Library Catalog (For Use with EndNote and other Zclients)

Draft Date: 10/30/00

What is Z39.50?

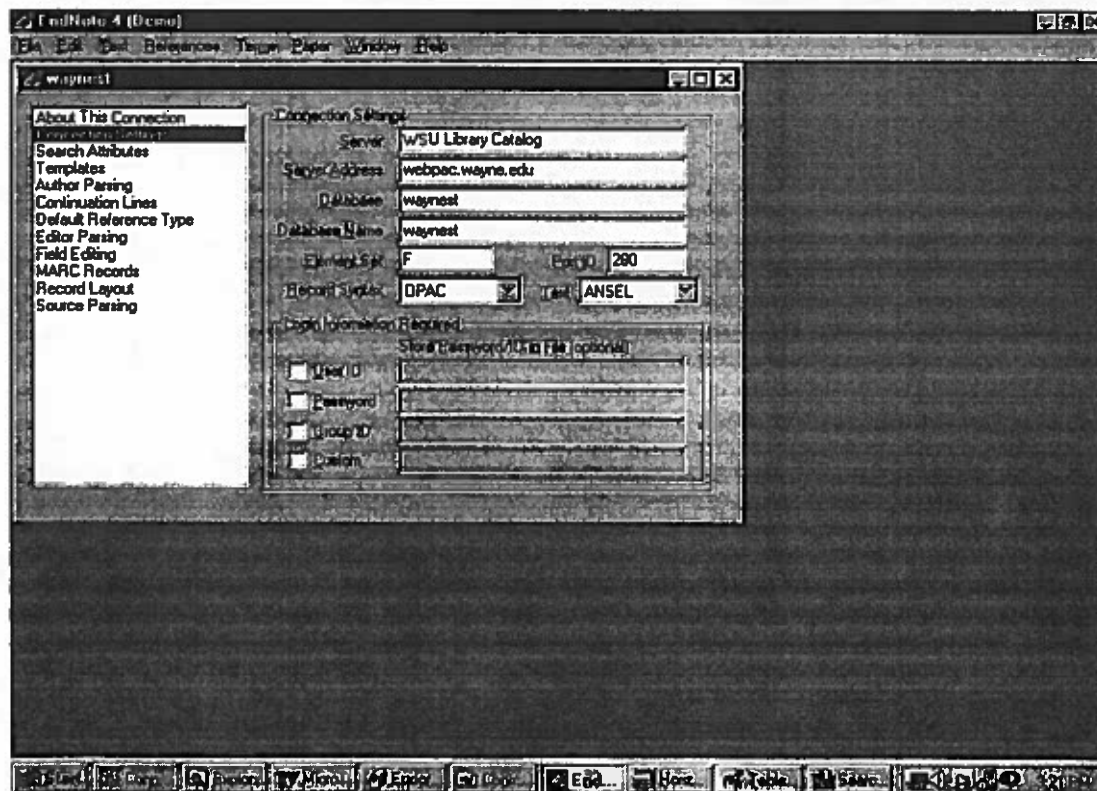
National Information Standards Organization Z39.50 is a computer protocol that can be implemented on any platform. It defines a standard way for two computers to communicate for the purpose of information retrieval. EndNote and other Zclients are able to provide access to many databases using the Z39.50 protocol.

Once I have my EndNote or other Zclient installed, is it possible to establish a Z39.50 connection to the WSU Library Catalog?

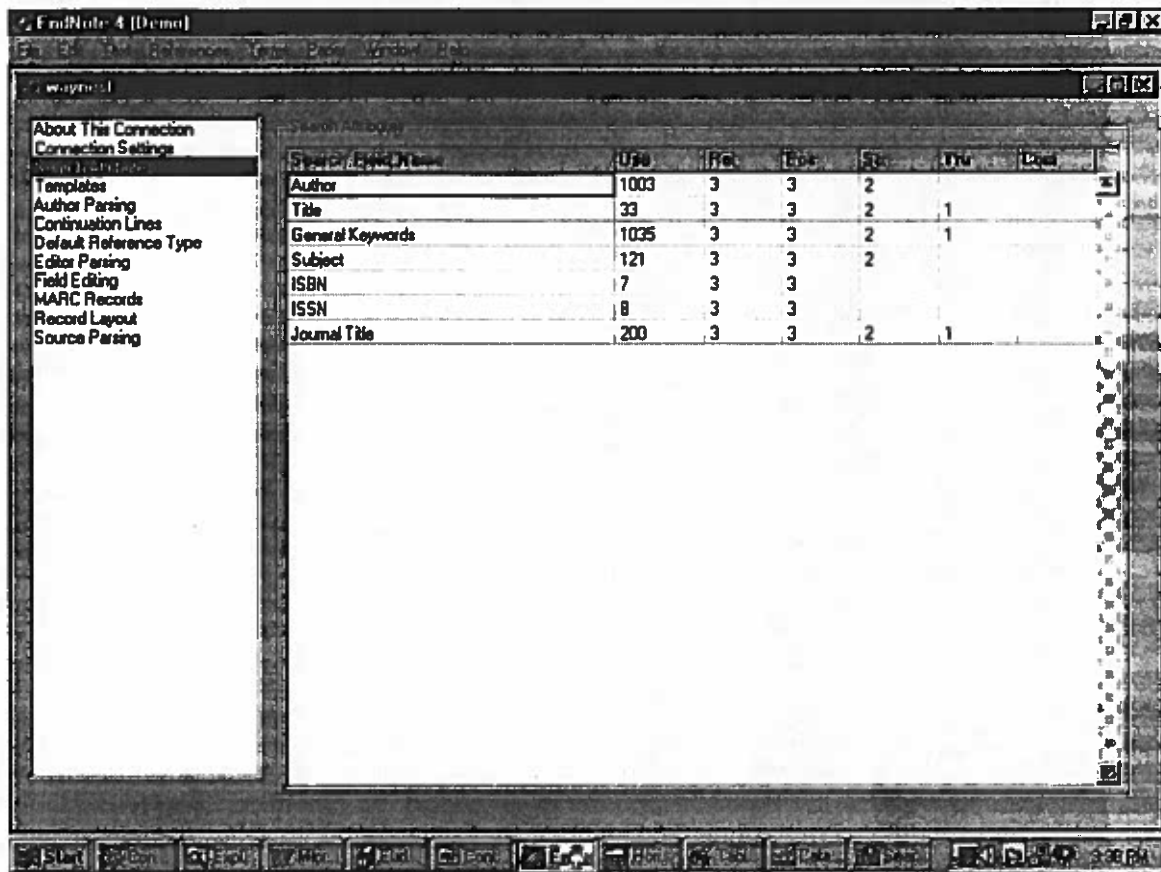
Yes. The WSU Library Catalog is Z39.50-compliant, so you may use the information on this page to create the necessary connection file in EndNote or other Zclients. The Z39.50 server at the WSU Library System is available 24 hours a day, 7 days a week.

What are the Z39.50 connection settings that I will need?

To make the connection file in EndNote, for example, start EndNote and Click on New Connection File in the File menu. Complete the connection settings screen so that it looks like this:



Next, edit the Search Attributes so that they have the following values:



Once you have these two sections completed, you may leave all other sections as they are, since they contain valid default settings. Save the connection file and close.

In order to connect to the WSU Library Catalog, choose "Connect" from the "File" menu and click on the name of the connection that you just created.

If you are using a Zclient other than EndNote, the same connection information shown should work as well.

Lim
10/2000

The
Annex



Making a Z39.50 connection to Horizon

Connection settings

In order to make a connection to Horizon through a Z39.50 server, the following information may be required:

1. Server name: **University of Chicago Library Catalog**
2. Name of the machine: **horizon-prod-1.lib.uchicago.edu**
3. Port: **210**
4. Authentication/Password for access restrictions: **None**
5. Data Format: **OPAC**

Search attributes

Name	Attributes	
	Use	Structure
Title keyword	4	2
Title scan	4	1
Series keyword	5	2
Series scan	5	1
ISBN	7	1
ISSN	8	1
Dewey scan	13	3
LC scan	16	3
Subject keyword	21	2
Subject scan	21	1
Place of Publication	59	2
Note keyword	63	2
Gov. Doc. scan	100	3
Journal Title keyword	504	2
Journal Title scan	504	1
Author keyword	1003	2
Author scan	1003	1
General keyword	1016	2
Publisher	1018	2

Return To: [Horizon](#)

Warner Memorial Library Unicorn Catalog Z39.50 Server Information

(For use with Bookwhere, Endnotes, Icone, ZNavigator and other zclients.)

What is Z39.50?

National Information Standards Organization Z39.50 Information Retrieval Protocol (Z39.50/ISO 23950), a computer protocol that can be implemented on any platform, defines a standard way for two computers to communicate for the purpose of information retrieval. A Z39.50 implementation enables one interface to access multiple systems providing the end-user with nearly transparent access to other systems.

Section 1. Site Information

1.1 Organization Data

Name: Warner Memorial Library, Eastern College
Address: 1300 Eagle Rd.
City: St. Davids,
State: PA
Country: USA
Zip Code: 19087

1.3 Technical Support for Z39.50 Services

Name: Mark D. Puterbaugh, Information Services Librarian
Phone Number: 610-341-1461

Section 2. Database Information

Database Name: UNICORN
Database Description: Warner Memorial Library Catalog

Section 3. Server Information

Address: 204.78.4.2
Port Number: 2200
Server Software Vendor: Sirsi Corporation

Section 4. Initialization Service

Z39.50 Protocol Version: 3
Preferred Message Size: 65530 bytes
Maximum Record Size: 65530 bytes

Section 5. Server Options Supported

5.1 General Options

Sorting
Scanning
Cross Reference
Result Set Naming
Intermediate Results
Result Set Deletes

5.2 Attribute Type

Type-1
Type-101

5.3 Element Set Names

Full
Brief

5.4 Record Syntax

MARC

5.5 Attribute Set ID

Bib-1 Attribute Set Profile

Section 6. Additional Database/Server Information

UNICORN Version 7.1 and higher are equipped with a Z39.50 Version 3 compliant server at no additional cost.
Server data tested June 17, 1999
