

DALNET Steering Committee 05082000 minutes1.txt

DALNET Steering Committee

May 8, 2000

Minutes

Present: D. Adams, Karen Bacsanyi, Louise Bugg, Randy Call, Jim Flahe  
rty, Phyllis Jose, Scott Muir, Leo Papa

Guest: Jeff Trzeciak

Agenda and minutes from April 10 were approved.

The Web Site Committee has only met once and will be meeting again thi  
s week. DALNET staff have begun putting some items on the website. S  
cott will instruct the committee to provide their mission statement be  
fore the next meeting of the Steering Committee.

The change in membership of the Children's OPAC committee was distribu  
ted. The DALNET webmaster will be ex officio and should be invited to  
the next meeting by the chair. Scott will also ask that they submit  
their plan with deadlines before our next meeting.

The LSTA grant for an interlibrary loan system has been sent. They ar  
e requesting the full \$125,000. Included in the proposal is a SUN ser  
ver for DALNET. This grant will include basic functionality for all p  
articipating libraries. The state librarian has been heard to support  
library cooperation, resource sharing, and a state union catalog.

George has moved into Ana's position and Dody is retiring this week.  
Both empty positions are System Analyst II 's and are union positions.  
They will be posted internally for ten days. Jeff hopes the positio  
ns will be filled by mid-June. The new hires will need Horizon traini  
ng.

Applications are being reviewed for the open DALNET positions (Sybase/  
Unix, Webmaster, and WAN) at DPL. Interviews should begin soon.

The firewall has not allowed individual DALNET libraries to make chang  
es to their Webpac templates themselves. Jim reported this is still a  
problem. Moving the test Webpac server outside the firewall has been  
proposed. In the meantime, Tim Cromer will assist any library with t  
heir Webpac templates. A solution should be in place before iPAC sinc  
e this is an entirely different system and will require reconfiguratio  
n for every library's templates.

Jeff felt the meeting with SUN regarding our maintenance contract was  
successful. He now has escalation procedures to follow and the repair  
person cannot leave until the problem is resolved or another person c  
omes to take their place.

DALNET Steering Committee 05082000 minutes1.txt

Scott is arranging a meeting with SUN to evaluate our equipment, come up with a disaster plan, and look at mirroring options for the servers. Several board members will also attend.

Some of the DALNET technical staff are being trained on Horizon.

The two Webpac NT servers are here and George should have the broadcast searching working in a couple of weeks. He will need to do some load balancing between the servers.

George should have Horizon 5.3 in test by late May. The client CDs are being copied to be sent to all DALNET libraries. They are expecting implementation to take place in late July over two weekends (WSU, medical libraries, DIA, Oakland Law on one weekend, UDM and community colleges on the other). It was suggested that the optimal processor speed be added to the client PC specs which are on the website and that all project managers be notified of these now so they can prepare for 5.3.

Anaclare and Adriene are tallying the results of the functionality testing. Louise will give them a deadline for finishing so a list can be sent to epixtech.

The Media Scheduling task force needs to evaluate the latest version of that module and provide epixtech with feedback on further enhancements. Scott will follow up with the chair since this has contract implications.

Serials Binding and Homebound are two other modules that will be included with Horizon 5.3. There was discussion on how we should set priorities and how these relate to the contract. Leo will invite Margaret Auer to the next meeting to discuss.

iPAC will not work with RSS until end of the year. We cannot implement both at the same time. The group concurred with DALNET staff, Willy from DPL and Dea from WSU, that iPAC should be the priority but still work on RSS on a slower track. Scott will present our recommendation to the Board for approval this afternoon.

Next meetings:

June 12 UDM

July 17 WSU (both Steering and Proj Man)

Aug 14 Botsford

Sept 11 Walsh? (both Steering and Proj Man)

Respectfully submitted by:

Debbie Adams

## DALNET Checklist of Requirements for ILL Software

DALNET needs to proceed with its plans to implement an ILL software package with its Horizon system as soon as possible. These plans have already been delayed from the original schedule of implementation in 1999. However, with the grant proposal for linkage with OWLS and the Library Cooperative of Macomb being submitted for funding in FY2001, DALNET would also like to ensure compatibility with the ILL system most likely to be selected for the grant project.

With these objectives in mind, we have drafted this checklist of requirements for ILL software to help us choose between the RSS and URSA products now. This assumes that the grant-funded project would be highly likely to select the new "merged" RSS/URSA package in development by *epixtech* for delivery by June 2001.

DALNET will make a decision by July 1, 2000. Ideally DALNET would like to be using RSS/URSA in Fall 2000.

1. The software works with Horizon, including the WebPAC user interface, the new iPAC user interface in development, and the circulation module.

***epixtech* response:** WebPAC does not work with URSA. iPAC will not work with URSA or RSS until late Fall (October 2000). If we choose URSA we would use the URSA interface instead.

Neither product does extended circulation currently. URSA will do it with the introduction of Horizon 6.0, which will have ESIP. (Note: When NISO SIP comes out it will replace ESIP.) Horizon is not character-based, so cannot use screen scrapers. There are no plans for RSS to do extended circulation other than check-in and checkout at the lending library. RSS does use SIP to interface with patron file. RSS will make use of RPA in release 3.1. URSA will not make use of RPA until release 2.6 due out in August 2000. URSA currently uses SIP2 to get patron info. It authenticates based on barcode. Both make use of patron blocks now, getting patron type threshold functions for blocks in next release.

With RSS, can chose to have patron authenticate at time of request or at log-in to search. With URSA patron authenticates prior to searching, can do "guest" searching in URSA. RSS relies on SIP2 for authentication. URSA makes use of SIP and screen scrapers for authentication. For purposes of grant, RSS will not work with DRA since DRA does not use SIP2.

2. The software enables the use of broadcast searching across the DALNET Horizon catalogs.

***epixtech* response:** Both RSS and URSA use Z39.50 for broadcast searching. RSS uses WebPAC, URSA uses a proprietary interface, screen scrapers, and also does de-duping. iPAC will replace this in late Fall (newer version of iPAC, RSS, and URSA).

3. There is an operational OCLC ILL system interface.

**epixtech response:** RSS is currently partially ISO compliant on that it sends message to OCLC queue. Now testing OCLC interoperability full message suite of twenty-four messages, still finding a few issues. Expect to be fully resolved by summer. URSA not ISO/OCLC compliant currently. URSA will get a subset in August release that will put requests into OCLC queue and then one may have to login to the OCLS system to mediate the request if "direct to profile" is not available for the submitting library. Local processing must be done in URSA, e.g. check-in, etc. The item may be received by URSA by referring to the OCLC request number. The borrowing library can use extended circulation by creating a temporary bib record. Unlikely to add more ISO functionality into URSA. Currently there is not any OCLC URSA interaction.

4. There is a development plan for the hardware and software platform that includes both NT and SUN versions, with a migration strategy from the current product to the new "merged" product.

**epixtech response:** Will support both RSS and URSA with a migration strategy. Will provide conversion programs for data. Next generation product (NGP) will be on NT and SUN: developed on UNIX, ported to NT planned. However, development of the NGP has not yet started!

5. The delivery of the new "merged" product will be by June 2001 with options for bridging with the old product if there is slippage in delivery.

**epixtech response:** June 2001 still the goal, both URSA and RSS will be able to talk to NGP. If DALNET starts with RSS, we should negotiate for an interface for RSS to URSA in the grant contract. *epixtech* could put links to URSA so it could talk to RSS.

6. The software is ISO/IPIG compliant with development plans that include interfacing with other vendors' ILL systems.

**epixtech response:** NGP will do this. Currently RSS is complaint and URSA is not.

7. The software is compatible with *epixtech's* RPA product.

**epixtech response:** answered previously per question one

8. The functionality of the software is equivalent, i.e., RSS 4.0 = URSA 3.0, by the delivery date of 3rd quarter 2000.

**epixtech response:** Product update given

RSS 3.1.1 due 3<sup>rd</sup> qtr 2000 (Summer) includes with full ISO operability, Release 3.1., currently in beta at Cal State

URSA next version 2.6 due August 2000, send OCLC requests, use URSA interface instead of iPAC, will have RPA interface

iPAC will interface with RSS and URSA by October 2000. The URSA broadcast search interface will still be an option at that time, but the URSA interface is likely to be eliminated after that release.

OWLS/Macomb would use URSA or WebZ searching, eventual need for iPAC, Could also use WebZ or RSS. WebZ will be interface with NGP.

Grant: DALNET specify requirements needed.

9. If the grant-funded project requires DALNET to relocate its ILL databases to another server, e.g., at TLN Headquarters, *epixtech* will provide a migration strategy and support to minimize impact on a production system.

***epixtech* response:** will provide a migration strategy. Server may or may not be at DALNET. Can use multiple servers that talk to each other: separate or master/slave. Specify hardware configuration and migration support in contract.

10. (Desirable) There is an operational ILL system interface with NLM's Docline.

***epixtech* response:** Currently there is not an NLM interface, but it is on the list for the NGP, along with other document delivery providers ( e.g., Infotrieve). NLM is (still) not ISO compliant. Dee has seen something new from NLM and will distribute.

	RSS 3.1 (5/00)	RSS 3.11 (8/00)	URSA 2.5 (Current)	URSA 2.6 (8/00)	NGP (6/01)
SUN	no	no	yes	yes	yes
NT	yes	yes	no	no	yes
ESIP	no	1	no	2	yes
ISO/OCLC	no	yes	no	3	yes
RPA	yes	yes	no	4	yes
Web	no	no	yes	yes	yes
NT	yes	yes	no	no	5
WebPAC	yes	yes	no	no	yes
URSA	no	no	yes	yes	6
iPAC	no	no	no	no	7

Servers: SUN, NT

Protocols: ESIP for Circulation, ISO for Interlibrary Loan, RPA for Authentication

Client platform: Web-based, Windows NT

Search Engine: WebPAC, URSA, iPAC

1. Lending Library check-in and check-out
2. URSA's delivery of ESIP is dependent on Horizon 6.0

3. URSA will be able to transmit requests to OCLC (no other functionality)
4. Limited RPA functionality
5. Unknown if a Windows client will be available
6. URSA search engine will work with version 1.0, may not work with future releases
7. iPAC will work with RSS and URSA in 4<sup>th</sup> qtr. 2000, delivered in advance of NGP

Additional notes:

URSA search engine will not resolve search time-out problems

Broadcast searching from URSA might cause worsened response time

One Horizon library in Tampa Bay is being configured; no other Horizon sites are using URSA at this time.

L. Bugg 4-25-2000

S. Muir 5-4-2000