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TO: Patricia Senn Breivik
Margaret Auer

FROM: Louise Bugg *Louise Bugg*

SUBJECT: Horizon Enhancements for DALNET—Status Report

DATE: April 7, 1999

Here is my understanding of the status of the Horizon Enhancements for DALNET. I have also provided Ameritech with this information, however, I did not include the information related to DALNET's testing and payment schedules.

- 1. Horizon 5.1 Release:** Horizon 5.1 was supposed to be ready for DALNET libraries when UDMercy installed the system last summer. UDMercy is running on Horizon 5.0 and waiting to be upgraded to 5.1. Wayne State is also "live" with Release 5.0 and now needs to be upgraded to 5.1. Release 5.1 was delivered for Botsford Hospital and DPL, however, some of the features and fixes that were to be in Release 5.1, per Rider H Schedule 1 of our Agreement, have been postponed to 5.2 and later releases. Botsford went "live" March 29th and DPL is scheduled to go "live" on May 20th.

DALNET has always planned to test and accept Horizon 5.1 when two of the largest DALNET libraries have been installed. The two we expected to be ready first were UDMercy and Wayne State. Because the fiscal year rollover does not work with Release 5.1, Wayne State has to wait until Release 5.2 in order to fully implement the Acquisitions module. This could mean that the two largest DALNET libraries ready to test Release 5.1 first will be UDMercy and DPL after DPL goes "live".

[DALNET's intent was to tie functionality acceptance testing to software payment. A large payment—81% of \$348,500=\$235,064—is due when WSU/DPL/Botsford install Horizon. See attached copy of DALNET's payment schedule.]

2. **WebPAC 1.3:** was supposed to be ready for UDMercy's Horizon implementation in August 1998. Two major features of WebPAC 1.3 have been installed with WebPAC 1.2, however, broadcast searching has not been provided yet. This feature is critical to DALNET's being able to manage on an interim basis without a union OPAC. We expected it to be ready when the second DALNET library, i.e., Wayne State, went "live" with Horizon. This capability is related to DALNET's phase in plan for the shared authority file enhancement being delivered as part of the Sunrise project. It is also a key feature needed to search both OPAC and image databases simultaneously.

[WebPAC software is bundled in the Horizon software payment. Testing, acceptance and payment are tied to the Horizon software schedule.]

3. **Shared Patron Database Enhancement:** this was scheduled for delivery in March 1999. Ricc Ferrante has sent Anaclare and she has prioritized a list of 25 items for this enhancement that were discussed at ALA Midwinter. There is not agreement yet about the matching algorithm solution DALNET is requesting because we cannot require that SSN's be provided in our patron records. A solution is needed to this problem before the Detroit Public Library will be able to go "live" with Horizon, which they are now targeting for May 20th. A conference call was held with Steve Nielsen to discuss this algorithm solution on March 23rd.

[The first payment for the first three Horizon enhancements—50% = \$47,500—is due in July 1999. The first three are (1) Shared Patron (2) Authentication System and (3) Shared Authority File. The final 50% payment of \$50,000 is due October 2000.]

4. **Authentication System for Users:** this was also scheduled for delivery in March 1999. Ricc Ferrante has now provided Anaclare, who is the Shared Patron Database Task Force contact, with the specifications for RPA (Remote Patron Authentication), which is a feature in RSS. DALNET needs to evaluate its ability to meet our needs for authentication and get back to Ameritech. The DALNET Steering Committee had a conference call with Tyler Gingrich about our requirements for authentication and authorization functions on June 1, 1998.

5. **Shared Authority File:** the delivery date for this enhancement is still an OPEN ISSUE in our contract negotiations. DALNET proposed delivery by December 1999, when all DALNET libraries are scheduled to be “live” with Horizon. Ameritech responded that that date was not feasible, but no alternate date has been proposed. In the meantime, we are proceeding with the phased in plans outlined by the DALNET Horizon Cataloging/Authority Design Task Force. Those plans called for delivery of broadcast searching in WebPAC as the interim solution for a union online catalog. DALNET has information now to participate in testing the first piece of the Sunrise project, which will include some of DALNET’s needed functionality.
6. **Children’s OPAC:** the DALNET Task Force was recently formed and the contact person’s name given to Harry Masek and to Ricc Ferrante. The Project Development Team, including both Ameritech and DALNET representatives, now needs to put together a detailed program plan, including proposed deadlines.

[Payment for Children’s OPAC of \$57,000 is due July 1999.]

7. **Ad-Hoc Management and Statistical Reports:** a December 1999 deadline was accepted by Ameritech. Ameritech contacts keep indicating that no enhancements to Horizon software will be needed. This enhancement was to enable DALNET libraries to run their own reports on shared file information, such as the shared patron database, without having access to (or including) information from other DALNET libraries. Most DALNET libraries will now have separate bibliographic and item databases, which seems to reduce the need for the record ownership capabilities in development, however, some DALNET libraries, such as the Detroit Medical Center hospitals, will be sharing bibliographic and item databases. An analysis is needed to determine if, indeed, any enhancements are needed for DALNET.

[Payment for “ReportSmith—completion of functionality” of \$3,800 is due May 2000.]

8. **Integrated Booking Module:** the agreed upon delivery date is December 1999. DALNET has requested specifications for the booking module now in development for Horizon and has supplied old specifications written while still on NOTIS LMS. Ricc Ferrante responded on March 16th that DALNET will be included as a beta partner for Media Scheduling due out Q2 1999. A joint effort between the DALNET Task Force and Ameritech contacts needs to get underway very soon.

[Payment for Integrated Booking Module of \$19,000 is due July 2000.]

9. **ILL/Document Delivery System:** the agreed upon delivery date for the enhancement to RSS for DOCLINE connectivity is December 1999. Contact persons have been identified for this project from both Ameritech and DALNET. A joint effort needs to get underway here too.

[Payment for RSS with Links to DocLine of \$14,250 is due August 2000.]

10. **Horizon Image Module (NetPublisher replacement product):** a letter of agreement (or contract amendment/addendum) is needed to document the proposed Image Module to replace the NetPublisher product. This is still an OPEN ISSUE in our contract negotiations.

[Payments for NetPublisher

<i>December 1998</i>	<i>Hardware</i>	<i>\$ 5,954</i>
	<i>Software 50%</i>	<i>22,564</i>
<i>June 2000</i>	<i>Software 50%</i>	<i>22,564</i>

RECOMMENDATION: DALNET needs written project plans with milestone dates and Ameritech staff responsible for each of our enhancement projects. We also need to receive regularly scheduled updates on progress made and changes for our review.

[NOTE: The 5% holdback of \$108,010 for all payments is due October 2000.

"In the event Ameritech does not deliver the Children's OPAC module by November 1998, the following penalty shall apply: Beginning three months following November, 1998, 20% of the price of the Children's OPAC module shall be deducted from the price of the module for every month that the module is late. The total deduction shall not exceed the price of the Children's OPAC module."

"In the event Ameritech does not deliver any of the other enhancements to the Licensed Software described in Rider K by the applicable due dates, the following penalties apply: Beginning three months following the due date of the late enhancement, 10% of the price of the enhancement shall be deducted from the total price of the enhancement for every month that

the enhancement is late. The total deduction shall not exceed the price of the late enhancement.”

We need to review the date for delivery of the Children’s OPAC in light of the changes made after contract signing.]

LB/cmz

Attachments:

1. Enhancement Deadlines 9/18/98
2. Rider F: Payment Schedule

An email was sent to Bill Easton, Regional Manager, Ameritech Library Services concerning the DALNET Steering Committee's Enhancement deadline recommendations. This version was in response to Ameritech's reaction to DALNET original proposal.

On Friday, September 18, 1998, 5:47 pm, Bill Easton provided Ameritech's response. Ameritech's response is noted in all caps on this original email message.

The DALNET Board is asked to affirm the DALNET Steering Committee's recommendation and communicate such acceptance to Ameritech.

From: Margaret E Auer (auerme@udmercy.edu)
To: SMTP("easton@amlibs.com")
Date: Tuesday, September 15, 1998 6:09 pm
Subject: Re: Deadlines -Reply

1. Patron Database Enhancement. March 1999 meets DALNET's timetable and is acceptable.

AMERITECH ACCEPTS

2. Authentication System for Users. March 1999 meets DALNET's timetable and is acceptable.

AMERITECH ACCEPTS

3. Shared authority file. DALNET would like by March 1999 (Ameritech proposed June 1999) Earl Boyce and Jan Shepard will be in Detroit on Sept. 22 to meet the DALNET Horizon Cat/Authorities Design Task Force. We may know more after that meeting what are the alternatives for WSU, DPL, and Botsford to join UDM in March without a shared authority file. This is perceived as being a problem right now.

The question is would both Ameritech and DALNET agree to set this date after the Sept 18 deadline and after the Sept 22 meeting? Maybe the agreement on this is to have ten (or x) working days following the Sept 22 meeting to finalize the enhancement date.

AMERITECH ACCEPTS SETTING THE SHARED AUTHORITY FILE ENHANCEMENT DEADLINE TEN (10) WORKING DAYS AFTER THE SEPT 22ND MEETING.

4. Children's OPAC. DALNET proposed Oct 1999 with prototype by March/April 1999; Ameritech did not commit to any date. In lieu of a delivery date for the prototype or final product, could we get an agreement on a process or project plan with delivery dates for milestones along the way? For example, DALNET will put together a project team to develop specifications and to work with Ameritech by "x" date; specifications will be written by "x" date; programming will begin by "x" date; testing of prototype will be by "x" date. Basically, we do not want this project to be put off indefinitely but we also realize there are many unknowns. So, what do you see as the steps in the process to get to the enhancement and could we work on dates for these steps?

AMERITECH ACCEPTS PUTTING TOGETHER A PROJECT DEVELOPMENT TEAM IMMEDIATELY. THIS TEAM WOULD DEVELOP THE DETAILED PROGRAM PLAN, INCLUDING PROPOSED DEADLINES.

5. Ad-Hoc Management and Statistical Reports. DALNET proposed Fall 1999, Ameritech has no delivery date for new record ownership capability; DALNET is willing to consider a December 1999 delivery which is when all DALNET libraries should have migrated to Horizon.

AMERITECH ACCEPTS THE DECEMBER 1999 DEADLINE.

6. Integrated Booking Module. December 1999 is acceptable to DALNET.

AMERITECH ACCEPTS

7. ILL/Document Delivery System. December 1999 is acceptable to DALNET.

AMERITECH ACCEPTS