

DALNET ENHANCEMENTS STATUS REPORT

March 1, 2001

Updates since last report are in boldface type

1. Patron Database Enhancement Project Plan

Status

- Revised NCIP (NISO Circulation Interchange Protocol) based solution was received from *epixtech* on January 22, reviewed by the Steering Committee and approved by Board of Directors. Returned to *epixtech* on January 29.

Next Approval Steps

- *epixtech* will send proposed specifications to be reviewed by Circulation Committee and the Steering Committee; approvals by the Board.

Circulation Committee (Brad Burningham, chair)

- Committee has discussed criteria for the review of functional specifications once delivered by *epixtech*, and will recommend changes and additions
- Is also considering
 - Plans for testing enhanced functionality
 - Policies, procedures, and workflow issues for enhanced functionality

Systems Staff

- Anaclare is involved as a member of this Committee
- Currently there is not any work required by the DALNET IT staff

2. Remote Patron Authentication Enhancement Project Plan

Status

- **Initial Testing is complete. Leo Papa has prepared a draft document for an interim implementation of RPA at individual DALNET sites. Scott and Leo have completed a Needs Statement for the RPA enhancement. It will be given to *epixtech* by March 6.**

Next approval/Signature Steps

- DALNET will be able to provide additional functionality requirements in **early March**
- DALNET's Needs Statement should include a sentence that NCIP must be incorporated in this solution

Systems Staff

- Adriene, Martin, and Leo have been meeting to test and configure product

Additional Comments

- This product may be offered to DALNET members as an individual library use product while the enhanced (DALNET-wide) product is developed

3. Shared Authority File Enhancement Project Plan

Current Status

- **DALNET Board has approved the proposed Solution, even though there was concern that it was unclear on many issues. The Task Force recommended that DALNET approve this solution and that we focus our efforts on the specifications.**
- **The Task Force is in the process of scheduling a conference call with *epixtech* to discuss the specifications.**

Next Approval Steps

- Following receipt of specifications from *epixtech* – need review and approvals by Cataloging/Authority Task Force, Steering Committee, and Board

Task Force (Randy Call, chair)

- Task force is prepared to work with *epixtech* to prepare and review functional specifications, recommend changes and additions

Systems Staff

- Anaclare and Adriene are task force members, Anaclare taking the more active role
- Currently there is not any work required by the DALNET IT staff

4. Children's OPAC Enhancement Project Plan

Status

- DALNET is still working with *epixtech* staff to install the iPAC software, but the installation of this product is taking longer than anticipated **due to problems with the product and the lack of documentation.**
- DALNET has received *epixtech's* response to the Search Engine Task force report describing which of the features from the report are in iPAC 1.0, and which features may be in release 1.1 (due Summer 2001) and release 2.0 (due late 2001)

Next Approval Steps

- DALNET will need to negotiate on the due date for the Children's OPAC needs statement pending *epixtech's* proposed solution

Children's OPAC Task Force (Sandra Bialic, chair)

- Task Force is identifying screens from other WebPAC and iPAC sites that they wish to use as models for a children friendly iPAC.

- **Task Force is preparing a DALNET Needs Statement**
- Task Force will review *epixtech's* comments and respond to Steering Committee and Board
- Final Children's OPAC report will incorporate information from the Search Engine Task Force report

System Staff

- **Martin and Adriene are now testing and installing yet another copy of iPAC**

5. Ad-hoc Reports Security Enhancement Project Plan

Status

- *epixtech's* proposed solution appeared to address DALNET's security needs for this enhancement, but DALNET has discovered a problem with the sharing of serials pattern records. We are working with *epixtech* to resolve this problem before recommending the enhancement is accepted.
- The Steering Committee recommended DALNET investigate a better solution for the Serials pattern sharing prior to recommending this for approval and sending to the Board.

Next Approval Steps

- If implementation in production is satisfactory, recommend signoffs by Steering Committee, and Board

Contract Implications

- Following final acceptance approvals, Steering Committee will recommend to the Board that payment be made for this enhancement

Systems Staff

- Staff is in the process of completing the Sybase security changes on the two production servers.

6. Integrated Booking Module Enhancement Project Plan

Status

- DALNET sent the needs statement/functional requirements list to *epixtech* on 1/18/00
- *epixtech* indicates that the next version of Media Booking will be integrated with the Circulation Module

Next Approval Steps

- **Scott and Leo discussed the DALNET Needs Statement with Rice Ferrante and Shelley Neville of *epixtech***
- **DALNET is waiting for a proposed solution from *epixtech***

Systems Staff

- Adriene is working as a member of this task force
- Currently there is not any work required by the DALNET IT staff

7. Interlibrary Loan Document Delivery Enhancement Project Plan

Background

- The LSTA grant for ILL sharing between DALNET, TLN/OWLS, and SLC has been funded, **and the process for selection and implementation are underway**
- DALNET currently has a contractual obligation to *epixtech* for RSS/URSA, even if it is not selected as the product of choice for the other participants in this grant. A requirement for the software selected will be compatibility - interoperability with RSS/URSA.
- Neither RSS nor URSA work with iPAC release 1.0, so DALNET must wait for iPAC 1.1 for full implementation
- *epixtech* is replacing RSS and URSA with a new product in 2001, it will be iPAC compatible

Status

- DALNET and *epixtech* have agreed on the Statement of Needs; approved by Steering Committee on 9/25/00
- *epixtech* and DALNET have revisited the approach to this enhancement due to the introduction of new circulation standards and protocols (NCIP)
- *epixtech* is waiting for DALNET's selection of an ILL product before preparing a solution

Next Approval Steps

- Following the receipt of a solution, need review and approvals by the ILL task force, Steering Committee and the Board.

Task Force (Dee Callaway, chair)

- Task Force will reevaluate the options for URSA/RSS and grant implications
- DALNET's ILL task force will begin working on ILL policies and procedures in conjunction with the grant process

DALNET Staff

- Adriene is working on this as a member of the task force
- Scott, Louise, and Dee are working as members of the grant planning team

Submitted by
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