

Minutes
OCLC-Hosted ILL Policy Directory/IPIG Conference Call
April 2, 2002

Attendees: Kerry Blinco (Infostructure Consulting Services), Mark Needleman (SIRSI), Marilyn Babych (NLC), John Bodfish (epixtech), Barbara Shuh (NLC), Mary Jackson (ARL), Ken Victorson (epixtech), Sue DeTillio (OCLC), Craig Wright (OCLC), Don Bohn (OCLC), Mark Tullos (OCLC), Collette Mak (OCLC)

Background: OCLC had agreed to investigate both X500 and LDAP as potential protocols for the ILL Policies Directory, summarize its findings, post the summary to IPIG-L, and hold a follow-up call with the IPIG to discuss the findings. Don is the author of the technical document and answered technical questions from the group. Sue and Collette authored the preliminary conclusions.

Update from OCLC: OCLC is in the design stage. Part of the design work is making the decision on X500 or LDAP. Don has been working closely with Kerry on questions and issues with schema. The X500/LDAP decision needs to support IPIG's requirements and be a solution that OCLC can implement (costs, in-house expertise, hardware).

Technical discussion:

- Does X500 require OSI or can it also work with TCP/IP?
 - Computer Associates supports TCP/IP.
- Performance considerations
- Why does OCLC believe that LDAP would give better performance? LDAP has fewer layers, bench mark charts give the nod to LDAP for better performance. Is the difference great? OCLC didn't have the bench mark charts at the call but considers it significant. Would this be true in a distributed directory environment? (LDAP performs better than X.500 as long as there is no referral (i.e. the data being sought resides on the initial server and doesn't need to look on another server).
- Referral
 - Acceptable referral capabilities and response are critical concerns for the IPIG. What are the issues and capabilities of LDAP vs X500 for referral? How does the directory know where to refer? How will referrals happen? If OCLC adopts LDAP could this be tied into the NLA X500 backbone? (yes—either by direct query or by being plugged into the directory tree) What/are NLAs restrictions for a directory tree on geographic areas—country codes are a traditional approach but this may not be specific enough to support regional ILL activities. This needs to be investigated much more thoroughly before a decision is made.

- Hardware
 - Is AIX a requirement for OCLC? No, management has not said this was a requirement but our production room is AIX and we would need a very good business reason to justify changing our production support.
- Is Open LDAP source an option?
 - No, it wouldn't scale well.

General discussion:

- Vendors
 - Did OCLC check out the vendor Ed suggested? Yes, their web site did not have a US contact or phone number. Has OCLC looked at other X500 vendors—no, we were unable to find any other companies currently selling X500.
- Where is NLA in their implementation?
 - NLA would like to be further along than they are, in part NLA is waiting for finalization of the schema. Kerry would like to encourage OCLC and NLA to begin discussions on how their directories could interact.
- Client side implementation
 - Kerry reports that NLA's experience with X500 is that there is still a need for a strong application layer for the user interface so that the ILL staff would not necessarily need to use the native X500 client. This would be true for any protocol.
- When do others think their systems would be ready to use the policy directory?
 - This question should be asked of the IPIG group as a whole next week, in general everyone is in the talking stage, no one has coding staff assigned yet.
- When does OCLC believe it will have the directory ready to be accessed?
 - With our development method (DSDM, Dynamic Systems Development Methodology) projects concentrate only on the next "time box" which is about a 6-8 week time frame. One of the down sides of DSDM is not being able to determine the expected length of a project this early in a project. OCLC hopes to be able to give a better answer late spring/early summer.

Next Steps:

- Kerry's goals for post April IPIG meeting are
 1. Get the document in a format that's acceptable to the IPIG
 2. Protocol implementation for the schema
 Kerry also plans on asking for some assistance from other IPIG members to help this happen!
- OCLC action items
 - Investigate the referral issue (this may involve talking to the various vendors) draft a summary of the findings, post the findings to IPIG-L as

we did with the X500/LDAP investigation, schedule a conference call with IPIG for 1-2 weeks after that posting

- The summary document should focus on the client side and the user experience
- IPIG member action items
 - If you have names of any X500 vendors please send them to Sue. If you have suggestions for other LDAP vendors please also send us those suggestions.