

DALNET NOTIS Project Managers' Meeting

Agenda

April 26, 1990 -- 9:30 a.m. - 12:00 Noon

I. NOTIS Release 4.6.1 Implementation

- A. Merged Heading Index demo -- Charlene
- B. New online "has" screen demo -- Louise
- C. Training needs/plans for DALNET staff
- D. NOTIS table changes for Release 4.6.1
- E. What to do about 750 charge limit?
- F. Other 4.6.1 implementation issues

II. Progress Reports

- A. NOTIS Consortium SIG Enhancement Ballot
- B. MDAS
- C. ALA NOTIS SIG meetings
- D. Acquisitions SAS reports
  - (1) New titles list
  - (2) Lists by fund
- E. Keyword Boolean testing
- F. New Systems librarian position

III. Questions/Announcements

L. Bugg  
April 16, 1990

LB90-194

## DALNET PROJECT MANAGERS' MEETING

April 26, 1990

### Minutes

Present: Debbie Adams, Louise Bugg, Joanie Emahiser, James Flaherty, Indra David, Kul Gauri, Jean Houghton, Michele Klein, Charlotte Liner, Helen Ma, Sandra Martin, Judy Murray, Charlene Wecker

#### I. NOTIS Consortium SIG Enhancement Ballot

L. Bugg distributed a consolidation of the Round One NOTIS Consortium SIG Enhancement Ballots submitted by some DALNET libraries. She questioned the desirability of DALNET voting for enhancements which will not be important to most other libraries (e.g., keyword searching across separate files) or which are slated to be in upcoming Releases (e.g., call number improvements).

Eleven Round One ballots were received from Consortia (including DALNET). A second round ballot will now be developed and sent to NOTIS Consortia. Responses to this ballot need to be returned to L. Bugg in order for the results to be tallied and sent to NOTIS in June. The last section of the ballot will be used to determine the SIG's top choices. The first three pages (module by module breakdown and the "other" section) are useful for determining the most desirable enhancements within each module, and could be used to inform the module-specific SIGs regarding consortia's top priorities. There are plans to convene a meeting of all SIG Chairs at ALA.

In reviewing the ballots received from the 11 consortia, there were 38 enhancements listed in the last section. Of these, 23 were "write-in" enhancements not mentioned on the first three pages. Even though they each only received votes from a single consortium, it seems desirable to include them in the second round voting so other libraries have a chance to consider them.

#### II. Keyword Searching Across Multiple Files

L. Bugg reviewed with the group the three alternatives for developing this enhancement:

1. NOTIS, Inc. staff could develop it, possibly for a fee.

2. DALNET Systems Office staff could develop it. We tried a method suggested by NOTIS, but it was unsuccessful. NOTIS suggested creating a separate keyword index for each Processing Unit. This worked insofar as separate keyword indexes identified records held by the various Processing Units. However, the individual bibliographic records could not be successfully displayed. The Processing Unit code is not stored within the record key in the keyword index. The NOTIS contract with BRS does not give us access to the keyword index programming "code" so that we cannot fix this problem. We would have to negotiate with NOTIS to get access to the code.
3. A third method of achieving keyword searching capability for DALNET is via MDAS software. Using MDAS, Processing Units could be set up as separate MDAS databases with their own separate indexes. The problem is that MDAS currently only retrieves the bibliographic record, not the OPR, volume holdings, copy holdings, or item records. However, in version 2 of MDAS, there will be a "soft-link" between MDAS and LUIS records on specified fields. We are discussing with NOTIS our need for a "soft-link" on NOTIS record number. This seems, perhaps, to be the best of the three options for achieving delivery of keyword searching in the short term.

### III. NOTIS Release 4.6.1 Implementation

#### A. Merged Heading Index (MHI) Demonstration

C. Wecker demonstrated 2 of the possible 44 new staff mode searching "views" that will be available with the implementation of Release 4.6.1, when the authority index is merged with the bibliographic author/title and subject indexes. The first view demonstrated was the "jx" (universal dictionary) view.

The other view demonstrated was "b," or "opac-like" dictionary view. This view will probably be the same view that the public will see when MHI is operational in LUIS with Release 5.0.

C. Wecker distributed a sample of two 4.6 batch products: the "Conflict and Error" detection report and the "revamped" New/Dropped Heading Report. The frequency of production of these reports and the methodology for using these reports will be topics of the next DALNET Database Standards Committee meeting.

B. New Online "Has" Screen Demonstration

L. Bugg demonstrated the new online "has" screen. With 4.6.1, the "has" command will display items charged for all patrons, including "pseudo-patrons" with indefinite loans. Dody Fox installed a "fix" to the Release 4.6.1 programs to re-instate the item ID on the "has" screen for linked items.

C. Training Needs/Planning for DALNET Staff

Training needs to be done for DALNET Circulation, Acquisitions and MHI. Circulation and Acquisitions training needs to be done prior to 4.6.1 implementation; MHI training can be done following 4.6.1 implementation. The training sessions for Circulation and Acquisitions will each be one hour long; the MHI training will take 3 hours. Each DALNET library can send up to 2 people to training, preferably the Project Manager and the "lead" person for that module. The training is intended to "train the trainers." Only libraries who have implemented (or completed training for) a particular module should attend the training. 4.6.1 training will be included in all future DALNET training for a particular module. The training schedule is as follows:

Circulation Training

Tuesday, May 15	9:30 a.m. - 10:30 a.m.
Thursday, May 23	9:30 a.m. - 10:30 a.m.

Acquisitions Training

Tuesday, May 15	11:00 a.m. - 12:00 Noon
Thursday, May 23	11:00 a.m. - 12:00 Noon

MHI Training

Monday, June 11	9:00 a.m. - 12:00 Noon
(Project Managers' meeting will be held in the afternoon)	
Wednesday, June 13	9:00 a.m. - 12:00 Noon
Monday, June 18	9:00 a.m. - 12:00 Noon

NOTE: A list of those signed up, to date, is included with the minutes. Contact C. Wecker with changes and additions.

Implementation of Release 4.6.1 is currently "on target" for the end of May. To ensure its completion and to provide sufficient time for 4.6.1 to stabilize after the installation, we are designating the period from May 15 to June 15 as a "quiet" period where no new modules will be put into production. This will make it easier to diagnose problems arising from 4.6.1 implementation.

D. NOTIS Table Changes for 4.6.1

L. Bugg distributed to each Project Manager 2 copies of those tables which need to be modified for 4.6.1 implementation and a document describing necessary changes. Libraries' Processing Unit Security tables need to be modified to include a new field to "record=invoice." "ACU" flag needs to be added to "record=authority" for those who will be authorized to "claim" authority records. (The latter change should not be made until after the next DALNET Database Standards Committee meeting when decisions regarding implementing distributed authority control will be made.) The third change to the Processing Unit table is to "record=batch" where libraries need to add "T" to the "codes" if they wish particular records to be "written" to MARC output tapes.

Libraries' Patron Group Security tables must be modified to add "record=charge." Authorization for this will permit staff to view the "has" screen. Libraries must also decide for each security level which of two flags should be used for record=charge: "has" which allows staff to see all entries on the "has" screen, or "over" which allows staff to see only those titles which are overdue, charged to "missing," or charged to "lost."

Libraries should submit table changes to the Systems Office by May 8 so they can be put into the tables in CICSNOTR by the May 15th training session.

E. 750 Charge Limit

L. Bugg distributed copies of the 103 Patron Category tables. With 4.6.1, there is a problem if a patron has more than 750 items charged out. Not only will the titles for the 751st, 752nd, etc. charges not display on

the "has" screen, but these titles cannot be successfully discharged since the System cannot "clear" them from the "has" screen.

To prevent this from happening, a "maximum charge" of 750 or less needs to be specified for each patron category. Most likely, only "pseudo-patrons" will have more than 750 items charged out. Libraries will need to create additional "pseudo-patrons" for bindery, lost, missing, etc., to accommodate charges over 750. Because NOTIS only checks the number of items charged against the "maximum charge" amount at the beginning of a charge session, it is advisable to make the "maximum charge" lower than 750 so that during a particular charge session, the total number charged does not go over 750.

Libraries should check their patron records for "pseudo-patrons" to see if any are already over the 750 limit. The new "maximum charges" for each patron category will be put into production prior to 4.6.1 to prevent charges from going over the 750 charge limit immediately.

F. Other 4.6.1 Implementation Issues

1. Authority Loads: A top priority has been to load all outstanding authority tapes by the time 4.6.1 is implemented. The only one currently outstanding is for DPL's serials records. This will be loaded in early May. We are also going to attempt to have the authority records for DPL's GPO/MARCIVE tapes created and loaded by Memorial Day.
2. Running the MHI Index: A. Fidler estimates that it may take 10 - 12 hours to run this index; if this is the case, Saturday night is the only night available. We will have a more accurate idea of the time needed after we run the production index for the first time. Since batch tapeloads and global changes do not update the index, we will need to regenerate the MHI index, perhaps as often as once a month.

3. Retaining the current authority index: With the advent of the various searching views of staff mode MHI, we may not need to retain the current "na=" index to authority records. Input on the need for this index will be requested from the DALNET Database Standards Committee.

#### IV. Other

##### A. ALA NOTIS SIG Meetings

The schedule for these meetings has not been announced. They are expected to be held during similar time periods as in the past, i.e., Friday, Saturday and Sunday evenings and all day Tuesday. As soon as more specific information is known, Project Managers will be notified.

##### B. Acquisitions SAS Reports

A "New Titles List" and "List of Serials by Fund" have been successfully produced using SAS. The "New Titles List" is generated by putting a date in a "d" subfield of the copy holdings statement copy level note field. This gives the library control over which titles are to be included in the list. The test site for this list is the WSU Law Library. It is in order by the first LC Subject Heading on the bibliographic record. Other sort options, e.g., MeSH heading, author, title, etc., could be done for other sites. L. Bugg will send examples of these reports to Project Managers. These reports can be run for other libraries after 4.6.1 implementation.

##### C. New Systems Librarian Position

One candidate, Deborah Ludwig from Fort Hays State University, was interviewed on April 13th. An interview for Charlene Wecker is scheduled for May 2nd.

##### D. MDAS

L. Bugg reported that she is talking with NOTIS about licensing MDAS. Relating to the use of MDAS for commercial indexes, K. Gauri distributed a chart with information gathered, to date, from DALNET libraries regarding specific databases used (online or CD) and monies spent for them. The group felt that a more "relevant" figure would be the monies that libraries would "free" up if particular databases were mounted on MDAS.

E. GTO

GTO enhancements, including improved transfer of records for multiple Processing Units and GTO from CD-ROM (for OCC's Gaylord product) and from LANs, are very important for DALNET libraries. It is not yet clear when it will be necessary for DALNET OCLC libraries to begin using the GTO in lieu of the Telex transfer. OCLC plans to distribute the new terminal emulation software to medium-sized sites later this year, but OCLC says they will continue to support the current transfer method for some time. Our plan was to begin work on GTO implementation after 4.6.1 implementation, assuming that the new GTO Release would have been available by that time. NOTIS is now citing Fall as the target date for the next GTO release.

The next DALNET Project Managers' meeting is scheduled for Monday, June 11, at 1:30 p.m.

Notes by:

Charlene Wecker  
May 2, 1990



DALNET LIBRARIES SIGNED UP FOR RELEASE 4.6 TRAINING

NOTE: These are the libraries/people signed up by 5:00 April 30.  
Contact Charlene to make additions and modifications.

4.6.1 CIRCULATION TRAINING

Tuesday, May 15  
9:30-10:30

BR - Joan  
BR - Joanie  
CH  
CH  
DP  
BH  
WC  
MC

Thursday, May 23  
9:30-10:30

UD  
OU  
OU

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4.6.1. ACQUISITIONS TRAINING

Tuesday, May 15  
9:30-10:30

CH  
CH  
OL

Thursday, May 23  
9:30-10:30

OC

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4.6.1 MHI TRAINING

Monday, June 11  
9-12

BR - Joan  
DP - Helen  
UD - Jean  
WC - Jim  
HH - Sandra  
BH - Debbie  
CH - Michelle

Wednesday, June 13  
9-12

MC - Kul  
OU  
BR - Joanie  
OC  
DP

Monday, June 18  
9-12

UD - Anne  
OL  
OL - Charlotte