DALNET PROJECT MANAGERS MEETING
September 9, 1996, 1:00 - 3:30 p.m.
Oakland Community College, Royal Oak Campus

Agenda

Estimated Time

1. Welcome/Introductions/Approve agenda — 1:00 - 1:10 p.m.

2. NOTIS LMS Releases/Software — 1:10 - 1:30 p.m.
   a) *LMS 6.0.1--location based catalogs by processing unit--Jim*
   b) *LMS 6.2 Circulation Re-Write--Anaclare*
      (1) *Item record purge*
      (2) *Patron record archive*
      (3) *Patron interface sessions*
   c) *LMS 6.3--New OCLC transfer via TCP/IP--Anaclare*

3. DALNET Cataloging Services--Anaclare — 1:30 - 1:45 p.m.
   a) *OCLC record transfer service*
   b) *Use of TAPE command*
   c) *Other cataloging services needed, eg. AV/media cataloging*

4. Ameritech/DALNET Partnership Team report-- Louise (and team members) — 1:45 - 2:15 p.m.
   a) *Partnership retreat*
   b) *System demo plans*

5. NOTIS MDAS security levels--Jim — 2:15 - 2:30 p.m.

6. OCLC WebZ project--Louise — 2:30 - 2:45 p.m.
   a) *MRLT developments*
   b) *Pricing for DALNET license (options attached)*

7. Migration to PCs and Ethernet--Louise (will bring revised document to meeting) — 2:45 - 3:00 p.m.

8. DALNET Web Interest Group Meeting--Jim — 3:00 - 3:10 p.m.

9. **Progress reports**   3:10 - 3:30 p.m.
- *a)* *OVID Medline discussions--Louise*
- *b)* *PsycInfo--Louise*
- *c)* *WMU PacLink--Louise*
- *d)* *LUIS menu revisions--Jim*
- *e)* *DMC and VA database loading--Anaclare*
- *f)* *New circulation and acquisitions*
  implementations--Anaclare
- *g)* *PrinText article delivery system--Jim*
- *h)* *BIP via PacLink to MSU--Jim*
- *i)* *WSU e-mail migration from PROFS--Louise*
- *j)* *WSU dial access--Jim*

NEXT MEETING: November 4, 1996, 1:00 - 4:00 p.m.
                   (Need host site)

L. Bugg/cmz
9-3-96

Attachment: Map and parking information

DALNET PROJECT MANAGERS MEETING

September 9, 1996
OCC Royal Oak Campus

Present: D. Adams, J. Brennan, L. Bugg, I. David, G. Ellis, A. Evans, J. Flaherty, J. Green, J. Houser, M. Klein, J. Murray, B. Platts, M. Sheble, F. White, D. Zyskowski

Excused: N. Bulgarelli, D. Drobny, K. McPeak, J. Moldwin, C. Mudloff, M. Campbell

1. The agenda was approved as issued.

2. **NOTIS LMS Releases/Software**

   a. **LMS 6.0.1--location based catalogs by processing unit**

   Jim reported these were installed on 8/5/96 as planned. Some problems have been identified and we are working with NOTIS to resolve them. 1) The authority file entries and references function correctly in the "all" catalog, but in the location based catalog, references appear only if they are connected to that processing unit. 2) There are some problems if you enter a truncated keyword search. The shorter the character string you input, the fewer the records you retrieve. Because this is happening in the "all" catalog and the scoped catalogs, this may not be related to LBC, however, it was reported after 8/5. 3) Keyword searching is usually much slower in the scoped catalog than the full catalog.

   b. **LMS 6.2**

   1. Anaclare distributed the project overview chart for the implementation of 6.2. The release has now been installed in CICSNOTR and libraries doing training should use CICSNOTD/CICSNOTT. On the project overview, the only firm date on the chart is the date for putting LMS 6.2 into production (Memorial Day weekend 1997). All other dates are flexible. The item record and patron record file cleanup jobs should be run soon.

2. **Item file cleanup:** This has been tested on WS records only. The purge will remove item records with the status D (logically deleted) or O (orphaned, started as unlinked, later linked). Neither category of record can be retrieved by a terminal operator. The item purge will first be run for the WS processing unit and then a QuikReport will be run to identify remaining unlinked item records for linking. Other processing units will be run in succession. The processing units with the larger number of records will be run individually, while the smaller processing units will be grouped. We hope to complete this task by Thanksgiving. The jobs will be run again just before 6.2 goes live.

3. **Patron Record Archive:** The patron record archive will archive records with delete dates of 12/31/94 or earlier. It will delete: a) patron ids which have been marked for deletion (lost, stolen, damaged, etc.); b) patron subrecords marked for deletion; and c) patron records marked for deletion. Patron records archived may not have any open bill and fine activity. The test of the patron archive indicates that about 173,000 records or about 23% of the file will be archived. Completion of this cleanup should make the files easier to use. This will likely also be run again just before we bring up release 6.2.

4. Anaclare will schedule a meeting for the technical staff and librarians who will be preparing files/tapes of patron records to be loaded. Dody and Anaclare will review the specifications for the patron data which is required for LMS 6.2. This meeting should be held either in very late September or early October.

C. **LMS 6.3--New OCLC transfer via TCP/IP (a.k.a. GTO upgrade)**

This will require use of OCLC's Passport for Windows. It will not work with Passport for DOS. The new version of

GTO replaces the individual GTO PCs with a UNIX box at Wayne State which will upload the records to the mainframe. When a terminal operator issues the command to export a record, the OCLC PC will then FTP the desired record to the UNIX box. The record will then be transmitted from the UNIX box to NOTIS. A number of NOTIS sites, including MSU, have installed the software. The University of Detroit Mercy and Botsford Hospital volunteered to test the new GTO.

3. **DALNET Cataloging Services**

   a. **OCLC Record Transfer Service.** Anaclare distributed "DALNET Record Loading Service." Subscribers to this service will be able to have WSU Library Staff members use GTO at WSU to get OCLC records into their NOTIS database for them. No cataloging will be done, only record transfer. For details, please see the document. Contact Anaclare to implement the service.

   b. **"Tape" Loading to OCLC.** Anaclare distributed a document describing the process for record uploads via FTP from NOTIS to OCLC. Holdings can both be contributed and deleted from OCLC in this manner. Anaclare will write procedures for both adding and deleting holdings. Anaclare will clarify the obligations of those DALNET members who are not full OCLC members to upload their holdings to OCLC. Just a reminder, use of the "tape" command is limited to those libraries who have a tape loading agreement with OCLC. There are no additional DALNET charges for this service but each institution must estimate its own OCLC charges. The major impact is on improved workflow.

   c. **Other Cataloging Services:** Anaclare and Louise surveyed those present regarding other cataloging services which Wayne State or DALNET might provide for the members. Frank White suggested audio-visual or media cataloging. Some DALNET libraries receive other bibliographic services from Wayne State through other contracts, such as DC3. Anaclare will develop a proposal for media cataloging services.

4. Ameritech/DALNET Partnership Team Report

a. **Retreat:** Louise reported on the Partnership Team's two day meeting held Sept. 4-5 at the Outer Drive Campus of the University of Detroit-Mercy. A second meeting is scheduled for Oct. 7th. This initial session concentrated on the vision for DALNET and what the outcome of this Partnership could be. DALNET could develop into a major information provider in the metropolitan Detroit area. It could also be a showcase for Ameritech Library Services systems. A path of long and short term objectives will be developed.

The proposed library system will be based upon Horizon, the Ameritech client-server system. Ameritech Library Services has asked for library sizing data in order to provide cost estimates. One model will be for separate systems which can be linked together, while another model will be for a central system. In interpreting the Horizon questionnaire, serial titles will be current subscriptions; acquisition titles are titles received in one year; patrons are only active patrons. Internet connections are lines terminating in your building, not lines accessed by dialing. The ALS questionnaire should be faxed back to Louise at 33-577-3615 by Friday, September 13, 1996. In order to plan for our migration from an SNA network to a TCP/IP network Ameritech also needs information about workstations and access. ALS would also like an inventory of any special projects planned such as electronic reserves, digitizing of slide collections and the like. Louise would also like this information faxed to her by the 13th.

b. **System Demonstrations:** Only the DRA demonstration for October 9-10 will still be held as scheduled. There will most likely be two other demonstrations and Ameritech Horizon will be the last system demonstrated. The demos are scheduled to begin the week of 9/23 and there will be about one system demoed per week. Each vendor has been asked to demonstrate features based upon the scenarios outlined by a large group of library staff members. Those viewing the demos will be requested to complete an evaluation form which will assist the Partnership Team in making recommendations on the Partnership proposal. More information regarding the system demos will be forthcoming.

5. **NOTIS MDAS Security Levels:** Jim reviewed the matter of the limited number of NOTIS MDAS security levels and what this means. Basically, the lower the security level of an MDAS database, the more open the access is. Users at defined terminals in the library are not required to sign on to use the various third-party databases licensed by that library. Remote users are required to sign on before accessing the various indexes. The way in which these levels work, the higher numbers encompass all of the lower number's security capabilities. This will require libraries who want higher security level databases to subscribe to all databases with lower security levels. This problem has been reported to Ameritech and they recommended that we explore a fix developed by WRLC as an interim solution. For further information see Jim Green's handout prepared for this meeting.

6. **WebZ:** Wayne State University will proceed with the installation of WebZ in October as part of the MRLT/CIC grant project. This will allow WSU users to use NetScape to access the DALNET, U of M and MSU catalogs and for these patrons to initiate an ILL request. The MRLT Automation Task Force will work out the plans. Attached to the agenda is WebZ pricing for a license for the rest of DALNET. There might also be a proposal from ALS regarding the implementation of WebPac. Louise suggested that since the Partnership Team decision would be made in October or early November, the matter of a web front end for the rest of DALNET be put on hold until then.

7. **Migration to PCs and Ethernet:** agenda item skipped. Ameritech will be providing recommendations for PCs and networks as part of their proposal.

8. **Web Interest Group:** Jim facilitated a session for interested DALNET librarians concerning the construction of an official DALNET web site. The group also found out about what individual DALNET members were doing with their own web sites. A recommendations needs to go to the Board to make this an official DALNET committee. It is just as important to include members from DALNET sites that do not yet have their own home pages. Minutes of the Web Interest Group are attached to Jim's report for the project managers meeting.

9.   **Progress reports**

a.   **Ovid Medline**: Louise is still in active discussions with Ovid about sharing the Medline system at Shiffman with DALNET. We are also getting pricing which will allow use of a web browser, such as NetScape, instead of the Ovid client. Barbara Platts reported that Beaumont Hospital has installed a networked version of the Ovid software to be shared by both Royal Oak and Troy. There is interest in Ovid Medline through DALNET, if the price is right.

b.   **PsycInfo**: We have not been able to negotiate better pricing. University of Detroit-Mercy is going ahead. Oakland University reported that they preferred the search engine available on the CD-ROM software, PsycLit.

c.   **WMU PacLINK**: The needed information has been exchanged and work is proceeding on making the link. Once the WMU link is established, work can begin on the link to U of M Dearborn, our first non-Notis site, and next on our list.

d.   **LUIS Menu Revisions**: Jim distributed samples of the revised LUIS Menu screens. Some, but not all, of the DALNET member library menus have been updated, screens for UD, DP, and WS are not done.

e.   **DMC and VA database loading**: All tapes have been received and all loader specs have been written. The databases for the DMC libraries have been loaded into test and a few modifications need to be made to their loaders. The loader for VA is being written. Training for the DMC and VA will begin shortly. As soon as the records are approved, they will be moved into production. Look for their records in early Fall.

f.   **New Circ and Acquisitions Implementation**: Beaumont Troy and DIA have had circ training. Beaumont Troy is scheduled to start circulating on-line on 9/16. DIA has not set a date they want circ to go live. DPL, WC3, and UDM have all implemented part or all of the acquisitions module. DPL and UDM are now doing all ordering on line. WC3 has implemented enough of acquisitions to be able to check in journals.

g. **PrinText:** Printers up and running at WSU Purdy Library, Oakland Center, and Oakland University. Additional printers about to be installed at WC3.

h. **BiP via PacLINK to MSU:** MSU has Books in Print available in production in MDAS. The publisher information is in a separate file. There is no hook to holdings. Jim is requesting pricing information from MSU to link to them and use BiP. OU is interested. CH is interested only if the subject file of BiP is available.

i. **WSU e-mail migration:** Louise is still awaiting answers from the Computing Center.

j. **WSU Dial Access:** Jim distributed the latest leaflets on dial access.

k. OCC has four 32 port IBM3274.41C controllers available free for pick up. Louise will have them picked up and stored as spares for DALNET libraries that might need replacements.

l. **ILL Pseudo Patrons:** OCC has identified that some DALNET libraries charge ILL materials out to a Pseudo Patron and keep paper records relating to the library the item was lent to. When items are not returned, tracking is not done in a timely manner and then OCC cannot get materials back from the user. The use of pooled patron records for ILL was referred to the DALNET Circ Standards Committee.

NEXT MEETING: November 4, 1996 at Oakland University.

Summary notes by,
Anaclare Evans
September 13, 1996

ae
Attachment