

DALNET PROJECT MANAGERS MEETING
March 4, 1996, 1:00 - 4:00 p.m.
WSU Purdy Library, Simons Room

Agenda

- | | <u>Estimated
Time</u> |
|--|---------------------------|
| 1. LMS Releases and Software Installation--Louise
Status report and questions on these projects:
a) 6.0.1
b) 6.2 planning
c) DocDirect | (10 mins) |
| 2. Visioning report evaluation (previously distributed)
a) Review of report to provide input to the Board by
March 11
b) Next steps in planning process--discussion to help
planning Committee | (20 mins) |
| 3. Ameritech visit March 20-21 (See attached)--Louise | (30 mins) |
| 4. Statistical and management reports--Helen
Briefing on three types of reports: NOTIS generated;
Quik Reports; and SAS/locally designed.
Goals: to help Project Managers understand
currently available reports and provide info for
future reference. | (30 mins) |
| 5. Follow up--Louise
Status reports; seeking input on these projects and
events:
a) WinPac testing--Jim
b) WebZ/WebPac evaluation
c) OCLC First Search/decision making model
d) MDAS database negotiations
e) Z39.50 PacLink planning
f) Ovid Technologies program invitation
g) DCAT screen changes | (30 mins) |
| 6. Michigan NUGM--Jim and Helen
Update on plans; seeking program ideas and volunteers. | (5 mins) |
| 7. Web home page for DALNET/Web developers SIG--Jim
Seeking ideas and input on need for Web services. | (10 mins) |

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8. Mark/Send downloading (demo)--Jim (20 mins)
Preview of this new functionality; seeking reactions.
9. Wrap-up--Louise (10 mins)
Review of decisions made, actions taken, next meeting plans

NEXT MEETING: Monday, May 6, 1996, 1:00 - 4:00 p.m.

NOTE: Kathy Ratliff of UMI will be here by 4:00 p.m. to meet with those libraries interested in ProQuest Direct.

L. Bugg/cmz
Attachment
2/27/96

DALNET PROJECT MANAGERS MEETING

March 4, 1996, 1:00 - 4:00 p.m.
WSU Purdy Library, Simons Room

Present: J. Brennan, N. Bulgarelli, L. Bugg, R. Call, I. David, D. Drobny, G. Ellis, A. Evans, J. Flaherty, K. Fulwood, J. Green, H. Ma, J. Moldwin, C. Mudloff, J. Murray, M. Sheble, M. Thomann, F. White

Excused: D. Adams, M. Campbell, M. Klein, K. McPeak, B. Platts, N. Skowronski

1. LMS Releases and Software Installation

- a) 6.0.1: L. Bugg reported that LMS 6.0.1 was successfully installed during the previous weekend, March 2-3, 1996. It ran so smoothly, that we were able to generate the monthly keyword index. Therefore, everything is running on schedule. Please report to the Systems Office if you find any problems.

L. Bugg reported that since 6.0.1 was installed, we will begin testing the Location Based Catalog by processing unit. L. Bugg will send a message to the project managers on what is being planned.

There is another Format Integration training session for the DALNET staff on Thursday, March 7, 1996, at 9:30 a.m. Please call Anaclare Evans to register.

The printed copy of the 6.0.1 cataloging tag tables is available from the Systems Office for \$50. The programmers will work on making the tag tables available via FTP. Please contact A. Evans for purchasing the tag tables.

- b) 6.2 planning: A. Evans reported that she has received most of the responses from her survey on how DALNET libraries use the NOTIS item record status codes to record items being discarded or withdrawn. The consensus was that the libraries did not use the codes consistently. Since this is the first step in cleaning up the bibliographic database, Judy Murray suggested that libraries could utilize the QuikReports to identify the codes used and perform manual cleanup first before record purging starts.

FTP patron records: OU is ready to FTP patron records to DALNET, and H. Ma will follow up with MC, WA and WC.

L. Bugg also stated that installation of 6.2 is tentatively scheduled for January 1997. However, this date is not definite. We will know more after we receive the software and the documentation on April 2, and as we move forward with planning.

- c) **DocDirect**: With 6.0.1 in place, DocDirect is now the top priority. Jim Green is coordinating the project. The tentative schedule is for testing in April, installation in May and with the function operational at the participating sites by June 1. The next meeting of the implementation team is March 15th.

The printer used by the DocDirect project is specified by UMI as the HPIV+ LaserJet.

2. Visioning Report Evaluation

L. Bugg reported that the Planning Team was given two charges, a) to review the report and to synthesize input for the DALNET Board by March 11, and b) to come up with a recommended time line for the next steps in the planning process. To solicit input from participants, the Team prepared a "Feedback Form". The survey form was sent to all project managers and Board members along with the consultant's report. The Team requested that the finished form be returned to L. Bugg by March 4.

L. Bugg reviewed the responses at the meeting and a lengthy discuss followed. Suggestions to the Team included:

- a) We may need another planning session;
- b) A smaller work group might be more effective in drafting the vision statement;
- c) We could ask the consultant for input as to what our next steps should be; and
- d) It seems more appropriate for the Board to develop the vision, mission, and goals, and for the project managers to develop action plans to implement the goals.

3. Ameritech Visit March 20-21

L. Bugg reported that Dean Breivik, WSU Libraries, received a letter from Thomas Burns, Vice President for Strategic Sales and Programs at Ameritech Library Services (ALS), indicating ALS's interest in joint development with DALNET to provide improved library services to our diverse users. Mr. Burns proposed a two-day discovery trip to visit representative DALNET libraries to gain a better understanding of our needs.

Following a discussion, it was decided that we will schedule ALS visits to the following libraries:

- WSU- Host site;
- DPL- Main Library and possibly Sherwood Forest branch;
- UDM- Representing the university libraries;
- WCCC-Representing the community colleges;
- CH or HH - Representing the special libraries.

These libraries are near each other, which cuts down on the travel time during the two-day visit.

Representatives from the above libraries will work with L. Bugg as a site visit team and will develop plans and distribute them to the project managers for input prior to the ALS visit.

4. Statistical and Management Reports

H. Ma gave a briefing on the three types of NOTIS related reports, and distributed the documentation with sample reports. The three types are:

- The system generated reports
- Locally developed and SAS reports
- QuikReports

The fourth packet is the updated list of DALNET scheduled reports. The document lists the reports by type, by calendar month, and by library. If you noted any errors, have not received any of the reports, or would like to make changes, please contact A. Evans.

H. Ma was to give a detailed comparison between some of the locally developed reports and QuikReports, however, due to the shortage on time, that portion of the report was curtailed. A written report on the comparison is included with the minutes. Please keep this comparison with the rest of the packets and retain on permanent file.

J. Murray informed the group that she has done a report on which QuikReport or DALNET locally developed reports to use to gather the statistics required by IPEDS. It is included for your reference.

(During the break, the Project Managers gave a surprise farewell party for Helen Ma, as this was the last meeting Helen will attend with the group.)

5. Follow Up

- a) WinPac testing: Twenty copies of the software arrived at WSU. J. Green will test it first. The other libraries offering to test it are BH, CH, DI, OC, OU, UD, and WC. J. Green reminded everyone that WinPac is a graphic OPAC interface with no World Wide Web access, and is an older product than WebPac.
- b) WebZ/WebPac evaluation: L. Bugg is doing data gathering and will call a meeting in April with OC, OU and UD to evaluate the two products.
- c) OCLC FirstSearch decision making model: OCLC sent us a survey form to compile data on the reference databases we have or desire. Libraries are asked to complete pages 1-3 in full, and only list the databases you desire on page 4. The survey is due back to L. Bugg on March 29, 1996. In the meantime, she will FAX to everyone the available database lists from FirstSearch, Silver Platter and Ovid.
- d) MDAS databases negotiations: DALNET is ordering the Wilson Abstracts as agreed at the last meeting. DPL was able to participate. The cost will be pro-rated for this year. We hope to have abstracts with the April tape to be loaded by May to coincide with DocDirect implementation.

The negotiations with PsycInfo are not going well. The vendor requires the new DMC hospital libraries' bed counts for price quotes. They can be folded into the current special libraries' group rate if the bed counts are under 200 each. It was decided that we terminate the negotiations until October.

- e) 239.50 PacLink planning: Discussion tabled for the next meeting.
- f) Ovid Technologies program invitation: Ovid will send invitations to the DALNET Libraries for their March 26, 1996 Ovid briefing on their latest technology. An Ovid installation is underway at Shiffman.
- g) DCAT screen changes: J. Green announced that there will be two minor changes to the LUIS screens soon. One line will be added under DCAT to say "including the <library> catalog". This will be library specific, and controlled by terminal ID. The second change is to the top of the screen.

The major changes will occur during the summer when AFRI will be moved to the INDEXES group, which will be alphabetized, and the REMOTE group will be re-named CATALOGS. Making these changes in the summer gives DALNET libraries time to update their signs and brochures by Fall.

6. **MichNUGM**

J. Green is the program co-organizer of this year's Michigan NOTIS Users Meeting. He announced that there are about 8-10 breakout sessions planned. They still need more technical services and programmers sessions. If you would like to volunteer or have recommendations, please contact Jim.

It was also suggested that DALNET send one or two people to the NOTIS 6.2 Circulation Training Workshop to gather preliminary data on the new circulation release for DALNET libraries.

7. **Web Home Page for DALNET/Web Developers SIG**

Discussion tabled for the next meeting.

8. Mark/Send Downloading

J. Green gave a demonstration on how to mark LUIS bibliographic record and reference citations and download them to your PC for creating bibliographies. The software tested is the McGill TCP/IP 3270 and the IBM PC3270. No holdings information will be downloaded.

If project managers are interested in trying this functionality, please contact J. Green and give him your terminal ID (must be a PC). He is developing user documentation and online help screens. LUIS downloading demonstration for DALNET staff is being planned for May.

The next DALNET Project Managers Meeting is on Monday, May 6, 1996, 1:00 - 4:00 p.m. at Oakland University.

Notes by,
Helen Ma
March 7, 1996

HM/cmz
Attachments