1994 NOTIS USERS GROUP MEETING and FIRST DIRECTOR'S DAY

October 26-29, 1994

Report by Louise Bugg

This was my ninth annual NOTIS Users Group Meeting, or NUGM. What a change from a small group of customers meeting in Evanston--each reporting on their installations--to over 900 participants gathered at the Palmer House to watch the new Ameritech Library Services (ALS) presentation "simulcast" on a large video projection screen!

This massive general meeting was preceded by a half-day session targeted at library and computing center directors. Several pre-NUGM training workshops were also held, including an intensive session to prepare sites for the new circulation release coming in LMS Version 5.2. The following two days of 60 to 90 minute sessions planned by users and the vendor left little time to visit the expanded exhibit area of poster sessions and product demos.

My goals for this meeting were:
1) to learn about current ALS product development and what the issues were for our WSU/DALNET site;
2) to make sure we are taking appropriate steps to position ourselves for client/server technology; and
3) to acquaint our new marketing representative, Jim Lewis, with our unique NOTIS site.

I. ALS Product Development

A. *Mainframe (aka legacy or host) system products*

The NOTIS Library Management System (LMS) will still be supported on the mainframe platform for the foreseeable future. ALS emphasized its commitment to enhance and support this product and not to "force users off the mainframe." It turns out that libraries were not as ready to migrate to client/server systems as originally projected.

LMS Release 5.1.2

This release includes MARC format integration (phase I), 773 linking fields, over 50 fixes to LMS bugs, item record creation via GTO, PACLink support for Z39.50 connection to OCLC FirstSearch, and PACLoan item status review in the staff client. Beta testing starts in November with general release expected by the end of the year.

Issues for WSU/DALNET: ALS is willing to send us an "early release" tape of 5.1.2, in case we need it to keep in synch with our MRLT PACLink partners who are already "early release" sites.

QuikReports

WSU/DALNET input as a beta site for the upcoming release was much appreciated. ALS plans to send a "fix" tape in November for us to verify that the software loads properly and that the reports all run, even on our large files. Their goal is distribution with LMS Release 5.1.2, if possible.

PACLink/PACLoan

In addition to support for password protected servers (like OCLC), PACLink improvements in the next release include expanded holdings export (e.g., circ status) and better support for non-NOTIS linkages (e.g., Innovative and DRA). The vendors have been collaborating to get their Z39.50 clients and servers working across systems.

The Washington Research Library Consortium is scheduled to implement PACLoan--initially for staff use only--in November. ALS says it is possible to change the footer of the OPAC screen to display the PACLoan user commands, but this requires programming to modify source code to remove other commands already in the footer.

Issues for WSU/DALNET: testing of InterCampus Loan (ICL) between WSU and OU still seems feasible with the current PACLoan release; PACLoan may require changes to our CICS region configuration, which is another reason to get testing underway.

LMS Release 5.2

This complete re-write of the circulation module is going to three beta test sites this fall. It will include course reserve access for users via the online catalog. It eliminates the need for fixed CICS terminal IDs at the circ desk; instead all circulation authorization will be by staff logon ID.

The goal is a spring 1995 general release. This seems very optimistic to me, given all that still needs to be programmed! The Circulation SIG and the Circulation Re-write Team of users are still accepting comments on the release as it goes to beta testing.

Issues for WSU/DALNET: it became clear that implementing this release will be a MAJOR project for us; several files will need to be converted including the patron and item files; all circ output and reports will change; local reports will probably all have to be re-programmed; patron record extract programs to provide input to the patron file will all have to be re-written; my estimate is at least 6 to 9 months from receipt of software to implementation in production.

Beyond LMS 5.2

During 1995, FCLA will help ALS convert all remaining LMS macro code to command level to make it compatible with the latest releases of the CICS operating system software, i.e., CICS 3.2 or higher. The target is distribution in Release 6.0 in early 1996. Also to be included in Release 6.0 are OPAC enhancements and phase II of format integration. Suggestions are to be submitted to the OPAC SIG.

The next release, LMS 6.1?, will be a "re-write" of LSER, the serials check-in module. The Serials SIG plans to appoint an LSER Re-Write Advisory Group, with representatives from three sites using LSER and one site that is not using it because it doesn't meet their needs.

Issues for WSU/DALNET: how do we cope with the CICS constraints of our large site until 1996; should we attempt to use LSER at all until Release 6.1.

Location Based Catalogs

The University of South Carolina explained how they had figured out how to make location based catalogs more efficient, and, therefore, feasible for medium- to large-sized sites. They use a capability of CICS that is in Release 2.1 and higher called Hiper Space. This is a complex solution, but it seems worth exploring for WSU/DALNET after we deal with our higher priority tasks this year. This is the first ray of hope I have seen for enabling us to use location based catalogs!

B. Information servers

These currently available information server products are considered "bridges" between the mainframe and client/server systems.

InfoShare

InfoShare is a Z39.50 information server that delivers large index/citation databases. Instead of loading such databases on the mainframe MDAS system, they are loaded on smaller Unix machines with less-expensive disk drives. This off-loads work from the mainframe and begins the migration to client/server technology.

The latest InfoShare product (Release 2.0) will be going to beta sites (2 Sun and 1 IBM) for testing in November, with general release expected in a few months. It includes two search engines--Newton (OCLC's search engine) and Silverplatter's ERL (based on SPIRS). ZRouter (Z39.50) software routes the request to either the Newton or ERL engines, depending on the database.

Databases are distributed pre-loaded by ALS for the Newton engine and by Silverplatter for the ERL engine. Sites just load them onto the hard drives from CD (like we already do for CD-PLUS). Some databases from Silverplatter are not yet licensed for hard drive loading and must continue to be made available on CD. InfoShare will support databases on CD as well as on hard drive. ALS plans to migrate all databases to the ERL engine so it can get out of the pre-loading business entirely.

Clients that come with the InfoShare license include the Navigator (mainframe LMS) client, WinPAC, TermPAC, and WinSPIRS/MacSPIRS/PcSPIRS (Silverplatter). The Silverplatter clients are not Z39.50 compatible. Hook to holdings is supported. The InfoShare license is based on simultaneous users.

Issues for WSU/DALNET: InfoShare seems one of the obvious next steps in our move toward client/server architecture; it will relieve the mainframe and begin to off-load transactions to Unix machines; the question is when InfoShare will be tested and proven robust enough for our very large site. WSU has two Silverplatter Multiplatter CD LANs installed already. A migration to InfoShare also seems an obvious path to upgrade those systems. One question is the network capacity needed to house the Unix hardware in the Library rather than in the Computing Center.

DocDirect

DocDirect is a full-text article delivery server that uses CD juke boxes. Links in the citation records in MDAS or InfoShare point to the articles to be retrieved from the CDs. The articles cannot be viewed online before requesting that they be printed. Having abstracts with the citation records reduces unnecessary requests for articles.

The WRLC figured out how to deliver DocDirect articles from a central site to either FAX machines or printers at remote sites. T-1 telecommunication lines seem the minimum for such large image transmission to remote sites. The system seems complex and is less-than-perfect, however, it works. Requests for articles have already peaked at 1,000 per day since the system went into production in September, which exceeds their projections. WRLC collects 15 cents per page from users when they pick up their articles.

Issues for WSU/DALNET: is this a cost-effective option for full-text delivery in a shared system?

NetPublisher

NetPublisher is a Z39.50 and World Wide Web (WWW) server that libraries can use to make information available via a LAN and the Internet. It currently requires a Windows NT environment. It supports text, image, audio, and video files. Access is via WWW client (eg., Mosaic), Gopher client, or Z39.50 client.

This is a very new product going to beta testing in the fourth quarter of 1994. One use for it came to mind immediately--for an electronic course reserve system. It is "integrated" with the LMS online catalog.

C. Access clients

This family of client products is for searching and information retrieval. For the LMS online catalog, they work through the TAG machine already in place for PACLink. They require a TCP/IP network.

WinPAC

WinPAC is a new Windows-based graphical client for searching Z39.50-compliant and Gopher servers. Version 1.1 is currently in beta testing and expected to be available by the end of 1994. It includes a "hook to holdings" feature for LMS online catalogs. The Macintosh version (MacPAC) lags 6-9 months behind the Windows product.

My understanding is that this product replaces the "old" ProPAC Z39.50 client.

WinPAC is available in two options:

1. WinPAC itself, which includes WinGopher and the Z39.50 clients; and
2. WinPAC Complete, which includes a TCP/IP stack from Distinct.

WinPAC supports full text, images, sound, and motion record retrieval and display. Minimum workstation configuration is: 486pc with Windows 3.1, 8MB RAM, 3.5" floppy, and TCP/IP network connection (either dial access or direct).

Issues for WSU/DALNET: I asked our new marketing representative about options for upgrading our 58 copies of ProPAC (that we never claimed from our PACLink purchase) for the WinPAC product; we will need workstations to support this software; WinPAC is another obvious next step for us in the move to client/server systems.

WinGopher

WinGopher seems to be primarily an end-user Gopher client. WinGopher Version 2 is targeted for the first quarter of 1995 and will be upgraded to Gopher Plus standards. It includes the runtime version of the Distinct TCP/IP stack.

TermPAC

TermPAC is a character-based UNIX terminal client for Z39.50 server access. Low-end PCs and dumb terminals can use TermPAC to run Z39.50 client sessions for them. I think of it as a "public" Z39.50 client. TermPAC runs on Unix hardware. The idea is to enable client-type access to Z39.50 systems from old workstations as an interim step to having 486 machines with TCP/IP communication running their own client software.

Issues for WSU/DALNET: can our low-end PCs and 3270 terminals access TermPAC; if so, what hardware, software, terminal servers, and network systems do we need to put in place for that access; is this a cost-effective interim step to simply upgrading our dumb terminals to 486 PCs with TCP/IP access.

D. The new Horizon

Horizon is the ALS client/server library automation product. It offers cataloging, authority control, acquisitions, fund accounting, circualtion, serials control and public access. It requires a Unix server and microcomputer client stations. The staff mode client is currently only available in OS/2 systems, with a windows version expected in 1995.

The current version of Horizon (v. 3.1) is based on the Dynix Marquis system. It is licensed by over 100 sites of which 50% are academic. The largest academic site has 1 million volumes. Twenty sites are in the installation queue for v. 3.1. Version 3.2 is in beta test now at four sites. The target is two releases per year.

Indiana University was announced as the new ALS development partner for the academic Horizon product.

Issues for WSU/DALNET: are we taking appropriate steps to position ourselves for client/server technology.

II. Steps to Client/Server Technology

Client/server technology still seems to be the future for library systems. The role of the mainframe in that future is less clear, e.g., its function as a server. In order to position ourselves for the next generation library system, we need to

continue our migration to Ethernet networks with TCP/IP protocol and to 486 or better client workstations. Our staff and users need to familiarize themselves with a Windows environment.

One hurdle to our complete switch to Ethernet and TCP/IP is the LMS requirement for fixed CICS terminal IDs for much of its functionality. The LMS still uses fixed IDs for system printing, including spine labels; for circulation terminals (until LMS 5.2); for Navigator, which controls LUIS menus, database logon, location based catalogs, and print/download features; and for GTO machines for OCLC record transfer.

We are investigating licensing a TCP/IP mainframe software package for the IBM 9121 that will map Internet ID's (i.e., IP addresses) to CICS terminal IDs and that will enable distributed printing over the Ethernet. We are also experimenting with the McGill University TCP3270 Windows software that works over the Ethernet and provides data entry and display of the ALA character set. WSU Library System is installing an Ethernet-based LAN in Technical Services that will enable all stations on the LAN to export OCLC records to the GTO machine.

The first LMS client product we will use is the staff PACLoan client. Plans are still underway to test PACLoan between WSU and OU this fall. Installing the PACLink TAG machine introduced our first UNIX machine into the LMS family.

The most likely next step seems to be to get the new WinPAC online catalog station client software for DALNET. Moving from dumb terminals to PCs for user access to LUIS will involve several steps, e.g., set up individual PC stations booted by diskette, migrate to networked stations managed by servers, use the McGill TCP3270 software which comes in both DOS and Windows versions.

After that, InfoShare is a logical "bridge" product to license. After we load PsycInfo on MDAS, we need to consider InfoShare for any future citation databases rather than adding more to our mainframe system. Licensing InfoShare and purchasing the Unix equipment and pre-loaded databases is not inexpensive, however.

Based on what I learned at NUGM, I think we are still on the right track for client/server technology.

III. New ALS Marketing Representative

Jim Lewis, our new ALS marketing rep, will be focusing on the needs of large ARL libraries. We should invite him to visit our WSU/DALNET site to demo these ALS products as we evaluate them during the coming year.