D R A F T

Implementation Schedule Options for WSUL

WSU Library Automation Planning Group

April 23, 1985

In response to two new goals for the WSUL Automation Project, the WSU LAPG has come up with these options for implementation of a GEAC libary system. The two new goals are:

1. to implement circulation as quickly as possible, preferably by Fall 1985;

2. to speed up the use of our automation funds so as not to lose them.

[Note: we could always pay a larger percentage of our contract with GEAC upon signing, thereby speeding up the cash flow like the U of M Dearborn had to do to avoid losing their funds. We do expect to sign a contract this fiscal year. The disadvantage this puts one in with the vendor is considered preferable to not being able to buy a system.]

If at all possible, these two new goals should not impact negatively on the plans for and the potential of DALNET.

OPTION I: CIRCULATION "ON-THE-FLY" (Purdy or Science only)

Description:

Implement circulation "on-the-fly" in Purdy using one "interim" GEAC 8000 located in the Purdy building. This method involves unlinked barcodes, unregistered patrons, and no circulation database. Basically, users would wait in lines at the circulation desk while circ staff keyed in their registration, issued them ID's, barcoded the books, keyed in call numbers, and checked the books out. The only data in the circ database would be call numbers and barcodes. This circ "system" could be "up" by October 1985, given the best circumstances. It is viewed by the LAPG as a throw-away system, since all the barcodes used would have to be re-linked to the database of the integrated system later, and the circulation records transferred, if that was possible. If the barcodes were not linked, all the barcodes applied to books would later have to be replaced by barcodes linked to bibliographic records. A similar method was used by Michigan State for their CLSI installation several years ago and they are still recovering from it.

They never linked to an integrated library system and they keyed in more than just the call number.

Possible@timeline:

June 1985:	Contract with GEAC for 60 day delivery of a temporary 8000, making sure it could be upgraded to a 9000 with a renegotiated contract for DALNET after it was established.
July 1985:	Have temporary site prep begun; begin work with GEAC to develop circulation parameters, codes, etc.; order barcodes and ID cards.
August 1985:	Have cabling run to Purdy circ desk. Complete temp. site prep. Install GEAC 8000 hardware and software.
September 1985:	GEAC trains computer operators an circulation staff; circ parameters, codes, etc. are loaded and tested.
October 1985:	Begin circulation "on-the-fly" at the Purdy circ desk.
December 1986:	Switch over to circ using re-linked barcodes and a master bibliographic database. The workload for installing the 9000 and loading the database will have been running parallel to the "on-the-fly" system.

Benefits:

Students do not have to complete McBee cards at Purdy, unless we give them the option when lines are too long. The library can announce that automation has begun. Purdy Circ staff can stop filing McBee cards, or at least most of the McBee cards.

Concerns:

Staff time saved by not filing McBee's will be more than made up by extra work of "on-the-fly" circ; in fact, more staff may be needed.

Staff will have to be re-trained to use a circulation system with a bib database later.

A manual circ system using mcBees may need to be kept functioning for peak circulation periods when lines are too long at the circ desk.

Additional funds not budgeted would be required for the temporary site prep, cabling Purdy, unlinked barcodes, and ID cards.

Having only a call number to identify an item will cause problems and will not provide much useful statistical or managerial data.

The workload of installing and operating this "on-the-fly" system will be added to the workload of implementing the integrated system in the permnent location, thus slowing down the latter implementation.

The transition from this system to the "real" system could be very confusing as old barcodes are relinked to the bib records in the master bibliographic database.

The local Overdues program we run at the CSC would have to continue, since manual circ would continue at all libraries except Purdy.

Budget/cash@flow@implications:

Since delivery would be in fiscal 1985, it could speed up the cash flow requirements, which called for the most money to be spent in fiscal 1986. The system would be smaller than a complete system, so the cash required will be less. GEAC would use the temporary 8000 in the 9000 configuration, as a Boolean processor, which we are to add in Phase Two of the WSUL installation, i.e., fiscal 1987.

The amount of additional funds required could be considered minimal -- approximately $10,000 for site prep, $3,500 for ID cards, and $8,000 for barcodes for 12 month's circulation -- for a total of $21,500 without any contingency funds.

Affect@on@future@DALNET@potential:

If this is truly a throw-away system, it should not impact significantly on DALNET's timeline. To the extent that barcodes can be relinked from the "on-the-fly" circ there may be a slow down on the DALNET system.

Wayne would not have time to consider the DALNET implications for their decisions, so future complications to incorporate DALNET would be inevitable, e.g., with the purchase of barcodes and ID cards.

DALNET should not be required to share the additional costs of Wayne's "on-the-fly" implementation.

Wayne's experience would benefit DALNET.

If GEAC cannot deliver the 9000, and WSUL is already up on an 8000 with circ, DALNET cannot then go to a different vendor for a system, unless WSUL is willing to deal with the consequences.

OPTION II: IMPLEMENT BASIC CIRCULATION SYSTEM (PURDY or SCIENCE ONLY)

Description:

Implement circulation in Purdy using one "interim" GEAC 8000 located in the Purdy building. This method involves linked barcodes, registered patrons, and a very brief record circulation database. Basically, this is the pre-integrated library system method used by libraries a few years ago who bought circ systems only. To implement a master full MARC record database later and synchronize it with the brief circ records and barcodes already in use is a significant task -- one which is similar to the University of Michigan's situation, except that we would use briefer records to make the workload manageable on a single 8000. This system could be operational in January 1986, at the very earliest.

Possible timeline:

May 1985:	have OCLC archive tape cut-off as of May 31; buy unlinked barcodes to be added to OCLC records after tape cut-off; identify vendor to prepare tapes for loading and develop specs for the job with GEAC; identify temporary site.
June 1985:	begin adding barcodes to OCLC records for new and reconned items; complete GEAC contract with 60 day delivery for temporary 8000 and future contract for the 9000; receive, check, copy and ship most recent OCLC tape (plus all

previous tapes) to vendor of choice; put through work orders to do temporary site prep.; get specs from GEAC for patron tapes.

July 1985: begin temporary site prep; vendor de-dupes tape and adds barcodes; order ID cards and patron barcodes; send sample records to GEAC to program the circ loader; develop specs for circ loader.

August 1985: vendor creates barcode tape in call number order; barcodes printed; site prep completed for the temporary site; GEAC delivers system and begins installation and software testing.

September 1985: begin barcoding materials during Fall term; GEAC trains computer operators and data entry staff; circ loader delivered; install cabling and wiring at Purdy circ desk.

October 1985: Continue barcoding; test OCLC tape to circ loader; accept circ loader after needed fixes are done; install terminals and other peripherals at Purdy circ desk; work with GEAC to develop circ parameters, codes, etc.

November 1985: Continue barcoding; begin barcoding problem solving; begin loading circ database (de-duped records @ 5000/hr. then tapes from June on at @500/hr.); get sample tape of patron names and addresses from SIS; develop specs for patron file to be built.

December 1985: continue barcoding and problem solving; continue loading circ database; test patron tape; load circ parameters, codes, etc.

January 1986: get current patron tape and load; finalize circ "on-the-fly" procedures; set patron validation procedures; finish loading circ database and stabilize the system; complete training of circ operators; BRING UP CIRC.

February 1986: continue OCLC tape loads weekly into

circ database; operate circ.

March 1986: complete site prep for Science Basement (the workload for which has been running parallel to the circ implementation); install GEAC 9000 system and load and test software; continue to operate 8000 system.

April 1986: train operators for 9000; begin to test MARC database loader on 9000 (written for DALNET database, if DALNET was organized in the fall.)

May 1986: complete testing of MARC database loader on the 9000; continue to operate 8000 system.

June 1986: begin loading full-MARC record database on the 9000.

December 1986: operate parallel systems until MARC database loaded on 9000 and data from 8000 translated and merged in.

Benefits:

Same benefits as Option I, plus these:

"Circ-on-the-fly" is reduced to those items that were not on the OCLC tapes and therefore are unlinked.

Brief bib data in the circ database enables better overdue/fine info, statistics and reports, and even public query -- for Purdy only.

Enables use of linked barcodes, for start-up.

Work done is not thrown away, but used in the future 9000 system.

Re-training of Circ staff for the 9000 system should be less extensive, since they would already be using a brief record bib database.

Patron registration would have been largely done in advance, reducing delays to patrons at the circ desk.

This option builds a brief record circ database only, enabling AACR2 flipping and authority file building to go on later, in preparation for the OPAC on the 9000.

Concerns:

This option takes us back to pre-integrated library system implementation methods, but, if a module has to be implemented quickly, better circ than the online catalog, which has a more complex database. It requires 2 GEAC 8000's for an integrated library system, with circ on one and the OPAC on the other, like we saw at the University of Maryland.

The workload of installing and operating this circ system for Purdy only will be added to the workload of implementing the integrated system on the 9000 in the permanent location, thus slowing down the latter implementation.

The translation of this system into the 9000 could be a problem, causing downtime that is unavoidable.

The local Overdues system we run at the CSC would have to continue, since manual circ would continue at all libraries except Purdy.

Budget/cash@flow@implications:

Since delivery of the temporary 8000 would be in fiscal 1985, it would increase the cash flow requirements for this year. Depending on our contract with GEAC, we may be required to pay extra for the temporary 8000. It fits into the 9000 configuration as the Boolean processor we get in Phase 2 for WSU, which we had in the budget for fiscal 1987.

The amount of additional funds required could be considered minimal -- approximately $10,000 for site prep, and $3,500 for ID cards --for a total of $13,500 without contingency funds.

Affect@on@future@DALNET@potential:

This method enables the option of a joint DALNET database being built on the 9000, should DALNET form by September 1985. The WSU circ data would be linked later.

DALNET should not be required to share the additional costs of Wayne's temporary 8000 installation.

Wayne would not have time to consider the DALNET implications for their decisions, so future complications to incorporate DALNET would be inevitable.

Wayne's experience would benefit DALNET.

DALNET may lose the option of contracting with another vendor, should GEAC be unable to deliver a 9000 system.

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