DALNET NOTIS PROJECT MANAGERS' MEETING

September 10, 1990, 1:00 - 3:00 p.m.
Wayne State University Libraries—Dean's Conference Room

Agenda

 I. Communications/Telephone Support Goals (attached)

 II. Fall Training Needs for DALNET Libraries

III. NOTIS Location Based Searching Requirements (attached)

 IV. NOTIS 1990 LMS Enhancement Ballot (previously distributed)

  V. Progress Reports

   A. SAS Report Development
      1. Acquisitions
      2. Circulation
   B. GTO Implementation
   C. LCSH Loading
   D. Keyword
   E. Feasibility Study of Merging Bib Files
   F. Derive Overlay Software
   G. System Performance Problems
   H. Catalogers' Update Session
   I. "Distributed" Authority Work
   J. NUGM '90 Attendance

 VI. Problems/Questions/Other Announcements

   A. Order Records

L. Bugg
8-30-90

LB90-358

DALNET PROJECT MANAGERS' MEETING

September 10, 1990

Minutes

Present: D. Adams, L. Bugg, I. David, K. Gauri, J. Flaherty,
W. Kane, M. Klein, C. Liner, H. Ma, S. Martin,
J. Murray, A. Sargent (for J. Houghton), J. Smith,
C. Wecker

I. The new librarian in the Systems Office, Bill Kane, was introduced to the Project Managers.

II. The DALNET Database Statistics (as of August 1990) were distributed to the group. L. Bugg will forward these statistics to Project Managers on a monthly basis. Oakland University's retrospective GPO records (over 123,000) loaded into production September 8 were not included in this count.

III. Communications/Telephone Support Goals

With the recent addition of another librarian, the WSU Systems Office would like to identify ways to increase its responsiveness to DALNET member libraries. L. Bugg circulated a draft document called "DALNET User Service Policy: Operational Support of NOTIS Library Management System (LMS) Communications/Telephone Support" to be used as the basis for discussion. The first objective was to identify goals, followed by ideas of how these goals could be accomplished.

The group discussed the five communication goals in the draft document. The group identified three categories of telephone calls to the DALNET Office: emergencies, questions of an immediate (but not emergency) nature, and routine questions. Response from the Systems Office may vary, depending on the category of telephone call, as follows:

1. Emergencies: If none of the DALNET librarians are available, Project Managers can make urgent calls to other people in the Systems Office. Staff will know how to reach a librarian so an immediate response should usually be possible.

2. Questions of an Immediate Nature: If none of the DALNET librarians are available, a message will be taken by the Student Assistant or will be recorded on the answering machine. The answering machine will be monitored at least once an hour. A librarian will respond to the caller as soon as possible, but within four hours.

3.   Routine Questions: DALNET librarians will respond to
these telephone calls at their convenience, but within
24 hours. All agreed that electronic mail should be
used for routine questions. When questions are too
complex to explain via electronic mail, Project
Managers could email a note to DALNET librarians asking
them to call. FAX can also be used to transmit
questions or information, e.g., screen prints.

Louise explained that currently there are two answering
machines: one that picks up messages from the librarians'
phones and one that picks up messages from the programmers'
phones.

The group discussed having designated hours during which a
DALNET librarian would be available to answer the phone.
The group did not feel that this was necessary.

L. Bugg reviewed the current DALNET policies for
communications/telephone support. She will forward to
Project Managers a list of all staff in the Systems Office
and their telephone numbers. L. Bugg will prepare a final
document on telephone support to be forwarded to the Board.
A major objective of adding a librarian to the staff was to
increase the DALNET Office's responsiveness to member
libraries. This policy should help meet this objective.

IV. Fall Training Needs for DALNET Libraries

Member libraries' staff will be offered training in the Fall
for two new capabilities—use of LCSH records as resource
authority records and use of the Derive Overlay software
(AOVL/BOVL). Training for new NOTIS Library Management
System releases has been offered free of charge to DALNET
libraries, as part of their basic support.

L. Bugg asked if there was a need for training sessions
beyond those conducted for implementation of the various
NOTIS modules. These sessions could include: 1) "refresher"
training sessions for DALNET libraries that have received
training on a particular module, but have either new staff
or staff reassigned to new responsibilities; 2) sessions for
member libraries' staff in instances where the DALNET
library wanted to supplement its own training, and 3)
regularly scheduled sessions covering each module, staff
mode training, MHI, etc. These sessions would cost the
current rate, but could be "paid" with contracted training
days, if any remained. L. Bugg told the Project Managers
how many contracted training days their libraries had left.

Project Managers felt that additional training should be available "on demand," rather than scheduled. They were interested in having the additional training sessions conducted for a group of staff from more than one DALNET library. They also requested that Staff Mode training sessions geared to public services staff be added to the online catalog implementation training.

The group was very interested in having annual staff update sessions for each module—much like the Database Standards Committee's Catalogers' Update sessions. Update sessions provide staff from DALNET libraries with the opportunity to discuss common problems and solutions. It was recommended that such sessions be organized by the DALNET Committees already existing for each module.

V. NOTIS Location Based Searching Requirements

L. Bugg distributed the latest revision of the location-based searching requirements written by the NOTIS Consortium/Network Special Interest Group. It incorporates the discussion of an earlier draft of this document at the SIG meeting at Summer ALA. All suggestions made at the DALNET Project Managers meeting last Spring have been included in this document.

VI. NOTIS 1990 LMS Enhancement Ballot

L. Bugg reviewed the 1990 NOTIS Enhancement Ballot recently sent to DALNET Project Managers, to see if there was any consensus in the group on the highest priorities. The ballot includes a separate section on each module as well as a technical section. Project Managers agreed that the technical section could be filled out by the DALNET Office. DALNET Project Managers should return their ballots to the Systems Office by September 17.

VII. Progress Reports

A. **SAS Report Development**

1. Acquisitions: Programmers have completed development of the top two reports on the list of desired SAS reports generated by the Acquisitions Task Force. A new titles list and a list of serials and standing orders by fund can now be requested. Work has begun on the third report—an alphabetic list of serials. The Acquisitions Task Force will review the specifications; a sample should be available in late October/early November.

Thus far, a new titles list has been created for Wayne State and Children's Hospital. Many Project Managers were interested in receiving new titles lists for their libraries. A sample page from Children's list, along with instructions on editing the copy holdings record for production of the list, will be sent to all Project Managers.

2. <u>Circulation</u>: The first priority SAS report from the Circulation Task Force—a list of borrowers who have not paid their bills—has been developed. It will be discussed at the Circulation Task Force meeting next week.

L. Bugg will send a progress report on SAS reports to Project Managers on a regular basis.

B. **GTO Implementation**

L. Bugg reported her findings to date on the installation of OCLC's PRISM system and the delivery of NOTIS GTO Release 3.0. Only GTO 3.0 will work with PRISM. NOTIS expects to deliver 3.0 by the end of 1990. DALNET OCLC libraries were asked to delay scheduling PRISM training until January 1991. DALNET expects to have GTO 3.0 operational by the end of March.

List of current hardware needed for GTO were distributed to those needing to purchase it. Purchases can now be made from local vendors, as well as from NOTIS.

NOTIS discovered that the Passport software to be used with the First (i.e., old) OCLC system may alter the format of the screen print. An OCLC M3XX function key can be set up for the old screen print format. L. Bugg will distribute details about the function key as soon as they arrive from NOTIS.

C. **LCSH Loading**

The LCSH retrospective tapes (183,000+ records) were test loaded last week. Following testing of the retrospective file, the weekly update tapes will be loaded and tested. When testing has been completed, DALNET libraries will receive training in use of this resource file. The DALNET Database Standards Committee will recommend the desired frequency for loading the weekly update tapes.

D. **Keyword**

Keyword searching can now be done on all terminals accessing LUIS, including dial access. Response time will continue to be monitored to ensure that keyword searching is not affecting other LUIS searching.

E. **Feasibility Study of Merging Bibliographic Files**

L. Bugg is talking to NOTIS about a feasibility study of merging DALNET files. The study would identify the anticipated "gains and losses."

F. **Derive Overlay Software**

C. Wecker described the capabilities of this new software—called AOVL/BOVL (authority overlay/bibliographic overlay). It enables the overlay of an existing bibliographic record in one processing unit with another bibliographic record from the same or another processing unit within the DALNET database. This will be particularly useful for overlaying full bib records onto provisional records that have order records attached. Following testing of AOVL/BOVL, DALNET Libraries' staff will be trained on its use.

G. **System Performance**

L. Bugg sent a memo to DALNET sites about the three problems that have been affecting system performance: front end problems, power outages, and Release 4.6 "crashes." She outlined steps being taken to remedy these problems. One problem that has been reoccurring with 4.6 is frequent ATNI abends. When many of these occur during a given period, they may be related to the system crashing. In order to assist with diagnosing ATNI abends, DALNET Libraries' staff are asked to send screen prints with the abend message to the DALNET Office. Printouts need to include the date, time, terminal ID, and make and model of terminal.

H. **Catalogers' Update Session**

C. Wecker circulated packets to Project Managers with the announcement and agendas for this half-day update session to be held at Detroit Public Library on the morning of October 4.

I. **"Distributed" Authority Work**

Currently, there are three libraries, in addition to WSU, whose staff are authorized to update authority records for other processing units: Oakland University, University of Detroit, and the Detroit Public Library. Wayne County Community College staff will probably be authorized later this Fall. The remaining libraries will be authorized after they gain more experience with online authority work.

J. **NUGM '90 Attendance**

Those attending the NOTIS Users Group Meeting in October are: Eric Condic and Alexis Salisz from Oakland University; Anne Sargent from the University of Detroit; Helen Ma and Terry Potvin from the Detroit Public Library; Anaclare Evans, Barbara Heath, and Jeffrey Pearson from Wayne State University; and L. Bugg, G. Marck, and C. Wecker from the DALNET Office. In addition, several people will be attending workshops the day before NUGM, as follows: B. Heath, H. Ma, and C. Wecker—MARC Holdings; W. Kane—OPAC; G. Marck—Release 5.0.

VIII **Problems/Questions/Other Announcements**

A. **Order Records**

L. Bugg asked for review of DALNET policy for allowing authorized staff to look at each other's order/pay/receipt records. Currently, libraries can look at each other's bibliographic, copy holdings, volume holdings, and item records. Order records contain cost information. Most of the Project Managers said it was fine to let other libraries view their order records; others will PROFS C. Wecker regarding this issue. C. Wecker will then make sure the security tables reflect this policy.

B. **DALNET Access Committee**

A question was raised regarding this Committee. J. Flaherty reported that it has not yet convened.

C.   **Charging for Printing Done Centrally**

The University Computing Center (UCC) informed L. Bugg that, beginning October 1, they will begin to charge for consumables, including paper used for printing. L. Bugg is getting cost information from the UCC to prepare a charging schedule for the DALNET Libraries. In the meantime, DALNET libraries not yet using distributed printing may want to step up their plans to get it in operation. George Marck will contact Project Managers ready to proceed with distributed printing. L. Bugg will send out the list of currently approved printers that can be used.

The next DALNET Project Managers' Meeting is scheduled for November 4, at 1:00 p.m. in the WSUL Dean's Conference Room. As a reminder, Project Managers meet five times a year, in September, November, January, March and June, on the first Monday (unless it is a holiday) at 1:00 p.m.

Notes by

Charlene Wecker
September 19, 1990

LB90-38L

DALNET User Service Policy

Operational Support of NOTIS Library Management System (LMS)

Communication/Telephone Support

A. **Communication Goals**

1. To have a DALNET Office librarian respond within an hour to telephoned problems of an immediate nature—Monday through Friday, 8:30 to 5:00, except University holidays.
2. To be able to talk to a DALNET Office librarian weekdays during designated hours.
3. To have a DALNET Office librarian respond within 24 hours to telephoned questions of a routine nature.
4. To understand calling procedures, for both routine and emergency calls.
5. To understand DALNET's use of electronic mail and FAX.

B. **Current DALNET Communications/Telephone Support Policies**

1. DALNET Office librarians are the first level of contact for help.
2. The programmer/analysts are called only in emergencies or when the caller has been referred to them.
3. A student assistant will take call overflow messages for the DALNET librarians, and will interrupt them with emergencies or messages requiring immediate attention.
4. The DALNET administrative assistant can be called directly in matters relating to secretarial support for the Office, e.g., meeting schedules and attendance, distribution of documentation, responses to mailings.
5. Anyone from a DALNET library can call the DALNET Office. DALNET libraries are expected to coordinate calls from their staff.
6. Other Wayne State public and technical services staff should be called only when the caller has been referred to them, with the exception of the Head of Database Management, who is contacted according to established DALNET authority database maintenance procedures.
7. All DALNET Office staff, project managers, and site administrators are expected to have mail boxes accessible from WSU's PROFS electronic mail system. They are expected to review their mail twice a day.

DRAFT
L. Bugg/C. Wecker   9/7/90
LB90-364

USER REQUIREMENTS FOR NOTIS "SEARCH BY LOCATION"

NOTIS Systems Inc. is planning to develop an enhanced
searching capability to allow users to limit searches to
specific locations. This capability is extremely important
to NOTIS consortia.

The NOTIS Consortia/Networks Special Interest Group would
like to see the following capabilities as part of such an
enhancement.

1. Define locations that can be searched

MANDATORY: Provide the ability to search a single
processing unit, a single institution group (union catalog),
or a location group (a table-controlled logical group of
locations such as all locations in a physical building or
all locations of the same material type).

Provide the ability to index any given location and
sublocation under more than one location group through table
definition. (Allowing searchers to retrieve items in
"Georgetown Law Library Microforms" under "Law Libraries"
AND "Microform Collections"). A location group could
contain locations from different processing units.

DESIRABLE: Provide the ability to index multiple
institution groups, or locations from different institution
groups, together into a search location group.

2. Choose a location to search

MANDATORY: Provide a command to change the search location
at any time, affecting all subsequent searches. This should
provide for optional display of a menu of the defined search
locations (institution groups, processing units, and
location groups), so searchers don't have to know how
collections are arranged in the data base.

Default the search to a particular search location based on
terminal ID (through a table). Provide a time-out function
that would return the screen to the main search menu,
resuming the original default search location. Provide for
identifying a "terminal location" for dial-in searchers.

Display the name of the location being searched in a banner
, on the screen at all times, as a reminder.

DESIRABLE: Provide different menus of search locations for
different terminal locations (based on terminal ID). This
would allow staff to arrange the lists of other available
search locations in a meaningful order for that location.

3. Display only entries from selected location(s).

MANDATORY: Display only those index entries for the search location that was selected. If there are no matching index entries at the selected location, provide the capability to see entries for other locations [or in the union catalog], with a message such as "No match found at the selected location. To see items found at other locations, enter (command)".

For authority records, display all cross-references as encountered in the index, even if there are no corresponding items in the selected location (a blind reference). If the searcher chooses a cross-reference on search redirect which has no matches in that location, display the same message option as described above. NOTE: This is one area where inherent NOTIS design factors dictate what is feasible to include in this feature. It probably would not be feasible to ask the searcher to wait while the system went out to check the holding locations for every cross-reference encountered in the index. (Since authority records are not directly linked to bib records, that information is not already available through the index.)

4. Display copy holdings in a meaningful order

Currently, copy statements are stored and displayed in the order added to the record, so that holdings for a particular location or branch may be scattered throughout the list.

MANDATORY: When the searcher displays a particular bibliographic record with multiple copy holdings statements, display copies belonging to the same location together, in a table-controlled order, e.g. alphabetically by location name.

DESIRABLE: Display the copy statements in order by location such that copies belonging to the selected search location are displayed first. That is, a searcher looking for Main branch materials would see those items first, ahead of East Branch items.

5. Allow resubmission of the search at other location(s)

MANDATORY: Allow searcher to use the "r" (Revise) command to resubmit the last-entered search at a different location, to broaden or narrow the search.

6. Provide location-based searches in all search types

MANDATORY: The features described in this requirements statement should be available eventually in all OPAC searches, keyword/Boolean and staff searches (implementation in staff mode could come later).