DALNET NOTIS Project Managers' Meeting

June 11, 1990 -- 1:30 - 4:30 p.m.
WSU Purdy Library—Dean's Conference Room

AGENDA

   I. NOTIS Release 4.6.1 Implementation-status review

  II. DALNET requirements for NOTIS location based searching previously distributed.

 III. NOTIS Consortium SIG Final Enhancements Ballot (previously distributed)

  IV. NOTIS User Directory Update Sheets -- Charlene Wecker

   V. Progress Reports

       A. Plan for implementing distributed authority work
       B. DALNET Cataloger's Update Sessions
       C. Derive overlay software
       D. Acquisitions reports: (1) New titles list; (2) Lists by fund
       E. Keyword/Boolean development plans
       F. MDAS planning
       G. New Systems Librarian position
       H. NOTIS meeting at ALA
       I. NOTIS SIG Enhancement ballots (other than Consortium)

  VI. Questions/Announcements

L. Bugg
6/1/90

LB90-257

DALNET NOTIS Project Managers' Meeting

June 11, 1990
Minutes

Present: D. Adams, L. Bugg, I. David, K. Gauri, G. Hicks (for
           J. Flaherty), M. Klein, C. Liner, H. Ma, S. Martin, J. Murray,
           J. Smith, C. Wecker, F. Young (for J. Houghton)

I. New Systems Librarian Position

An offer has been made to and accepted by Bill Kane, currently a
Reference Librarian in Purdy/Kresge. He has been very involved in
user education, both as a Public Services librarian and as the
librarian in charge of our Library Skills course. The paperwork is
currently being put through; it is expected that he will join the
Systems Office staff in July.

II. NOTIS Release 4.6.1 Implementation

Implementation of NOTIS Release 4.6.1 has gone well. The Systems
Office is currently training key DALNET staff in the use of the new
staff mode Merged Headings Index (MHI). The first "round" of
training is for MHI use in Technical Services. During July and
August, sessions will be held for Public Services staff of DALNET
libraries. This training will be designed and conducted by B. Kane
and C. Wecker, emphasizing use in Public Services.

L. Bugg distributed order forms for the NOTIS Tag Tables for Release
4.6. Forms should be mailed or faxed to E. Franks in the Systems
Office.

III. DALNET Requirements for NOTIS Location Based Searching

The Group reviewed the three-page document written by a Task Force
of the NOTIS Consortium/Network Special Interest Group (SIG)
entitled "Requirements for NOTIS Search by Location." This document
will be a major agenda item at the meeting of the SIG being held at
ALA on Saturday evening. This document has been forwarded to the
Systems Analyst at NOTIS who is designing location-based searching.

In the document, features were designated as either "minimum" or
"desirable," although all the features are "essential" for the
"optimal" location-based searching.

The Project Managers made the following comments:

1.   Choose A Location To Search

       Minimum: The menu displaying choices of locations/groups of
       locations to search should be able to be controlled by
       terminal. A "time-out" component is necessary to return the
       screen to the menu after a specified period of inactivity.

Desirable: Locations should be able to be grouped across processing units. (This is probably implied by the SIG document, but needs to be clarified.)

2. Display Only Entries From Selected Location(s)

Minimum: In addition to the message "No match found at the selected location," options should be provided with possible reasons why, how to proceed, etc. (This screen should be similar in concept to the current OPAC help screen for "no hits.")

3. Display Copy Holdings "Nearest" To Searcher First

It was not clear what was meant by this section. If location-based searching was designed as described in sections 1. and 2. of the SIG document, the search would already be "limited" to the search location. If it means within a location group, the display should be so ordered.

4. Display Location Being Searched

The Group emphasized how vital it is that the location (institution group, processing unit, or location group) be displayed on the screen at all times.

5. Allow Resubmission of the Search at All Location(s)

The Group strongly believed that this was very important and should be moved "up" from "desirable" to "minimum."

The Group agreed that, as a general principle, location-based searching should parallel MDAS searching, where applicable, e.g., the menu, movement from file to file, the technique for having a search "carried" over to the next file, etc. This will maximize ease of use.

IV. NOTIS Consortium SIG Final Enhancements Ballot

L. Bugg and C. Wecker created the "final" enhancement ballot based on the returned "round one" ballots. Ballots are due back from the consortium sites on July 16. Ballots are due to C. Wecker from the DALNET sites on July 2, to allow time to merge responses from all twelve DALNET sites into a single DALNET consortium response.

Since enhancements included in Release 5.0 (slated for late 1990/early 1991) "seem" to be fairly firm, the decision was made to exclude 5.0 enhancements from this ballot. Enhancements that NOTIS has said would be in 5.1 were included on the ballot.

The "final" ballot includes all enhancements which received votes in the first round. Some enhancements were **very** specific or were very similar to others and, therefore, were grouped together into larger categories. The top ten enhancements on the back page will be forwarded as the "official" SIG-recommended enhancements to NOTIS. "Top" enhancements listed under specific modules on the first three pages will be forwarded to the appropriate "module-related" SIG as input from our SIG.

L. Bugg then reviewed the ballot, section by section, and answered any questions regarding particular enhancements.

V.   NOTIS User Directory Update Sheets

C. Wecker distributed copies of DALNET libraries' User Profiles as they appear in the current NOTIS User Directory. DALNET libraries should update these sheets, as necessary, and forward them to C. Wecker by Monday, June 19. The next edition of the User Directory will be distributed at the NUGM '90 in October.

VI.   Progress Reports

A.   Plan for Implementing Distributed Authority Work

Now that 4.6 has been implemented, authority work will be distributed among DALNET libraries according to the plan developed following N. Hunn's (NOTIS) visit last year. Oakland University will be the "alpha" site and will begin in mid-June. During the summer, Detroit Public Library and the University of Detroit will be phased in. In the Fall, Wayne County Community College will begin. Other libraries will participate in the future as they become more experienced in authority work.

B.   DALNET Catalogers' Update Session

There will be a Catalogers' Update Session on October 4 at Detroit Public Library. The major topics to be discussed will be implications of the Merged Headings Index, Conflict and Error Detection reports, distribution of authority work among DALNET libraries, and other cataloging and authority matters relating to the implementation of NOTIS Release 4.6.

C.   Derive Overlay Software

L. Bugg has ordered this software (at $3,000). We hope it will be in place by Fall.

D.   LCSH Tapes

The LSCH tapes have been ordered. There is no delivery date yet.

E.   Acquisitions Reports

Now that 4.6 has been implemented, the Systems Office is ready to accept orders from DALNET libraries for Acquisitions (SAS) products.

We have now produced both a new titles list and lists of orders by fund. L. Bugg sent sample copies of the new titles list (done for our Law Library) to DALNET Project Managers. We are currently printing it for WSU Law Library. The Law list is sorted by subject heading; one sorted by call number is being designed for the WSU Science and Engineering Library.

The lists by fund can be subarranged by title or author/title. Only open orders are listed. The list can include either detailed payment information (i.e., all payments within a given fiscal year or date range), if needed.

F.   Keyword/Boolean Development Plans

P. Spyers-Duran and L. Bugg met with Jane Burke, John Kolman, and Gene Adams on June 5 regarding an MDAS contract and Keyword/Boolean searching on our files. MDAS can be used as we had hoped, as an interim solution for keyword searching in our file configuration. The long term solution for keyword searching in our configuration doesn't look good. NOTIS is concerned because our file structure is unique among NOTIS sites. NOTIS finds it expensive to support a single site with this structure and has requested that we change our structure to a single file. L. Bugg is reviewing this situation with the programmers to determine the implications of such a change to our operation.

If the decision is made to maintain our current file structure, we would need to negotiate with NOTIS and BRS for access to the Keyword/Boolean source code to do the necessary "fix" ourselves. NOTIS does not feel that maintenance of our current structure is desirable. Future NOTIS Releases may need further customization to operate in the unique DALNET structure.

If we decide to reconfigure into one "giant" file, this will need to be done when NOTIS implements location-based searching (in approximately two years). To use MDAS in the interim as we envisioned, we need to be in separate files.

G. MDAS Planning

NOTIS is preparing a cost proposal for an MDAS license for the DALNET site. The unresolved issue is license fees to BRS for consortium use of their "search engine" in MDAS. P. Spyers-Duran and L. Bugg will meet with Jane Burke at ALA to continue pursuing this license.

H. NOTIS Meeting at ALA

The NOTIS Consortium/Network SIG meeting at ALA will be held on Saturday night, June 23, 8:00 - 10:00 p.m., in the Bismarck Hotel, Parlor A.

I. NOTIS SIG Enhancement Ballots (Other than Consortium)

The decision was made that DALNET libraries' staff who fill out enhancement ballots should forward copies of them to the DALNET Systems Office.

VII. Other

Included in the packet for today's meeting was a draft list of recommended NOTIS Circulation Reports developed by the DALNET Circulation Task Force. DALNET Project Managers were asked to indicate which they feel are the top 1 or 2 priority items in each group listed. Responses need to be returned to L. Bugg prior to the next meeting of the Task Force on July 25.

The next DALNET Project Managers' meeting is scheduled for **Monday, September 10, at 1:00 p.m.** in the WSUL Dean's Conference Room.

Notes by

Charlene Wecker
June 25, 1990

LB90-294

Wayne State University Libraries

Memorandum

TO: DALNET Project Managers

FROM: Louise Bugg *Louise*

SUBJECT: DALNET Circulation Management and Statistical Reports

DATE: June 11, 1990

The attached draft list of Recommended NOTIS Circulation Reports
was developed by the DALNET Circulation Task Force. Within each
section, the top priority report as identified by the Task Force
has been listed as Number 1. In the Statistical Reports section,
the top two priorities of the Task Force have been identified.

The Task Force's goal is to identify the top 1 or 2 priority
items in each section at its next meeting on July 25th. With the
Board's approval, these reports can be begun immediately.
Priorities for the remaining reports can be decided later.

The Task Force is seeking your input as to the top two priorities
for your institution within each section. Please indicate on the
lines provided your number 1 and 2 items, sign, and return the
list to me **BEFORE July 25th.**

Many thanks.

Attachment

cy: DALNET Circ Task Force

LB90-267

- D R A F T -

DALNET Circulation Standards Task Force
Priority Listing of Recommended NOTIS Circulation Reports

PATRON REPORTS

_____1. List of patrons with outstanding fines above a specified amount by patron group.

_____ Lists of patrons with blocks (including patrons who have reached charge/renewal limits)

_____ List of books with holds

_____ Lists of books currently charged, by patron category and within category by patron name

_____ Lists of all patrons in the system, first by patron category and within category by patron name

STATISTICAL REPORTS

_____1. Monthly circulation totals (items that appear on the operations reports)

_____2. Number of charges for each call number range by date by library/building

_____ Statistics by patron group
(a) the number of patron records per group; sorted as needed, including by zip code
(b) the number of charges per group

_____ Number of charges for each unlinked item, in call number order

_____ Number new patron IDs, by service unit, patron category, and date

_____ Number of items overdue, by service unit and 1st notice, 2nd notice, etc.

_____ Amounts collected, by service unit and operator ID

COURSE RESERVES REPORTS

_____1. Lists of items on reserve by professor, course, author, title

_____ Lists of items on course reserve by expiry date, then by professor

Institution_____

Signature_____

Date_____

June 8, 1990

LB90-267

NOTIS 4.6 TAG TABLES ORDER FORM

DALNET Institution:_____

Number of Copies: _____

Authorized Signature   Date

Each set of the Tag Tables is $40.00. (The Tag Tables can only
be ordered as a complete set.)

Please indicate billing preference:

                _____ bill separately

        or _____ debit deposit account

(If being billed separately, please indicate below the name and
exact address of person to whom invoice should be sent)

_____

_____

_____

_____

_____

Please return this form by FAX (577-4172) or mail to Betty
Franks, DALNET Office.