

DALNET NOTIS Project Managers Meeting

Agenda

Monday, March 20, 1989

- I. General Meeting -- 9:00 - 10:00 a.m.
 - A. OCLC Options for DALNET (GAC info attached) --
D. Adams
 - B. NOTIS Location Based Searching Requirements
(UPRLC proposal and letter attached)
 - C. Michigan NOTIS Users Meeting (June 8) Plans
 - D. DALNET/NOTIS Technical Bulletin Progress Report --
C. Wecker
 - E. NOTIS Release 4.5 Progress Report
 - F. Linking Local Library Systems
 - G. Other
- II. NOTIS Release 4.5 Demonstration -- 10:15 a.m. - 12 Noon
 - A. Course Reserves Module
 - B. Bill and Fine Module
 - C. Keyword/Boolean in LUIS
- III. LUNCH BREAK -- 12:00 - 1:00 p.m.
- IV. NOTIS Release 4.5 TABLES FOR CIRCULATION -- 1:00 - 3:00 p.m.

Only DALNET libraries currently using the circulation module should attend. Can probably accommodate two people per site. The revised tables will be due the first week of April, so they can be entered into the DALNET test region for 4.5. DALNET circ libraries will be asked to help test 4.5 during April.

Attachments

L. Bugg
March 10, 1989

LB89-102

DALNET NOTIS Project Managers

Meeting Minutes
Monday, March 20, 1989

Present: D. Adams, L. Bugg, E. Condic, J. Flaherty, K. Gauri,
J. Houghton, M. Klein, C. Liner, H. Ma, J. Murray,
J. Smith, C. Wecker

Absent: S. Martin

I. General Meeting (9:00 - 10:30 a.m.)

L. Bugg reviewed the agenda for the day. Judy Murray, the Project Manager for Oakland Community College Library (which joined DALNET in February), was introduced to the group.

A. OCLC Options for DALNET -- D. Adams

D. Adams described OCLC's Group Access Capability (GAC) which she learned about at a meeting of Oakland County's CORD (Council on Resource Development). Libraries can join up to four different GACs. Members of the GAC can search bibliographic holdings of all members of the GAC, participate in the OCLC Interlibrary Loan Subsystem for lending/borrowing titles held by GAC members, and access and update their serial Local Data Records for union listing purposes. This may be advantageous for the three DALNET libraries who have 3 character OCLC codes for union listing, but who do not have access to the ILL Subsystem.

A DALNET GAC may be advantageous only to these three libraries: Botsford, MCC, and OCC. Also discussed was the possible formation of a GAC that could include all libraries in Michigan.

There were many questions that arose from the discussion. D. Adams will pursue them with MLC. Questions included: Will a Michigan GAC be formed? Will it include all MLC members? All Michigan OCLC members? All Michigan sites with three character OCLC codes? What would be the costs for a Michigan GAC? Do bibliographic holdings of non-OCLC GAC members need to be tapeloaded into OCLC? The Interlibrary Loan component of the GACs especially interested DALNET because of the lack of an Interlibrary Loan Module on NOTIS.

B. NOTIS Location Based Searching Requirements

L. Bugg reviewed the UPRLC's Proposed List of Features for NOTIS' future location based searching enhancement. They are sending this document to NOTIS during the design phase for the enhancement. DALNET libraries are interested in a three level design rather than the two levels recommended by the UPRLC. L. Bugg will write a response to Northern and find out how far along NOTIS is on this development project.

C. Michigan NOTIS Users Meeting (June 8) Plans

H. Ma outlined the plans for this all-day meeting to be held at the new Library of Michigan facility. The morning portion of the meeting will include a speaker from NOTIS discussing upcoming enhancements, future plans, etc. and a 5 minute update from each of the Michigan NOTIS sites. L. Bugg will do the update for the DALNET Libraries. In the afternoon, there will be two one-hour breakout sessions. There will be 5 sessions during the first hour (mostly module-related) and six sessions the second hour. There will be a session each hour of interest to programmers. Each session will have a moderator and a recorder. Minutes will be circulated to Michigan NOTIS libraries following the meeting. There is no limit on the number that can attend from a library. There will also be a table for libraries' handouts for exchange.

H. Ma also announced that on April 26, from 9:00-1:00, the DALNET Database Standards Committee is holding a Cataloging/Authority Information meeting. Up to three people from each DALNET institution may attend. The meeting will be held in the Explorer's Room at the Detroit Public Library. An announcement will be sent to each DALNET library regarding the meeting.

D. DALNET Technical Bulletin

The DALNET Technical Bulletin that was proposed at the last Project Managers' Meeting has been modified. It will be issued on an "as needed" basis and will be devoted solely to "technical" information presented module-by-module. It will be

formatted with sections that can be separated out and kept in a notebook. DALNET libraries should forward to C. Wecker technical information (e.g., problems encountered and solutions) for inclusion in the Bulletin. It is hoped the first issue of the Bulletin will be issued shortly.

E. NOTIS Release 4.5 Progress Report

Course Reserve & Bill and Fine: These components of 4.5 are currently being tested in the Wayne-only test region.

Vendor Invoice Tape Load System (VITLS): WSU data is being loaded to test VITLS. We will be loading invoices on tape from Faxon.

Keyword/Boolean: Testing of this will begin soon. Implementation of Keyword is expected to begin in a conservative fashion, e.g., a few public terminals and a staff terminal in each Wayne State Library. Plans are to eventually have a terminal at each DALNET library authorized for Keyword/Boolean searching on the Wayne State database.

F. Linking Local Systems

L. Bugg distributed and briefly reviewed her summary of the MLA Technical Services Caucus on "Linking Local Library Systems" held on March 1.

G. Other

L. Bugg announced that Jane Burke (NOTIS's President) and Maribeth Ward, NOTIS's Vice President for Customer Services will be in Michigan this week visiting NOTIS installations. They will be at Wayne State on Wednesday morning. This will give L. Bugg the chance to discuss various enhancements, etc., of interest to DALNET libraries with them, e.g., progress on location based searching and Keyword/Boolean searching across multiple files.

C. Wecker will be calling a DALNET Screens Committee meeting for Release 4.5 screens in early April. She will contact Project Managers for names of Committee members.

II. NOTIS Release 4.5 Demonstration (10:30 a.m. - Noon)

Following the general meeting, L. Bugg described and conducted a "hands-on" demonstration of the NOTIS 4.5 Course Reserve and Bill and Fine modules. This not only provided the DALNET Project Managers with the opportunity to become more familiar with the features of these two new modules, but also provided a framework for the afternoon session on circulation tables.

III. NOTIS Release 4.5 Tables for Circulation (1:00 - 2:30 p.m.)

Following a lunch break, a session was held for DALNET members currently using the circulation module. L. Bugg reviewed the modifications that need to be made to libraries' current circulation tables for the implementation of NOTIS Release 4.5. Revised tables are due back from these libraries by April 7.

After the 4.5 tables are loaded, the DALNET test region will have Release 4.5 installed for testing. DALNET libraries "live" with circ will be asked to help with testing.

Notes by:

Charlene Wecker
March 22, 1989

LB89-119

Fact Sheet
July 1988

Group Resource Sharing Options

If you belong to a library group that wants to expand resource sharing activities, you'll be interested in OCLC's Group Database and Group Access Capabilities. With these services, you get complete and powerful resource sharing potential that includes database creation, maintenance, access, and inter-library loan.

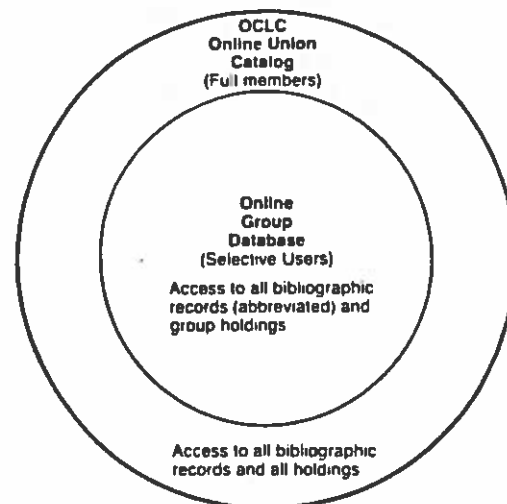
Through the Group Database Capability, OCLC[®] creates and maintains databases on a large scale (at the state or regional level) or on a smaller scale (at the city or county level). OCLC can also create special-interest databases, including bibliographic records, locations, and summary holdings information related to specific types of materials or libraries.

Group databases are created through OCLC Online System activity (current and retrospective cataloging and serials union listing), through tapeloading, through retrospective conversion activity (such as the OCLC RETROCON[®], MICROCON[®], MICROCON*PRO[™], and TAPECON[®] services), and beginning in late 1988, through the CAT CD-450 microcomputer-based compact disc cataloging system.

Once a database is created as part of the Online Union Catalog, all group participants, both OCLC members and nonmembers, may access it. Those libraries without automation can have their resource sharing needs met through Offsite Borrowing, described below.

OCLC's Group Database and Group Access capabilities offer a number of benefits.

- Access to the OCLC ILL Network of more than 3400 libraries
- Provide low-risk, low-cost method for establishing a Group Database that can be used by both OCLC members and nonmembers
- Increase the efficiency of interlibrary loan, improving resource sharing among your group members while providing libraries that are not OCLC members access to the resources of the full OCLC ILL Network
- Use equipment you currently have available for database searching, eliminating the need to purchase new or additional equipment



Group Database on OCLC

Database Creation

The first step in creating your group database is adding the records, both current and retrospective, of all group members to the Online Union Catalog. This can be done through one or a combination of five methods:

- Ongoing Online System Cataloging and Union Listing
- OCLC CAT CD-450 Compact Disc Cataloging System
- Tapeloading
- Retrospective Conversion
- Converting Holding Codes to Institution Symbols

1. Ongoing Online System Cataloging and Union Listing

Current and retrospective cataloging performed online using the OCLC Cataloging Subsystem adds records to the Online Union Catalog (OCLC). As an OCLC member, your records are added to the group database automatically.

In other words, you don't have to change your processing procedures to include records in a group database. A profiling process links your records into a single state, regional, or other group database.

In addition, serials data entered online by OCLC members and non-OCLC libraries using a fully integrated Serials Union List Component provide group participants with online access to summary holdings for serials held by the group.

2. CAT CD-450 System

In late 1988, OCLC will offer the microcomputer-based CAT CD-450 compact disc cataloging system. The system provides full MARC bibliographic record subsets of the OCLC Online Union Catalog and the complete Library of Congress authority file on compact disc.

The CAT CD-450 system can be used for both current cataloging and retrospective conversion. A dial access connection to the OCLC Online System enables you to search for records in and add location symbols to the Online System via batch processing. You also may contribute original cataloging records.

Combined use of CAT CD-450 and the OCLC Online System provide an average cataloging hit rate greater than 95%. The CAT CD-450 system runs on an OCLC M300, M300XT, or M310 Workstation. Up to four compact disc readers can be included in the system configuration to allow searching on multiple compact discs.

3. Tapeloading

Machine-readable bibliographic records from other sources can be batch loaded into the Online Union Catalog and your group database. Each tapeloading database participant is assigned a unique three-letter location symbol to identify its holdings. Currently, OCLC can load tapes from a variety of automated sources, and these capabilities continue to expand. OCLC evaluates tapes from other sources for tapeloading on request.

In addition, a Standard Union List Tapeload Capability allows union list group members and individual institutions to tapeload serial holdings. This one-time process creates Local Data Records (LDRs), which form the foundation of Online Union Lists.

4. Retrospective Conversion

OCLC provides a number of retrospective conversion options—the RETROCON, MICROCON, MICROCON*PRO, and TAPECON services. You choose the best method for converting your nonmachine-readable records into OCLC-MARC format and adding them to the OCLC Online Union Catalog.

- Through the OCLC RETROCON service, OCLC staff convert your library's records online from shellist or other card files according to customized instructions.
- The microcomputer-based MICROCON service allows your library staff to enter data on disk-

ettes using OCLC workstations or any IBM[®] PC-compatible hardware. OCLC performs the actual conversion by matching data on your diskettes with records in the Online Union Catalog.

- Through the new MICROCON*PRO service, you ship your shellist cards to OCLC, and we enter the data on diskettes. Records are machine-matched to the O.U.C. and you receive tapes of the single matches.
- With the TAPECON service, your library can upgrade machine-readable records to full OCLC-MARC records after reformatting existing machine-readable records according to specifications provided by OCLC.

5. Converting Holding Codes to Institution Symbols

Many institutions have their cataloging done by an OCLC processing center. Their records contain a four-character holding code, but display in the Online System under the three-character institution symbol of the OCLC processing center. While this approach is economical for cataloging, it masks the real location of the item, which can result in less efficient resource sharing.

OCLC can convert four-character holding codes to unique three-character institution symbols to reflect accurately the location of the material in the Online System. The process involves the initial conversion and tapeloading of retrospective bibliographic records and a monthly conversion and tapeloading of current cataloging, which continues to be done under the four-character holding code.

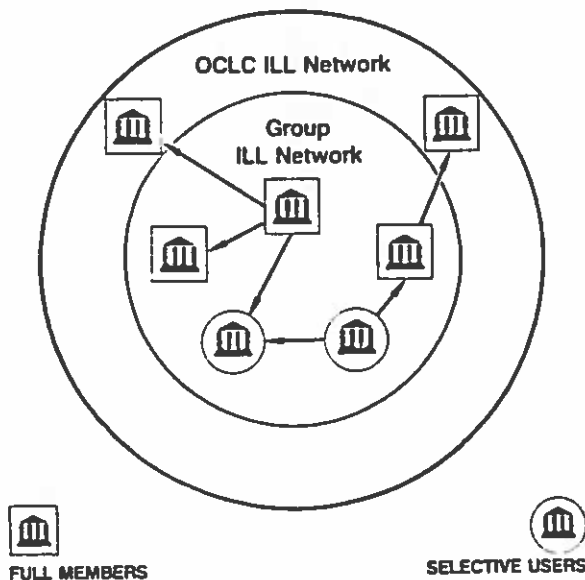
This approach lets OCLC processing centers continue to provide cataloging at lower prices to small libraries, using existing workflows and procedures. Libraries, however, can access the unique three-character institution symbols online for resource sharing purposes.

Database Maintenance

Your database will be maintained in a combination of online and batch processes.

You can update locations information in the database instantaneously. Locations symbols are added online as libraries catalog on the OCLC Online System. These Online System Cataloging activities incur no additional charges beyond standard Online System charges and require no changes to your workflow or procedures. In addition, locations can be deleted online as libraries' collections require. A credit is issued for each location deleted.

Ongoing database maintenance can be executed through batch tapeloading processes. The tapeloading maintenance function includes both batch addition of records and holdings, as well as deletion of locations within the group.



Group Access and Resource Sharing on OCLC

Database Access

Once your group's records are in the Online Union Catalog, OCLC executes an automated profiling procedure to pull these records into a single database. The database is accessible through OCLC's Group Access Capability to all OCLC member and nonmember group participants as an integrated subset of the OCLC Online Union Catalog. Your group database, accessible during normal Online System operating hours, uses all standard OCLC record access points. As a group database participant, you first search the Online Union Catalog for a bibliographic record, then identify which members of your group hold the item.

Within a group, OCLC recognizes two types of libraries:

- **OCLC members.** Group databases are part of the OCLC Online Union Catalog, and may be searched by any OCLC member. Members can access group databases using dedicated OCLC terminals and workstations or dial-access equipment they already own. (OCLC members are libraries that, according to present criteria, agree to contribute all current cataloging to the Online Union Catalog online, via the Cataloging Subsystem, taping, or a combination of the two. They access the OCLC online system using all current capabilities.)
- **Selective users.** Non-OCLC libraries may want to participate in a group database for resource sharing purposes, but may not find it practical to contribute any or all of their current cataloging

records to OCLC or the group database. These nonmember libraries, called selective users, may search the group database, access abbreviated bibliographic records from the entire Online Union Catalog, and borrow and lend within the group. They do not, however, have access to the locations and holdings data of libraries outside their group. Requests that cannot be satisfied within the group can be referred by OCLC members in the group to any of the more than 3,400 libraries in the OCLC Interlibrary Loan Network.

You and other group members can arrange to share materials using the OCLC Interlibrary Loan (ILL) Subsystem. The ILL Subsystem speeds interlibrary lending over an extensive telecommunications system, linking you to the shared resources of over 3,400 user libraries that make up the OCLC ILL Network. A growing number of resource centers and document suppliers, including the British Library Document Supply Center, Chemical Abstracts Service, The Library of Congress, The National Agricultural Library, The National Technical Information Service (NTIS), Universal Serials and Book Exchange, and University Microfilms International (UMI), are also ILL Subsystem participants.

The subsystem eliminates many of the time-consuming, labor-intensive tasks associated with interlibrary borrowing and lending. The electronic transmission of requests reduces turnaround time.

Offsite Borrowing

OCLC's Offsite Borrowing Capability helps non-OCLC libraries unable to search the group database or use the ILL Subsystem for resource sharing due to a lack of automation, staff shortages, inadequate budgets, or telecommunications costs. Through Offsite Borrowing, OCLC members act on behalf of smaller, non-OCLC libraries, borrowing and shipping materials for them.

OCLC is currently developing a system giving you the ability to build and access group databases for interlibrary loan and other resource-sharing purposes using compact disc technology. Look for announcements about this product in the future.

Setting up your group database is easy. Through a profiling procedure, OCLC identifies all the libraries in your group that are authorized to access your group database and links their bibliographic records, locations, and summary holdings records to fulfill your collective resource-sharing needs. OCLC can establish a group database and provide online access to it within a period of eight to twelve weeks.

For more information about OCLC's Group Database and Group Access Capabilities, contact your participating Network Office or call OCLC at these toll-free numbers:

- U.S.A. (outside Ohio): 800-848-5878, ext. 6258
- Ohio: 800-848-8286, ext. 6258
- Canada (Manitoba and East): 800-533-8201
(Saskatchewan and West): 800-854-5753

Libraries in the Asian/Pacific region, please contact OCLC Asian/Pacific Services, 6565 Frantz Road, Dublin, Ohio 43017-0702, U.S.A.

For related information about resource sharing through OCLC, please refer to the OCLC Catalog of Products and Services (Pub. No. 13c) and publications on Resource Sharing, Cataloging, and Retrospective Conversion available from your Network Office or OCLC.

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AFLI
Association for Library
Information
Duquesne University Library
Pittsburgh, PA 15282
(412) 434-6138

AMIGOS Bibliographic Council,
Inc.
11300 North Central
Expressway
Suite 321
Dallas, TX 75243
(214) 750-6150
(800) 843-8482
(800) 443-2548 (Texas only)

**Bibliographical Center for
Research (BCR)**
1777 South Bellaire
Suite 425
Denver, CO 80222
(303) 691-0550

BCR Ames Office
%Iowa State University Library
Room 295
Ames, IA 50011
(515) 292-1118, 1119

CAPCON
1717 Massachusetts Avenue,
NW
Suite 101
Washington, DC 20036
(202) 745-7722

**Federal Library and Information
Center Committee
(FEDLINK)**
Library of Congress
Adams Building
Room 1026C
Washington, DC 20540
(202) 287-6454

ILLINET OCLC Services
Illinois State Library
Centennial Building
Room 288
Springfield, IL 62756
(217) 785-1532

**Indiana Cooperative Library
Services Authority
(INCOLSA)**
5929 Lakeside Boulevard
Indianapolis, IN 46278
(317) 298-6570

**Michigan Library Consortium
(MLC)**
6810 South Cedar Street
Suite 8
Lansing, MI 48911
(517) 694-4242
(800) 292-1359 (Michigan only)

MINITEX
S-33 Wilson Library
University of Minnesota
309 19th Avenue South
Minneapolis, MN 55455-0414
(612) 624-0572

**Missouri Library Network Corp.
(MLNC)**
12166 Old Big Bend Boulevard
Suite 215
St. Louis, MO 63122
(314) 965-7030

**Nebraska Library Commission
(NEBASE)**
1420 P Street
Lincoln, NE 68508
(402) 471-2045

NEUNET, Inc.
385 Elliot Street
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**OCLC Pacific Network
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250 W. First Street
Suite 340
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(714) 621-9998
(800) 854-5753
(800) 472-1787 (California only)

**OCLC Pacific Network
(PACNET)**
%University of Portland Library
Box 03376
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Portland, OR 97203
(503) 283-4794

**OCLC Pacific Network
(PACNET)**
%SeaFirst Bank Library
P.O. Box 3586-CSC-8
701 Fifth Avenue
Seattle, WA 98104
(206) 223-9499

**OCLC Pacific Network
(PACNET)**
San Francisco Office
(415) 386-2521

OHIONET
1500 West Lane Avenue
Columbus, OH 43221
(614) 486-2966
(800) 282-8975 (Ohio only)

PALINET
3401 Market Street
Suite 262
Philadelphia, PA 19104
(215) 382-7031
(800) 233-3401 (PA only)
(800) 233-3402 (DE, MD, and
NJ)

**Pittsburgh Regional Library
Center (PRLC)**
Chatham College
Beatty Hall
Pittsburgh, PA 15232-2898
(412) 441-6409
(800) 242-5790 (PA only)

SOLINET
Southeastern Library Network,
Inc.
400 Colony Square, Plaza Level
1201 Peachtree Street, NE
Atlanta, GA 30361
(404) 892-0943
(800) 999-8558

**State University of New York
(SUNY)**
State University Plaza
Albany, NY 12246
(518) 443-5444
(800) 542-3353 (NY only)

**Wisconsin InterLibrary Services
(WILS)**
728 State Street, Room 464
Madison, WI 53706
(608) 263-2773
(608) 263-5051



OCLC Online Computer Library Center, Inc.
6565 Frantz Road
Dublin, Ohio 43017-0702
(614) 764-6000

OCLC GROUP ACCESS CAPABILITY (GAC)

Start-up costs (if all participating libraries have 3 character codes)--profiling fees (up to 25 participants)	\$300.00
Ongoing costs	
Dial access password	\$50.00 per yr.
Compuserve	\$7.29 per hr.
ILL charge (within group only) (credit is given for loaning items)	\$0.95 per loan
Searching group locations	\$0.20 per item
Searching union list	\$0.10 per item

Note: MLC has estimated an average total cost for one interloan to be an average of \$2.61.

Northern
Michigan University
Marquette, Michigan 49855

OLSON LIBRARY

(906) 227-2117

February 8, 1989

Ms. Louise Bugg
Assistant Director for Library Systems
University Libraries
Wayne State University
5265 Cass Avenue
Detroit, MI 48202

Dear Louise:

Thank you for telling me that a meeting of Michigan NOTIS users may be held June 8th at LOM. I will pass the word among the UPRLC NOTIS users. In considering topics or leaders for breakout sessions, our recent experience at UPRLC has been in OCLC database preparation (with AMIGOS, BNA, and NOTIS Conversion Services), smart barcoding, and implementing cataloging. We hope to receive a final version of our customized loader shortly and unveil LUIS this spring. We have not yet implemented authority control, although our authority records are ready to load. A session that would help us better understand options for implementing authority control and overcome our trepidation would be most welcome.

The UPRLC Automated Library Services (ALS) Council has accepted a list of features members hope to find in location based searching. One can conceive of a host of related features. This short tentative list is intended to convey our fundamental assumptions about location based searching, to preserve the simplicity of LUIS, and to satisfy our immediate needs without greatly constraining the design. If the first version of location based searching provides at least these capabilities, it would succeed in our cooperative environment and remedy many problems.

Our list is attached for your review. Feel free to share it with others. The UPRLC is sending this list to NOTIS, but also wishes to pursue concerted action and to encourage discussion of location based searching. I hope this leads to a fruitful exchange of ideas among NOTIS users and to building some useful guidelines for NOTIS which articulate common needs.

Thank you for offering to raise the issue with DALNET in March.

Cordially,



Joanna Wagar
Chair, UPRLC ALS Technical Services Committee
(Head of Technical Services, Olson Library)

Location Based Searching or Customized Catalogs in NOTIS

A List of Features Proposed by UPRLC ALS Council

January 24, 1989

In LUIS, we propose that the patron have only two catalogs from which to choose (the default "home" catalog and the complete union catalog.) Libraries, represented by locations below the level of the processing unit, should be able to select a list of four-character primary location codes for the default LUIS catalog. A library should be able to select locations from other processing units as well as from its own processing unit for inclusion in the default catalog.

(1) Each library should be able to establish a default public catalog consisting of records with one or more selected primary four-character location codes. All LUIS searches initiated at that library's public terminals would display results only from this "home" catalog. The default catalog need not include the library's own location codes, but ordinarily would. Some special libraries may prefer to have another resource library's holdings as the default catalog. Some libraries may prefer to have the union catalog remain the default catalog; the design for location based searching should preserve this option.

(2) If a LUIS search matches entries of other locations than the default locations, a message would display informing the user that further information is available from the "union" catalog and giving the user the opportunity to expand the search and see the bibliographic record or the complete index display of matching records from all locations by entering one command, perhaps "u" for union or "a" for all. The message about the search matching other records in the larger database would display whether or not there were matches in the "home" catalog.

(3) When holdings from the union catalog are displayed in LUIS, the display of locations associated with a single title should be sorted alphabetically by the full location name or at least by primary location code. It would also be helpful to the patron if processing unit codes in identical lines of index displays were sorted alphabetically.

(4) The introductory LUIS screen might allow the option of initiating a search in the union catalog rather than the default catalog if the two are not identical. For example, a "u" might be added to the commands or used as a qualifier: au=,tu=,su= or a=twain,u.

In staff mode, we would prefer that the default catalog continue to be the complete union catalog. However, the terminal operator should be able to qualify any search by processing unit code or primary four-character location code. This feature is particularly helpful in acquisitions for recording receipt and payment of books and periodical issues.