

DALNET Project Managers' Meeting

December 16, 1988
9:00 a.m., Room 220, Purdy Library

Tentative Agenda

1. NOTIS Release 4.5 Implementation (Schedule Attached)
2. NOTIS Production Batch Job Schedule
 - Regular schedule
 - Holiday schedule
3. Distributed Printing
4. OCLC GTO
5. Keyword Boolean Development
6. DALNET Info Sheets to Provide near LUIS at each Library
7. DALNET Access and ILL Rules Directory
8. NOTIS Documentation
9. Joint Maintenance Contracts
 - Telex
 - Codex
10. NOTIS/DALNET Technical Bulletin
11. DALNET Committees
 - Database Standards
 - Acquisitions
 - Circ
12. Quarterly PM Meetings
13. Michigan NOTIS Users Meeting (June)?
14. Questions/Problems

Louise Bugg
12/9/88

LB89-26

DALNET PROJECT MANAGERS MEETING
December 16, 1988

Minutes

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

1. NOTIS 4.5 Implementation

L. Bugg reviewed the two-page document "NOTIS Release 4.5 Implementation Plan" which summarizes the enhancements being made to each module and outlines the timetable for implementation. Areas needing careful testing in a network environment were pointed out. Policies that will apply to all DALNET sites were identified. There may be some new features that cannot be used in a network, e.g., posting fines and bills paid to specific fund records in the Acquisitions fund files. DALNET Project Managers will be "oriented" in early February, so they can submit 4.5 table values that month.

2. NOTIS Production Batch Schedule

L. Bugg reviewed the batch schedule as well as the hours that NOTIS will be operational during the holiday period. This holiday is the first that has had such a high level of activity on the system. During this period, only circulation indexes will be run. WSU will forward to all Project Managers a copy of the regular DALNET batch schedule.

3. Distributed Printing

Oakland University will be the first site to implement distributed printing. Both circulation and acquisitions products have already been tested at O.U. As soon as Oakland receives the Memorex 1387 they have ordered, they will begin remote printing. Token ring and ASCII installations will need PC printers. If multi-part forms (e.g., order forms or circulation mailers) are to be printed, an impact printer is necessary. IBM's Quickwriter seems to be a good option for these libraries (ca. \$1,500), if they don't already have a suitable printer. Project Managers from the three hospital libraries and WCCC will be meeting together with L. Bugg to discuss options.

4. OCLC GTO

WSUL is ordering the NOTIS OCLC GTO (Generic Transfer Overlay), which is scheduled for release in January 1989. It appears necessary to combine all the loader programs for libraries using the GTO into one giant loader so that the GTO software will be able to translate OCLC locations appropriately. L. Bugg described the workflow: After transferring a record via the GTO, it will still be necessary for staff to create the necessary item and volume records on NOTIS. The GTO will provide for the successful transfer of diacritics. DALNET libraries can utilize both the GTO and the OCLC transfer via a Telex "black box." Each processing unit may need its own GTO terminal or at least its own OCLC terminal cabled to a GTO terminal. NOTIS has several questions outstanding on how the OCLC GTO will work.

5. Keyword/Boolean Development

The 4.5 NOTIS Release includes enhancements to Keyword/Boolean (KB). Response time is expected to be decreased to 1/3 of that of the 4.4 Release. WSU is planning to implement KB Memorial Day. Plans call for only using KB on a few terminals in each WSU Library Unit to monitor its effect on system resources. It will not initially be offered on dial-up. DALNET libraries may want staff terminals authorized for KB to search WSU LUIS records and learn about KB. We have asked NOTIS for the "fix" that would enable Keyword/Boolean searching of all DALNET libraries' records. We are waiting for written confirmation of NOTIS's verbal commitment to deliver this enhancement by the end of 1989. We volunteered to be the test site for this enhancement. There are eight help screens associated with Keyword/Boolean searching which will need to be reviewed for necessary local modifications. WSU will be training DALNET libraries' staff in the use of Keyword/Boolean searching.

6. DALNET Information Sheets to Provide near LUIS at each Library

This subject was discussed at the December DALNET Board Meeting. LUIS handouts could include information about how patrons can get access to materials at the DALNET libraries, e.g., via interlibrary loan, Infopass, or direct check-out with guest cards.

7. DALNET Access and ILL Rules

Also discussed by the Board was the idea of A DALNET access directory. It could include member libraries' access policies and Interlibrary Loan rules and fees. WSU will develop a standardized form to send to each DALNET library to gather data for the directory.

8. NOTIS Documentation

Project Managers were asked if the proper person in each library is receiving documentation from NOTIS. C. Wecker will follow up.

9. Joint Maintenance Contracts

The concept of joint purchasing and maintenance for NOTIS peripherals (which was brought up at the December Board meeting) was reviewed. L. Bugg will pursue and determine if savings could be realized. L. Bugg reported on initial discussions with Codex of a joint maintenance contract for modems and multiplexors. The 3% discount offered may not cover the paperwork required at WSUL to manage a joint plan. WSU does not usually have peripheral maintenance contracts, but rather purchases spares and utilizes on-site WSU technicians to make repairs. The idea of centralized storage for spare parts was attractive to DALNET libraries, especially for Telex equipment.

10. NOTIS/DALNET Technical Bulletin

The idea of a monthly DALNET NOTIS Technical Bulletin was discussed and accepted. This publication would include technical information about implementing and operating NOTIS that is not in other NOTIS documentation. Solutions to problems can be shared. There would also be room for reports from meetings pertaining to NOTIS and news from DALNET sites of interest to all. DALNET libraries should forward information for inclusion in this Technical Bulletin to C. Wecker by the third Monday of each month.

11. DALNET Committees

A brief review of the activities of the three Committees was presented:

DALNET Database Standards Committee

A copy of this Committee's draft of the "DALNET Database Standards" was distributed at the December Board meeting. Board members will review it with their staff for possible modifications and forward suggestions to L. Bugg. A revised draft will be sent to Board members. If the changes are minor, a telephone vote will be acceptable to the Board. If modifications are major and further discussion is necessary, approval of the document would be delayed until the next Board meeting.

Acquisitions Task Force

The "Vendor File Standards" document was received by the Board at the December meeting. Approval procedure is the same as for the "Database Standards" document.

This Task Force is now working on a ranked list of management reports to develop for the acquisitions module. L. Bugg will distribute the list to DALNET Project Managers to gather input.

Circulation Task Force

A progress report was distributed at the Board meeting. Patron and unlinked item record standards are being drafted. The Task Force is also going to develop a list of needed management reports.

12. Quarterly Project Managers' Meeting

Project Managers agreed that quarterly meetings would be very useful. The next meeting will be called in mid to late March.

13. Michigan NOTIS User Meetings

At the 1988 Annual Michigan Library Association Conference in October, a dinner was held for Michigan NOTIS Project Managers. This informal group has been getting together twice a year in conjunction with statewide meetings. Jeff Johnson from the Library of Michigan volunteered to host a meeting which would allow broader participation from Michigan NOTIS sites.

The proposal was to hold an all-day meeting (perhaps the day after the Michigan Library Consortium's Annual Trustees' meeting since people would already be in Lansing). The morning portion of the meeting could consist of a NOTIS staff member addressing the entire group on the status of enhancements, or a topic that the group chooses. In the afternoon, breakout sessions by function and/or type of library could be held, with the NOTIS person moving between breakout sessions in order to field questions and hear concerns of the group. H. Ma volunteered to assist with the planning for this meeting. C. Wecker and L. Bugg will pursue with Jeff Johnson.

14. Questions/Problems

L. Bugg described the work that is being done with the Health Sciences (HS) bibliographic records on Saturday, December 17. Separate processing units will be created for the three DCCC libraries who are DALNET libraries, i.e., Beaumont, Royal Oak (BR), Children's (CH) and Harper (HH). The other HS NOTIS records, representing the past and present DCCC libraries, will be removed from the LUIS production database and stored in a separate file. Should these libraries decide to join at a later time, their records could be extracted from the HS file and re-loaded into LUIS.

Notes by:

Charlene Wecker/Louise Bugg
January 6, 1989

LB89-51

NOTIS Release 4.5 Implementation Plan

NOTIS Release 4.5 provides these enhancements:

1. Acquisitions: fund accounting fixes and fiscal year change over.

NOTE: We received early delivery as Release 4.4.4 and installed in Production November 1988.

- VITLS (i.e., Vendor Invoice Tape Load System)
2. Circulation:
 - Course Reserve indexes in staff mode
 - Bill and Fine module
 - Block renewal with a hold
 3. Cataloging tag tables up to USMARC update 15.
 4. Keyword Boolean improvements, including:
 - WITH and XOR
 - qualify by MARC tag
 - numerous error messages added
 - performance improvements
 5. New programs to do these batch jobs:
 - generic overlay for tape-loaded OCLC bib records
 - SAS extracts for item, order, circ history, and journal files
 6. Over 30 fixes to specific problems reported with the previous NOTIS releases.

It will take six months to get Release 4.5 customized, tested, and installed in production. Here are the proposed steps of the three-phase quality assurance installation plan:

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|---|-----------|
| 1. Install Release 4.5 in WSU-only Test Region (CICSNOTT) | Dec. 1988 |
| • Tables customized for WSU | Dec. 1988 |
| • Keyword and other LUIS screens reviewed for WSU | Dec. 1988 |
| • Circ Team orientation | Jan. 1989 |
| • Keyword/Boolean Team orientation | Jan. 1989 |
| • Acquisitions orientation | Jan. 1989 |
| • Testing | Jan. 1989 |
| • Design mailer for bills | Jan. 1989 |

2. Install Release 4.5 in DALNET Test Region (CICSNOTD) Feb. 1989
 - DALNET Project Manager orientation Feb. 1989
 - Tables customized for DALNET libraries Feb. 1989
 - Programs customized for multiple library installation Mar. 1989
 - LUIS screens reviewed by DALNET Screens Committee Mar. 1989
 - Testing Mar. 1989
 - Complete Keyword Boolean screens for WSU Mar. 1989
3. Install Release 4.5 in DALNET Training Region (CICSNOTR) Apr. 1989
 - Train DALNET Project Managers (PM's) Apr. 1989
 - Train WSU Circ and Technical Services staff May 1989
 - Train WSU staff in Keyword Boolean Apr. 1989
 - DALNET PM's train their staff May 1989
 - Complete mailer for bills May 1989
4. Install Release 4.5 in Production (CICSNOTP) Memorial Holiday

L. Bugg
11-22-88

LB89-15