DALNET PROJECT MANAGER'S MEETING

Monday, March 2, 1992, 1:00 - 3:30 p.m.
WSU Libraries, Purdy Library, Dean's Conference Room

Agenda

1.   1992 Overall Schedule (attached)

2.   Release 5.0 Implementation
    a. Table conversion
    b. LUIS screen design
    c. LUIS training, incl. NOTISEARCH
    d. MFHD conversions
    e. Circ patron and bill file purge programs
    f. Moratorium on work in Release 4.6

3.   Reciprocal Borrowing (Indra David)

4.   New Report: Collection Statistics by Call Number

5.   NOTIS 1992 Enhancement Ballot

6.   Progress Reports
    a. GTO 3.0 implementation
    b. Michigan NUGM plans
    c. DALNET library reports

7.   Other

NOTIS handouts from ALA Midwinter (2)

L. Bugg
2/21/92

LB92-73

DALNET PROJECT MANAGERS' MEETING

March 2, 1992

<u>Minutes</u>

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

I.   <u>1992 Overall Schedule</u>

L. Bugg distributed and reviewed the 1992 schedule, as follows:

A.   <u>Hardware:</u> All hardware upgrades are complete.

B.   <u>Operating System Upgrades:</u> ESA for our 9121 is currently in test; we hope to have it in production the 3rd or 4th week of March. The Computing Center's target date for its implementation of ESA is March 15. Implementation of MVS/ESA will give us access to more memory so we can run more files and more programs in one CICS region.

C.   <u>NOTIS LMS:</u>

    1.   <u>GTO Release 3.0:</u> During the past month staff at Detroit Public Library, Oakland University and Wayne County Community College were trained; all three libraries are currently in production with 3.0. The remainder of Wayne State's Technical Services staff and staff of the University of Detroit will be trained shortly. The deadline for implementation of GTO 3.0 is the end of April, at which time all OCLC libraries must use PRISM for cataloging activities. There have not been major problems with the GTO implementation; libraries should report any problems to C. Wecker.

    2.   <u>Release 5.0:</u> Testing of 5.0 has identified two major hurdles:
       a.   <u>VPS:</u> Because of changes NOTIS has made to the software, VPS may not function. A. Fidler will analyze and resolve the situation.
       b.   <u>NOTISearch:</u> The 5.0 Keyword module (NOTISearch) will not work with the current DALNET file structure. The files must be merged prior to 5.0 implementation.

    3.   <u>File Merger Analysis:</u> A. Fidler is working on analysis and testing of the file merger. The main problem is the required change to existing NOTIS

record numbers wherever they appear (on bibliographic, copy, item, order, invoice, etc. records). We have contracted with NSI for assistance in this project. We need to insure that the new configuration is optimal for our needs, e.g., running SAS reports. Originally this project needed to be done for Release 5.1 with location based searching.

4. <u>LMS Release 5.0.1 Test:</u> 5.0.1 is currently being tested in the "TR" region (minus keyword).

5. <u>LMS Release 5.0.2 Test:</u> The software has arrived but has not been loaded.

6. <u>LMS Release 5.0.2 Production:</u> NOTIS's contract with BRS for the keyword software used in 4.6 expires in August; libraries need to have the BRS software off their machines at that time. DALNET's deadline for implementing 5.0.2 with NOTISearch in Production is August.

D. <u>NOTIS MDAS</u>

W. Kane distributed a letter from Becky Clarke at Wilson regarding costs for DALNET libraries.

MDAS is currently in its own NOTIS region (CICSNTPA), Wilson and Current Contents indexes are available at some dedicated LUIS terminals as well as at staff terminals in Wayne's libraries. On February 24th, MDAS also became accessible from WSU campus network terminals. CINAHL is currently in test. The ERIC tapes have arrived. CINAHL and ERIC are scheduled for addition to MDAS this spring. PsychInfo and the Legal Resource Index will not be implemented until after LMS 5.0 and MDAS 1.2 are in. Wilson's Reader's Guide Abstracts and General Science indexes are being considered for addition to the Wilson database.

As soon as the DALNET libraries with MDAS licenses (OCC, Botsford, Beaumont and Children's) are ready, MDAS will be activated for them. W. Kane will do the training and authorize their terminals.

We are planning to implement MDAS Release 1.2 in May. It includes the security "component" for dial-in users to identify themselves when logging on (e.g., through the use of a social security number).

After LMS 5.0.2 is stable, MDAS will be "remerged" back
into the production region (CICSNOTP). The new ESA
operating system is expected to give us the capacity to
"remerge" and thus restore the "hook-to-holdings"
capability.

II. Release 5.0 Implementation

L. Bugg reviewed the implementation plan document. W.
Kane will convene the DALNET Screens Committee in March
to begin to review LUIS screens. Sample DALNET screens
(based on the decisions made by University of Michigan
for its 5.0 implementation) will be reviewed by the
Committee. On March 13, the DALNET Circulation Task
Force will meet to begin work on the parameters needed
for the circ file purge programs.

L. Bugg pointed out that when Release 5.0.2 has been
implemented, the MHI will be updated online during
tapeloads. Also, 5.0.2 has LUIS guide screens that are
improved from those in 5.0.

Because of all the work to be done to implement 5.0,
there will be a moratorium on additions/modifications to
NOTIS tables beginning June 1 (except for emergencies).
Table changes need to be submitted by May 1 to ensure
their completion by May 31.

5.0 training will be conducted similarly to that done for
keyword implementation. The major areas that will be
different are LUIS screens, the call number index,
NOTISearch, and the MHI in LUIS.

The Systems Office is hoping to implement Release 5.0 in
July. It is a massive project and the System may need to
be "down" twice--once for the file merger and once to
implement 5.0.2. Many libraries are closed the July 4th
weekend, and others find it a time of low activity. July
4th may be one of the "down" times scheduled for this
project.

The programmers have asked that no new reports be
requested until after 5.0 is stable in production.

L. Bugg recommended that libraries retain both 4.6 and
5.0 NOTIS documentation.

III. Reciprocal Borrowing

L. Bugg emphasized that this ia a policy matter and, therefore, would need to be addressed by the DALNET Board. the Project Managers' group can discuss the NOTIS mechanisms for accomplishing it.

G. Bosler described for the group the SEMLOL initiative to institute reciprocal borrowing. SEMLOL libraries can choose to stay with INFOPASS rather than institute reciprocal borrowing. Plans are for a three-month pilot project to begin in September 1992, with only academic libraries participating. Privileges could extend to currently enrolled students and would allow them to charge three items for a 14-21 day period. The loaning institution would be responsible for generating overdue notices; fines and fees would go to that institution. If a borrower has incurred over $25 in fines and fees, none of the participating institutions would permit borrowing by that patron. Ultimately, the home institution would be liable for fees not paid.

Macomb is willing to start out as a communication clearinghouse between loaning libraries and home institutions. SEMLOL thinks this might be used more than INFOPASS, because borrowers could use the libraries they are familiar with.

Does NOTIS have the capability to keep track of net lenders and net borrowers? L. Bugg said that specifications would need to be developed and a report would have to be designed to accomplish this. The main requirement is that whatever needs to be counted is retained in the NOTIS circ history records.

Various NOTIS options were discussed for enabling reciprocal borrowing among DALNET libraries, including the use of single or multiple ID's, creation of new patron categories, and the use of patron codes. Within the next month or two, DALNET academic libraries need to decide about their participation in the pilot project. Any changes to NOTIS circulation tables must be submitted by May 1 to be done before the June 1 moratorium.

IV. 1992 Enhancement Ballot

L. Bugg asked the group to indicate issues they wanted to ensure were on the enhancement ballot. The group was satisfied with the procedure used last year whereby the Systems Office distributed a completed "draft" ballot to DALNET libraries for their input. Project Managers were very

interested in the development of an ILL Module, separate from PACLOAN--something that would function between libraries within the same network. L. Bugg will forward this to the appropriate NOTIS SIG.

V.   Progress Reports

A.   Michigan NUGM Plans

This year's meeting will be held on Thursday, June 4 at Central Michigan University. The University of Michigan and Wayne State are planning the program; Central is responsible for site arrangements. Stuart Miller from NOTIS will be a speaker once again. There will be a room near the coffee area with a table for each site to use to display and distribute information, brochures, posters, etc. about its NOTIS implementation. DALNET libraries should begin plans for what they will bring for display and distribution. DALNET libraries will be asked for volunteers to moderate and speak at the meeting breakout sessions.

B.   Reports from DALNET Libraries

1.   Botsford: They are looking forward to implementing MDAS. They have signed a contract with OCLC as a "full member" (Independent); OCLC staff will give them cataloging training in a few weeks. L. Bugg will inform B. Lessin that they would like to be included in future open sessions conducted at Wayne by OCLC Independent representatives.

2.   OCC: OCC will be implementing circulation in June in order to meet the terms of its grant. New circulation terminals have been installed; additional terminals are being installed for MDAS. Following implementation of GTO by the DALNET OCLC libraries, OCC will implement GTO using a CD-Rom database as its MARC record source. J. Murray described OCC's automated Bibliographic Instruction Sites being set up at the various LRC's.

3.   University of Detroit Mercy: UDM is working on "bringing up" the Outer Drive Campus. Outer Drive has 5 LUIS terminals and is in the process of adding its holdings to the UDM NOTIS database. Equipment is being ordered for Outer Drive's Media Center; there are no machine readable records for the Media Center's holdings.

4. <u>Beaumont:</u> Beaumont has added a terminal for staff
    use.   They are looking forward to implementing
    MDAS.

5. <u>WCCC:</u> WCCC implemented use of OCLC Prism and the
    GTO. At the time of GTO implementation, WCCC moved
    from its Telex environment to an IBM environment;
    they have available 2 Telex 476L terminals, three
    G.E. Terminet printers, and a Telex MCA 909.   J.
    Flaherty described the current difficult economic
    situation at WCCC.

6. <u>Oakland University:</u> Oakland has had to make major
    "cuts" to its serials budget. They have signed up
    with CARL's Uncover Service.   Oakland is still
    testing CALL with WSU.   CALL is PC-based ILL
    software developed by OU to enable users to
    retrieve the desired LUIS bibliographic display and
    use a "fill-in" screen to request materials from
    Wayne. OU transmits the requests to a WSU BITNET
    mailbox.

7. <u>Children's Hospital:</u> They are looking forward to
    implementing MDAS; faculty are anxious to have
    access to Current Contents on MDAS.   They are
    adding a new part-time position--a Family Resource
    Librarian.   This person will be working with a
    collection which includes both "lay" medical
    materials as well as recreational reading materials
    for patients and families of patients.

8. <u>Detroit Public Library:</u> DPL received a Skillman
    grant for $500,000. In light of the additional
    monies, H. Ma is redoing plans for Phase III. The
    grant will provide enough money for necessary
    equipment and the ability to expand the linking
    project. DPL's goal is to link two million volumes
    in one year. Currently there is one team of six
    people working on the linking project. Two more
    teams will be added in the next month or so—
    beginning with the Browsing Library and the
    Children's Library. Main Library staff will be
    trained soon.   Patron registration for adult
    borrowers will begin on March 17. Registration of
    children will be done closer to the implementation
    of NOTIS circulation at the Main Library.

9. <u>Oakland County Law Library:</u> The announcement was made at the meeting that the Library would be moving to its new quarters the week of June 4. (As of the beginning of April, circumstances have changed and the move is no longer necessary. The Library will not need to move until the new Annex is completed.)

10. <u>Harper Hospital:</u> Harper has signed up for the OCLC three character code conversion program LOM is offering via DALS ROC grant money. Harper is testing the HealthPlus database on a CD Workstation.

Notes by

Charlene Wecker
March 31, 1992