

DALNET PROJECT MANAGERS' MEETING

November 6, 1995, 1:00 - 4:00 p.m.
WSU Purdy Library, Simons Room

Agenda

1. Introductions (roster attached)
2. DALNET Committee Membership
3. NOTIS and PROFS ID Problems
4. Circulation Bill/Fine Record Purge Parameters
5. NOTIS Ad-Hoc Report Schedule (attached)
6. LMS Release 5.1.2 Implementation and Future Release Schedule
7. Mark/Send Downloading Progress Report -- Jim Green
8. MDAS Database Opportunities
 - IAC's Business Index and Company Profiles
 - PsycInfo
 - Wilson Abstracts
 - OCLC FirstSearch (after 5.1.2)
9. Planning Education Sessions (Proposed list attached)
10. DALNET Visioning Session -- Status Report
11. New LUIS PC Demo -- Jim Green
12. Other

L. Bugg
10/25/95

LB95-4

DALNET PROJECT MANAGERS MEETING

November 6, 1995, 1:00-4:00

WSU Purdy Library, Simons Room

Present: J. Brennan, L. Bugg, N. Bulgarelli, M. Campbell, I. David, D. Drobny, G. Ellis, J. Flaherty, M. Galvin, J. Green, J. Hollier, M. Klein, H. Ma, J. Moldwin, C. Mudloff, J. Murray, B. Platts, M. Sheble, D. Smith, J. Van Buskirk, F. White

Excused: D. Adams, K. Fulwood, N. Skowronski

1. Introductions

Introductions were made all around as there are five new project managers from the DMC libraries.

2. NOTIS and PROFS ID Problems

a) You may set up PROFS to forward all mail to a different local e-mail address.

b) We discovered that slow campus mail service is at least partly to blame for the slow turnaround on getting PROFS IDs from Computing and Technology. We are walking them through now and this should reduce the time it takes. The turnaround should now be 7-10 working days.

c) Where to send requests: Send to Betty Franks--requests for PROFS IDs, MTS IDs (for eligible member libraries), and password resets.

Send to Helen Ma: All requests for NOTIS IDs.

d) For all requests, please be sure that the name is legible, and address and phone number is included. If requesting a NOTIS ID to be mapped to a new person, the old person must still be in the system. For changes to user profiles, e-mail is fine.

3. DALNET Committee Membership

Current lists of members of DALNET committees were passed out. Each library type should have at least one representative on each committee. Every library may have one representative on each committee if desired.

Some changes discussed: Joan Emahiser will move from Circ. Standards to Database Standards; Alva Fuquay will be DPL's

representative on the screens committee; DPL will have two representatives on the Acq. and Serials Control Committee, Bob Chapman and Betty Wadsworth.

Please let us know of any other additions, changes, or corrections and we will get an updated list to you.

4. Circulation Bill/Fine Purge (Archive) Parameters

It was decided to archive closed bills one year old (or older). This worked well last year. It will be run on the first working day after New Year's.

5. Report Schedule

Helen has compiled lists of reports, who is getting them, and according to what schedule. In addition to the NOTIS QuikReports, there are the "Vandy" reports (developed at Vanderbilt University), and DALNET-developed reports.

Please check accuracy and verify that you still need them. Let Helen know so she can update the lists for next month.

Also, think about reports you might want to add.

Helen will send a DALNET combined request to NOTIS for QuikReports not available now.

Give us specific information on reports that don't run or have bugs and we will try to get a better answer from NOTIS (like, a commitment to a specific time frame for fixing them).

6. Contact with NOTIS/ALS and/or DALNET staff

- a) Part of our agreement with ALS is that all contact should be through the DALNET Systems Office.
- b) Whether individuals other than the Project Manager may contact the DALNET Systems Office directly is up to the Project Manager at the individual site.
- c) Please do not call our programmers/systems analysts directly. Call Jim, Helen, or Louise. We will refer you if you need to talk directly to technical staff.

7. 5.1.2 Progress Report/other coming releases

Testing of LMS 5.1.2 is progressing (staff mode is in test now and public mode will be in test as of Friday, Nov. 10) and it is expected to be ready to implement by early December. It

includes fixes to bugs, improved GTO, and a fix to the MDAS via PacLink problem that is currently preventing remote access to MathSci, and fixes to patron record archiving. We decided not to implement RRI (Related Record Index); however that decision should be subject to periodic review.

It was decided to implement LMS 5.1.2 on Saturday, Dec. 16, 1995 (we could also have done it a week earlier). The system will go down early that day (the time will be announced in advance) and should be up by 11:00 AM on Sunday, Dec. 17.

Release 6.0 (format integration Part 2) is scheduled for January. This will require conversion of records to the new MARC format. Vendor-supplied records (from Gaylord, Blackwell, Yankee, Baker & Taylor, etc.) will also need to comply with the new format. OCLC plans to implement the new format in March.

LMS 6.1 and 6.2 are planned for simultaneous release on April 1, 1996.

6.1--PacLoan fixes, command-level programming for all staff mode except circ (enables CICS upgrade on the mainframe).

6.2--Circulation re-write; will take about 9 months to install and test.

8. Mark/Send Progress Report

Jim is leading a project to implement enduser marking and downloading of records from NOTIS MDAS databases. This process utilizes IBM file transfer software called IND\$FILE on the mainframe and requires terminal emulation software on the PC side that supports IND\$FILE.

At present, IND\$FILE has been installed on the mainframe and testing is in the early stages. It appears to work with SNA-connected PCs running PC3270 (the IBM terminal emulation software) and also on ethernet/campus net-connected PCs running TCP3270 (the McGill University terminal emulation software). We are still looking for software for dial-in and MacIntosh that supports IND\$FILE. We hope to have something in place ready to release to users by sometime in January, 1996.

9. MDAS Opportunities

- a) **IAC's Business Index and Company Profiles**--We will re-open negotiations to extend license to interested DALNET libraries.

- b) **PsycInfo**--American Psychological Association wants updated FYES figures for the academic libraries. Let us know within a week so we can continue the negotiations.
- c) **Wilson** offers abstracts for all the databases in WILS except **Library Literature** -- A cost sheet will be sent out to all. Extra disk storage might be needed, especially for the business abstracts.
- d) **OCLC FirstSearch**--Should be possible via PacLink/Z39.50 after we upgrade to 5.1.2; Jim called ALS and they reported that Boston College is the only institution that is trying to link to OCLC FirstSearch via PacLink, and they haven't got it working completely yet.

10. Z39.50 Linking Opportunities

Louise has talked to a number of Detroit area libraries about linking to us via PacLink recently. The next library we will link with is Eastern Michigan University.

11. Planning Education Sessions

Bill Easton of ALS is planning to come to Wayne State University on December 1, 1995, for an all day session demonstrating various ALS products. In the morning he could show various "bridge" products to use between now and the time we migrate, to client/server, including WinPac, WebPac, NetPublisher, InfoShare. In the afternoon he will demonstrate Horizon, ALS's next generation system.

This would be primarily for project managers and key management personnel only.

12. DALNET Visioning Session

The proposed dates for the visioning session are: Dec. 7, Jan. 11, or Jan. 17. Board members should be getting a final letter with a list of consultants and time line.

13. World Wide Web

Jim is the coordinator for the WSU Library System World Wide Web server. A WSULS home page was put into production in September and is currently being expanded and improved. One addition in the near future will be a DALNET home page, which will contain some information about the consortium and its member libraries.

We have space on our server at this time and could accommodate member libraries wishing to place their own home pages or other HTML documents on our server. If you prefer to set up your own servers (this is probably better for you if you have the technical expertise to do it) we would like to link to you from the DALNET home page.

14. MichNet

DMC libraries are supposed to be able to get IDs and passwords for MichNet authentication through the DMC's affiliation with Oakland Center (810-553-3425) and Sterling Heights (810-795-9100) have migrated to NASS (requiring authentication) and have new phone numbers.

You can still authenticate using guest@wayne.edu/guest as the login/password. Guest logon is supposed to be evaluated by WSU sometime this month.

Longer term, WSU plans to discontinue the use of MTS for authentication. Also, the use of MTS IDs by DALNET libraries that do not have MichNet affiliation is supposed to be only a temporary measure.

15. Screens

There will be a meeting of the Screens Committee on Thursday, Nov. 9 at 9:30 a.m. in the Simons Room. The main topic on the agenda will be revisions to the LUIS menu screens. A draft was passed out--send comments to Jim.

16. DocDirect

Louise gave another new price to those libraries working on DocDirect and UMI PowerPages.

17. LUIS PC Demo

Those interested in seeing WSU's new LUIS PC followed Jim to a demo in the Kresge Auditorium.

NEXT MEETING: January 8, 1995, 1:00-4:00 p.m.

Notes by,

Jim Green
November 13, 1995

LB96-12

DALNET SCHEDULED REPORTS

The following is a list of all the regularly scheduled reports generated and/or developed by the Systems Office in addition to those which are generated by NOTIS automatically. There are other reports which are requested on a "as needed" basis.

All of the reports can be printed on the WSU Computing Center's printer and mailed to libraries (at the usual per page charge). Other production methods include:

VPS: All reports can be sent via distributed printing to DALNET libraries' system printers. Sites need to consider the length of the report and the quality of their local system printer.

Diskette: Reports, other than QuikReports, can be sent on diskette to DALNET site for manipulation utilizing a word processing package.

User's CMS ID: Reports, other than QuikReports, can be sent to a user's CMS ID for local manipulation utilizing a word processing package.

1. QuikReports

ACQUISITIONS:

ACQ003: January 1 of each year for BH (Detail & Summary)
ACQ006: October 1 of each year for BH (Detail)
Monthly for WA
ACQ009: January 1 of each year for BH (Detail & Summary)
ACQ014: Quarterly for WA
ACQ015: Monthly for WA
ACQ016: January 1 of each year for BH (Detail)
ACQ020: Monthly for BH (Detail & Summary)

CATALOGING:

CAT003: Monthly for BH (twice), MC
CAT005: Monthly for MC; July 1 for BH
CAT007: Quarterly for BH, WA
CAT009: September 1 for BH; Quarterly for WA
CAT011: April 1 for BH
CAT012: November 1 for BH; Quarterly for WA

CIRCULATION:

CIR001: August 1 for BH (3-times)
CIR002: Monthly for WA; WS/SIC
CIR003: Quarterly for WA

CIR004: June 1, December 1, for BH
CIR005: Monthly for WA
CIR006: Quarterly for BH (Report does not run)
CIR007: Quarterly for BH (Report does not run)
CIR008: Quarterly for BH (Report does not run)
CIR009: July 1 for BH; Quarterly for WA (Report does not run)
CAT011: July 1 for BH
CAT019: January 1, July 1 for BH

Other Reports Upon Request.

2. Vandy Reports

Semi-annually on 6/30 and 12/31 for: BH, BR, BT, CH, DI, DP,
HH, HP, OC, OL, OU, UD,
WC

Quarterly at 3/31, 6/30, 9/30 and 12/31 for: WS
Three times yearly at 4/30, 8/31 and 12/31 for: WA
Monthly at end of month for: MC

Reports are mailed to each library.

3. Recent Acquisitions List (RAL)

Monthly for HH, MC, WA

Reports are mailed to each library.

4. DALNET Developed Reports

Title List: 4/1, 10/1 for BH
Location statistics: 6/30, 12/31 for DPL
Record Extract to Autographics: 11/1 for MC
Bibliographic statistics by MARC format: On request
list of record numbers fulfilling certain criteria: On request
Call number analysis

OCCIR001: On request for OC

OUORDLST: Quarterly for OU
WSORDLST: Semi-annually for WS
ENCUMRPT: Annually for WS

5. Bill & Fine Records Archive

First of the year

6. Reports Listed by Calendar

7. Reports Listed by Library

REPORTS BY CALENDAR

JANUARY:

Bill and Fine Records Archive

Vandy Reports for all libraries

RAL for: HH, MC, WA

QuikReports: ACQ003: BH
ACQ006: WA
ACQ009: BH
ACQ014: WA
ACQ015: WA
ACQ016: BH
ACQ020: BH

CAT003: BH (twice), MC
CAT005: MC
CAT007: BH WA
CAT009: WA
CAT012: WA

CIR002: WA (3 times), WS/SIC
CIR003: WA
CIR005: WA
CIR006: BH - does not run
CIR007: BH - does not run
CIR008: BH - does not run
CIR009: WA - does not run
CIR019: BH

FEBRUARY:

Vandy Report for: MC

RAL for: HH, MC, WA

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: MC

CIR002: WA (3 times), WS/SIC
CIR005: WA

MARCH:

Vandy Report for: MC

RAL for: HH, MC, WA

OUORDLST for OU

WSORDLST for WS

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: MC

CIR002: WA (3 times), WS/SIC
CIR005: WA

APRIL:

Vandy Report for: MC, WS

RAL for: HH, MC, WA

Title List for: BH

QuikReports: ACQ006: WA
ACQ014: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: MC
CAT007: BH WA
CAT009: WA
CAT011: BH
CAT012: WA

CIR002: WA (3 times), WS/SIC
CIR003: WA
CIR005: WA
CIR006: BH - does not run
CIR007: BH - does not run
CIR008: BH - does not run
CIR009: WA - does not run

MAY:

Vandy Report for: MC, WA

RAL for: HH, MC, WA

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: MC

CIR002: WA (3 times), WS/SIC
CIR005: WA

JUNE:

Vandy Report for: MC
RAL for: HH, MC, WA
Location Statistics for: DP
OUORDLST for OU

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: MC

CIR002: WA (3 times), WS/SIC
CIR004: BH
CIR005: WA

JULY:

Vandy Reports for all libraries except WA
RAL for: HH, MC, WA
QuikReports: ACQ006: WA
ACQ014: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: BH, MC
CAT007: BH WA
CAT009: WA
CAT012: WA

CIR002: WA (3 times), WS/SIC
CIR003: WA
CIR005: WA
CIR006: BH - does not run

CIR007: BH - does not run
CIR008: BH - does not run
CIR009: BH WA - does not run
CIR011: BH
CIR019: BH

AUGUST:

Vandy Report for: MC

RAL for: HH, MC, WA

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: BH, MC

CIR001: BH (3 times)
CIR002: WA (3 times), WS/SIC
CIR005: WA

SEPTEMBER:

Vandy Reports for: MC, WA

RAL for: HH, MC, WA

OUORDLST for OU
WSORDLST for WS
ECCUMRPT for WS

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: BH, MC
CAT009: BH

CIR002: WA (3 times), WS/SIC
CIR005: WA

OCTOBER:

Vandh Report for: MC, WS

RAL for: HH, MC, WA

Title List for: BH

QuikReports: ACQ006: BH WA
ACQ014: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: BH, MC
CAT007: BH, WA
CAT009: WA
CAT012: WA

CIR002: WA (3 times), WS/SIC

CIR003: WA
CIR005: WA
CIR006: BH - does not run
CIR007: BH - does not run
CIR008: BH - does not run
CIR009: WA - does not run

NOVEMBER:

Vandy Report for: MC

RAL for: HH, MC, WA

Record Extract to Autographics for: MC

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: BH, MC
CAT012: BH

CIR002: WA (3 times), WS/SIC
CIR005: WA

DECEMBER:

Vandy Report for: MC

RAL for: HH, MC, WA

Location Statistics for: DP

OUORDLST for OU

QuikReports: ACQ006: WA
ACQ015: WA
ACQ020: BH

CAT003: BH (twice), MC
CAT005: BH, MC

CIR002: WA (3 times), WS/SIC
CIR004: BH
CIR005: WA

REPORTS LISTED BY LIBRARY

BH: Vandy Reports: January 1, July 1

Title List: April 1 and October 1

QuikReports: ACQ003: January 1; Detail & Summary; run twice (sort by A & D); send by VPS
ACQ006: October 1; Detail; covers 07/01/XX to present; sort by A; send by mail.
ACQ009: January 1; Detail & Summary; run twice (sort by A & D); based on R line Date and A, D, or Z status; send by VPS
ACQ016: January 1; Detail; sort by A; based on A or B order status; send by VPS
ACQ020: Monthly; sort by PU/Title; only include Title, NOTIS Control #, Vendor, M Stmt

CAT003: Monthly; Summary; sort by C (A or W); send by VPS
CAT005: July 1; Detail; sort by A; mail
CAT007: Quarterly, Detail; sort by A; send VPS
CAT009: September 1, Detail; sort by A; VPS
CAT011: April 1; Detail; sort by A; mail
CAT012: November 1; Detail; sort by A; VPS

CIR001: August 1; Detail & Summary; run three times (sort by A, D & E); only include Patron Status, Patron ID, Patron Name, Dept. Code 1, and Last Used Date; mail
CIR004: June 1 & December 1; Detail; sort by A; VPS
CIR006: Quarterly; Summary; sort by A; VPS (Does not run)
CIR007: Quarterly; Summary; sort by A; VPS (Does not run)
CIR008: Quarterly; Summary; sort by A; VPS (Does not run)
CIR009: July 1; Detail; prior 2 years (May-June); sort by A; mail (Does not run)
CIR011: July 1; Detail; prior 2 years (May-June); sort by A; mail
CAR019: January 1 & July 1; Summary; covers the previous 6 months; sort by A; VPS

BR: Vandy Reports: January 1, July 1

BT: Vandy Reports: January 1, July 1

CH: Vandy Reports: January 1, July 1

DI: Vandy Reports: January 1, July 1

DP: Vandy Reports: January 1, July 1

Location Statistics: June 30, December 31

HH: Vandy Reports: January 1, July 1

RAL: Monthly

MC: Vandy Reports: Monthly

RAL: Monthly

Records Extracted to Autographics: November 1

QuikReports: CAT003: Monthly; sort by B

CAT005: Monthly; sort by A

OC: Vandy Reports: January 1, July 1

OL: Vandy Reports: January 1, July 1

OU: Vandy Reports: January 1, July 1

OUORDLST: OU's order list by fund, 3/31, 6/30, 9/30, 12/31

UD: Vandy Reports: January 1, July 1

WA: Vandy Reports: January 1, May 1, September 1

RAL: Monthly

QuikReports: ACQ006: Monthly; covers the previous month;
sort by A; for all locations; for all
order statuses

ACQ014: Quarterly 1/1, 4/1, 7/1, 10/1; covers
the previous 3 months; sort by A; for
all locations, all order statuses and
all serial types

ACQ015: Monthly; covers the previous month;
sort by A; for all locations, order
statuses and all serial types

CAT007: Quarterly 1/1, 4/1, 7/1, 10/1; covers
the previous 3 months; sort by A; for
all locations and MARC formats

CAT009: Quarterly 1/1, 4/1, 7/1, 10/1; covers
the previous 3 months; sort by A; for
Item Status A; for all locations

CAT012: Quarterly 1/1, 4/1, 7/1, 10/1; covers
the previous 3 months; sort by B; for

Item Status A; for all locations

- CIR002: Monthly; covers the previous month; sort by A; run three times each month for TE, TK and TS patron groups; for all patron statuses; Fines Owed Threshold is \$1.00
- CIR003: Quarterly 1/1, 4/1, 7/1, 10/1; covers the previous 3 months; sort by C; for all MARC formats and all locations
- CIR005: Monthly; covers the previous month; sort by A; for Service Units TN and TY; for all locations
- CIR009: Quarterly 1/1, 4/1, 7/1, 10/1; covers the previous 3 months; sort by A; Title Count Threshold is 2; for Service Units TN and TY; for all locations
(Does not run)

WC: Vandy Reports: January 1, July 1

WS: Vandy Reports: January 1, April 1, July 1, October 1

WSORDLST: WS order list by fund, 3/31, 9/30

ENCUMRPT: WS encumbrance report by fund, 9/30

WS/SIC: QuikReport: CIR002: Monthly; 8/1/94-12/31/9x

DALNET Project Managers Education Sessions To Prepare for Next Generation System

- | | <u>Date</u> |
|--|-----------------------------------|
| 1. Future Directions of Learning/Information Delivery
Panel of three (?) experts to tell us about
- future direction of higher education in new teaching,
learning and information needs;
- future direction of public libraries;
- future directions of special libraries, especially
health sciences. | ? |
| 2. Future Technologies in Libraries/Consortia
Expert from a leading edge libraries or consortia. | ? |
| 3. Client/Server and Other Developing Library Systems
SIRSI, HORIZON, CARL Systems;
to learn state-of-the art and future
directions. | Oct. 20-SIRSI
Nov. ?-HORIZON |
| 4. Internet Services, Especially Full-text Delivery
CARL (Uncover and Reveal); IAC; UMI;
ISI for SDI. | ? |
| 5. LAN-based Information Systems
OVID Technologies (formerly CD-PLUS);
SilverPlatter; how these fit in the total
picture. | Jan. ?
(incl. demos at
WSU) |
| 6. Web Information Organizers
To integrate WWW resources into information delivery
systems; OCLC's WebZ; Ameritech's WebPac. | December
for OCLC? |
| 7. Digital Libraries and Electronic Publishing
Electronic course reserves; NetPublisher from Ameri-
tech; UM's Digital Library project. | ? |
| 8. Impact of Technology on Technical Services
Cataloger's workstation; new roles for organizing and
providing access to electronic materials on the Internet. | ? |

Considerations:

- Which, if not all, of these sessions? Others?
- Who is the intended audience?
- Ideas for speakers, agendas, program formats?
- In lieu of Project Manager's meetings?