DALNET PROJECT MANAGERS MEETING
May 6, 1996, 1:00 - 4:00 p.m.
Oakland University Library

	<u>Agenda</u>	<u>Times</u>

1. Introductions/Welcome — 1:00 - 1:05

2. LMS Releases and Software Installation
    a) *LMS 6.0.1--Anaclare* — 1:05 - 1:15
        Plans for processing unit catalogs
        testing (Attachment 1);
        Problems reported; documentation questions.
    b) *DocDirect/PowerPages project--Jim* — 1:15 - 1:30
        Status report; additional participants;
        Policy issues that impact all DALNET
        libraries (Attachment 2)
    c) *LMS 6.2--Louise* — 1:30 - 1:45
        Project plans for preliminary discussion
        (draft Project Charter will be distributed
        at the meeting)

3. DALNET Strategic Planning Process--Louise — 1:45 - 2:15
    a) *Role of Project Managers in Strategic
        Planning*
        Input to the Board on vision, values/
        principles, etc. for June 17 retreat
        (Attachment 3)
    b) *Review of focus sessions by Planning Team*
        Goal: To recommend priorities to the
               Board after discussion with
               Project Managers
    c) *Planning for next generation system*
        i.   Evaluate bridge products
             Report on Web Pac/Web Z evaluation.
        ii. Migration to PCs with Ethernet
             connectivity
             Need for Standards document; what
             should it include?
        iii. Criteria/functional requirements
             document
             Discussion of how to develop this
             document

4. **Ameritech Proposal(s)--Louise**   2:15 - 2:45
    a) Role of Project Managers in evaluating
        proposal(s) received and making
        recommendations to the Board
    b) Criteria to be used to evaluate
        proposal(s)
    c) Process to follow when proposal(s)
        received

--BREAK--   2:45 - 3:00

5. **Web Home Page for DALNET/Web Developers**
    SIG--Jim   3:00 - 3:15
    Discussion of these ideas; possible DALNET
      services/support.

6. **Z39.50/PacLink Planning--Louise**   3:15 - 3:25
    Links already planned; next links desired
      by DALNET libraries

7. **E-mail for DALNET/PROFS replacement at**
    WSU--Louise   3:25 - 3:35

8. **Follow up /Status Reports**   3:35 - 4:00
    a) WinPAC testing--Jim/test sites
    b) OCLC FirstSearch investigation--Louise
    c) BUSI/COMP negotiations--Jim
    d) Ovid follow up--Louise
    e) DCAT screen changes--Jim
    f) Quik Reports--Anaclare
    g) Database loading for DMC and VA--Anaclare
    h) MichNUGM meeting--Jim
    i) Mark/Send downloading--Jim
    j) LUIS Leaflet revisions--Jim

9. **DALNET Library Announcements--Project**
    Managers   As time permits

NEXT REGULARLY SCHEDULED MEETING: September 9, 1996, 1:00 - 4:00 p.m.

L. Bugg/cmz
4/27/96

DALNET PROJECT MANAGERS MEETING

May 6, 1996, 1:00 - 4:00 p.m.
Oakland University Library

Present: L. Bugg, N. Bulgarelli, M. Campbell, I. David, G. Ellis,
           A. Evans, J. Flaherty, J. Green, M. Klein, J. Murray, B.
           Platts, T. Prince, M. Sheble, N. Skowronski, M. Thomann,
           K. Tubolino, F. White, D. Zyskowski

Excused: D. Adams, J. Brennan, D. Drobny, K. Fulwood, K. McPeak,
           J. Moldwin, C. Mudloff

1.   LMS Releases and Software Installation
     a)   LMS 6.0.1
          Volunteers are needed for testing location-based catalogs
          by processing unit. MCC, WCCC, WA, OCC volunteered.

          Two phases for the default catalog planned are:
          1.   Default to the "all" catalog for everyone. We hope
               to implement this by mid-summer.
          2.   Your institution's catalog is default on selected
               terminals. This will have a phased implementation
               beginning in late summer and continuing into the
               fall.
          In either situation, users will be able to "set catalog"
          from a list of processing units and ALL. Part of testing
          will be cpu load testing.

          Staff mode serials fixed fields moved to 006 but 006 may
          not have been created in record conversion. If anyone
          encounters this problem, please send screen print to
          Anaclare.

          6.0.1 documentation from NOTIS--sites report they didn't
          get it; Anaclare will follow up.

     b)   DocDirect/PowerPages project
          At the most recent Implementation Team meeting PrinText
          Article Service was selected as the name for the service.

          The UMI Contract for Power Pages is on a calendar year.
          Fall is the time when additional institutions should have
          decided about joining the project as of January 1997.

c)   **LMS 6.2**
     Features:
     - New circulation module rewrite.
     - Course reserves in the OPAC.
     - Improved guide screens (developed by Columbia University).
     - No macro level coding means we can now upgrade to a newer version of CICS on our mainframe.
     - Call number index updated online.
     - PacLink enhancements (we're not sure exactly what they are).
     - Also, the limit on the total number of circulation desks has been removed.

We plan to install 6.2 in the training region (CICSNOTR) by October to be ready for training by February.

Libraries who are planning to implement circulation need to do so by November 1996, or they'll need to wait until 6.2 is ready.

We may be able to install 6.3 (GTO) before completing 6.2.

We will need help from member libraries with 6.2 training.

Release 6.2 will be DALNET's top priority after DD/PP (now known as PrinText) goes into production.

2.   **DALNET Strategic Planning Process**
     a)   The DALNET Board is moving ahead quickly. A June 17 Retreat has been scheduled at Oakland University for board members and project managers to work on mission/vision/goals.

     b)   Review of focus sessions held last summer is being done by the Planning Process Team. They'll have an initial report at the June PM meeting.

     c)   Next generation system--bridge products.
          The PM team to evaluate Web front ends looked at WebPac (Ameritech) and WebZ (OCLC) at their meeting at Oakland University.

Since then, there have been further developments in the HEA II grant with MRLT (Michigan Research Libraries Triangle) and CIC (Committee for Institutional Cooperation, Big 10 plus University of Chicago). The three-year grant included:
1. PacLink OPACs (this was completed);
2. PacLink from MDAS (also completed) and PacLoan (never finished because the software didn't work);
3. We're waiting to hear about going in with MRLT and CIC for whatever replaces PacLoan so we can proceed with patron-initiated ILL.

MRLT and PacLoan money: The WSU share amounts to about $22,000. CIC did an RFP for a patron-initiated/staff managed ILL system. The contract has been awarded to OCLC; WebZ will be the front end.

We may get a good deal on WebZ by going in with CIC on this. Louise will find out the specifics of Wayne State's and DALNET's inclusion and report at the next PM meeting.

d) **Planning for next generation system**
   - Migration to PCs/Ethernet--The WSU/DALNET Systems Office will put together some standards/guidelines and distribute to PMs. A three-year timetable for complete migration has been proposed.
   - Criteria/functional requirements--The DALNET Planning Process Team will tackle this task and recommend a process. Anaclare will do a literature search on streamlining the RFP process and check with some institutions for recent RFP samples.

   Frank White will talk to some vendors.

   An advantage of the traditional RFP process is it allows you to document why one vendor was chosen over another.

3. **Ameritech proposals**
   Right now we are waiting for proposals for pilot-type projects from Ameritech, based on their site visit in March.

   Louise can make the first cut to review them before they are discussed at the June 24 Project Managers meeting. If more input is needed, the site visit team can help with the preliminary review.

4. **Web Home Page for DALNET/Web Developers**
    Jim will set up a meeting of interested DALNET parties to
    discuss concept of a DALNET home page and an interest group
    for Web developers.

5. **Z39.50/PacLink Planning**
    Everyone agreed to have the WMU OPAC added to the REMOTE
    section of LUIS. Systems staff will proceed.

    Future OPAC links: UM Dearborn, TLN, MetroNet (7 different
    links).

6. **E-Mail**
    WSU is eliminating PROFS/Ricemail, probably by the end of
    1996.

    The WSUL agreement with C&IT specifies that they provide 200
    e-mail IDs for DALNET member institutions. But the new WSU e-
    mail system may not be accessible from dumb terminals.

    A fall back option would be to set up our own e-mail system on
    the IBM 9121 (the LUIS mainframe).

    Hospitals have trouble getting IDs for Internet access because
    of institutional fire walls.
    E-Mail

Need from DALNET	Have own
DMC hospitals	OU
DPL	UD McNichols
WCCC - 2 years	OCC
OCU	MCC
UD-Outer Drive, Dental	Walsh
DIA	VA

    Louise will follow up with C&IT and let them know DALNET's
    needs.

7. **Follow up/Status reports:**
    a)   WinPAC--stopped testing because of too many problems
         encountered.

b) OCLC FirstSearch: survey results were passed out. There are clusters of interest in Books in Print and PsycInfo. PsycFirst (last 3 years of PsycInfo) is a less expensive alternative. Two options for FirstSearch--subscription or per-search price at 55¢ per search. Other groups are also talking with OCLC about FirstSearch pricing. If 55¢ per search is the lowest price, there seems no advantage to a DALNET group subscription.

c) BUSI/COMP--licensing is completed; installation is underway to add DALNET libraries; should be completed by July 1.

d) OVID--Jean Miller is coming May 22. We will explore DALNET group pricing for Medline on OVID.

e) DCAT Screens--will be revised, in phases, in conjunction with location-based catalogs and DocDirect. Jim hopes to finish this summer but this may continue into the fall.

f) Please contact Anaclare for QuikReports requests; in writing or by PROFS is preferred. A sample of how you would like the report to look is very helpful (photocopied from a book of samples, or a copy of a previously run report, etc.). Turnaround varies from days to weeks depending on timing and nature of the report requested.

g) Database loading for DMC and VA: we have received tapes for DMC and expect to begin loading records early this summer. We are in the process of getting the tapes for VA.

h) MichNUGM 96 at EMU: June 6, 1996, keynote speaker is Tom Quarton, president of Ameritech Library Systems. Breakouts presented by Louise, Anaclare, and Jim, among others.

i) Mark/Send downloading: in production for remote and in-library PCs connected via TCP/IP. We can enable it for SNA-connected PCs; send requests to Jim, be sure to include the four-character terminal IDs.

j)   LUIS Leaflet revisions: New LUIS Leaflet No. 23
      (Downloading LUIS Records) has been distributed to all
      project managers. There is a revised leaflet for Cinahl
      (CNHL) (Leaflet No. 11) which has been distributed to
      project managers at all libraries that license this
      database; a description of citation searching in CNHL was
      added. There should be a new revision of LUIS Leaflet
      No. 5 (Remote Access to LUIS) out soon.

UPCOMING MEETINGS:

June 17, 1996, DALNET Planning Retreat, Meadowbrook Hall, Oakland
University,   8:30 - 4:30 p.m.

June 24, 1996:   Special DALNET Project Managers meeting, Simons
Room, Purdy Library, Wayne State University, 1:00 - 4:00 p.m.

September 9, 1996: Regular DALNET Project Managers meeting, 1:00
- 4:00 p.m., location TBA.

Notes by,
Jim Green
June 14, 1996

JG/cmz

- D R A F T -

Processing Unit Catalogs
(Location-based Catalog Bypass)

Testing Plan

Areas/functionality to be tested:

1. Default catalog (either PU catalog or DCAT)
    - serials
    - kwb
    - do all bib records display in PU catalog, including on
      order/in process?

2. Can p.u.'s be grouped?

3. DCAT access/searching
    - as default
    - with another catalog as default
    - holdings/item status

4. Set catalog command
    - various help/explain screens

5. Response time
    - in test region
    - in production region (how to test?)

6. Cross-reference display (in p.u. catalog)

7. Hook to holdings
    - in default catalog
    - PacLink to MLAB, etc.

8. Any impact on staff mode?
    - adding new (or editing) records that would update location
      filter file

9. Dial-up (assume DCAT is default)
    - also telnet and TN3270
    - set catalog?

10. PacLink inbound to DCAT
    - set catalog?

11. Use statistics and reports?

Implementation Ideas

1. Avoid creating location filter file

2. Begin by giving libraries two options for default
    a) their p.u. catalog
    b) DCAT

3. Implement by fall semester 1996
    a) Demo to PM's and WSU UH's – mid-June
    b) Implement first in one library – July
        – to test response time before full implementation
    c) Implement as requested from mid-August on

L. Bugg, A. Evans, J. Green/cmz
rev. April 29, 1996

DocDirect/PowerPages Issues

1. Patrons from all DALNET institutions will see the screen message that appears when the article retrieved by their WILS search is available, instructing them to type REQ DOC to print the full text. If a patron from a non-participating institution submits a request, a sign-on screen appears asking for the patron's Social Security Number (this is checked against the NOTIS patron file to see if the person belongs to one of the patron groups defined as having access to DocDirect). An error message appears if the patron is not eligible to submit DocDirect requests.

   Screens/messages that might be seen by patrons from all DALNET institutions:

   a) "Type REQ DOC to print full text" in WILS.
   b) The sign-on screen will appear if REQ DOC is typed. This is the same sign-on screen patrons see for signing on to MDAS databases from non-dedicated/remote workstations; with DocDirect, this screen does double duty.
   c) Patrons of non-participating institutions will also see the error message if they issue a REQ DOC command.

   We are able to change the wording of these screens/messages, but there is no provision in the software for enabling/disabling them by terminal or institution.

2. Patrons from participating sites will be presented with a listing of all available print servers, from which they can choose where to direct the request. There may be cross-institution routing of requests, where, for example, a WSU student who lives near Oakland U. sends requests to OU's print server. They would pay for and pick up the printout at OU.

3. Bill and fine records can be created for DocDirect charges. It is possible to have the system create one for every transaction (we probably will not do this); or the "create a bill" function could be used for selected transactions. We are not really sure how blocking will (or will not) work with these charges. This might affect some multi-institutional patrons.

4. Name--We have yet to think of a good name for the service. We do NOT want to stay with the NOTIS name (DocDirect) or the UMI name (PowerPages). Help with this would be greatly appreciated.

5. Installation time line:
   a) Install DocDirect on the mainframe: mid-March (done)
   b) Put ARNs into WILS records: mid-to-late March (partially done--we have a partial file for testing--work continues)
   c) Install image server and at least one print server for testing at WSU: (image server and Purdy print server were installed on April 17; testing is underway)
   d) Install print servers at all sites: early-mid May
   e) System up and running at all sites: June 1 (there may or may not be a week or two of slippage in d) and e) -- this is still our goal at this point in time).

Notes by Jim Green
April 30,1996