DALNET PROJECT MANAGERS' MEETING
February 12, 1996, 9:00 a.m. - 12:00 noon
WSU Purdy Library, Simons Room

Agenda

1. NOTIS   LMS   Release   6.0.1   (project   charter   previously
    distributed)
    a.   New tag table
    b.   Training for format integration
    c.   Location-based catalogs by processing unit

2. NOTIS LMS Release 6.2 preparation
    a.   Item record cleanup
    b.   Patron record archive
    c.   New patron loaders
    d.   Other file cleanups
    e.   Training--MichNUGM

3. MDAS database negotiations
    a.   Wilson abstracts
    b.   PsycInfo
    c.   BUSI/comp

4. Follow up on education sessions and focus sessions
    a.   Possible short-term and long-term goals
    b.   Preparation to achieve them
    c.   Priorities
    d.   More education sessions?

5. Follow up on visioning session
    a.   Review of consultant's report
    b.   Planning timeline

6. Updates
    a.   NOTIS batch job schedule
    b.   DocDirect implementation
    c.   DMC progress report
    d.   What's new at each library? (as time permits)

NEXT MEETING: March 4, 1996, 1:00 - 4:00 p.m.

(Tentative agenda items: briefing on NOTIS statistical and
management reports; mark/send downloading; PACLink planning; WinPAC
testing; MichNUGM plans.)

L. Bugg/cmz
2-6-96

DALNET PROJECT MANAGERS MEETING

February 12, 1996, 9:00-12:00
WSU Purdy Library, Simons Room

Present: D. Adams, J. Brennan, L. Bugg, R. Call, M. Campbell, I.
           David, D. Drobny, G. Ellis, A. Evans, J. Flaherty, M.
           Klein, H. Ma, K. McPeak, J. Moldwin, C. Mudloff, J.
           Murray, M. Sheble, M. Thomann, F. White

Absent: N. Bulgarelli, K. Fulwood, J. Green, B. Platts, N.
           Skowronski

I. NOTIS LMS Release 6.0.1

Louise Bugg briefly reviewed the NOTIS LMS Release 6.0.1
project charter which was distributed at the last Project
Managers meeting on January 31, 1996. 6.0.1 is a big release
because all the bibliographic records must be converted to
comply with the new format integration standards.   The
implementation date for DALNET is targeted for March 2/3,
1996.

a)   New Tag Table - Attached
     With Format Integration, NOTIS issued tag tables for two
     new cataloging formats, H for MARC Holdings and U for
     Mixed Media. Some of the tags in the existing tables
     have also been updated. DALNET libraries are to notify
     A. Evans of the options they elect to get the new tag
     tables listed on the attached list.

b)   Training
     Two training sessions on Format Integration will be
     offered by the Systems Office, one the week before the
     implementation and the other the week of March 4.   The
     dates and other details of the workshops will be
     broadcast after final arrangements are made. The two and
     a half to three hour training sessions will be offered to
     all DALNET libraries, but mostly for the catalogers.

c)   Location-based catalogs by processing unit
     DALNET libraries now have the capability of limiting by
     processing unit when searching by using the keyword
     search in LUIS qualified with .lib. With 6.0.1, NOTIS
     enables more efficient OPAC searching of location based
     catalogs by Processing Unit. This is controlled by
     terminal IDs. DALNET must study the program and do
     extensive testing of the functionality before deciding on
     its implementation. The Systems Office will test the
     feature after 6.0.1 is up and running smoothly.

II. NOTIS LMG Release 6.2 Preparation

NOTIS' official release date for LMS 6.2, the Circulation Rewrite Release, is April 2, 1996. Since it is a major release, L. Bugg estimated the DALNET implementation date to be January 1997. This would give us time to add local modifications to the software for the network environment and testing. Release 6.2 requires some NOTIS record conversions, mainly item, patron, and bill/fine records. In preparation for the Release, the following cleanup tasks are planned.

a) Item record cleanup:
A. Evans distributed a questionnaire at the last meeting surveying each library's practice of coding item records when item is no longer "live". The three item status codes involved are:

O = Orphaned records
D = Deleted records
W = Withdrawn records

After the data has been gathered, A. Evans will make recommendations on how best to clean up the item record files.

b) Patron Record Archive
H. Ma is working with D. Fox on patron record purge and archive. The purging matrix has been set based on the data supplied by each library. The first task is to set the "delete date" on patron records where the information is missing. The program will be run in "test mode" first before the actual purging/archiving.

c) New patron loader
Release 6.2 will also have a new patron record tape load program. A list of DALNET libraries that tape load patron records was distributed. The programmers might have to work with the project managers and the computing center staff from these libraries on the new loader if the new system so requires. The following libraries will investigate and notify WSU if they will switch from tape loads to FTP patron records: MC, OU, WA and WC.

d) Other file cleanup
Once the item and patron files have been cleaned up, we can begin to work on the other NOTIS files, such as the MARC holdings record, copy holdings record, MARC bibliographic record and the Order/Payment/Receipt records.

e) Training – MichNUGM – attached
    A survey form was distributed asking for DALNET
    libraries' input on training session(s) on 6.2
    circulation by the NOTIS staff. Please return the form
    to H. Ma if you have not yet done so.

III. MDAS Database Negotiations

a) Wilson abstracts:
    The latest cost analysis was sent to the libraries
    earlier regarding adding Wilson abstracts. L. Bugg
    reported that DALNET must participate as a group in
    licensing abstracts, all current Wilson libraries or
    none. It was decided that we would pursue acquiring the
    General Science (GSA), Humanities (HUA), and Social
    Sciences (SSA) abstracts this year, in addition to
    Readers Guide which we already have, and consider
    Business Abstracts as the next year's project. All
    except DPL were ready to commit. Randy will consult with
    DPL decision makers and get back to Louise.

b) PsycInfo:
    A revised cost analysis sheet was distributed for
    PsycInfo database for DALNET libraries. L. Bugg will
    have Betty Franks inquire with the vendor if the new
    Detroit Medical Center libraries may be included as part
    of the current special library group. Betty will also
    check if the license can begin in July, and a pro-rated
    fee charged for the remainder of this fiscal year. CH is
    ready to go, and the other interested libraries will
    notify WSU by 3/4/96.

c) BUSI/COMP
    A revised cost analysis sheet was distributed for
    BUSI/COMP database for DALNET libraries. The interested
    libraries will notify WSU by 3/4/96.

IV. Follow up on Education Sessions and Focus Sessions

As a result of all the DALNET education sessions and focus
sessions, L. Bugg identified four items that we should focus
our attention on: 1) DALNET service education, 2) Shared
vision, 3) Educate ourselves and 4) Bridge products. The
discussion was centered on the bridge products during this
meeting.

A "Bridge product" was defined as the bridge between the mainframe-based and client/server library management systems. DALNET libraries have now had demonstrations from SIRSI, DRA, ALS, and OCLC. SIRSI, DRA, and ALS' Horizon are full client/server library management systems, yet none is ready to handle a network like DALNET, though they could handle individual DALNET libraries. Louise listed seven possible bridge product areas.

(1) UNIX-based servers for databases, e.g. indexes and abstracts, full-text, and video and sound. Examples are:

- **Infoshare (ALS)**: Offers indexes, abstracts, and full-text.
- **Site Search (OCLC)**: Available at WRLC, a NOTIS consortium, and Georgia (Galilio system).
- **Net Publisher**: A web server.

(2) Web front end to multiple servers:

- Access to the local system is through a Web client such as Netscape.
- Accessible only to PCs via Internet.
- OPAC would be only one of the menu choices among networked databases and reference tools.
- DALNET would probably need more than one front end box for redundancy.
- **WebPac (ALS)**: costs about $20,000; includes Z39.50 access;.
- **WebZ (OCLC)**: also has Z39.50 access.
- **WebCat (SIRSI)**

(3) Graphical User Interface (GUI) front end to OPAC:
- OPAC will be the only menu item accessible on Windows-based PCs.
  WinPac (ALS): WinPac client software runs on individual PCs. DALNET is promised 20 PC copies of WinPac to test. Louise will have Betty follow up with Ameritech.

(4) Electronic publishing:
- Local web server:
- **NetPublisher**:
- **Site Search (OCLC)**:

(5) Direct Internet access to vendor databases/services:
- Might need specific clients for each system.
- Not usually integrated with local system.
- **Ebsco Host**
- **Homework Helper**
- **Britannica Online**
- **Encyclopedia of Associations (Gale):** WSU subscription
- **Contemporary Authors (Gale):** WSU subscription
- **Uncover**
- **ProQuest Direct (UMI)**
- **IAC**

(6) Z39.50 links to databases:
- **First Search (OCLC):** Can't do document delivery requests via Z39.50.
- **Ebsco Host**
- MRLT and other partners

(7) LAN based local servers:
- Distributed servers, e.g. for CD-ROM networks.
- **ERL (Silver Platter):** being mounted on a SUN server at WSU SEL. Not yet Z39.50 capable.
- **OVID Technologies:** Z39.50 capable product being mounted on SUN at WSU Shiffman.

DALNET libraries expressed interest in seeing ERL and OVID at WSU when they are operational.

As a result of the discussion, three immediate objectives were identified:

1) **Proceed with WinPac:** Jim Green will coordinate testing along with the librarians from BH, CH, OC, OU, UD, WC and WS. Testing can begin in April and continue through the summer.

2) **Evaluate WebZ and WebPac:** Louise Bugg will head the team along with librarians from OC, OU and UD. The evaluation will begin in April.

>   3)   **Develop decision making model for databases**: Judy
>   Murray and Indra David will draft criteria for a
>   decision matrix for DALNET databases accessible by:
>   - Local mounting
>   - LAN server
>   - Internet
>   - Z39.50

L. Bugg then asked each library how they were coming on
installing PC workstations with Internet access in
preparation for bridge products as we move toward
client/server technology:

BH: Wiring and PCs by late spring, 1996

CH: Have some PCs now

DI: Need to switch from SNA to Ethernet; some PCs in
June 1996; no Internet access other than dial up.

DP: Unknown

MC: 2 stations with Internet access, one per campus.

New DMC libraries: All installation will be PCs with
Internet access.

OC: 46 PCs in Spring 1996; will replace all dumb
terminals by Fall, 1996(?)

OL: Bought 3 new Gateway PCs; will move to PCs, but no
Internet.

OU: Fully wired on Ethernet; need to replace the dumb
terminals with PCs; has 12 PCs for public now and
all staff have PCs.

UD: 12 PCs at McNichols campus; Outer Drive campus
planned for late 1996.

WA: All PCs now with Internet access.

WC: In one year; may switch the current T1 lines to T3.

WS: Ethernet connections to campus network are in all
library buildings; some PCs for users, but not all
staff have Ethernet access at their desktops.

V. Follow up on Visioning Session

The consultant's report is due on February 15, 1996. Both the
Project Managers and the Board will be sent copies of the
report on the 16th. The following is the timeline for the
process:

2/15:	Receive report from the consultant.
2/16:	Mail the report to the Board and the Project Managers with a cover memo from the Planning Team.
3/4:	Discussion of the report at the Project Managers meeting, using the questions in the cover memo.
3/11:	Report from the Project Managers due to the Board.

VI. Updates:

The following documents were distributed at the meeting:

DALNET Libraries list
DALNET Batch Index Schedules
DALNET Libraries NOTIS Implementation Chart
DALNET Libraries MDAS Database Chart
DALNET DocDirect Project Charter
Detroit Medical Center Libraries NOTIS Implementation Progress
   Report
PROFS Password Change Message

NEXT MEETING: March 4, 1996, 1:00 - 4:00 p.m., in the WSU Simons
                Room. (Tentative agenda items include: review of
                consultant's report; briefing on statistical and
                management reports; WinPAC testing plan; PACLink
                planning; mark/send downloading; Mich NUGM info).

LB/cmz
Attachments (2)