DALNET PROJECT MANAGERS' MEETING

September 18, 1989, 1:30 - 3:00 p.m.
WSU Purdy Library, Dean's Conference Room

Proposed Agenda

1. NOTIS Password Changing Implementation Plan (attached)

2. NOTIS Tag Table Distribution Options

3. Procedure for Updating NOTIS Tables

4. NOTIS Online Documentation

5. Planning for MFHL Conversion (Release 4.7)

6. DALNET Contributions to LOEX

7. Progress Reports:
    - Billing Threshhold
    - Keyword/Boolean
    - SAS Reports for Aquisitions
    - GPO Project -- WSU, DPL, and OU
    - DALNET Office Staffing Proposal
    - OCLC Cluster Option
    - NOTIS Multiple Database Access System
    - Authority Consulting by NOTIS
    - Release 4.6 Test Site

8. Announcements
    - New NOTIS Batch Schedule
    - NUGM Consortium Meetings
    - MLA Fall NOTIS Meeting
    - DALNET Library News

NOTE: A demonstration of the NOTIS OCLC GTO will be given
       prior to this meeting (from 12:30 to 1:30 p.m.) for
       interested DALNET Project Managers. Please meet at
       12:20 in Louise's office.

L. Bugg
9/7/89

DALNET PROJECT MANAGERS' MEETING

Meeting Minutes
September 18, 1989

PRESENT: D. Adams, L. Bugg, I. David, J. Flaherty, K. Gauri,
          J. Houghton, M. Klein, C. Liner, H. Ma, J. Smith,
          C. Wecker

ABSENT: S. Martin, J. Murray

1. **Changing NOTIS and PROFS Passwords**

    L. Bugg has been working with a WSU CSC Security Officer
    to enable changing passwords for both NOTIS and PROFS
    IDs. It is the University's policy to require that
    passwords be changed every 28 days. Passwords can be
    changed more often, if desired. On October 16, passwords
    for all DALNET IDs will expire unless they have recently
    been changed by the user. From then on, passwords will
    expire every 28 days. New passwords will be "expired"
    when issued; first time users will need to create new
    passwords immediately. If staff do not remember their
    passwords, the system allows them to try 10 times. If
    they are not successful, they are then locked out of the
    system and must request a password "reset."

    A packet of instructions on changing both NOTIS and PROFS
    passwords and requesting password "resets" was
    distributed. L. Bugg gave an online demo of the change
    process.

2. **NOTIS Tag Tables: Distribution Options**

    Per NOTISES #45, vol. 1, part 3 (the NOTIS Tag Tables) of
    the Terminal Operator's Manual will no longer be
    published. Instead, tag tables can be either printed
    locally by programmers using a NOTIS batch job or
    purchased from NOTIS at $25 per volume. L. Bugg will
    make a proposal to P. Spyers-Duran to print the tag
    tables at WSUL for DALNET sites, as desired. The price
    for the tag tables is yet to be determined.

3. **Updating NOTIS Tables**

   As more DALNET libraries implement NOTIS modules, the
   updating and modification of NOTIS production tables
   becomes more complex and more time-consuming. In order
   to facilitate this process, the Systems Office is
   instituting a schedule for updating these tables. Except
   for emergency changes and deletions, tables will be
   modified in production once a week. All changes
   submitted to us by Wednesday will be operational by the
   following Wednesday. In order to further facilitate the
   updating process, all DALNET sites will receive copies of
   all of their tables once a month.

4. **NOTIS Online Documentation**

   NOTIS documentation in a machine-readable format is now
   available for purchase from NOTIS for $2,500. It is on
   35 diskettes in an ASCII file. These diskettes must be
   loaded into a mainframe file; the software needed to
   search and display the documentation must be supplied
   locally. For the annual maintenance fee of $1,000,
   additional diskettes with updates are sent to sites. The
   updated information must be compared to previous
   information, and additions, modifications, and deletions
   made to the local file, as necessary. L. Bugg will
   pursue to see if there are any other options.

5. **Planning for MARC Format for Holdings and Locations
   (MFHL)**

   NOTISES #45 included information regarding NOTIS's
   implementation of MFHL (which will be in Release 4.7 in
   1990). DALNET libraries' current use of the volume
   holdings record needs to be reviewed in light of this
   information.

6. **LOEX**

   There was discussion of LOEX at Eastern in Ypsilanti,
   Michigan, and its function as a clearinghouse for user
   and staff education materials. NOTIS users are sending
   their documentation to LOEX. In turn, libraries can
   borrow desired materials and copy them for their use.
   Project Managers agreed that materials created by DALNET
   libraries should be sent to LOEX by the DALNET library.

Regarding the distribution of this documentation to other DALNET sites, the following was agreed upon:

i)   If the document is brief, the DALNET library will send a copy to each DALNET library;

ii) If the document is extensive, one copy will be sent to the DALNET Office and DALNET libraries will be notified of its existence through the <u>DALNET Technical Bulletin</u>. The DALNET Office copy can be loaned out upon request.

7.   **Progress Reports**

A.   <u>Billing threshhold:</u> We have received the fix from NOTIS to activate the $5 billing threshhold. D. Fox is testing a way to use two versions of the programs, one with the $5 threshhold and one with a $1 threshhold. When this testing is done, DALNET libraries will be asked which threshhold they want to use.

B.   <u>Keyword/Boolean:</u> We are currently planning to make this operational on the WSUL database for staff by the end of October. L. Bugg and A. Fidler will be meeting with John Kolman (NOTIS Development) at NUGM to discuss options for developing this capability across multiple databases. Our future plan is to authorize terminals at DALNET libraries for K/B searching on the WSUL database. No date for this has been established. It was suggested that some DALNET libraries' terminals be authorized for K/B searching on the test database.

C.   <u>SAS Reports:</u> We are currently working on the top priority from the DALNET Acquisitions SAS list, i.e., a new accessions list. Louise briefly reviewed how this might work, with a date in a "d" subfield of the copy level notes field.

D. <u>GPO/MARCIVE:</u> H. Ma announced that Barbara Hulyk from the Detroit Public Library has been asked to be a member of the MARCIVE Cleanup Council. L. Bugg reported that we have an agreement with MARCIVE for the use of their records by other vendors. Blackwell has signed MARCIVE's Third Party Use Form in preparation for the authority record selection they will be doing for MARCIVE records. An abbreviated version of the records on the monthly MARCIVE tapes can be sent to OCLC for tapeloading (at $.17 per record). Regarding the use of MARCIVE records by other DALNET libraries, records can be "derived" for use by other DALNET libraries on an "occasional" basis. A copy of our contract with MARCIVE will be sent to Project Managers. Wayne is currently looking at how it will handle the monthly tapes/check-in procedures.

E. <u>DALNET Office Staffing Proposal:</u> A proposal regarding the addition of staff to the DALNET Office is on the agenda for the next DALNET Board Meeting on October 3, 1989.

F. <u>OCLC Cluster:</u> We are currently waiting to receive answers from OCLC to our questions regarding this option. It will be forwarded to the Board for review.

G. <u>Multiple Database Access Product (MDAS):</u> F. VanToll is close to completing a grant proposal to the National Library of Medicine to provide increased DALNET access within the Detroit Medical Center (DMC) Libraries. Specifically, it would provide funding to enable Hutzel and Rehabilitation Hospitals to join DALNET and would provide money for its two current DALNET libraries, Children's and Harper Hospitals, to add terminals. The proposal also includes funding for MDAS search software and two years of the MEDLINE database during the second year. Concern was expressed regarding the effect that the above would have on the DALNET System. It was also recommended the proposal be on the Board agenda.

H.   NOTIS Authority Consultant: WSUL is hiring Nancy
      Hunn from NOTIS as a consultant to review DALNET's
      options for cost-effective management of its shared
      authority file.   N. Hunn is a User Services
      Librarian and the Authorities expert at NOTIS. She
      will be coming initially for a two-day visit
      (October 11 and 12) and will return for a third day
      with her recommendations. N. Hunn will be meeting
      with a Task Force that includes representatives from
      DALNET member libraries. J. Curtis will work with
      DALNET Board members to determine representatives on
      the Task Force.

I.   Future Project Managers' Meetings: The group agreed
      that Project Managers' meetings should be held more
      frequently, specifically that there be five meetings
      a year: 2 in the Fall (September and November), 2
      during Winter Semester (February and April), and 1
      during the Summer (June). Meetings will be held on
      the second Monday of these months.

J.   Release 4.6: NOTIS asked Wayne State to be an
      "early release" site for the 4.6 Release during the
      three weeks prior to the annual NUGM meeting.   A.
      Evans and C. Wecker tested Merged Headings, L. Bugg
      and D. Fox tested the Circulation Enhancements, and
      B.   Heath tested the NOFA "fixes" for the
      Acquisitions Module.   A Fidler installed the
      Release, including the creation of a "test" database
      with approximately 150,000 bibliographic records (OU
      and WSU records) and 70,000 matching authority
      records. Every attempt was made to have the testing
      not affect the day-to-day operations of DALNET
      libraries. Some plans, e.g., implementing keyword
      and GTO at WSU, were re-scheduled.

      Information regarding things such as 4.6 testing
      needs to get to DALNET project managers before the
      decisions are made, so they have an opportunity to
      express their concerns.

K. <u>New Batch Schedule:</u> Added staff at the CSC has made it possible to run batch on Friday and Saturday nights. The full "pack," i.e., weekly, backup will be run on Saturday night, not on Sunday morning. This will alleviate the problem that has sometimes occurred on Sunday morning when the backup took longer than usual and caused NOTIS to come up late. The patron charge index will now be run 7 times a week.

L. <u>NUGM Consortia-Related Meetings:</u> L. Bugg announced two "consortium-track" meetings that will be held during the NUGM meeting. L. Bugg, I. David and C. Wecker will present "Consortia and Networks--Training and Support Issues" on September 27th. L. Bugg and C. Wecker will co-convene the "Consortium and Network Discussion Group" on September 28th.

M. Project Managers then reported on progress and news in their libraries.

The next meeting is scheduled for **Monday, November 13, at 1:30 p.m.** in the Dean's Conference Room.

Notes by:

Charlene Wecker
October 24, 1989

Changing NOTIS Passwords
Implementation Plan

1. Enable "LOOK" access to ACF2 file of NOTIS IDs for Libraries' Systems Office staff — R. Schott (CSC) — 8-1-89

2. Enable NOTIS password changing on IBM 4381 cpu — R. Schott (CSC) — 9-9-89

3. Develop instructions for staff to change passwords
   - Online (text from L. Bugg) — R. Schott, R. Welch (CSC) — 9-11-89
   - Paper — L. Bugg — 9-12-89

4. Establish Log-on ID procedure
   - New IDs issued w/28 day password change — C. Jackman (CSC) — 9-11-89
   - Procedure for password resets — C. Jackman/B. Franks — 9-11-89

5. Develop problem tracking system
   - Passwords forgotten — L. Bugg/B. Franks — 9-12-89
   - Too many invalid passwords — " — "
   - New passwords not operational — " — "

6. Conduct test of Password Changing System — L. Bugg/C. Wecker — "

7. Train supervisors
   - WSU Libraries — L. Bugg — Week of 9-12-89
   - DALNET project managers — L. Bugg — Week of 9-18-89

8. List of passwords not yet changed (sorted by project number)
   - Create — R. Schott (CSC) — 10-9-89
   - Review and alert supervisors — L. Bugg — 10-13-89

9. Implement Password Changing System
   - Force NOTIS password changes every 28 days — R. Schott (CSC) — 10-16-89

10. Handle problems/questions — Systems Office — ongoing

L. Bugg/R. Schott
July 21, 1989

LB89-210

Wayne State University Libraries

Memorandum

TO: Peter Spyers-Duran

FROM: Louise Bugg

SUBJECT: DALNET Project Managers' Meeting

DATE: September 7, 1989

Attached is the proposed agenda for the September DALNET Project Managers' Meeting. This group has been meeting quarterly in March, June, September, and December. This meeting is tentatively scheduled for Monday, September 18, from 1:30 to 3:00 p.m., to provide an opportunity to update the group before the annual NOTIS Users Group Meeting held in Chicago and to explain NOTIS password changing to take effect in October.

With your approval, I will finalize the meeting plans and distribute the agenda.

Thanks.

Attachment

LB89-258