DALNET PROJECT MANAGERS' MEETING
January 7, 1991, 1:00 - 3:00 P.M.
WSU libraries, Purdy Library, Dean's Conference Room

## Agenda

1. HEA Title II D Grant Application (Louise/Bill/Bob Holley)

2. SAS Report Production Schedule (Louise)

3. NOTIS GTO Release 3.0 Update (Charlene)

4. Keyword for DALNET--Implementation Plan (Louise)

5. LD025 Batch Linker Program (Louise)

6. Disclaimer on Overdues (Circ Task Force)

7. Coded Notes on Patron Records-Need to
   Standardize? (Circ Task Force)

8. Progress Reports
   · USPS Mailing Label Requirements (Bill)
   · LCSH Resource File (Charlene)
   · MDAS Installation (Louise)
   · SAS Report Development (Louise)
   · WSU Major Microform tape loading (Charlene)

9. Questions/Announcements/Other Topics


L. Bugg
12/20/90


LB91-81

DALNET NOTIS Project Managers' Meeting
January 7, 1991
Minutes

Present:  D. Adams, A. Bondar (for K. Gauri), L. Bugg, E. Condic
          (for I. David), J. Flaherty, J. Houghton, W. Kane, M.
          Klein, C. Liner, H. Ma, J. Murray, J. Smith, C.
          Wecker.
Guests:   A. Fidler, R. Holley.

1. Keyword for DALNET -- Implementation Plan

A. Fidler described the local enhancements made to the NOTIS
software which allow creation of a single keyword index for all
DALNET Processing Units. A test file has been created in "td"
with records from all Processing Units. Using Boolean logic,
Processing Unit codes can be combined using "and" with a keyword
search, providing "location-based" keyword searching, e.g.,
"k=history and OU" will retrieve records for Oakland University
with history as a keyword.

L. Bugg distributed the plan for implementing keyword indexes for
all libraries over the next six months. Libraries will be phased
in on a monthly basis, beginning with the smallest libraries.
Libraries will be added on the third Saturday of each month when
the keyword index is regenerated. W. Kane will work with the
DALNET Screens Committee to design the necessary screens. WSU has
purchased additional disk to accommodate the enlarged keyword
index.

2. SAS Report Production Schedule

L. Bugg distributed the schedule for SAS Report production,
including parameters and frequency for each of the five reports
currently being produced. Requests for these products can be sent
to L. Bugg; currently, the only charge incurred for these
products is for the paper if the report is printed at WSU. LUIS
statistics are routinely sent to all libraries on a monthly
basis.

3. HEA Title IID Grant Application

WSU is submitting a HEA Title IID grant request to support access
to MDAS (with WILSON and CURRENT CONTENTS indexes) by DALNET
Libraries for a demonstration project in 1992. R. Holley
distributed a draft of the Project Description with the proposed
budget. He explained that WSU, rather than DALNET, will be the
applicant because a research and demonstration grant must be from
an institution of higher education. Therefore, a letter of intent
to participate from each DALNET library will be needed, instead
of a signed grant cover sheet. He also asked libraries to obtain
letters of support for this grant from their users. Letters
should be from a range of users, including students, faculty,
etc. Letters from Library Science educators would also be good.

HEA Title IID Grant Application (continued)

They should be addressed to Louise Bugg, who is the Principal Investigator.

R. Holley pointed out that the grant is being written as a demonstration project with no commitment on the part of the participants to continue after the grant period is over. He is hoping that since DALNET libraries will not incur any costs (other than costs for their own staff, publicity, and handouts), all will be able to participate. One stipulation from WILSON is that libraries should not cancel their paper or other products during the demonstration period. The grant period would be 15 months; October 1 - December 31, 1991 would be the implementation phase; 1992 would be the year of use. This would provide empirical data on use of locally-mounted databases in a consortium environment.

Due to limited storage space, the five WILSON indexes for the grant will be the same that WSU selected. If libraries are interested in continuing use of MDAS, they would incur costs beginning in 1993, as follows: licensing costs for the individual databases and the NOTIS MDAS maintenance fee. If additional databases are desired, more disk drives would need to be purchased, as well as database licenses. In response to a question regarding the costs of the various databases, W. Kane said that $5,000 - $8,000 was a good "ballpark" estimate for each WILSON database (it varies by the file and number of users) and that CURRENT CONTENTS databases were $5,000 per file with discounts if multiple databases were purchased.

R. Holley needs letters and library descriptions by Friday January 11th. Project Managers should submit their comments on the grant to R. Holley or L. Bugg.

4. NOTIS GTO Release 3.0 Update

C. Wecker distributed and reviewed a document on Release 3.0 of the GTO. The software and documentation for the OCLC transfer should arrive soon and the DALNET Office is hoping to have it installed within 90 days of receipt. The GTO Release 3.0 software for CD-ROM applications arrived the first week of January. DALNET Office staff will go to DALNET libraries to install the GTO software and train the staff on their own equipment.

5. LD025 Batch Linker Program

We have ordered NOTIS software to link unlinked item records by matching on call number. Libraries that have used the software report between 50% and 70% of their unlinked item records were linked (depending on how clean the data is in the call number fields). Libraries that are interested in having this program

LD025 Batch Linker Program (continued)

tested and run on their records should inform the DALNET Office. The question arose whether unlinked records are actually "deleted" at the time of linking. (Note: The answer is that the unlinked record is actually used to create the linked record. The unlinked record is not "orphaned". The NOTIS record number for the unlinked record, however, is not reused by the system.)

6. Disclaimer on Overdues

The DALNET Circulation Task Force developed the following wording to replace the existing wording on the bottom of overdue notices: "IF YOU RETURNED THESE ITEMS, PLEASE CALL THE LIBRARY AT THE ABOVE NUMBER." With this message, users are encouraged to call if they have returned their materials when they receive an overdue notice, rather than waiting until they get a bill. The group approved the concept, but recommended that the wording be revised slightly.

7. Coded Notes on Patron Records

The Circulation Task Force has been considering the need to standardize notes used in the shared "Note" field of the patron record. There are standards regarding the structure of the note (first two characters represent the library, followed by a 3 - 4 character code), but libraries can use whatever codes they wish. DALNET libraries have exchanged lists of their local codes, but no attempt has been made to standardize codes among institutions. Project Managers suggested that codes for the "top ten" most commonly used notes should be standardized so that library staff would not need to consult each other's lists. Beyond that, libraries could create their own local codes for this field.

8. Progress Reports

   · USPS Mailing Label Requirements - W. Kane talked to WSU's
     Vice President for Business Operations. A memo will be
     issued detailing what WSU will be doing. At that point, a
     decision will need to be made regarding handling of
     addresses for DALNET. It seems that the processing of mail
     which does not comply with standards could be delayed by
     hours, not days.

   · LCSH Resource File

     C. Wecker reported that the test load of both the
     retrospective LCSH records and the weekly tapes was
     successful. The new disk which will be used for LCSH, MDAS
     and DPL's GPO should be installed after January 11. The

8. Progress Reports (continued)

> DALNET Office hopes that the LCSH Resource File will be loaded into production by the end of January, or soon thereafter. At that point, DALNET libraries can "claim" LC records for use in the DALNET authority file. There is an additional feature which will not be operational initially (because a "fix" is needed for the NOTIS software), which will automatically "claim" LCSH records for headings on bibliographic records that have no DALNET authority records.

> Because use of the LCSH records is fairly straightforward, DALNET training sessions will not be necessary. C. Wecker will issue a procedural document (as done for the AOVL/BOVL command) to DALNET libraries detailing use of the records.

- MDAS - WSU has a signed contract with NOTIS for use of MDAS by WSU. (A second license is required for the rest of DALNET). The first databases to be loaded will be the WILSON databases. It is hoped that MDAS be in test by the end of January - mid-February. An implementation schedule is currently being developed.

> Security software developed by SUNY Binghamtom has been ordered for dial-access. This software will not be put into production until after MDAS's initial implementation. Dial access, therefore, will not immediately be available.

- SAS Report Development - L. Bugg distributed a January 1991 update on SAS Report development, listing the six top priority reports for acquisitions and circulation and the current status of each.

- Major Microform Tape Loading - C. Wecker reported on WSUL's progress in loading almost 100,000 OCLC records representing 12 microform collections. During December 1990, records for the following collections were loaded: Early American Imprints (37,840), Early English Books (39,768), and Pamphlets in American History (12,285).

9. Questions/Announcements/Other Topics

- NOTIS Music Users Special Interest Group - L. Bugg received a ballot for officers for the board of this group.

9. Questions/Announcements/Other Topics (continued)

- NOTIS Preservation Users Group - This group is being started at MidWinter ALA. A meeting will be held in the NOTIS Suite at the Hilton on Sunday, January 13, from 10:00 - 12:00.

- Revised LUIS Brochures - W. Kane distributed copies of WSUL's revised brochures for LUIS, Keyword, and dial access.

- OCC - J. Murray reported that OCC is replacing 21 Telex 476L terminals and printers over the next year and a half. They will be replaced in groups of seven; the first seven will be available within the next four months.

  She also reported that one of the OCC librarians is using PROCITE and BIBLIOLINK to create bibliographies from NOTIS MARC records. A procedural document for access via PROCOMM has been developed and will be shared with DALNET libraries.

- Children's Hospital - Children's is now "live" with distributed printing.

- DALNET Access Committee - J. Flaherty reported that the next meeting of the Committee will be Wednesday, January 9.

- University of Detroit - J. Houghton announced Ann Walaskay will be leaving the University of Detroit Library to accept a position at the Oakland Community College Libraries. (University of Detroit's loss is OCC's gain!) It is now official -- University of Detroit and Mercy College have merged to form the University of Detroit Mercy. Technical Services has finished the first "pass" of its NOTIS serials conversion project.

The next meeting of the DALNET Project Mangers will be held on **Monday, March 4 at 1:00 p.m. in the WSUL Dean's Conference Room.**

Notes by

Charlene Wecker
January 15, 1991


LB91-103

# Implementing Keyword Indexes for DALNET Libraries
## Project Plan

A NOTIS software enhancement has been developed and tested by Ana Fidler and George Marck that provides a single keyword index for all processing unit files in DALNET's current file structure. Keyword searches in this index can be "qualified" by processing unit, to limit retrievals to the records of one library.

The following plan is proposed to implement keyword indexes for all DALNET libraries over the next six months, with completion scheduled for June 1991. A phased implementation, beginning with the smallest libraries, is recommended to better monitor system resources required and to more accurately adjust the parameters affecting performance. The current keyword index will be tripled in size by full implementation.

| Task | Staff | Target Date |
|------|-------|-------------|
| 1. Design "generic" DALNET keyword screens, to be updated as processing units are added to the keyword index. | DALNET Screens Committee, chaired by Bill Kane. | February 1, 1991 |
| 2. Develop keyword training for DALNET public service staff, to be offered as libraries are added to the index. | Bill Kane | February 8, 1991 |
| 3. Add these processing units to keyword indexes: BH, BR, CH, HH, OL, and monitor performance. | George Marck, Bill Kane | February 16, 1991 |
| 4. Add these processing units to keyword indexes: OU. | George Marck, Bill Kane | March 16, 1991 |
| 5. Add this processing unit to keyword indexes: MC, OC, WC. | George Marck, Bill Kane | April 20, 1991 |
| 6. Add these processing units to keyword indexes: UD, CR. | George Marck, Bill Kane | May 18, 1991 |

| | | |
|---|---|---|
| 7. Add last processing processing unit to keyword indexes: DP. | George Marck, Bill Kane | June 15, 1991 |
| 8. Initial evaluation of keyword performance and policies. | DALNET Keyword Task Force, chaired by Bill Kane. | August, 1991 |

To better monitor performance and evaluate the impact full keyword implementation will have on system resources, it is proposed that Wayne State's current keyword policies be followed. After keyword is fully implemented, the policies should be re-evaluated by a DALNET Keyword Task Force. If a current keyword policy adversely affects performance, it may need to be revised during the implementation period.

Current Wayne State keyword policies are:

1. Keyword indexes are accessible from all terminals that can search LUIS;
2. The default Boolean operator is "same";
3. The maximum number of retrievals that can be displayed from a single search is 250;
4. The current stopwords that cannot be used in a keyword search are: and, not, with, same, or, a, the, an, for, by, in, to;
5. The keyword index is regenerated monthly, on the third Saturday night;
6. The maximum number of terminals that can execute keyword searches simultaneously is twenty;
7. The fields currently indexed will stay the same, with the addition of the processing unit "field";
8. The basic keyword screens currently in place will not be substantially revised.

L. Bugg
1-3-91

LB91-87

# Wayne State University Libraries

## Memorandum

TO:      DALNET Project Managers

FROM:    Louise Bugg

SUBJECT:  Social Security Number Policies

DATE:    January 10, 1991

Attached for your review and comments prior to submission to the DALNET Board is the DALNET Circulation Standards Task Force document "Social Security Number Policies." This Addendum to the Patron Record Recommendations was requested by the Board to clarify our policies for several social security issues. Also attached, for your information, is a copy of the brochure "Your Social Security Number."

Please send me your comments by January 31, 1991, so the Task Force can review them at its February meeting.

Thanks.

Attachments

cy:   DALNET Circulation Standards Task Force
      Bill Kane
      Charlene Wecker

LB91-97

DALNET Circulation Standards Task Force

Patron Record Recommendations

Addendum No. 1:

Social Security Number Policies

Issues identified in handling social security numbers (SSN's) in the shared DALNET patron file are:

(1) patrons who refuse to give their SSN's;
(2) the use of "pseudo" SSN's for patrons without SSN's;
(3) patrons who request their SSN's be deleted from their patron records; and
(4) duplicate, or multiple, SSN's.

It is recommended that DALNET libraries follow these policies:

(1) No patron records without SSN's should be tapeloaded into the DALNET patron file;

(2) "Pseudo" SSN's should not be entered into DALNET patron records in the SSN field;

(3) DALNET library staff may delete the SSN on a patron's record at the request of the patron only if the patron has no other library cards from any of the other DALNET libraries;

(4) If a patron has multiple records with more than one SSN, DALNET library staff should ask to see a social security card to verify the correct number. Since each patron should have only one record, the one matching the social security card number should be retained;

(5) If more than one patron has the same SSN, DALNET library staff should ask to see each one's social security card. If both patrons were issued the same number, they should be referred to the Social Security Office. The DALNET patron file will prevent more than one record with the same SSN from being created;

(6) SSN's should not be updated via tapeloads. Discrepancies will be reported on the tapeload error report and should be reconciled by staff as in (4) and (5) above;

(7) Every effort should be made to consolidate all DALNET patron IDs for one person on a single record, selecting the record with a valid SSN. IDs on duplicate patron records without SSN's can be expired and new IDs issued on the consolidated record.

NOTE: Patron records can be blocked to alert staff to request SSN information. When patrons at more than one library are involved, staff will need to coordinate their efforts to obtain SSN information.

1-10-91
LB91-4

# YOUR SOCIAL SECURITY NUMBER

## AUGUST 1984 EDITION
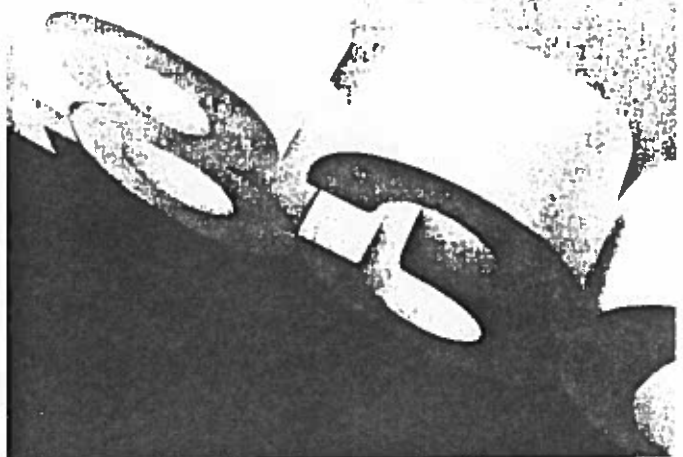
## Your Social Security number

Your Social Security number is the key to assuring that your earnings are accurately recorded during your working years.

Other people may have the same name you have, but your Social Security number is yours alone. It singles out your Social Security record from more than 200 million others.

## Your new Social Security card

The enclosed Social Security card is a counterfeit-resistant card required by the Social Security Amendments of 1983. All future cards will also be counterfeit-resistant. *Do not laminate the enclosed card.*

If members of your family or your friends already have a Social Security number card with their correct name, they should not apply for a new card. The old Social Security cards are still valid.

## Protection for young and old

Social Security protects young workers and their families, as well as retired workers.

Social Security disability insurance can provide monthly checks for workers and their dependents if an illness or injury is expected to keep the worker from working for a year or more.

Survivors insurance provides monthly benefits for the widow and widower and young children of a worker if he or she should die.

In addition to retirement, disability, and survivors benefits, Social Security provides a comprehensive program of health insurance—Medicare. This program helps pay the cost of health care for people 65 and older, some disabled people under 65, and people with permanent kidney failure.

## Here's how it works

If you work as an employee, your employer deducts your share of the Social Security tax from your wages. Your employer adds a matching amount as his or her share and sends a report of the wages you have earned to the Social Security Administration. The report shows your name and Social Security number and how much you earned.

If you work for yourself in your own business, you pay your own Social Security tax and make your own report. You do this when you file your Federal income tax return.

Your reported wages or self-employment earnings are entered on your Social Security record. This record will someday be used to figure the amount of benefits payable to you and your family when you retire or become disabled, or to your family if you should die.

If you are an alien legally in the United States but not authorized to work, this section does not apply to you. Your Social Security card should be marked "NOT VALID FOR EMPLOYMENT."

## Using your Social Security card

Treat your card as an important document and protect it against loss or theft.

Take your card with you when you get a new job, and make sure that your employer copies your name and number correctly. You should never rely on your memory when you provide your Social Security number.

Record your number elsewhere for safekeeping. If you lose your card or change your name—through marriage, for example—you should apply for a replacement card.

If you need to apply for a replacement card, you must provide documentary evidence to establish your identity. If you are a naturalized U.S. citizen or legal immigrant, you must also provide evidence of your current U.S. citizenship or immigrant status. This also applies to you if you were once a U.S. citizen but no longer are.

If you change your name, you will get another card with your new name but the same number. You will need documentary evidence showing both your old and new names.

If you ever find you have more than one Social Security number, get in touch with any Social Security office promptly. Someone there will help you correct your record so that you get full credit for all the earnings reported for you.

## Penalty for misuse

It's against the law to alter, buy, or sell Social Security cards or to use someone else's Social Security number. It's also against the law to use a Social Security number you obtained by giving false information on the application or to use false information when applying. Penalties include a fine, a jail sentence, or both.

## Disclosing your Social Security number

Any Federal, State, or local agency that asks for your Social Security number must tell you whether giving it is mandatory or voluntary, under what authority the number is being requested, and what uses will be made of it.

Some non-government organizations also use Social Security numbers for recordkeeping purposes. Such use is neither required nor prohibited by Federal law. Although you are not required to give your number, the organization is not required to provide you service if you do not. Knowing your number does not allow these organizations to get information from your Social Security record.

## In the years ahead

It's a good idea to check your Social Security record every few years to make sure your earnings have been correctly credited. This is especially important if you change jobs often. You can get a form from any Social Security office to help you do this. Always give your Social Security number whenever you write about your record.

It's a good idea to keep evidence of your earnings, such as Forms W-2, until you know your earnings are credited to your record.

Unless you are already getting Social Security checks, there is no need to tell us when you change your address. But you should contact any Social Security office immediately if you:
o Lose your card—to apply for a duplicate card.
o Change your name—to apply for a card in your new name.

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o Are unable to work because of a severe disability expected to last 12 months or more—to ask about possible disability checks and possible vocational rehabilitation services.
o Are age 62 or older—to ask about possible retirement checks.
o Are within 3 months of age 65, even if you don't plan to retire—to sign up for Medicare.
o Have a question about Social Security.

Tell your family to ask about survivors benefits in the event of your death regardless of your age.

You can find the address and phone number of the Social Security office in your local telephone directory under "Social Security Administration."

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