

DALNET PROJECT MANAGERS MEETING
Wayne State University, Purdy Library
March 10, 1997, 1:00 - 4:00 p.m.

Agenda

1. IAC Search Bank System demo-- 1:00 - 2:30 p.m.
Michelle Dotterer, IAC
in Kresge Auditorium

NOTE: DALNET staff are welcome to attend demo.

Move to Simons Room for rest of meeting.

2. Discussion of IAC databases 2:30 - 3:00 p.m.
for DALNET
Determine next steps to take.

3. Introduce Adriene Lim, new 3:00 - 3:10 p.m.
DALNET Database Management services
librarian

4. Planning for NOTIS LMS Release 6.3.1-- 3:10 - 3:30 p.m.
A. Evans
Review and discussion of next steps,
including:
- a) Testing results to date;
 - b) patron record archiving;
 - c) New patron record requirements;
 - d) Course Reserves;
 - e) Training plan for circulation staff;
 - f) Moratorium on changes to system control files, e.g. locations, circ policies, authorizations;
 - g) Role of DALNET Circulation Standards Committee.

5. Shared Database Opportunities-- 3:30 - 3:45
L. Bugg/J. Green
Update on status of negotiations/research.
- a) Proquest Direct/ABI Inform
 - b) BIP options
 - c) Medline on Shiffman's OVID system

DALNET Project Managers Meeting Agenda
March 10, 1997
Page 2

6. DALNET Partnership Team report--L. Bugg 3:45 - 3:55
Attachment: memo from M. Auer to DALNET
Board
- a) Status of partnership proposal documents
 - b) Plans for in-depth Horizon demo for the Partnership Team plus some key DALNET experts
7. Announcements 3:55 - 4:00
- a) DALNET Cataloging/Authorities Spring Users Meeting, April 8, 1997 at WSU, Purdy/Kresge Library
 - b) Other

NEXT MEETING: May 5, 1997, 1:00 - 4:00 p.m.

Attachments: Flyer for IAC demo;
M. Auer memo to Board

L. Bugg/cmz
3-1-97

DALNET PROJECT MANAGERS MEETING
Wayne State University, Purdy Library
March 10, 1997, 1:00 -4:00 P.M.

Present: D. Adams, BH; L. Bugg, WSU/DALNET; N. Bulgarelli, BR; E. Condic, OU; D. Drobny, RI; G. Ellis, WA, A. Evans, WSU/DALNET; J. Flaherty, WC; J. Green, WSU/DALNET; A. Lim, WSU/DALNET; J. Murray, OC; D. Roe, UD; F. White, MC; D. Zyskowski, OL.

1. **IAC Search Bank System demo--M. Dotterer, IAC:** Michelle Dotterer and Gary Ross, IAC, gave a demonstration of the IAC Search Bank System for interested DALNET Project Managers and staff members from DALNET libraries. IAC has a number of citation, abstract, full-text and image databases which are now available over the Web. A number of these were demonstrated and a free trial period has been established for those DALNET libraries with Web access available.
2. **Discussion of IAC Databases for DALNET:** Libraries who do not subscribe to the IAC databases now on MDAS asked to be added to the trial. OCC reported that they already have some IAC databases available over the Web. A trial of 60 days would give all DALNET libraries time to try them. It was also requested that we arrange a trial and get prices for the Health Reference Collection and Books in Print from IAC. Louise will follow up with M. Dotterer.
3. **Introduction of Adriene Lim, DALNET Database Management Services Librarian:** L. Bugg introduced A. Lim who fills the positions left vacant when A. Evans and M. Samson moved into new assignments from Database Management. A. Lim will be responsible for increasing the visibility of DALNET database services within the DALNET member libraries. Many of the DALNET database services relate to authority control but not all. Adriene Lim will be attending the DALNET Database Standards Committee meetings and is planning to visit the various DALNET libraries to see what each library is doing and what database management services are needed from DALNET.

4. **Planning for NOTIS LMS Release 6.3.1--A. Evans:** Anaclare Evans reviewed the progress to date and presented plans for the next steps.

- a. **Testing results to date:** WSU, DPL, and members of the Circulation Standards Committee are testing the various functions of NOTIS LMS. There are few changes to modules other than circulation. There are new guide screens for the public in the OPAC. Course Reserve records will be searchable by the public from any terminal which connects to the DALNET OPAC. The changes are mainly in how the circulation functions are performed, rather than in the data in the records. If other DALNET libraries wish to test circulation functions, the test database is in CICSNOTR. Staff doing testing need to be authorized by and get instructions from A. Evans.
- b. **Patron record archiving:** The current production patron file is in CICSNOTP. The patron file after records with deletion dates before 12/31/94 have been removed is in CICSNOTD and will be there for the rest of the week. A. Evans distributed to Project Managers present a list of patron records, subrecords, and IDs which were deleted in the test run of the archive program against the production on file.

Project Managers will be asked to sign off on the record archiving parameters before the actual archive is done. If DALNET library staff identify any patron records that should not be archived, they need only edit the expiration and delete dates in the production file to prevent those records from being archived.

When the program is run in the production database, it is estimated that between 20 and 25% of the records will be archived. No records will be archived in these cases:

- 1) pseudo patrons,
- 2) if they have open bill and fine records, or
- 3) if active charges are attached.

Archived records will be retained on tape by WSU and should be able to be loaded and accessed in the event a DALNET member library ever faces an audit of its circulation records.

Because the actual archive will require three separate runs of the program (one each for records, subrecords, and IDs), DALNET Staff will determine how much time the jobs require and schedule them accordingly. It is very likely that the jobs will be run over more than one weekend. The schedule will be posted on the DALNET listserve.

- c. **New Patron Record Requirements:** The programmers will work on new patron extract and loader requirements over the summer so as to be ready for the Fall term. DALNET libraries may not need new extract programs if all required data is the same. A program can be written to map the old data to the new fields. The Circulation Standards Committee will have to make recommendations on whose address information takes precedence in tape loads.
- d. **Course Reserves:** The course reserve subrecords will be searchable by the public by author keyword, title keyword, course, instructor, and call number. There will be a prompt at the bottom of DCAT screens: "For course reserve information type CR". This will call up a form for patrons to fill in to conduct their searches.

The ability to create course reserve subrecords is currently available. Their display in DCAT will be controlled by data fields in the subrecords. Academic libraries in DALNET are strongly encouraged to review or create these subrecords so they have appropriate dates in them when this release is put into production.

- e. **Training Plans for Circulation Staff members:** We will be using a "train the trainer" format for training. The emphasis will be on screen navigation and location of information on the various screens. Training has begun for WSU full time circulation staff members. DPL will be the next library to be trained. Sessions will be about 3 to 3.5 hours in length and will be scheduled to best suit the needs of the individual library; they can be scheduled outside of normal work hours, if necessary.

Although we prefer to train in the DALNET Training Room (250 Purdy), we are willing to conduct some sessions elsewhere because fixed terminal IDs are no longer required for circulation. Anaclare Evans will contact each Project Manager to schedule training for that library.

- f. **Moratorium on Changes to System Control Files:** It has been determined that this release will require a large amount of work on the system control files. Because of this, the files will be closed in late April or early May. This moratorium will mean that we will be unable to create new locations, add new circulation policies, create new NOTIS authorizations, etc. Any system control file work already submitted will be completed before the moratorium. Project Managers will be notified of the specific dates for the moratorium.
- g. **Role of the DALNET Circulation Standards Committee:** The DALNET Circulation Standards Committee is meeting regularly to make the decisions needed for implementing this release. They will be making recommendations on address types. They are currently involved in testing and will be involved at training at their home libraries. Libraries that do not currently have a representative on the Circulation Standards Committee are welcome to send a representative to the committee meetings during this crucial time. The meeting schedule will be provided to Project Managers.

5. Shared Database Opportunities

- a. **ProQuest Direct/ ABI Inform (UMI).** The following libraries are up and running with ProQuest Direct: Walsh College, Oakland University, Wayne State University, and Botsford Hospital. Walsh College reported that UMI is slow at billing.
- b. **Galenet** has no provision for dial-in access. They cannot provide password protected access at this time.

- c. **BiP Options:** DALNET has obtained pricing for access to Books in Print from IAC and SilverPlatter. If we select SilverPlatter and mount it as an InfoShare database, we should be able to provide a hook to holdings. Access via OCLC FirstSearch is another option.
 - d. **MEDLINE on Shiffman's OVID System:** This is still being discussed with OVID. We are authorized for a free trial and databases other than MEDLINE can be added to the trial. Some databases suggested for the trial period are Current Contents, PsycInfo, and Books in Print.
6. **DALNET Partnership Team Report:** L. Bugg alerted Project Managers to the memo from M. Auer which was attached to the agenda. Discussions relating to the Partnership venture are continuing. There are plans for an in-depth demonstration of Horizon on for 3/11/97 to which the Partnership Team and a small group of DALNET experts have been invited. This will provide an opportunity for many questions to be answered which arose from the earlier demonstrations. A de-briefing will be held immediately after the demonstration to assist the Partnership Team in their discussions with Ameritech the next day.
7. **Announcements**
- a. **DALNET Cataloging/Authorities Spring Users Meeting:** A users meeting for catalogers and authority control staff will be held on 8 April 1997 at Wayne State University in the Purdy/Kresge Library. Flyers for the meeting were distributed and all library staff interested are invited to attend.
 - b. **Next meeting:** 5 May 1997, 1:00 to 4:00 PM
Botsford Hospital Library, Farmington Hills

Summary notes by,

Anaclare F. Evans