

## ILS Coordinators' Meeting -- February 19, 1997

Present: Nancy Stancel (recorder) - UMKC-Law, Vianne Sha - UMC-Law, Linda Hulbert - SLU-HSC, John Huang - SLU-Pius, Helen Spalding - UMKC, Dean Schmidt - LSO, George Rickerson - LSO, Robin Kesphol - UMC, Gary Harris - LSO, Janet Jackson - LSO, Amy Arnott - UMSL, Richard Amelung - SLU-Law, Bob Heyer-Gray - UMR.

1. Review of minutes - approved as written
2. LSO Update: George commented on three problems that III agreed to correct: bar-code validation, simultaneous printing, and sparse scoping. Out of the three topics, only sparse scoping has been corrected.
  - a. Bar-code validation: George R. met with Jerry and Tom from III at mid-winter ALA concerning several problems. The bar-code validation problem at SLU and MU was due to ID pattern recognition and this is being investigated.
  - b. Simultaneous printing: This has a high priority for Jerry Kline and III. It is not yet corrected. Janet explained that the new printing method is causing a large amount of hung records which frequently will not clear after issuing the "free record" command. III initiated a fix for hung records that did not have the expected result. Arrangements have been made with some campuses to print overdues and see where in the process it is failing. It's a very hidden problem for III to diagnose. A test print job is being done today to see if records are still getting hung.
  - c. Sort by Volume numbering: This is being run and monitored by Rob Hawks and he is running the program against the entire database. This run is very time-consuming and the one-time pass is not yet complete. George R. will update this group once he gets more information from Rob.
  - d. GOV. DOCS. and 930's. Kurt Kopp was not available to update us on these topics. Autographics is ready for us to set up a load profile which can be ready to test soon. Autographics will load OCLC numbers and we need to examine test records and make sure that the OCLC numbers (field 001) have had leading prefixes substituted with leading zeros. All Marchive records will be loaded and cataloging centers will have to resolve any duplicate bibliographic records.
  - e. Missing Holdings: George believes that Kurt has finished this project. Once this is verified, we could go ahead and turn off LUMIN.
  - f. Duplicate Overdues printed: Richard A. noted that when printing overdues, a duplicate overdue is being created but the Status field in the patron record is not being updated.
  - g. Bursar Interface: This system was activated on February 12th

and should be operational by June. It has the ability to collect circulation fines.

h. Port Availability for interactive download: We originally contracted with III for 10 simultaneous users via OCLC's Gateway software. This software will not be utilized and we will use III's software for interactive downloads. The question arose as to whether we still have 10 users licenses with III's software. Richard commented that in the setup he has the system re-try logging on up to 8 times. The screen says that you are logged on but then it disconnects. Also, during downloading, the system will give a "bib and item will be created" message if the transaction file can't process the records immediately. Sometimes, the bib and item records do not get created despite this message. In addition, the message given at the time of downloadings is always "bib and item ..." regardless if your downloading bibs, order, or item records. This message should reflect what is actually being downloaded. Vianne explained that whole sessions of records have not downloaded so she sends the entire group again. This can explain some of the duplication of records in the system. Greg at III is aware of this and we need to document this problem. Dean S. found in III's INNOPAC Product Catalog (p.10) that product 110N "Interface for OCLC Passport for Windows" allows an unlimited number of simultaneous users. George R. will inquire of Linda at III, where we stand on what we originally purchased for interactive downloading and how it compares price-wise to III's software and number of simultaneous users. George R. wants to look into the ftp connection for downloading. If no password is required this could be a security concern.

i. Link Bib to Item Process: We are in week 3 of the new process to link bib and item records on a daily schedule. It is working fine and reference and circulation people are much happier with this updating process.

j. Status of Authority Scoping: Janet said that the scoping problem is fixed and the program is running much faster now. Occasionally the program hits an authority records and gets "snagged" on the record for a long time. Apparently the program is still running when this happens and it only looks like its stopped. III says it is the large spaces in the database in between one authority record and the next occurrence of an authority record that causes this to happen. The blind references still can be a problem. George R. would like Laurel Gayle-Green (MNL) to notate when an authority record doesn't go through. We can begin scoping again from that record and see if it has changed.

3. Password Options 101-202: There was unanimous consent to turn on these options on March 3rd. Everyone's passwords will need to be enhanced in III. There was discussion about how confusing some of the setup information is on III. Sometimes that only way to tell what an option controls is how it's grouped in the setup screens. Since only one person at a time can update passwords, the following schedule has been setup: Feb. 20 (Thurs.) UMC-Law (A.M.) and SLU-Law (P.M.); Feb. 21 (Fri.) UMKC-Law; Feb. 22 (Sat.) UMR; Feb. 23 (Sun.) SLU-Pius; Feb.

25 (Tues.) UMKC (all day) and SLU-HSL (after 5:00 P.M.); SLU and UMC can use the remainder of the time for updating passwords. We need to inform LSO if there are any problems getting passwords enhanced by March 3rd. Once the updating is done, you must restart the INNOPAC session AFTER Gary has turned on the options for the enhanced passwords to work. Some password options are reserved for LSO: "Shut Down the INNOPAC"; "Del Records of Any Type" was reserved to LSO but George R. feels that designated people at each site should be able to do this so that records can be deleted from review files. Network Managers and/or ILS Coordinators should be the only people passworded to assign passwords and logins.

4. Cataloging Workstation: We can get a preview copy of this software for a 30 day review. The product costs \$11,500 and if purchased, would increase the monthly fee approximately \$115.00. A decision to purchase would have to be made during the 30 day trial period. The program requires Windows 95 on a Pentium machine. The first demo version was very rough. It will be on display at IUG. There is no money this year to purchase such a program. The advantage is that it is a true Windows environment and prevents us having to use multiple interfaces. It is restricted to cataloging activities and does not allow for other III module functionality. III's future is in Java script, not Windows applications. It is unknown whether future Java applications will have the same functionality and cost. Several people from the UM system will be attending IUG and George would like those that attend to take a hard look at the cataloging workstation.

5. User Allocation report from UMKC: UMKC is overallocating by 10 ports to deal with the "All ports in Use" problem. This has greatly reduced the access problem.

6. BNA contract: Many of the concerns that MQCC has had about authority work have been resolved (i.e. local headings). The Notification portion of the contract is up for renewal and that service has been working correctly. The BNA contract was acceptable to the Board of Curators because it enabled us to out-source a significant portion of our authority work which helped make us more productive. Also, the Table of Contents Service record enhancement program was a great selling point for the Board. In the last quarterly load, 67% of the records loaded had TOC added. We discussed BNA's ASAP service as well but were reminded that the service does not offer TOC and would not print lists for us to review. Discussion continued on interactive downloading and the possibility of us exporting authority records at the time of cataloging. At that point we could consider canceling Name Authority service and continue with the Subject service, and using the ASAP service at that time. This is an issue for MQCC to re-visit. The question was asked, if the interactive downloading of authority records is a cost effective method in cataloging. UMC indicated that for DLC records, this would not be cost effective.

7. List of Outstanding Issues: This list is a compilation of lists maintained by Helen S. and Robin K. Robin wanted to know if the committee would like this list to be available to all staff on the LSO web page. This list can be considered a support tool and tracking

mechanism for current issues being addressed by MERLIN committees. George R. said that at LSO they are using Microsoft Access (database manager) to accomplish this task. It would be nice if we were all using the same tool for tracking. The outstanding issues list would conceptually be "in front of" the Access database. The Access database would need to be re-worked if it is to be understandable to staff end-users. It was decided that Gary H. will maintain a web page containing the committees' list. It is to be used as an internal document only. The lists will need to have more structure and clarity. Richard A. volunteered to write guidelines that contain a statement of purpose, design and format. The list will handle system-wide concerns. Robin will send MERLIN committee chairs their lists. They are to return any changes to the list to Robin. The MERLIN committees will maintain their lists with Gary's help. Committee chairs will update his/her list and send "cross-over" items on the list to Robin for the Coordinators list. Once an issue has been resolved, it is to be removed from the committee list. LSO's Access database will maintain an historical record of issues. We can also maintain a "desiderata or wish" list on the web page.

a. Committee Enhancements Process: III has two methods of handling enhancements. You can send an enhancement request through III's e-mail address on their web page. IUG goes through a formal process of gathering, rating, and submitting enhancements to III. George R. said that the chance of implementation of these enhancements is small. Enhancements have to attract potential III customers and be profitable for them. George suggested that we follow the OhioLink model. They negotiate a separate annual contract with III for special enhancements. It would be reasonable to consider \$50,000 (or less) for this type of contract with III to be part of an annual budget (apart from new products). The advantage of this is that you can be certain that the enhancement will be done in a timely manner. We don't have the money in this year's budget to consider doing this. To facilitate this process, it was suggested that the MERLIN committees submit all requests to the ILS Coordinators. Each committee will have indicated in priority order, which enhancements to be most beneficial. The ILS Coordinators would then forward the top two requests from each committee to III for potential enhancements. George R. would need these requests by March 15th. For example, PCode 3's will be cross-tabulated in version 11 on the web. This would be very helpful to us in the non-web environment.

8. Patron Initiated Borrowing: This is a priority for the library directors. Concern was expressed that ILL delivery services are not consistent among the libraries. In III, system options allow a library to limit requesting materials by login groups and material types. There is an option, >19 Patron Eligibility, which is driven by PType. A library can also place a message at the bottom of the screen indicating what types of materials are available for borrowing. There are two types of patron requests: manual and automatic. The automatic (which is what the library directors want) requires a PIN number or a library can specify another field to check for patron verification (i.e. bar-code ID). In a manual review operation, all requests go into one shared file, but a library can select requests

made only from their center. You can clear only your own patron request file. The Circulation and ILL MERLIN committees will need to figure out procedurally how to accomplish patron request borrowing. This is an operation separate (but similar to) traditional ILL but also involves the circulation component. Concern was expressed about the limited resources and the courier service that is in place, in dealing with the new type of patron requests. There is no agreement among the library directors as to what to do about courier service, although their expectation is a 24 hour turn around. A 48 hour turn-around is about the best that can be done at the moment. This is the time allotted in the OhioLink system for this function. There is to be a "phasing in" of the service which is to begin with faculty, graduate students, and staff borrowers. Pickup and delivery directly to libraries instead of to mailrooms would help speed of the process.

a. Patron Field Protection: A short discussion ensued concerning protecting certain fields in patron records. If this can be done, then that information will not be lost when a new load of patron files is implemented. We know that note fields can be protected. The Circulation committee needs to discuss this issue. SLU wanted to know how the codes in the PAF's are treated? There are faculty not on the payrolls but still employed by the university whose patron file is updated with a status of "expired" when new patron files are loaded. UMKC and SLU are both changing the status code on an "as-needed" basis.

b. Next Meeting: The next ILS Coordinators meeting is scheduled for March 26th. There is only one agenda item so far--cataloging workstations. Agenda items are due to Robin by March 12th. Dean Schmidt's retirement party is on March 26th. If the Coordinators meet that day, they will be let out early in order to attend Dean's party.

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