MERLIN ILS Coordinators Committee Meeting
Columbia, MO

1 December 1999

Chair: Richard Amelung
Minutes: Raleigh Muns

In attendance:
Richard Amelung (SLU Law), Raleigh Muns (UMSL), Gary Harris (LSO), George
Rickerson (LSO), Randy Diamond (MU Law), Vianne Sha (MU), Nancy Stancel
(UMKC Law), Ben Lea (UMR), Win Shih (SLU Pius), Dennis Krieb (SLU HSCL),
Helen Spalding (UMKC)

    RICHARD:

Any questions about the minutes from the last meeting?

    VIANNE:

One minor correction - under SLA "General Discussion" where I said

"... sometimes you are asking about the SLA."

should be changed to:

"... sometimes you are asking about the standards."

    RICHARD:

Announcements?

    GARY:

On December 31 ... I am passing out our Y2k compliance statement from
Innovative ... (passed out).

    RICHARD:

I am passing out from Vianne a chart for the enhancements requested from
each cataloging center. When filled out we can see what each center wanted
and we can make a complete copy for everyone.

    GARY:

The update continues. I received an email from Anne Rakes last night re
InnReach asking where our plans are for III 2000. I sent an email about this
- basically it will be a change to the menus that our circ people will be
seeing. They substituted the word "InnReach" for "MOBIUS". It will now say
"Print InnReach Paging Slips." This is because they are selling a lot more
systems. I sent this to the Circ committee this morning.

Also re the IUG ballot, everyone voted FOR the proposed change about membership. Peter Murray told me that it is running 164 FOR and 4 AGAINST (3 small institutions and OPAL - 17 Ohio libraries sharing the same machine). That means that this office will join the IUG as a consortial office and those of you who are NOT members may join IUG as individual members.

RICHARD:

This, of course, will give us all a stronger voice.

GARY:

I'd like to mention the letter that George wrote to Jerry Kline is worth passing out (re: transaction file throughput).

RICHARD:

I think OhioLink has the same response to this unanticipated consequence.

GEORGE:

Sandy Westall has said that this is a real time update ...

GARY:

I remember quizzing them intensively about this in 1997.

GEORGE:

Innovative's executives (attitudes) have always behaved in a way that I would regard as responsive. But, technically, I expect that they are up against some difficult problems. Pressure from OhioLink and us is needed to move this to a top priority - I don't sense they consider this their top priority.

RICHARD:

I don't see the relationship between advanced searching and updating.

GEORGE:

The throughput is related to the speed of the index updating. I don't know enough about Unix to understand the problems they are having with multiple threads.

RICHARD:

But, as they sell more and more of these systems this is something that new users should be made aware.

GEORGE:

One of the things that is coming into play is the International Consortium of Library Consortia's new interest in consortial borrowing and patron

initiated borrowing. Innovative is interested in being represented here and the last thing they would want would this problem to come out in is that venue. There's a lot of market pressure on Innovative to fix this.

GARY:

Does this control program preclude them from changing the code at a low level?

GEORGE:

I don't know what the technical barriers are ... if it were easy to fix, they'd fix it.

VIANNE:

Why do making simultaneous lists create this problem?

GEORGE:

System resources are impacted. This only has to do with the Union Catalog system. Local boolean searches on MERLIN don't affect the Union Catalog. It's an operating systems problem - no matter how fast your machine is, no matter what hardware upgrades you do, you still can't solve this problem. Creating lists on MERLIN doesn't affect the Union Catalog.

We're going to upgrade the MERLIN server in the next fiscal year. That will help performance there. We'll never be in a situation where we want you to ... this is why we don't want to buy more review files.

BOB:

The times we've had the worst problems with create lists, there have been other things going on such as runaway processes. I'm not convinced that creating lists is that huge of a problem.

GEORGE:

Note that runaway processes happen on all systems - it happened with LUMIN and with Unix machines in general.

RICHARD:

Is there no way to have a tracking system on runaway processes?

GARY:

They do monitor the transaction file at each site. When control goes down they automatically get an email.

GEORGE:

The method for runaway processes to get fixed is when we see the system slowing down we contact them and they work on it. We won't be looking at

things on the new MOBIUS systems unless someone notifies us.

RICHARD:

One would think that you could test for runaway processes.

GEORGE:

>From the operating system point of view a process is a process. There are
all sorts of processes that run on a system, some forever. There's nothing
that intrinsically indicates a runaway process to the system.

GARY:

Re: proxy server. According to Dave, the proxy server is done. He has fixed
the original error. He has re-written every subroutine. There will be a note
in the next few days about it being available for use. He will also get back
to people about the "pac" files.

RICHARD:

And, when we want to add URL's to this, do they just go to LSO help?

GARY:

Yes.

BEN:

So the time table is days?

GARY:

Yes.

RALEIGH:

A note about this still being in need of testing first, and we may not be
rolling out for everyone to use. Being available in a few days is different
from production capability.

GARY:

For folks who go into "System Management" and look at tasks, there are lots
and lots of things going on that we may not recognize. You can't tell what's
a runaway process ...

RALEIGH:

If you can't tell what's a runaway process, how does III tell?

GARY:

They have command line access (we can only see the menu results).

Here at LSO we don't use our systems the way you do in the Library. We're
the first to know when the transaction file is backing up.

We had a meeting with Morenet regarding the Remedy Help Desk application.
Our Help Desk people prepared recommendations that Morenet will implement in
beta mode on December 15. After training here, I expect to roll this out
January 15. Immediate benefits will be when you call or email and cause us
to open a Remedy ticket you'll get an email with a URL that you can use to
check the status. Anytime the ticket has been updated, you'll see the
update. Lots of other neat features as well.

Re: Release 2000 - did you all get manuals? Anything else?

MOST COORDINATORS GOT THE MANUAL AND CD - VIANNE DID NOT GET A CD.

This could be caught up in Campus mail. It looks like III is sending out
user manuals on CD. I'll be mounting them on our machines and making them
available via the web.

A lot of things we used to download from sequoia ftp will be made via the
web. You'll have to send an email for the password if you don't have it.

The user name will be: ******
Password: ********
[Information distributed at meeting.   RCA]

Contact Gary Harris for access. He has previously sent out a message with
the user name and password.

    DENNIS:

Do you have a general idea how this will work?

    GARY:

We're not going to Millennium with this release. Plans are for next
summer.

    DENNIS:

Do you see any need for training, especially for Circ desk people?

    GEORGE:

Yes, we will. We don't know if everyone in MERLIN will be using the Java
clients at the same time.

    GARY:

Ok, release 2000 will be implemented during intersession ... late at night
...

    GEORGE:

Ovid update. I had hoped to have sent out an announcement - it's been delayed. We ARE going to switch to the Ovid online system and I was going to send out a message with all of the details on impacts. Last week Dave sent out a message raising a whole new way of doing this. Basically it would leave things the same way from a user's point of view. We forwarded that information to Ovid for response. This would require flexibility from them on how we would access their system. Hopefully we'll get their response this week. My intention to get this announced is on hold pending their response. If we continue with the plans we have in place the major functional impact is that the menus that we have (character menus on sequoia) would change - the subject list would go away. We'd have a simpler menu that would list the catalog and the other choices. The alphabetic list would be the list on the Ovid server. The reason that would happen is that in the original scenario the business of connecting to a database by having the cursor on the appropriate database is not easy to do in the telnet environment based on our original information. Now that Dave has thrown out this new possibility the impact would be much different.

NANCY:

Is Dave's way a "telnet" way?

GEORGE:

He originally saw that we were using a two system arrangement of menus on one machine, the databases on another. He proposed that we do the same thing, but that we interface with their machine with their permission. They might object to this due to security concerns which we are addressing.

The other advantage with Dave's proposal is that we wouldn't have to rely upon a script that had been written by Ovid that is running on an Ovid server. We're depending upon someone in Utah for writing scripts and I'm not sure to what extent we would have efficient control.

Remember, Dave's departure is rapidly approaching and we really don't have time to deal with either event. We're just going to have to do our best to pull this together.

DENNIS:

Regarding the timetable, and people with accounts?

GEORGE:

That is one thing we are looking forward to: authenticating users against the patron file.

DENNIS:

This access and authentication will work from an "outside" IP?

GEORGE:

Yes.

DENNIS:

We just don't want people to lose service. We need a timetable to prepare
for them. I'm assuming the target date for change is January?

GEORGE:

We need to hear from Ovid about which way we need to go. The initial
scenario requires a 6 week lead time.

DENNIS:

Do we need to know anything about people's SDI's?

GEORGE:

We don't know what we'll be doing yet so we can't say. The generation of the
Ovid userid and password will be transparent to the user. A table will
associate them with their Ovid id.

RICHARD:

What part of the patron record are you going to use?

GEORGE:

The University ID.

Because of MOBIUS, we are having to design a new ID number. We have to have
unique ID's within a cluster. One of the debates we are having is whether to
have UM people have an alpha prefix [i.e., suffix ?] on their ID's to make
everything equal. What we would love to do is have a table of the alpha
prefixes in the system and have the user's SSN looked up and automatically
add the prefix.

RALEIGH:

What will be the process for setting up new Ovid ID's? That is, how do we
set it up so new users can save individual SDI's?

GEORGE:

Saved SDI's will be affiliated automatically with the user ID. You won't
need to set up a new account.

The timetable is compressed but we'll have to keep you updated.

HELEN:

Java client update?

GEORGE:

I don't have anything here.

DENNIS:

>From SLU it takes about 50 minutes to download the client.

BOB:

Download times are very dependent upon network vagaries.

GEORGE:

It's a big file, but it shouldn't take that long.

RICHARD:

Gary, can you bring up the action items?

GARY:

Janet isn't here today, but she called me to tell me that she updated the
Action Items from home.

VIANNE:

I print the list out on Friday - could we have this updated before we meet?
Could this be updated by the end of Monday before we meet.

CONSENSUS: Request that LSO update the Action Items at least the Monday
before a meeting.

RICHARD:

Item 1712
Didn't we decide to do away with this?

Item 1712 is completed and can be deleted.

GARY:

Item 1782
Janet said she would be asking Richard for some clarification on the
standard. Change item 1782 Call Status to "waiting for Richard."

REMEDY may handle a lot of these Action Items. We're going to set up rules
for tickets remaining in a certain status (and I'll get automatically nagged
if a ticket is up to long).

RICHARD:

On to discussing the Service Level Agreement (SLA) and our suggested
revisions.

GARY:

I did say that you should bring your concerns ...

DENNIS:

Under 4.3 on page 2 (MERLIN databases) it mentions that the whole selection process will be determined by the MERLIN Library Directors. It seems that this means just the UM Directors.

Our representative on the Collection Development committee was told that what they were doing was a UM Directors choice only.

RICHARD:

What came out in Collection Development was that in fact what occurs is that when the UM has money (as they do this year but didn't last year) then the UM decides what to subscribe to and if SLU decides to participate they can and are billed appropriately.

DENNIS:

The agreement says "the MERLIN Directors". . .

RICHARD:

And that isn't really how it happens?

GARY:

. . . after the MRSC group makes its recommendations, they go to the appropriate body.

The Collection Development committee is the first MIRACL committee...

GENERAL DISCUSSION

The SLA is correct. The Collection Development committee is dealing, at this point in time, with mission enhancement money which is UM money. The MERLIN Directors DO decide, but if your money is at stake YOU have a decision. The committees make recommendations to the MERLIN Directors.

MORE GENERAL DISCUSSION

DENNIS:

We are also looking a clarification on the training aspect (section 5.6).

GARY:

We've only done one thing in this area. LSO still has the responsibility to develop training and we're looking at doing more in this area, especially with our new hire.

DENNIS:

Under 5.12.1. "Can we ask LSO for shelf lists for inventories?"

NANCY:

Can't we do this with the OPAC?

VIANNE:

You have to export the list for post-processing. It's very hard. It won't print the call number unless you print the full record. A full record will print on a lot of pages.

GARY:

What this (5.12.1) says to me is that we will provide a copy of your database to you. Processing is up to you. This is a guarantee that you can get your records out of the system (if, say, you want to go elsewhere). It doesn't say anything about creating shelf lists.

GENERAL DISCUSSION ABOUT SCAT TABLES AND REVIEW FILES

DENNIS:

Finally, re the User Satisfaction Survey (6.10). Have we ever done this?

GARY:

It's an option. I didn't hear a word from SLU on this topic.

RICHARD:

This has to do with individual users, not twixt LSO and the campuses.

GENERAL DISCUSSION

RALEIGH:

MRSC did a user survey in the past, and has basically left it up to the individual institutions to do so. When required, we'll do it again, but not all institutions feel that the information is universally useful. Personally, we've found such data about as useful as a Focus Group (said derisively).

WIN:

Do we want to keep using the UM Logo (LSO) on the evaluation form?

RICHARD:

They (LSO) are our "vendor" so it makes sense they would use their logo.

VIANNE:

Re: 6.7.3 and 6.7.4 I didn't receive acknowledgement about the timing on reports.

GARY:

The policy hasn't changed (independent of slow responses to your calls). We're implementing the Remedy system just so we can meet this standard to which we are committed.

VIANNE:

I had a call open for more than 6 months and I haven't received a response to this call.

GARY:

With Remedy's "time rules" we can force reminders that we need to follow up with the vendor.

RICHARD:

Do we have a "ratcheted up" agreement with III? That with no response, the priority is raised?

GARY:

As an example, remember the RAID fiasco with daily emails, etc? It's up to us to stay after them. We KNEW something was wrong with that configuration.

VIANNE:

We need to have some kind of SLA with III.

GARY:

They do commit to a Help Desk open 24-7, but there's nothing about "quality" that I know that they commit to. They're not the only Library Automation vendor guilty of using this approach.

RICHARD:

When are you planning on making your next round?

GARY:

The SLA says that we'll do this formal assessment by January 1. I don't know. I'll have to go back and check. I was still doing this in late Summer. I don't have a problem with the dates in the SLA.

RICHARD:

I think that at one point we talked about the responses being back sooner and that's when mid-winter falls and that's why we came up with March 31st.

GARY:

I sent these to the Directors (MERLIN) last year. I'll do the same thing
this year.

VIANNE:

This is an SLA only for MERLIN.

GARY:

There is a separate SLA for MOBIUS.

RICHARD:

One of the reasons to do the SLA was that when MOBIUS came up that we
wouldn't get short shrift. We were concerned that if LSO resources became
stretched we might not be served.

GARY:

There is an SLA between the MOBIUS Consortium Office and the MOBIUS Library
Directors.

Vianne, you mentioned that the staff wants to evaluate LSO - I think you
should talk to Martha. Evaluations were sent to Directors for disposition.

RICHARD:

As an aside, some of the system performance issues aren't really in question
in MOBIUS.

GARY:

And when you get to MOBIUS, you're talking about the MOBIUS Executive
Committee, and not the Directors.

VERY EXTENSIVE DISCUSSION ABOUT FUTURE OF MOBIUS AND LSO SUPPORT

LUNCH BREAK

RICHARD:

Win is tallying the IUG Enhancements. Perhaps we can talk about Review
Files?

GARY:

I've had Betty collecting data on this.

RICHARD:

The other thing that occurred at MQCC is that we noted with the standard

system 40 files are available. With the current user base of 5 campuses, we are now up to 200 files. There is a significant user base that was NOT included and that is LSO. If the number of Review Files were purchased based on users, LSO wasn't taken in to account. If one brings up a III system one brings it up with a standard set of 40 files, based on a user base. A user base (LSO) was not counted.

HELEN:

If all we asked for was 40 more files, is that asking for too much?

RICHARD:

Increased cost is $8000 (?) for 40 more files. One argument that I have been swayed by in the past is that the more files there are, the more potential of files being run at the same time and dragging system resources down. I don't think that is true because there are only a limited number of users doing this. I also find that the file sizes are often inappropriate.

GARY:

Betty has collected data on this.

RICHARD:

Last time we purchased, we bought a disproportionate number of smaller files. With LSO creating files in order to handle the WLN, BNA, OCLC, etc. we find a lot of the larger files are used as well.

NANCY:

We also found in MQCC that people would reserve files for future use.

EXPLORATION BY GARY OF CURRENT REVIEW FILES

GARY:

George reiterated this morning that he is not willing to spend more money on review files.

HELEN:

The Coordinators have to make a recommendation for the Directors to purchase more review files then.

ACTION ITEM:
Richard will draft a recommendation to the Directors for purchase of 40 more review files.

HELEN:

The MIRACL Directors meet on Dec. 16th so we have to have this recommendation to them before then.

GARY:

If we need 40 files per campus, and 40 files for LSO, should we also say
that each campus should only use 40?

RICHARD:

No, I'm saying that according to the vendor, 40 files is a reasonable number
for a user population of a system (otherwise they wouldn't give you 40).

HELEN:

The first number was "made up" at the outset, and we're trying to come up
with a number that reflects our true needs.

RICHARD:

When Betty gets back we can look at the data she's collected.

What you should have in hand now (passed out) the tallies for the IUG
enhancements. Some are not problems, but we've ended up with a few that have
three and four way ties.

VIANNE:

Can we go through this module by module?

RICHARD:

Yes.

FOLLOWING DISCUSSION OF EACH MODULE, THE FOLLOWING ENHANCEMENTS WERE THE
MAJORITY'S DESIRES

General System Management:
3, 6, 7, 13, 15

Acquisitions:
1, 2, 4, 13, 15

Cataloging:
1, 3, 5, 6, 11

Circulation General:
1, 4, 5, 7, 13

Circulation Checkins and Checkouts:
4, 7, 8, 10, 13

Circulation Financial:
1, 2, 6, 13, 14

Circulation Holds and Recalls:

1, 3, 4, 5, 16

Circulation Notices, Parameters, Set-up:
1, 2, 4, 7, 9

Circulation Millenium . . .
5, 6 , 9, 10

Course Reserves:
1, 2, 4, 5, 10

InnReach:
1, 4, 6, 7, 8

ILL:
2, 3, 8, 9, 14

Management Information:
3, 5, 9, 11, 13

OPAC:
1, 3, 7, 11, 13

Serials:
3, 4, 8, 14, 15

GARY:

If you give me the final choices I'll send them out on the ballot.

Moving on, I've asked Betty to collect data regarding use of review files.
She has some interesting data on review files . . .

BETTY:

PRESENTED REVIEW FILE DATA (PASSED OUT STATISTICS)

GARY:

I think we're at a point where we have to develop some kind of policy for
managing system resources, regarding creation of boolean lists.

RICHARD:

One idea would be if the system would tell us right up front "how many
boolean files are being created right now." III can see this, but we can't.
Does this need to be an enhancement?

DENNIS:

Besides running things over night, what else can we do?

GARY:

If I knew what the workflow was like, I might be able to make suggestions. I think we need to base management on projects.

RICHARD:

Example, for the bindery you have to gather your lists to figure out what to bind . . .

GARY:

If I knew what was routine, etc. I could figure out how we might manage this.

RICHARD:

I need to have each cataloging center forward to me what the routine created lists are being done by each center.

GARY:

I need to know the file sizes, how frequent you're doing it, etc.

HELEN:

Whe this information is distributed, people will say "hey, I never thought of x before. I want to do that too."

GARY:

The point is that I don't have enough information. I've heard of some sites that have two servers and I'm not sure what that means. Does the database live on one server? Are these two Innopacs that are completely mirrored and separate?

DENNIS:

What about down the road, using Millenium?

HEATED GENERAL DISCUSSION

BETTY:

PASSED OUT STATISTICS ON EMPTY LISTS AVAILABLE

HELEN:

The results indicate that people are using big files, and that we NEED big files.

GARY:

We need to know how often records need to remain in the review file. Are there times when you can create a review file and print out the data and work from the printout?

You need to be specific about all the things you do with lists.

VIANNE:

We also didn't use SCAT tables initially because we thought they weren't working and now we know otherwise.

BETTY:

DATA PASSED OUT FOR EACH DAY WITH CHANGE FROM PRIOR TIME IN AN INDIVIDUAL REVIEW FILE

The standards for naming reveiw files are not being adhered to in some cases. This makes comparisons difficult.

GARY:

Note "Items on search" files are system generated and thus won't adhere to our standards.

RICHARD:

The policy is that if you need a file and one is not available, you can use one that is not named correctly (e.g., "unnamed").

This data shows that there is movement, that files are being utilized.

HELEN:

We have to articulate our critical use more clearly. When do you need this information, Richard? We have to have it before they (the Directors) meet.

RICHARD:

Would Monday be ok? I need what the routine uses are, how big are the files, how often are they used . . .

GARY:

Please share this over the Coordinator's list so I can be enlightened.

RICHARD:

Thank you, Betty, for all of the work you did in compiling statistics.

Moving on. Another point that came up was concerning "uploading statistics" as encountered by Dennis.

DENNIS:

I don't know how many other libraries are using in-house statistics . . . we upload these to MERLIN and we see what is being used in the Library. Rolla is doing this also. Subsequently, we found that when you dump these barcodes

up to MERLIN . . . do you (Gary) put them all up into one file?

GARY:

First, you gave Alan a file with your data on it for experimental purposes. He sent me a file of barcodes. Another part of the problem is that Alan may have pressed the wrong key and may have been processing 1996 PC Circ statistics. I think that some of those that were sitting there were previously uploaded by John [Huang].

DENNIS:

When he (Alan) went to process these, he began processing our "230" barcodes. If we uploaded these in MERLIN and we didn't delete them, and if others are using this module they'll be getting records jumbled in. Are we going to be setting up times to do this so we don't conflict with each other?

GARY:

The only people showing an interest in this are Health Sciences people and that is the group with whom I've been working. The idea was they wanted to count their inhouse use. As far as I know you'd been using that without incident. So, when you (Dennis) were processing barcoded items picked up off the tables . . .

DENNIS:

I think you have to delete that file. I have to make sure that I tell my people to delete that file. If no one else is doing this there is no problem. If others (e.g., UMKC) are counting in-house use they can collide with our records if we haven't deleted them.

VIANNE:

We talked about setting up a schedule to do this originally, but no one was doing this originally.

DENNIS:

I'm anticipating that since other libraries are doing this that we're going to have to coordinate with others and set up times.

BEN:

I'm not sure we're collecting data now.

RICHARD:

I'm thinking that this is Circ data that the Circ people should work out.

HELEN:

Circ's next meeting is February 1, 2000.

GARY:

I'll send a note to the Circ folks and have the Coordinators copied.

If you (Dennis) can go back, find out what your people do step by step, I can then send a message to the Circ people, especially about the uncertainty whether you are deleting or not. I'll find out who's doing it, who wants to do it, and they'll get in on their agenda.

And, if Alan has learned how to use a non-Innovative scanner, that's worth knowing about as well.

RICHARD:

Just a couple more things. One, we should probably think about spinning out dates for next year. We've got January and February set up already. Does someone have the LSO calendar?

We have reserved January 5 and February 2 already. I've been thinking we should plan through June. . . the other thing is that people planning to go to IUG in April, the hotel may be filling up. I made my reservations six weeks ago and they were already having a problem with one of the nights.

Future meetings scheduled for: January 5, February 2, March 1, April 12 (in smaller conference room), May 17, June 28

Also, this being December, the chair of the committee changes (or not). I will continue if that's the pleasure of the committee.

CONSENSUS: Richard Amelung to continue as the Chair of the III Coordinator's Committee.

I would also like to update you on the Advanced Searching task force that I'm chairing - I'll be getting started this month. The deadline is for March to get a recommendation on how the Advanced Search product would be implemented. It can be implemented on three different levels and the question is which parts to give to the patrons. III has no description of the product. Kent State has a beta test site up and running. We'll use that to evaluate. The third level is a pure "Altavista" search on your databases. Anything a patron would have set in terms of scope and limit would be disregarded.

MEETING ADJOURNED
==
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