

ILS Coordinators Meeting 12/19/96 at LSO

Present: Linda Hulbert (SLU-HSC), Richard Amelung (SLU-Law), John Huang (SLU-Pius), Robin Kespohl (UMC), Vianne Sha (UMC-Law), Helen Spalding (UMKC), Nancy Stancel (UMKC-Law), Bob Heyer-Gray (UMR), Amy Arnott (UMSL)

LSO Staff: Gary Harris, Janet Jackson, George Rickerson, Dean Schmidt

George Rickerson Report:

LSO has been working with III on barcode validation and will be testing it this afternoon. The system does pattern recognition for patron and item ID's. It won't prevent an invalid barcode. It won't validate barcodes imbedded in a bibliographic record, such as incoming OCLC records. Hope sites will not to key or program barcode readers to provide a "b" before each patron ID.

Rickerson met with Jerry Kline on the sparse scope searching and simultaneous printing of notices at different sites problem.

Kline says these problems should be solved in Release 11. III would like to make a beta installation at UM in January to work on this. The beta version may have unknown problems. Beta sites are supported by the III Programming Dept. rather than by the III Help Desk.

The design for the sparse scope problem (scope is very small relative to the total database) is complex because of the conflict between scoping and the III design to always return a hit. One solution may be "No Hits," but III is proud that its system will always give a response that is NOT "No Hits." The simultaneous printing problem is due to a III file that ALL system printing requests must go through.

Update was fixed when III discovered what they changed in the Code that they should not have changed, and changed it back.

Rearrange by location appears to be working, but the program has problems related to the Waiting for 0 problem.

Speaker Telephone Call Between the Committee and Tom Jacobson:

III would like to deliver three pieces of development which would be Release 10.1 for UM/SLU only. It involves replacing the entire system with an entirely new Release, rather than providing individual fixes. III is able to do the replacement today. (The ILS Coordinators asked that it be scheduled for Monday, December 23, when patron/staff traffic will be lower.) III will slow down the system, then do the restart which would take a few minutes.

Release 10.1 will include barcode validation and will lay the base for sparse scoping, simultaneous printing solutions. It is possible that a printing solution could be tested the week of December 23, and a sparse scoping solution could be tested the week of December 30.

For barcode validation, the system recognizes that patron and item ID's have separate patterns, although they both remain in the same index. III will need to test variations on social security numbers. There may need to be a "b" in front of patron ID's, but hope will not

need. Should be able to test on December 23, after Release 10.1 is loaded.

Expectations we should have of the sparse scoping change:
After a reasonable attempt to find a close response, the system will go ahead and present a nearby entry screen with these two messages:

"Your entry not found"

"No nearby entries found"

Menu options appear for other search alternatives.

III will try to provide for the simultaneous printing solution:
At the point that a site selects the location from which it is printing, only one site at a time can make the selection. Once the originating location is chosen, the lock should be released so that others can select to print also, one at a time. The print jobs will then queue and run.

III staff will need to be trained on 10.1, so all support calls will initially go through the III Development Office (Beth or Linda).

The Committee elected Robin Kespohl as Chair. She asked Helen Spalding to take minutes. In the future, minutes taking will rotate to each committee member, alphabetically by campus. The committee will make recommendations to the UM Library Directors based upon consensus.

The Committee will meet on the third Wednesday of each month, beginning February 19. Agenda items are due to the Chair two weeks prior to the scheduled meeting. If the agenda does not warrant a meeting, it will be cancelled. Meetings will be scheduled on February 19, March 26 (March 19 is during the IUG meeting in California), April 16, May 21, and June 18. Agenda items for the February 19 meeting are due to Robin by February 5. If members cannot attend, they are encouraged to send a substitute, so that all are represented.

Robin's ground rules include:

- Silence will be interpreted as consent.
- If your opinion is requested, please respond.
- When polling the group by email, "ACTION ITEM" should appear in the Subject line, to alert members that they are expected to respond.
- If an individual sends a message to the LSO Help Desk, it should be copied to one of the ILS listservs. When LSO responds to the individual, the individual is responsible for copying whatever listserv s/he had copied when the original message was sent to the LSO Help Desk. (The Coordinators are copied on each ILS listserv.)
- If the agenda item warrants it, the Chair of one of the other ILS committees may be asked to attend a Coordinators' meeting.

LSO will post the Coordinators list on the Web Page, with email addresses and telephone numbers.

User License Allocation

UMKC is frequently rejected from system access because all the user licenses allocated to the UMKC Libraries are in use. System records show that this is not true for other campuses. Peak system use is not yet using close to all the user licenses purchased. The Coordinators recommended that UMKC overallocate user licenses. Campuses are to monitor Login statistics to see if any problem arises.

There are New Password Options in Release 10

If we select to use the new password options available in Release 10, we must select ALL of them. If not all campuses want to use them, we can establish option groups to segment campuses, but each option group must select all or none of the new password options. If we select to use the new options, all passwords must be reassigned before the options are turned on. SLU-Pius would like more information before deciding, so the group will wait until more information can be discussed before making a recommendation. The group is generally positive about the possibility of using the new options. LSO is to clarify with III if general authorization has to be given for specific options to work.

System Response Time

SLU is logging slow response time, and wants to know if there is a solution. Rickerson says that SLU should check their TCP/IP connection. LSO does not have terminal level information on response time. If we think we are having a response time problem, we need to troubleshoot any factor from the individual terminal to the system. Ralph Carusso has received the recommendation that dependence in the TCP/IP network be minimized and problems reduced. Some corrections have occurred. A task force is to evaluate TCP/IP network protocols and management, especially because more and more systems are being moved to the network. It needs to be a production system and currently management of parts of the network are too distributed for the network to perform in production mode. A factor is being unable to compete to hire the talent needed to manage the network. The UM administration is very aware that this is a high priority.

930 Load

Checkin records iwth checkin cards will ALWAYS appear before checkin records with checkin cards. If doing a scoped search, all the sites of checkin records with checkin cards will appear before all the sites of checkin records without checkin cards, BUT each group should be scoped with the scoped institution appearing first in each group.

Rickerson says he does not know when LSO will be able to reload the bibliographic records loaded with the 930. He has ordered additional checkin records that must be in place before the 930 load, but does not know when they will be available. Dean Schmidt would like us to consider not having a summary record for only a few volumes in a dead title; it forces the patron to look at two screens with the item record would be enough. Richard Amelung said that if a library has an active record, an earlier record with an inactive title at another library may then lose visibility. Robin suggested that we need a standard, and that this is an issue for Acquisitions/Serials, MQCC, and MRSS. MQCC will be asked to draft a standard for each group to review, after conferring with the Acquisitions/Serials and MRSC groups.

Helen Spalding asked Rickerson what protocols we needed to request purchase of more space, or new products, so that they are in place when needed. Rickerson said we should let him know when we need these, but the reason they do not happen is because he has not had time to address them, not because he does not know of the need. The

Coordinators will try to monitor needs and let Rickerson know what the needs are.

Synchronizing bib and item locations

This is an important program to run frequently, and the campuses must be notified if the program is not being run. Rickerson explained that LSO knows it is important, but the problem is being able to run all the maintenance programs consistently. LSO will try to do a better job of letting the campuses know if a program is not being run, so that campuses can consider compensating in other ways. The rearrange by location is also important but cannot be run simultaneously with the synchronizing bib and item locations program. Each takes over three days to run, so neither can be run more frequently than once a week. MQCC will be asked to look at a standard for synchronizing bib and item locations when resolving duplicates and to consider the problem of how often to run each of these programs.

Helen Spalding asked if each campus should join IUG to have greater voice by having a greater number of votes within IUG. Rickerson said the consortia members have talked about working together to take their concerns as a group to III. The UM directors have talked about annually negotiating a contract with III for the enhancements we need. Most IUG members are small and don't have our problems. SLU has asked for a price on cross-tabulating PCode 1,2,3 for statistical reports. The Coordinators need to prioritize enhancement recommendations to the UM directors to discuss with III each year.

Other Status Reports:

1. Importing of records other than OCLC into MERLIN

What process should we use if a library wants to load vendor supplied records? Jackson explained that OCLC and III do not talk together. OCLC uploading is a factor. Susan Lewis says that if we upload a non-OCLC record, there may be problems. Shelley says III does not know what OCLC needs. Rickerson wants to run records through a pre-processor that will go through our load table. We need more information, and the Acquisitions/Serials Committee needs to discuss this issue.

2. Cataloging Workstation for Windows

Rickerson says there is not money to buy it this year, but does not know the cost. The Coordinators want to be able to preview it, and to know the cost and whether we can purchase it. Rickerson says it is up to the UM directors if LSO will purchase it or the individual libraries will have to purchase it. He will try to get a preview copy and find out about costs.

3. Status of incomplete deletes and unattached holdings questions:

III has not yet answered. LSO will follow-up.

4. Waiting for 0 problem is till in software support at III.

5. Government Documents pre-processor status report:

No date yet. Kurt is working on missing items right now, so this is lower in Kurt's queue.

6. Rolla govdoc project:

New loader ordered. Getting test records from Autographics.
Will test after the first of the year.

7. Limit by Location

Previously, could have only 25 locaions, but in Release 10, we can have more. MRSC will be asked to discuss the locations needed.

8. Who is responsible for WHMC, Archives participation?

UMR WHMC will be responsible for all campuses' WHMC records going into MERLIN. The UMR cataloger doing this may attend MQCC meetings. UMC Archives is under Martha Alexander. UMR Archives is not related to WHMC or the UMR Library, but is related to the UMR History Dept. The State Historical Society is in MERLIN, but UMC has provided their cataloger a lot of support.

9. Remote Storage Facility

Robin and Rickerson visited Miami U to look at the software they use to manage their facility. Like it; is low cost, integrated with the library catalog, addresses functional needs, patron can see status of item, each site has its own RSF location symbol. Miami U RSF has programmed barcodes with system commands that can be scanned by wand to bypass several keying steps.

Spalding asked if the Corrdinators would want to maintain a Problem List like the UMKC list. Robin suggested that the group begin to work on such a list at the next meeting. She also wondered what UMKC's problem was with call number searching; Spalding will find out.

Robin also asked Spalding to avoid sending encoded documents through email that others can't convert.

Hope these minutes are readable. Please post corrections, additions to the list.

Respectfully submitted,

Helen H. Spalding, UMKC ILS Coordinator