

Automatome

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OOPS! For all of you who wondered about the last issue of *Automatome*, our appologies. The editors failed to identify it as the newsletter from the Automation and Scientific Development SIS. We'll try to not do that again.

The **annual meeting** of the SIS is scheduled for **Sunday morning, July 6, 7:30 a.m.** in the Sheraton Washington, the convention hotel.

Our program "*The use of Project Planning Microcomputer Software in Library Administration*" is scheduled for **Monday** afternoon, **July 7**, from **2:35 to 3:55 p.m.** Check your program for room numbers.

Nominations Committee Report - Byron Cooper

Chairperson Thomas M. Steel appointed Susan S. Roach and me as members of the Nominations Committee charged with nominating people for the offices of Vice-Chair/Chairperson-Elect and Secretary/Treasurer for terms beginning in 1986.

After soliciting nominations through the Section's newsletter and conferring with several interested people, we submit the following slate: Laurel Wendt for Vice-Chair/Chairperson-Elect and Linda Proudfoot for Secretary/Treasurer. The current Vice-Chair, Patricia Rempel, becomes Chairperson at the conclusion of the 1986 meeting.

In accordance with the Bylaws, article VII, section. 3, the nominations by our committee do not preclude nominations from the floor during the annual business meeting.

The Nominee for Vice-Chairperson/Chairperson elect: Laurel Wendt is currently Associate Director of the School of Law Library at Southern Illinois University at Carbondale. She has both the M.L.S. and J.D. Degrees and has been (in chronological order) Assistant Reader Services Librarian, Reader Services Librarian, and Automation and Research Librarian. She has been program chair and secretary for another SIS.

The Nominee for Secretary/Treasurer: Linda Proudfoot is currently Catalogue Librarian of the Joint Bank-Fund Library of the International Monetary Fund and World Bank. She has an M.L.S. and has been Chief of Cataloging at the U.S. Dept. of Justice, a Cataloger at the Army Library (Pentagon), Chief of the Army Studies Section of the Army Library, and District Librarian 15th D.S.G (Korea). She has been Chairman of the FEDLINK Quality Control Committee. She participated in the design of three online catalogs.

Technical Exchange - Linda Proudfoot

Several people suggested that we have a column for the exchange of technical needs and ideas. Therefore, this column will contain all the questions, solutions, and ideas you send me and a few that I think up on my own. Along this line, would it be useful to survey the membership and compile a directory of equipment, software, and projects in progress? My phone is (202) 623-7026 or write Joint Bank-Fund Library Rm. C-530 700 19th Street N.W. Washington, D.C. 20431 Attn: Linda Proudfoot.

Mary Brandt Jensen is looking for a template that could be used with a spreadsheet program to help her with the task of juggling student schedules at the Circulation Desk.

I'm trying to discover what software/personal computer combinations could be used to create a library catalog with entries in Arabic or other non-Roman alphabets.

From the Acting Editors - Sue Roach and Linda Proudfoot

The editors received two very interesting articles, one of which follows. The other, *Affordable Sources of Computer Expertise*, by **Mary Brandt Jensen** will be in the post-convention issue. We hope to have more articles in future issues, but we need your contributions. If you have ideas/articles for the newsletter call Sue (202) 325-9565 or write her at the Navy JAG Library; Code 64.31, Sue Roach; 200 Stovall Street; Alexandria, Va. 22332-2400.

Planning Automated Applications -- Jamie Niss Dunn

As an introduction, I'd like to describe the background I'm drawing from in writing this article. The Dorsey & Whitney Library has a custom designed integrated online system which operates on a time-share basis, using SEEK litigation support software. The system consists of a catalog database, with an acquisitions subfile; a serials database (in creation) based on the bibliographic file; and a workproduct retrieval database, with several subfiles. Generally, my experience is with a relatively small database in a time-share environment. However, I feel many of the practice oriented comments and hints I have to offer are of general application to many types of online installations.

The first consideration I want to stress is the question of the appropriateness of automation for your library. If you have a perfectly good, reliable manual system, which is up to date and with which, neither staff nor users is dissatisfied, why change? Don't become enamoured of automation merely because its the up and coming thing! If however, your manual system is not up to par, automation is a great solution.

My second major caveat is this -- don't reinvent the wheel. If possible, coordinate your automation efforts. If your parent organization has a computer system operating a general DBMS or a computer you could acquire software for, USE IT if at all possible. Also, investigate other cooperation possibilities. Check with your library system, your local library network, or any other group that would be willing to share resources.

Once you decide to automate, one of your first considerations in planning must be the actual contents of the database. Are you going to convert records in stages - some materials now, others at a later date? All of this must be decided early on to ensure that whatever system you select has the capacities you need.

Other primary considerations are record and output formats. How do you want the record to appear on the screen? What display varieties do you need to have available? Short records for patron access, longer records for staff reference, and the ability to change formats on the screen are all important options. When looking at output formats, you have to decide if onscreen access alone will be sufficient. Keep in mind that onscreen access necessitates having more terminals. If you wish to provide patrons with printouts, you need to consider where printers should be placed and who should control them. Would periodic printouts be a good way to distribute the information? Do you need the capability to generate COM for branch locations, multiple users, or possible sale? If COM output is a possibility, you'll need readers and possibly reader/printers for all of your catalog locations. Finally, do you wish to tapeload or upload into other systems? If so, you must have the software and communication capabilities for this function.

Getting down to the nitty-gritty. Who's going to get the data into the system? Are you going to have to hire new staff or can you rely on present staffing levels? Exactly what is going to be entered, records from tapes or another source, or records keyed in from your existing shelf list? What method do you plan to use for data entry? Options include directly keying records, optical character reading, tapeloads, or mass downloads from other data bases. A big question is how long will this take? Generally assume that whatever estimate you make for a time frame is inadequate and add a factor of 1/3.

One of my obsessions with online databases is authority control. Never think that once you've gotten your records loaded that your job is done. You must assume some error, and in a computer file any erroneous entry makes that entry unrecoverable. Therefore plan that records need to be checked initially and periodically against: 1) the previous manual records; 2) standardized thesuri/authority lists; and 3) against the database itself (to detect duplicate records). This process adds time to the creation of the data base, but a database containing poor information does your users no good. After all, isn't the goal of an automation project to improve access, not impede it?

A related area is database maintenance. Decisions need to be made as to how and how often both additions and deletions will be made. Because databases can be constructed to be updateable almost instantaneously, maintenance can reflect very current changes. If possible, do not settle for batch loading as your only device for maintenance or entry. No longer must there be an extensive time lag between acquisition of information and its accessibility. Inversely, when materials are purged or lost, there should be no user frustration due to entries leading to material that is no longer there. And as mentioned, authority checks are essential to the maintenance of a useable database.

All of this wonderful technology does no good if no one knows how to use it, so a further consideration is training. First the person performing and/or supervising the data entry function must have vendor supplied training in the intricacies and capabilities of the system, and they must be able to communicate this information to other staff members. In addition, the reference staff should be trained until they have a complete understanding of all of the search and output capabilities of the system. Patron training can be handled in many ways. If possible, assemble core groups of users for training

sessions. Otherwise most of your training will be done on a one-on-one basis, probably ad hoc, as the patron walks in the door and is first confronted with the new system.

The two final facets of planning are perhaps the most difficult. First budget - how do you begin to figure out how much all of this will cost you? The following factors all must be included to give a good look at costs. All applicable staff time, including time required for training; software costs for upfront purchase or license fees, online time if applicable, maintenance fees, and don't forget downtime! Downtime is one of the factors in hardware costs too, along with purchase and maintenance costs for all physical equipment. Miscellaneous costs that are easily overlooked include storage charges or storage media (tapes or disks), paper and other supplies.

The second and most crucial of the two big questions is management approval. My suggestions in this area are few but critical to success. All of your plans and budget should be complete - "I don't know" doesn't leave a good impression. Try to have all the answers. If your approving body is a committee or a board, do some predecision lobbying. Find a supporter/mentor on the decision making body and get them to back you up with their peers. Lastly, have a fall-back position prepared. Be willing to scale back your initial plans or create an alternate structure that would more easily be accepted.

CONCLUSION: The planning portion of an automation project is perhaps the most grueling part of the whole process. It is also crucial to the ultimate success of the project. My experience has shown that careful attention to detail at this stage saves a lot of pain later.

About the author: Jamie Niss Dunn is Library Supervisor and Technical Services Coordinator at Dorsey & Whitney in Minneapolis, Minnesota, where her duties include library database administration and planning. She is the immediate past president of the Minnesota Association of Law Libraries and speaks and consults on library automation.

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