DEE NEAR APPOINTED CLA/TSC SECRETARY

Jeanette Mosey, 1981 CLA/TSC Secretary, has accepted a position with the School of Library Science at the University of Michigan, Ann Arbor, and therefore had to resign as Chapter Secretary. At its July meeting, the CLA/TSC Executive Board appointed Dee Near, Technical Services Librarian at Merced County Library, to serve as Secretary for the rest of the 1981 term.

IDEA EXCHANGE

We would like to announce a new section in Tech Notes called "IDEA EXCHANGE." We envision this as being more than just a "letters to the editor" column. We would like it to serve as a forum for dialogue between CLA/TSC members. AACR2, automation, and shrinking budgets present us all with similar problems and concerns, and we ought to be sharing our solutions and thoughts. Therefore, if you're facing a problem or a change in your library and would like some input from others, or if you've found a solution to a knotty problem, or if you just have some random thoughts on the profession, AACR2, etc., send us a note and we'll be happy to print it in the next issue of Tech Notes.

All items for IDEA EXCHANGE should be sent to: Sue Metzger, Tech Notes editor, 510 15th St., Del Mar, CA 92014.

WORKSHOP REPORTS

The following two articles report on the CLA/TSC workshops held this Spring in the Southern and Northern parts of the state.

SOUTH: "WHAT DOES CIRCULATION CONTROL?" was the topic of the Technical Services Chapter's southern area program held May 20th at the Balboa Pavilion in Newport Beach. The four speakers gave practical information based on their own experiences with planning, implementing, and use of automated circulation systems and their effects on technical services and public services.

Joseph Matthews, consultant from Grass Valley and author of Choosing an Automated Library System, gave valuable tips on planning for a system and selection of a vendor. Some of the key points he made were the importance of weeding a collection first and then converting as many records as possible to machine readable form, the need for an effective temperature controlled environment for the computer, and the importance of staff involvement from the

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very beginning of the planning period as well as good "hands on" training, and the necessity of considering maintenance costs as well as just the "bid price" in the total costs of the system.

The other speakers confirmed much of the validity of Mr. Matthews' comments by their own remarks. David Snow, Director of the Placentia Public Library spoke about his library's shared circulation system with Anaheim, Yorba Linda, and Buena Park. The advantages of a shared system are many and overcome the few disadvantages such as cataloging differences between libraries and misconception by the public that one library is a branch of another.

Ruby Oshiro, Supervisor of User Services in the Charles C. Lauritsen Library at Aerospace Corporation illustrated with slides the circulation element of Aerospace's in-house integrated automated system.

Janet Easley, Head of Circulation at the University of California, Irvine, described UCI's successful experience with CLSI which she attributes in large part to careful planning and interdepartmental involvement and cooperation. Another important factor, which ensures relative freedom from hardware trouble, is the special temperature-controlled computer room.

The program was followed by a buffet lunch.

--Anne Frank
UC Irvine

NORTH: "AFTER YOU DECIDE TO AUTOMATE - WHAT NEXT?" This fast-paced program was designed to give those in the planning stages and those in the throes of library automation projects an opportunity to hear from "them that's been there." The speakers were asked to give practical, problem-solving advice based upon their own experience in planning for automation and in implementing OCLC or RLIN, creating a COM or On-Line catalog, or automating circulation and acquisitions functions.

Liz Gibson, Systems and Automation Consultant, California State Library, led off with the topic of "Getting Started." She outlined the planning process of doing a needs analysis to assess whether automation is indeed the appropriate route, listing various alternatives for solving the problem, budgeting for the new system, and developing the plan of action. Elements of the plan include:

1. Responsible party--Make sure one person is assigned primary responsibility for implementing the automated system with a commensurate level of authority and a degree of enthusiasm for the assignment.

2. Staff involvement--Change can be threatening. Staff involvement in planning and implementation, however, will help to prepare the way for an easier transition.

3. Funds--In this day of shrinking budgets fewer dollars will be available through outside sources. You can often be successful in acquiring local support by pointing out cost savings and cost trade-offs.

4. Options review--Read materials on automated systems; talk to others with various systems or with particular expertise; talk to vendors.

5. Obtaining the "System"--Develop specifications or RFPs. The State Library can offer assistance here because of the many specifications available through their files.

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(6) Implementation planning--Make sure electrical wiring, phone lines, air conditioning, appropriate lighting, and furnishings are all in place before the system is installed.

Ms. Gibson also outlined some of the State Library activities designed to help, including the CLSA Database, LCSA awards in the area of automation, and CSL planning assistance and advice. With regard to LSCA awards she pointed out that awards will now be made only to true demonstration projects, and that funding is increasingly limited.

Barbara Blei, Head Cataloger, Stockton-San Joaquin County Library, related the steps taken at Stockton Public Library to plan and implement installation of the OCLC system for cataloging. She emphasized the need to analyze current procedures and forms in order to assess their applicability to the new system. At Stockton Public Library all staff members were asked to describe in some detail the procedures relating to their work. This task analysis revealed many practices which were then streamlined through automated procedures and helped to provide a smooth transition to the OCLC system.

Ms. Blei expressed particular concern for the human aspects of automating cataloging procedures:

--Use staff task forces, including all Technical Services personnel, to assist in the planning process.

--Take staff on field trips to see OCLC in operation. Allow the more timid to observe that beginning users cannot do reorganization of the work space realize high. Detachable keyboards can be needs. Reduce lighting that is too bright or causes glare, as excess heat has negative affects on people and equipment.

--It is important to modify job descriptions as necessary.

--Flexible scheduling can help to balance the personal needed of staff and limited hours of terminal availability.

--There will continue to be some manual activity to perform during downtime and slow terminal response time periods.

--It is important not to schedule staff for too many consecutive hours at the terminal.

Stockton Public Library reshuffled Library Assistant and Typist/Clerk assignments based upon increased copy cataloging and reduction of in-house card production. No major reclassifications have taken place and other automated systems are now being introduced to an enthusiastic staff.

Linnea Kleinschmidt, Cataloger, Richmond Public Library, briefly described the configuration of automated systems at Richmond Public Library, and then described in detail their use of RLIN. The CLSI system was installed in 1974. RLIN in full-face mode was installed in 1979, and access to Dialog was added in 1980. Richmond Public Library has just installed a microcomputer backup to CLSI.

Unlike Stockton Public Library, Richmond did not experience considerable workflow modification in cataloging upon installation of RLIN. Staff still perform the same level of work. The introduction of an automated system, however, has allowed absorption of a 28% staff reduction without loss in productivity. Ms. Kleinschmidt cautioned that online cataloging with a utility does not necessarily bring time savings at the professional level. In fact, in some ways cataloging becomes more complex. Primarily, savings come at the clerical level.

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How? What? Where? When? Why? How much? are all essential questions to answer before embarking on an automation project, according to Lois Shumaker, Head of Technical Services, Sacramento Public Library. She described SPL's process in answering these questions as a staff committee planned and implemented a computer output microfilm (COM) catalog. She noted that the single most important factor toward the success of the system was to keep the staff informed and involved.

Ms. Shumaker's lively slide presentation demonstrated the methodical process, and the trials and tribulations experienced during COM conversion. She showed examples of specification pages and the evolutionary process that was required to write and polish a good set of specs. She recommended that a balance be struck between specs that are too detailed and those that are written too loosely. It is also important to write specifications so that responses to an RFP can be evaluated easily.

Samples of posters and flyers used to announce that "The COM Cat is Coming" served as an eye-catching explanation of what was ahead for the public and staff.

Ms. Shumaker described in detail the editing process for the COM catalog. Optical character reader (OCR) sheets were coded with LC card numbers or brief author/title information and call number/holdings data from shelf list cards. Printouts were returned by Autographics, the vendor, and entries were verified. The initial "hit" rate was about 60%. The waiting process in this batch procedure was perhaps the most frustrating. Sacramento Public Library staff are currently involved in catalog cleanup. Name authorities have been verified, "see" and "see also" references based upon LCSH have been added, and many questionable LC matches have been weeded out.

Mary Hoeber, Mission College Technical Services Librarian, provided a visual and verbal walk through the new Mission College Learning Resource Center. Mission has succeeded in developing an online catalog. Both catalog and circulation subsystems in operation were developed with the cooperation of Universal Library Systems (ULISYS), Vancouver, B.C.

Her experience with the Mission project taught several lessons:

--The importance of strong administrative leadership and support for the project.
--The need for adequate planning for the system.
--Need for careful preparation of the physical plant. The computer area should be dust-free. (Mission experienced burned up disk drives as a result of poor environment.) Proper, sufficient electrical wiring was also mentioned as a must. Mission's 3M Security System proved too close to the terminals. (Magnetic based security systems may cause terminal problems when terminals are placed within several feet.)
--Flexible staffing is important to completing a conversion project and maintaining an automated system.

Taku Nimura, Circulation Librarian, California State University, Sacramento, described CSUS's CLSI circulation system.

As with the Richmond Public Library, it is just one of several automated systems in operation at CSUS, including OCLC, the Innovative Interface 200 connection between OCLC and CLSI, the Bowker Acquisitions System, word processing, online reference services, and a tie-in to the campus computer center. Automated serials and bindery control are in the works at CSUS. CSUS will be installing the Computer Translation Inc. (CTI), Salt Lake City, minicomputer backup to CLSI (also purchased by Richmond). To date the only CLSI backup is available through CTI.

Single bar code label

2 9999 00004 6433
CSUS was the pioneer among state university campuses in installing CLSI. Hardware was installed in October, 1977. In 3½ months all conversion activity was completed, and the system went online in February, 1978. To prepare for the system the library closed for 3 weeks while 450,000 items were labeled and entered in short record format into the system. They worked 24 hours per day for 35 days to accomplish this feat!

Downtime and lack of adequate vendor maintenance support have proven to be significant problems. The computer system underwent its first maintenance overhaul in March, 1981. The system was down for 3½ days during the servicing. As an illustration of the importance of thorough, regular maintenance, the CSUS system was down: 36% in January 1981; 4% in February; 20% in March; .05% in April (after the overhaul).

When the system goes down it's back to paper and pencil, which works all right for check-out, but does not accomodate check-in and other functions.

As with previous speakers, Mr. Nimura emphasized that computers "hate heat." When the machine area temperature exceeded 85° the system had to be shut down. He cautioned, don't believe the vendor who says turnkey circulation systems require no special physical environment.

Nimura also related a tip on placement of barcode labels. If a laser unit is going to be used (or may be used in the future) the best label placement is the upper or lower right-hand corner of the flyleaf. Labels must not be placed on an inner edge if a laser scanner is going to be used.

The Brodart Book Express ordering system was the topic of Jane Kreissman's presentation. Ms. Kreissman, Acquisitions Librarian at Stanislaus County Free Library, described the operation of this specific system, its benefits and difficulties.

Stanislaus searches for materials available from Brodart through author, title, ISBN, key word in title, or LCCN search keys. One hundred fifty to four hundred volumes are ordered in one afternoon with an average 7 to 14-day delivery time. Fund control is available, giving discounted adjusted prices. The terminal can be used like an adding machine to encumber items not ordered through Brodart. The system as yet does not figure in the red when the non-Brodart items are added in. While one system has not eliminated all manual functions and is not a full acquisitions system, it has allowed the reduction of staff by .5 FTE.

This program was recorded. Tapes of the program are available for one-month loan periods from either William Way, Riverside City & County Public Library (714) 787-7210, or from Elizabeth Dickinson, Stockton-San Joaquin County Public Library (209) 944-8380. There is no charge for borrowing the tape, except for covering the cost of postage. There may be sufficient interest to repeat this or a similar program in the Fall. About 70 people had to be turned away because of the tremendous number of registrants.

--Elizabeth Dickinson
Stockton-San Joaquin County Library

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