

Presentation to TRLN Annual Meeting

National Humanities Center

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The purpose of the meeting today is to recall accomplishments of the past year and to review where we stand with the TRLN project. This general meeting is also important to reacquaint ourselves with the people involved in TRLN. Bringing everyone together in this way is the best way to visibly demonstrate the scale of the TRLN effort and the extent to which it is truly a cooperative enterprise.

There are at least four categories of TRLN people here today:

1. The Directors - whose role it is to give us moral support, the benefit of their wisdom, and their money - not necessarily in that order.
2. The Coordinating Committee - which deals with all issues related to TRLN at an important intermediate level that is a vital link in the chain from conceptualization to the implementation of TRLN, both in a technical and organizational sense.

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3. The Committees - Systems Advisory, Cataloging Policy, Organization, Circulation, and Acquisitions/Serials which do the very difficult, time-consuming, and important work of analyzing the bibliographic systems of our libraries and rendering them into functional specifications for automated systems.

 4. The staff which is doing a magnificent job of designing and implementing a very complex system. For the past several months the atmosphere around the TRLN office has resembled what I imagine to be the highly charged atmosphere of a high-tech firm trying to bring a new microcomputer onto the market. There have been the long hours on evenings and weekends and all of this without the driving force of a profit motive.

 5. There are also a number of ADP people here who have been of great assistance to TRLN both through contributing computer time and consultation.

(Introductions)

Last year at this meeting I gave an extensive historical overview of TRLN. Fortunately this does not have to be repeated this year. I will make a few brief remarks on this year's work and try to characterize our progress in a general way.

Jeanne Sawyer will make a few remarks on the status of BIS I and where we stand to date in terms of bringing up and testing the system. She will give you an idea of just what the process of installing a BIS I system will be like.

After a break for coffee and doughnuts, Dr. Littleton will talk about the Memorandum of Understanding which has recently been signed by the three chancellors. He will also report on planning and progress at State with respect to acquiring a computer to establish State's node of the network.

Elvin Strowd will then report on the status of financial planning at Duke with respect to implementing TRLN, and Sam Hitt will give a testimonial on what TRLN means to the Health Affairs Library at UNC-CH.

Let me begin by making note of some of the accomplishments of TRLN during the past year:

1. We were able to pull together from various sources enough funds to buy disc drives and other equipment sufficient to fill up the computer room in Davis Library. This will give us the capacity to keep all databases up for purposes of maintenance and test the full systems for all libraries up to a point. I believe Jeanne will have more to say about this.

2. We submitted and received another Title II-C grant which will be our sixth for development and our eighth overall. I suspect that this is unprecedented in the history of the Title II-C program. I should go into this a little bit because some of you may not be fully aware of the nature of the new grant.

This grant will begin October 1, 1984 and is for \$144,532 to support an effort focusing on designing and developing the links among the three nodes of the TRLN network. It has always been our goal to develop transparent links among the three physically separate databases so that users can choose whether to search the database of one of the libraries or those of two or more simultaneously. We have also expected to develop the most efficient and cost effective communication links possible for the network. We have realized, of course, that this will not be a trivial systems task and that it would not be easy to undertake this work with present staff while they are still engaged in the refinement and further development of TRLN systems. The new grant will provide two staff positions and some equipment to get started on this difficult and inovative work.

3. While we are on linkages, I should mention that we have maintained contact with OCLC throughout the year with respect to the TRLN/OCLC link. Tomarrow Mary Ellen

Jacob, Larry Learn, and Frank Anzelmo of OCLC will be visiting TRLN to begin planning for our linking project. It seems that I am always reporting that some important meeting with OCLC is on the horizon, but this time I believe it is finally coming to pass.

4. Also, while I am on little known accomplishments, I should report that with the help of Gordon Rutherford, the Director of the Facilities Planning Office at Chapel Hill, we have come up with what I believe to be a very attractive and functional office suite and computer room for TRLN in the renovated Wilson Library. It will be located in what was the Periodicals Reading Room on the 7th level of Wilson. Now Dr. Govan and the University Development Office are working on the far more difficult task of finding the funds to carry through with this plan.

5. Not to be forgotten as an accomplishment is the production of the 2nd edition of the TRLN COM Catalog. This catalog consists of 585 fiche and provides author, title, and subject access to almost 900,000 titles in the three libraries. Copies of the COM were distributed to ten public library systems in North Carolina through the State Library and we have received several letters of praise and appreciation for this catalog.

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Because the COM catalog is not seen as central to TRLN's future it tends to be overlooked as an important accomplishment. Recently I gave presentations on TRLN to two sets of visitors - our library educators and some visitors from the Cranfield Institute in the United Kingdom. I happen to mention to both groups in a somewhat casual way that we have produced a COM catalog. In both cases they were extremely impressed with the size and execution of our COM catalog and especially by the fact that it was done with our own software. This is one of the several areas in which I expect we tend to put into the background a development which others might view as major.

6. With respect to our systems effort during the year the System Advisory and Cataloging Policy Committees accomplished an enormous amount of work, much of which will be on display soon in the first components of BIS I. Jeanne will go into this in more detail, but from what I've seen of the various bibliographic and index displays, they are very impressive when they appear on the screen of a Telex terminal - clear, logical, and well ordered - and it is evident that they represent a great deal of hard work on the part of the committees and the TRLN staff.

Also in the area of system development, the Circulation Committee was active during the year; Jim Rush made a consulting visit and issued a report and we have come up with an approach which we hope will expedite the development of a circulation system.

Another significant development was the establishment late in the year of the Acquisitions/Serials Committee, which was spurred by interest in vendored serials control systems, in particular Blackwell's Perline, which happens to operate on a Tandem computer. TRLN will now begin a systematic evaluation and review of our requirements in these areas and the potential of available systems for meeting them.

7. We should not overlook some important behind the scenes work which might be placed in the category of everyday coping, but which can also be taken to represent significant accomplishments:
 - a. The computer was moved from Wilson Library to Davis and the TRLN staff moved from Wilson and ADP to consolidated quarters in Davis Library.
 - b. The software for the archive tape processing system and the accessions list was converted from the UNIVAC computer to the IBM at ADP.

c. Throughout the year the OES continued to run smoothly, providing an important service to the Libraries for database maintenance. Once developed it is easy to forget that systems such as tape processing and the OES are rather substantial systems in themselves and operating and maintaining them is no small task. The three libraries also continue to build and maintain their databases which now aggregate to over 1,000,000 records.

Not a great deal was done during the year in terms of publicity and exposure for the project, but there was at least one important development in that area. The Council on Library Resources is now including TRLN in its invitation-only conferences on library automation which constitutes recognition of TRLN as an established automation project of national significance.

9. In the future when we look back on the history of TRLN, if we in fact do that, I suspect that the major event of the year will be the work of the Organization Committee and the Directors in putting together a Memorandum of Understanding acceptable to the three institutions and the signing of this Memorandum by the chancellors. Dr. Littleton will discuss the Memorandum in more detail after the break, but let me just say that I think the

Memorandum is a sound instrument for the governance of TRLN, and that following through on the Memorandum by hiring a director - along with bringing up BIS I - will be the major developments of the coming year.

I realize that some of you sometimes feel frustrated by the slow pace of development and the fact that it may seem as if little is being accomplished. I can assure you that in my position I often feel frustrated when I focus on a narrow time-frame or a narrow spectrum of events having to do with TRLN, but when I look at the project over a broader period of time, such as a year, I come away with a feeling that we have indeed accomplished a great deal, and considering the problems of moving a project such as this forward in our complex institutional and technical environments, we are doing quite well. I hope that this brief review of the past year has given you the same feeling. It has indeed been an active and eventful year.

I developed this list of items while sitting in my office Friday and did not refer to my files as I did last year. If I missed anything that any of your regard as an accomplishment, please feel free to bring it up.

Last year I talked about some distinguishing characteristics of TRLN's approach to library systems development. These are part of the TRLN catechism and there is no reason to review them this year, but I would like to add a couple of new ones. These are features that have been implicit in our approach for so long that I must apologize for not raising them to the status of principle earlier.

The first of these is the cooperative approach to systems development. One library director who is somewhat familiar with TRLN told me that in his opinion, to develop a system cooperatively among three libraries the size and nature of Duke, UNC-CH, and State would be an impossible task. In his view if we bring up any system at all it will be a great accomplishment and if we bring up one which truly incorporates the collective bibliographic traditions and thinking of the three libraries it will be a miracle. That may be something of an exaggeration, but let me say that I do believe that the cooperative nature of this project is one of its great assets. Our system will incorporate different perspectives and practices to a degree that is not possible in the two predominate forms of development. These are:

1. To develop a system for a single library, or

2. To develop a system for a collective of libraries - such as a network membership, or a broadly defined potential customer base - which is so large and diverse that the target library becomes, in effect, a theoretical one.

I am indebted to several of our library educators for pointing out that for them the cooperative nature of the TRLN project is one of its most impressive characteristics and I think that we as a group should not fail to regard this as one of our underlying principles and strengths.

A second characteristic is one which is suggested to me by a book that I have adopted as a text for my course in technical services. It is Hagler and Simmon's Bibliographic Record and Information Technology, which takes the underlying perspective that traditional bibliography as practiced in libraries and computing are both highly advanced technologies and that library automation is a process of joining these technologies rather than of replacing one technology with another. Sound library systems development must give equal emphasis to both sides, neither can be neglected or underemphasized. In looking back over the conduct of the TRLN project, I think that it is clear that we have taken a balanced view of both the bibliographic and computing components of library systems, and I hope that we are in the process of achieving a marriage of equals in which neither side

dictates to the other. If we do succeed in implementing a system along the line of this principal we will have achieved something of which we can be proud.

(The presentation was closed with a tribute to Al Sharlip, retiring as Assistant Director for Planning and Finance at the University of North Carolina at Chapel Hill. It was noted that Mr. Sharlip was not on the roster of any TRLN committees but that he had done a great deal of work for the project. Hewitt noted that his own personal failing was to act first and to worry about the paperwork later. If you function in that way you need someone who is conscientious and skilled at handling the red tape which can be a truly awesome task in a state institution. He noted that Mr. Sharlip had been indispensable in preparing equipment requests and ushering them through the state bureaucracy, working with facilities planning, the II-C budgets, and setting up the funds for TRLN to operate under the Memorandum of Understanding.)