NOTIS Consortium/Network Special Interest Group
Business Meeting at NUGM '93

October 15, 1993, 8:00 - 9:00 a.m.

1. Introductions

Co-Chairs Louise Bugg, Wayne State University/DALNET, and Helen Healy, Western Michigan University, conducted the meeting. Guests included Pat Ramage, NOTIS Library User Council (NLUC) representative, and Charlotte Custis, NOTIS customer services representative.

2. Election of New Co-Chairs

Pat Calhoun, University of South Carolina, and Pat Young, City University of New York, agreed to be co-chairs for 1993/94. Responsibilities include:

(1) conduct SIG meetings at ALA Midwinter and Annual as well as at NUGM '94;
(2) plan NUGM '94 programs of interest to consortia and networks;
(3) participate on the NUGM '94 planning committee which meets after NUGM '93 and again at ALA Midwinter and Annual meetings.

A SIG meeting at ALA Midwinter might not be needed this year. Alan Hagyard volunteered to attend the NUGM '94 planning committee meeting at Midwinter if the co-chairs are unavailable.

3. NOTIS Library User Council

Pat Ramage is the NLUC representative to the Consortium/Network SIG. She explained her role and NLUC's plans to gather input from SIGs as well as from individual NOTIS sites for future enhancements to the LMS. Feedback to Pat is due December 10. See attached handout.

4. Enhancements

Critical enhancements needed by consortia were discussed. The following list will be sent to Pat Ramage:

(1) location based catalog improvements to provide options to the filter file for better performance;
(2) PACLoan enhancements to check information on the item record, including temporary location and circulation status, and to otherwise improve communication with the patron requesting materials;
(3) MDAS security improvements to set authorizations for patron access by database;

(4) MDAS hook to holdings display enhancements to enable sort options for a single processing unit as well as for all processing units;

(5) PACLoan and MDAS enhancements to enable users to request photocopies directly from the MDAS citation.

5. NUGM '94 Program Topics

The group came up with these topics for NUGM '94 SIG programs:

1. PACLink/PACLoan;
2. ProPac use and management in consortia;
3. MDAS, Infoshare, and Document Delivery;
4. Telecommunications in consortia;
5. Location based catalogs;
6. Horizon for consortia;
7. SIG business meeting.

6. General Discussion

The group then held a brief discussion of topics of interest.

Notes by,

Louise Bugg
October 18, 1993

NOTIS LIBRARY USER COUNCIL
OCTOBER 1993

Mission Statement:

*   Act in a liaison role to foster a sense of cooperative communication within the NOTIS community.

*   Advise NOTIS on the LMS from the library perspective on prioritizing and allocating resources with the goals of enhancing service and product functionality.

Members:

*   Carol Caro, Boston College
    617/552-3155
    Bitnet: Caroc @ BCVMS
    Internet: CAROC @ BCVMS.BC.EDU

*   Joyce G. McDonough, Columbia University
    212/854-4764
    Internet: JM86 @ Columbia.EDU

*   Pat Ramage, University of South Alabama
    205/460-7021
    Bitnet: URAMAGE @ SOUTHAL

*   Beverly Ryan, California State University
    San Bernardino
    909/880-5180
    Internet: BRYAN @ WILEY.CSUSB.EDU

*SIGs represented by members:

Carol	Pat	Joyce	Beverly
OPAC	Circ	Acquisition	Cataloging/
MDAS	Consortium	RLG	Authorities
Gov't Docs	Public Libs	Serials	Key NOTIS
Music	Health Science	Faxon	Cartography
Archivists	Preservation	BNA	LIB1
Law	Special Libs	CJK	Media

The User Council is working on a communication flow chart, and collecting feedback on functionality and service. Members are requesting you send them your feedback according to the SIG break down listed above. You should include:

1. What are the critical needs you see in the next couple of years?

2. What are the five things about the LMS that are working well for you?

3. What are the five things that you see as problems with the system?

The target date for having all this feedback together is December 10, 1993. The next NOTIS Library User Council meeting is December 17, 1993. The Council will present a summary of your feedback at Midwinter ALA in February, 1994.

Dec. 17 mtg -
feedback by Dec. 10

DALNET QUESTIONS/COMMENTS RE: RELEASE 5.2. CIRCULATION MODULE

Here are our questions and comments after having attended the Circulation 5.2 session and studying the prototype illustrations.

I. USE OF SAS FOR ALL PRODUCTS/REPORTS

We have major concerns about the efficiency of and resource requirements for using SAS for all products and reports for DALNET's very large files. An ad-hoc report writer is very much needed to be able to extract data for easy report generation. QuikReports is not a report writer.

II. PATRON RECORD ENHANCEMENTS

A. Automatic Blocking of Subrecords

We would like to be alerted to existing blocks when a new subrecord is created.

B. Custom display for Patron Records

-Will it allow for a note that will only display for authorized staff (e.g. particular processing unit/patron group) and not display on the charge screen

C. LSYS Enhancement

-Would like work unit security for patron records to enable staff to edit address fields without also being able to edit the name and Social Security fields

D. Patron Screen seemed very cluttered (ex. p. 10 of S. Miller's handout from NUGM)

E. Multiple Addresses

-Will there always be the blank areas for the 5 possible addresses (forcing staff to go through multiple screens to "ENTER" the record)?

F. "Owes" Field

-It looked like the "owes" field would only accommodate amounts up to $999.99? Is that true?
-In addition to the "owes" field for all monies owed by a particular patron, it would be nice to have the amount owed by the patron for each subrecord/patron group to be indicated so that when a patron is blocked, staff can determine if any money/how much money is owed to their library/patron group. (Particularly useful in a consortium environment.)

II. PATRON RECORD ENHANCEMENTS (continued)

H. "Claims Returned" Counter:

Does this counter decrement as items are discharged? How
will it reflect accurately when the patron was correct and
the items are later found to have been returned?

I. Overdue Counter: We would like this to be an "online" counter
incrementing when an item is overdue, rather than the current
situation where it is updated by batch after an overdue notice
has been generated. Also, it should decrement immediately
once the item is no longer overdue.

K. Change from "org id" to "local id": We feel that "local"
is confusing; people might think of the barcode that way.
"Org id" seems more straightforward.

We are also interested in improved data entry quality control,
e.g. ensuring that the patron category is typed in all lower case
characters

III. CHARGE/DISCHARGE

A. Use of operator ID rather than terminal ID

-It is a high priority for DALNET to eliminate use of the
terminal id
-We would like clarification regarding the process whereby
the operator indicates the Service Unit at point of logon.
Will only those service units for which the operator is
authorized display for selection? or all service units?
(We have close to 80!) Or, all service units within a
processing unit? or a blank to fill in?

B. Alert Operator to Patron Expiration Date

-Will this happen? This is desirable!

III. <u>CHARGE/DISCHARGE</u> (continued)

   C. <u>Display pieces information properly on charge/discharge screen</u>

      -At time of charge, will staff be alerted to number of pieces? If some are missing, can staff easily go to the item record to notate this fact?

      -At time of discharge when staff are alerted to the number of pieces before the discharge has been completed, will staff will be able to <u>easily</u> ascertain the patron who has the item charged out as well as go to the item record to see if there is a note before the transaction is completed?

   D. <u>"Owes Field" to display on Charge Screen</u>

      -We would like two figures to display:

         <u>Total fines owed to all ids</u> -- if a "universal id" is used, would like this to be the total amount for all patron categories utilizing the universal id.

         <u>Fines owed on item id in use</u> -- if a "universal id" is used, would like the amount owed on the charge screen to be tied to the particular patron category for the person charging materials.

   E. <u>Running total of fines for overdues during discharge within a single discharge session</u>

      We'd like the option for staff to indicate that for the next charge session, a running total is desired. This would allow all monies to be collected at one time rather than following each discharge in cases where a person is returning several overdue items.

   F. <u>Partial Payment on Discharge Screen</u>

      We would like the capability to do partial payments on the discharge screen. Will this be part of the 5.2 Rewrite?

III. CHARGE/DISCHARGE (continued)

G. Renewing (p. 15 of S. Miller's NUGM handout)

-When barcode is wanded in and item is already charged to
that patron, staff is asked to indicate if it should be
processed as renewal

.will this choice only be given when it is charged
to a category that can't usually renew (i.e. is this
the "override" situation?)

or

.is this choice given each time there is a renewal

IV. UNIVERSAL ID FEATURE

-With this feature, will all circulation situations/loan
policies/patron category privileges for the universal id
tied to a particular patron group's patron category be
discrete from the circulation situations/loan policies/patron
category privileges for the universal id tied to a different
patron group's patron category? (Wouldn't want a block
from one group's category, e.g. for renewals, to affect
another group's category -- but do want to be able to
have different policies/blocks, etc.)

-We have several areas we'd like clarification on regarding
the universal id feature:
.When the barcode is wanded in at point of charge, how will
the system know which patron group/category to assume for
that patron? Does it look at the Service Unit of the
terminal and then map to the Processing Unit? What if it
finds that the universal id is tied to multiple patron
groups/categories at that Processing Unit?
.How would a universal id expire and be deleted?
.What happens if a patron loses the universal ID
card?
.Could we tapeload "onto" a universal ID?
.Will each different patron category's portion of the patron
record have its own patron codes, etc. fields?
.How will multiple addresses (e.g. campus and home) work?

REMAINING CIRCULATION FEATURES/FUNCTIONS

As we discussed on the telephone, since there was no prototype for the remaining Circulation Module function/features, DALNET has few specific questions or comments.

Separate DALNET responses for the different components of the Circulation Module were sent to the Circulation Rewrite Committee in 1992. Rather than repeating them all, we have listed below some areas of particularly high priority. As we discussed, we will just refer below to some specifics; more detail is available in the seven DALNET documents we sent your Committee in 1992 in response to your Committee's enhancement requests. The letters/numbers below refer to our 1992 documents you indicated you have.

Note: We have added, in some cases, a few new suggested enhancements.

BILL AND FINE

DALNET included a general statement about the Bill and Fine enhancements as follows:

"Of all the Circulation modules in need of enhancement, we believe BILL AND FINE to be among the most important. A complete overhaul of the process, and the fixing or enhancement of the many particulars of bill records and bill summary, are of the utmost importance."

1. Bill Records and Bill Summary

    A. Ease of movement, e.g. from pbil to patron record, is extremely important.

    B. DALNET added to this enhancement the display of the item number on the display bill; it was felt to be an essential identifier.

    D. Highly desirable

    H. High priority; DALNET added to this enhancement the following: The withdrawn or delete status of the book should be indicated on the display bill. The non-display of the book on the HAS screen is not sufficient to indicate the actual status of the book.

    I. Very important

    J. Highly desirable; inaccurate and misleading

BILL AND FINE (continued)
 2. Bill and Fine Process

    A. and B. Of the highest priority

    C. High priority; misleading and inaccurate

    E. High priority enhancement; especially desirable in a consortium
       environment

In addition:
  -Cbils need to be associated with the processing unit or
   service unit that created them in instances where no item ID is
   involved.
  -Daily operations reports should include all Bill and Fine Activity
   that day for that service unit
  -Could there be an option for fines to only accrue for days that
   the calendar indicates the service unit is open? Some of the
   DALNET libraries do not charge fines for days the library is
   not open.

COURSE RESERVE ENHANCEMENTS

 The following are DALNET's highest priorities based on our
 1992 document.

  A. Course Reserve Index and OPAC

    1. Processing unit code to an optional display element in
       OPAC index
    2. Location based searching to extend to Public Access Course
       Reserve Index
    3. OPAC circulation status information to display the loan
       period and due time
     (Rationale explained in our document)

  E. Batch Products

    1. List of items requiring de-processing should be able to be
       sorted by Service Unit
    2. List of items on reserve should be able to be sorted first
       by Service Unit or location.

 DALNET had asked for additional functionality as well:

  F. Reserve Circulation Statistics - to be separate from "regular"
     circulation statistics. (Rationale included in our document)

ALSO, will the "end" date on the course reserve statement function to
alert staff when items need to be taken off reserve?

HAS COMMAND

Items with a particularly high priority include:

1. Content of Display -

    A, C, and D
    E. DALNET believes unlinked item record should display call
       number as well as item ID in all cases

    Need display by processing unit or service unit. Need to store
    processing unit as part of item record key for display of
    proper item record in multiple processing unit environment.

2. Functionality

    A.
    B. DALNET modified this statement to read: Add capability to
       qualify HAS command by patron ID number, by charging Service
       Unit, and by processing unit. High priority enhancement.
    D. and G.

DALNET wrote an additional paragraph emphasizing how vital it
sees "improved movement" between screens and functions.

In addition:

  -Will there still be a limit to the number of items that will
   display from a "has" command for a patron? We would like the limit
   removed.
  -We would like the "has" command to indicate items for which
   that patron has placed a hold
  - We would like the "has/over" feature to indicate that the patron has
    an "overdue/lost" item even after it has been charged to "lost"   .

RECALLS/HOLDS ENHANCEMENTS

Simplification of this process is a <u>HIGH</u> priority item for DALNET.
Of particular importance was:

B. Removing recalls/holds
C. System-Wide Holds

    1,4, and 5

    <u>ALSO</u> DALNET requested additional functionality, i.e. to
    have the system automatically delete holds after the "not
    needed date".

    On #4, we emphasized as part of the rationale that "the system
    should cancel all other holds when one copy is received and
    processed".

F. Particularly important to large libraries with lots of "holds"
   activity.

H. Necessary to have the option of staff mediation

K. Would like message to be service unit specific

TECHNICAL IMPROVEMENTS

Enhancements of highest priority included:

<u>Improve Error Handling and Recovery</u>: would be easier for a
consortium if the batch executed one product at a time.

<u>Patron Notices</u>: As a consortium, need to be able to vary by at least
processing unit, but, ideally by patron group and service unit.

<u>Batch Sort</u>: Need to vary by processing unit, service unit, and patron
group

<u>Service Unit</u> Handling: <u>Must</u> be able handle more than 75 service
units. Optimally, there should be no limit.

<u>LOST/MISSING</u>: DALNET would like to add different messages/text to
print on search forms by processing unit and/or service unit.

<u>Cumulative Reports of Circulation Statistics</u>

<u>Expired Actions Dates</u>: Circulation EARL should print separately from
Acquisitions EARL; also need an EARL for action dates in course
reserve subrecord.

<u>Circulation History File</u>

TECHNICAL IMPROVEMENTS (continued)

DALNET also suggested additional functionality, as follows:

File extracts for circulation-related records, including item,
patron, bill/fine - to be used by a report writer

Circulation activity totals on the daily operation report need to be
modified to provide:
 .separate counts for charges to LOST and MISSING;
 .separate counts for browse discharges
 Also, clarification of exactly which transactions are included in
 each total is needed

(Rationale for the above two are included in our DALNET document)

In addition:
 -LSYS limits increased or, preferably eliminated, e.g. number of
   processing units/patron groups/service units per operator id and
   number of locations for System-Wide Hold Groups, Bill and Fine
   Groups, and Technical Processing Groups.
 -Improved quality control

If you have any questions, Tom, please contact me at 1-313-577-4002 or
on BITNET at cwecker@waynest1. We are anxious to hear more about the
Circulation functions and features!! And, once again, thanks for all
the great work your Circulation Rewrite Committee is doing for all of
us in NOTISLand!!!   .

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