DALNET CIRCULATION STANDARDS COMMITTEE MEETING

Minutes - October 29, 1993

Present: G. Bosler, J. Emahiser, B. Nelson, J. Pearson, T. Potvin,
          C. Sims, L. Stewart, C. Wecker

1. DALNET Access Committee

   G. Bosler reported that he presented the Committee's draft of its
   charge to last DALNET meeting; it was approved. At this point, the
   Board has charged the Committee with responsibility for publishing the
   DALNET Access Directory and for PACLoan implementation. The Committee
   is not being directed to address other aspects of its charge, i.e.
   reciprocal borrowing and onsite delivery, at this time.

   P. Spyers-Duran offered to have the Directory produced at
   Wayne State. G. Bosler is in contact with all of the DALNET
   libraries; he is still awaiting updates from some of the them.

   L. Bugg has forwarded 10 policy questions relating to PACLoan
   implementation to the DALNET Access Committee for its
   consideration. The Access Committee will be responsible for
   addressing the policy components of PACLoan Implementation; our
   Circulation Standards Committee will be responsible for the actual
   implementation of this new capability.

2. QuikReports

   The Systems Office has now successfully run all of the Circulation
   QuikReports. C. Wecker distributed copies for Committee review of
   those that were run since the last meeting:

   CIR004 Missing Items Report

           This report was not judged to be extremely useful --
           except perhaps for a large library with thousands of
           items charged to "missing." The same information is
           already available online through use of the "has" command
           for the "missing" pseudo-patrons. With the "has" command,
           the information is available by "Service Unit" which is
           far more useful than the sort by Processing Unit with
           QuikReports.

2. QuikReports (continued)

CIR006,007,008   Items Charged-Out, Renewed, Discharged
                  by terminal, by time of day

                  The Committee felt these reports might be
                  useful, on occasion, to justify increased
                  staffing, longer hours, etc.

CIR018   Statistical summaries of above 3 reports

                  This report presents a single statistical summary
                  of all three types of circulation transactions.
                  This format is probably the most useful way
                  to present this information for the purposes
                  stated under CIR006,007,008.

CIR019   Graphic display of all three types of circulation
                  transactions from CIR018

                  This report might have a more limited use since
                  it does not indicate workload by terminal.

C. Wecker answered questions about reports distributed at the September
meeting, as follows:

CIR005   Bill and Fine Summary Report

                  Clarification regarding the definition of an
                  "active" record was sought from NOTIS. Any
                  record still on the file (i.e. not purged),
                  qualifies as "active". This includes both open
                  and closed records. The Committee felt it might
                  be useful to run this report annually to determine
                  amounts of monies collected during the last year.
                  It would be more useful it it could be sorted by
                  Service Unit and date range.

2. <u>QuikReports</u> (continued)

    CIR017   <u>Summary</u> <u>Patron</u> <u>Usage</u> <u>Statistics</u>

        C. Wecker clarified the statistical summary portion of
the report which includes: number of patrons in each
category who currently have items charged; number of
total items currently charged out to that patron
category; mean number charged out to each person in that
patron category; standard deviation (i.e. range) of
number of materials charged out to each person.

        As currently designed, this report would only be useful
for patron categories which are unique across DALNET
institutions. If it could be run by Processing Unit, it
might be useful to produce on occasion. It might also
be more useful if it could be done for a date range
rather than as of a single date. The Committee wondered
if only active patron subrecords are counted or if it also
counts those blocked for "stolen" or "lost".
If the latter is the case, it would give a false count
of numbers of patrons per category.

3. <u>Bill</u> <u>and</u> <u>Patron</u> <u>Record</u> <u>Purge</u>

    C. Wecker discussed the parameters for the Bill and Fine purge that
will be done annually at the end of December. She reviewed a sheet
indicating the results of a "test" purge done using these
parameters. Almost 1/2 of the 867,870 Bill and Fine records
present at the time of the "test" would be purged.

    To ensure that the purged records can be remounted and accessed
in the future, D. Fox will load the "test" purged records
and a copy of the patron file at the time of the purge in a test
region for review by C. Wecker and J. Pearson. When Release 5.2
is implemented, it will be necessary to convert the Bill/Fine file
records. The Systems Office will use the 5.2 conversion programs
to also convert purged files and copies made of the patron and
Bill/Fine file to ensure that purged records can be accessed, as
necessary, once Release 5.2 is implemented.

    After the bill file purge, the Systems Office will work on the
desired reports in preparation for the Patron Record purge:
(1) identification of records with expired, but not delete, dates and
(2) identification of patron ids not used for the past 2-3 years.

4. <u>Statistical Reports by Call Number Range/Location/Patron Category</u>
   <u>(Vandy Report)</u>

   C. Wecker announced the schedule for running this report:
   six month reports will be run for each institution at middle
   and at the end of its fiscal year. Reports will, therefore, be run
   the beginning of January, April, July, and October. In addition, a
   two year report for the period directly preceding each library's
   first semi-annual report will be run for each DALNET site.

5. <u>PACLoan/Intercampus Loan</u>

   C. Wecker announced that an updated version of PACLoan was sent
   to the development site in mid-October. NOTIS hopes this will be the
   last iteration and that it will be available to customers by the
   end of 1993.

6. <u>Release 5.2 Circulation Rewrite Preview</u>

   C. Wecker distributed copies of 5.2 prototype screens and a
   descriptive handout from the NOTIS Users Group Meeting (NUGM) in
   mid-October. She also distributed her "draft" report on the
   "Rewrite". She and T. Potvin (who also attended NUGM) reviewed
   these documents and what they learned regarding the new release.
   There are no screen prototypes yet on course reserve, bill and
   fine, or recall/hold functions; the redesign of these has not yet
   been completed.

   Tom Schneiter, a member of the Rewrite Team, is accepting
   questions from users regarding 5.2; he will be reporting on
   these issues at the next two ALA meetings. Our Committee will
   develop a list of questions/concerns to forward to him by
   the end of November. The group reviewed the documents it
   developed as a response to the Rewrite Committee on the various
   parts of the Circulation Module to see if desired features seemed
   to be there and determine the relative importance of these features
   to the group. Committee members were asked to review those
   documents not covered during this meeting. T. Potvin, J. Pearson, an
   C. Wecker will develop a list of questions/concerns to send to
   Committee members for comments/modifications before being forwarded t
   T. Schneiter.

7. <u>1994</u> <u>Circulation</u> <u>Forum</u>

The Committee felt that the Circulation Forum next year will be an appropriate time to present a preview of the Release 5.2 Circulation Module redesign to DALNET Libraries' circulation staff.

8. <u>Other</u>

The Committee decided to change its meeting time to Wednesday mornings. The next meeting will be December 8 at Wayne County Community College at 9:00. Following this meeting, the Committee's annual Holiday Lunch will be held at Shin-Shin's in Windsor.

Notes by Charlene Wecker
October 30, 1993