

DALNET CIRCULATION STANDARDS COMMITTEE

Minutes - February 15, 1995

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

Guest: W. Kane

I. This will be the last meeting which J. Pearson will Chair. S. Vest, who has replaced Jeff Pearson as Head of Purdy/Kresge Circulation, will be Chair, beginning at the next meeting.

II. **Bill and Fine Archive:** C. Wecker reported that the Archive ran successfully on January 8. All Bill and Fine Records that had been closed for at least a year were archived. This decreased the file by over 25%.

III. **Patron Purge:** C. Wecker updated the Committee on Systems Office testing in preparation for a future NOTIS patron file purge. In order for the purge program to work, ID delete dates must be present. The Systems Office is testing programs which will add ID delete dates in two situations, as follows:

A. **ID has an expiry date, but not a delete date:**

A delete date will be set with the same date as the expiry date

B. **ID has no expiry or delete date, BUT was created more than 2 years ago and has never been used/has not been used in at least two years:**

A pre-determined date will be set for the expiry and delete dates, e.g. the date the program is run. (DALNET sites can select different dates.)

Committee members were asked to respond to C. Wecker by February 24 to three site-specific questions about these two programs and the parameters for the patron purge.

1. **Program to set delete date to match expiry date:**

Is it acceptable to use the same date for the delete date as is used for the expiry date? (Some libraries are currently setting delete dates to be a year past the expiry date.)

Can the program be run on all patron categories in the patron group?

2. **Program to set expiry and delete dates when both dates are "indefinite":**

What date would you like to be used for the expiry and delete date? Can the program be run on all categories in a patron group?

3. **Date to be used for purge parameter:**

The purge program is run using "from/to" date parameters. These can vary, if necessary, for different patron groups/categories or some patron group/categories can be bypassed.

Will some patron groups/categories be bypassed?
What "from/to" date parameter(s) do you want used?
To which groups/categories will they apply?

IV. QuikReports

C. Wecker reported that DALNET continued to test and offer input to NOTIS during January as one of the Beta test sites for the new release of QuikReports. Almost all of the changes suggested by Beta test sites were incorporated into the new release, e.g. service unit has been added to all Circulation reports, when appropriate. Our report writing capability using QuikReports will be GREATLY improved. Sites can continue to order reports on an "as needed" basis through Project Managers; C. Wecker will be reviewing the ordering procedure with Project Managers at the March meeting.

V. Release 5.2 (Circulation Rewrite)

C. Wecker reported the following:

- Release 5.2 will probably not be sent to NOTIS sites until June or July. Beta testing will begin in February/March.
- This year's Michigan NUGM meeting will be held at Grand Valley State University on Thursday, June 1. S. Vest will moderate a session on "Planning for Circulation 5.2 Implementation" in the afternoon. Registration materials will be sent to Project Managers.
- NOTIS staff will conduct Circulation 5.2 training sessions the day prior to and following the Michigan NUGM meeting. The Wednesday, May 30 session will be held at Grand Valley State; the Friday, June 2 session will be at Wayne State. Registration materials will be sent to Project Managers.

- The Committee discussed the idea of developing a procedures manual for Release 5.2. Committee members would each be responsible for drafting a different section of the manual, including testing the various operations relevant to that section. The Committee, as a whole, would review all sections and create a final document. This document would be in an electronic format, enabling DALNET sites to customize it for their individual library.

VI. Enforcing financial blocks when threshold is exceeded because of money owed to another DALNET library/Confiscation of materials belonging to other libraries

The group reviewed and discussed the two documents drafted by Committee members following Committee discussion of these two issues at the December 1994 meeting. These issues had been referred to our Committee by the DALNET Board for our review and recommendations. The next step is for Committee members to review the issues and ramifications identified by the Committee with their institution's administration to determine each institution's opinion on these issues. At our next meeting, the Committee will be able to determine if there is consensus on these issues and draft recommendations to be forwarded to the Project Managers and then to the Board.

The next meeting will be held on Thursday, March 15 at the Detroit Public Library at 9:00.

Notes by Charlene Wecker
March 8, 1995

CW Cir2/15