DALNET CIRCULATION STANDARDS COMMITTEE MEETING

September 24, 1993

Minutes

Present: G. Bosler, L. Bugg, J. Emahiser, J. Pearson, T. Potvin,
           C. Sims, L. Stewart

Excused: B. Nelson

The Committee welcomed Carol Sims from Wayne County Community College, Downriver campus.

1.   DALNET Access Directory

Gerry distributed a draft copy of DALNET libraries' current access policies that he has compiled. Committee members will FAX updates/corrections for their data to Gerry as soon as possible. This compilation is being done by the Access Task Force to create a guide for DALNET libraries' staff. It can also serve to identify areas where policies could be standardized.

2.   QuikReports

Louise distributed samples for 14 of the 20 NOTIS circulation QuikReports. They were set up by Charlene Wecker and run by Dody Fox using the production patron, bill/fine, and items files and a single tape from the circ history file archive.

The group reviewed and discussed the reports, with these preliminary reactions:

CIR001   **Patrons by (ID) Status Report (i.e., Lost, Stolen or Other)**

           This is a useful report from the entire DALNET patron file. It could be scheduled to run for each of the three status codes (L,S,X) once a year, e.g., in early summer when libraries would have time to do followup.

CIR002   **Patron Fines Owed Report**

           This report of all patrons with a total owed above a specified amount is most useful to libraries that can follow up on delinquent bills, e.g., by sending accounts to a collection agency. It cannot substitute for Dody's followup bills and reports, which are done by institution. This report could be scheduled once a year with a large specified amount, e.g., $100 or above.

CIR003   **Lost Items Report**

This report of items charged to lost can be run by processing unit. It is useful for identifying items to suppress from LUIS display, to follow up with patrons, or to order replacements. It should be available for a library on request.

CIR005   **Bill and Fine Summary Report**

This report by location within processing unit lists total amounts of fines received and fines owed from "active" bill/fine records. The group requested clarification from NOTIS on what constitutes an "active" record.

CIR009, 010, 011

Most Popular Titles Report

These reports of most popular titles did not seem especially useful. They report by processing unit and location, within a date range, those items charged or borrowed more than 5 times and those recalled more than once. Items on course reserve are obviously among the most popular.

CIR012, 013, 014, 015, 016

Items Charged, Discharged, Renewed, Browsed, Recalled or Held

These reports of circulation activity by library and terminal ID did not seem very useful. They reveal which workstations do the most/least circulation transactions by type of transaction.

CIR017   **Summary Patron Usage Statistics**

This report lists the number of patrons with currently charged items in each patron category. It reveals all upper/lower-case versions of the same categories. The accompanying statistical analysis was not clear and the group requested clarification from NOTIS.

CIR020   **All Items Activity by Terminal**

This report summarized reports CIR012 through 016.

The remaining reports--CIR004, 006, 007, 008, 018, and 019--
will be run for review at our next meeting. The DALNET Office
will recommend to Project Managers a procedure for scheduling
the reports to be run regularly and for requesting the reports
to be run as needed.

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

Jeff reviewed a draft "agreement" for DALNET libraries to sign
to authorize Wayne State to purge and archive their patron
bill/fine records according to these parameters:

1. closed bills over one year old;
2. open bills of less than $2.00 and over one year old.

The test run of the bill/fine purge identified a few more
credits to be cleaned up and they were distributed to the
group. Almost half the file would be archived using these
parameters, which will make the work of circ staff easier.

Louise will re-write the "agreement" for review by DALNET
Project Managers. The idea is to do the purge at the end of
December and once a year thereafter.

The patron record purge will follow the bill/fine file purge.
The group reviewed that process and the need for expire <u>and</u>
delete dates in the ID subrecord. Dody will tackle
development of a report of ID subrecords with expire dates but
without delete dates. Libraries doing tape updates are adding
expire and delete dates as part of that process. Ideally,
DALNET libraries would like to have an automated way to
maintain expire/delete dates in patron records, including
those keyed in as well as those tape loaded.

To further clean up the patron file, the group would like a
report of those library cards not used in two or three years.
This report could be by patron group and category and could be
compiled by reading the "date of last charge" field. Louise
will ask Dody about the feasibility of such a reports.

4. <u>Wording on Overdue Notices</u>

Debbie Adams suggested changing wording on overdue notices to
something like: "THE NEXT NOTICE WILL BE AN INVOICE." There
was some concern that the word "invoice" may not be familiar.
The group will seek reactions to bring to the next meeting.