

DALNET Circulation Task Force Meeting

2/3/93

agenda

1. Reciprocal Borrowing
2. Statistical Reports
 - A. Vanderbilt - OU test
 - B. QuikReports
3. NOTIS PACLoan/IntraSystem Loan
4. Billing and Patron Record Purge
5. 1993 DALNET Circulation Forum
6. Other

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DALNET CIRCULATION TASK FORCE MEETING
February 3, 1993

Minutes

Present: G. Bosler; L. Bugg, J. Emahiser; H. Ma; J. Pearson; L. Stewart; F. Young

1. Reciprocal Borrowing Report

Pilot sites in the SEMLOL reciprocal borrowing project decided to renew their agreements. The pilot will end in August. Statistics for charges to "recp" patron categories for DALNET participants in the pilot will be available with the "Vanderbilt" reports. It is still highly desirable to further breakdown the "recp" statistics by library as coded in the Pat Code 2 field. This enhancement will be added to Dody's task list, but not currently as the top priority.

2. Statistical Reports

a. Vanderbilt statistics by call number range

OU reported the 6-month statistical report (July - December 1992) of charges by call number range looked good. Improvements for the future OU identified are:

- (1) correlate the circ statistics with the collection analysis by call number (two different programs);
- (2) provide finer breakdown of call number ranges;
- (3) provide printed reports of specified subsets of all call number ranges.

Next steps: a test with Dewey call numbers is needed, e.g., 1 day of DPL's circ.

Reports can now be run for the rest of the LC class type libraries represented on the Task Force. If they are all okay, the reports can be put into a production schedule for all DALNET libraries. Ideally, reports should be run as follows: WSU -- Oct. 92 to present; Beaumont -- Jan. through December 1992; UDM and MCC -- July through December 1992.

b. QuikReports

Louise distributed copies of the NOTIS QuikReports descriptions of the 20 circulation reports delivered with the first release. She also handed out copies of the Circ Task Force report priority list developed in 1990. The group's job is to review the 20 QuikReports and recommend priorities for implementation, taking into consideration the reports we have been developing on our own.

The group briefly reviewed the 20 reports. It is not clear from the documentation how the data will be presented, especially for multiple libraries sharing a NOTIS system. The next step is to actually run the 20 reports against test data to review the results.

Systems plans to put QuikReports into test with LMS Release 5.1 in February (or March).

3. NOTIS PACLoan/IntraSystem Loan

Louise distributed copies of the NOTIS IntraSystem Loan manual. There are many questions about how DALNET can use this new functionality.

The plan that we will start with is:

- The group will study the manual for the next meeting;
- Systems will install the software in test one month after LMS Release 5.1, to make problem diagnosis easier;
- Document delivery representatives will be added to this implementation project after the software is available in test.
- Goals of the group include: learn how IntraSystem Loan works and identify DALNET libraries' options for using its capabilities; identify policy issues and bring them to the attention of the Board (or appropriate Board Committee).

4. Billing and Patron Record Purge

The group strongly endorsed the plan to have billing and patron record purge be Dody's next top priority project. Problems with duplicate SSN's are growing and will likely be reduced when old inactive patron records are purged.

Jeff reviewed that patron record purge can be done at the ID subrecord, patron group subrecord, and full patron record levels. All purges require expire and delete dates. Patron records with billing records attached cannot be purged. Therefore, the first priority is to purge billing records.

Dody will begin with a test of the bill/fine record purge using the previously agreed parameters. Jeff will help review the results. The goal is to have the test done by the next meeting.

5. Circulation Forum Plans

It was agreed that ILL Circulation, Circulation Record Purging, and Circulation and Collection Development Issues (brainstormed in the December meeting) were viable topics for the program. It was suggested that a connection between Circulation Statistics and Collection Development, in terms of acquisitions, might be an interesting topic to present. Eric Condic was recommended as a possible speaker.

The possibility that PACLoan might not be ready for inclusion in the program was a source of concern. The agenda seemed a bit thin without it. It was suggested that we invite a speaker from a non-DALNET NOTIS institution, such as U of M or Eastern, to speak about their experience with NOTIS circ. The group decided to ask Louise her opinion of having a speaker, and specifically what she thought of having Darren Meahl (MSU) or Deborah Morrow (Grand Valley).

It was suggested that we have a half-day program in the morning (with a lunch afterwards providing people a chance to interact), or a full day program if we have a speaker.

Louann will ask Eric Condic if he would like to again be moderator. Jerry Bosler agreed (reluctantly) to be moderator if Eric declined.

Concern was voiced about a weak or "not a good" program. Jeff commented that perhaps we should reconsider whether or not to have one this year.

Jeff agreed to design the flyer again, to be distributed through the Circulation Managers. We thought we would use the same caterer, and Wayne's Systems Office would do the name tags.

NEXT MEETING: Three possible dates: March 5th (Fri.), 8th (Mon.), or the 10th (Wed.). Jeff will PROFS the Team. Location of the meeting was not decided.

Submitted by,

Louise Bugg
February 5, 1993

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