

DALNET CIRCULATION STANDARDS COMMITTEE MEETING

May 7, 1993

Minutes

Present: G. Bosler, L. Bugg, J. Emahiser, J. Pearson, T. Potvin, L. Stewart, F. Young

1. QuikReports

The revised new NOTIS release schedule calls for the QuikReports software to be installed in mid-July with LMS 5.1. Testing will likely be done after it is installed in production.

2. DALNET Access Committee

Gerry Bosler is co-chair of the DALNET Access Committee. He indicated that the Access Committee has met and is currently working on compiling a list of the access policies and procedures for the DALNET institutions (including ILL, circ, and database access), and a statement of their committee charge. Their charge will be submitted to the DALNET Board for review.

3. Billing and Patron Record Purge

This is the highest priority circulation task to be addressed by Systems staff. It needs to be done in production before Release 5.1 is installed, if at all possible. The biggest problem anticipated for the patron record purge to work is the need for delete dates on the patron records or subrecords. A report listing records eligible for deletion but without delete dates would be very helpful.

The list of patron records by category code continues to identify "bad" records that need to be either re-used or purged. DPL is still willing to re-use these records to help clean the shared patron database. A separate list of these records would be very helpful in the cleanup efforts.

4. Circulation Mailer

Jeff brought samples of the new WSU circulation mailer that includes a return envelope and allows payment by check or charge. The use of the new mailer has begun but no payments using the return envelope have been received yet.

5. Statistical Reports

The test reports of circulation statistics by call number range were reviewed by Committee members. Questions for Dody were:

- How far back can reports be generated for each DALNET library using the circulation module?
- Why is there a discrepancy between the total charges on this report and the monthly totals on the operations report? [Answer: The test data only included circulation history records and not items currently charged]
- Can the Dewey ranges be smaller than first digit, i.e., hundreds? [Answer: Yes, can be done at tens or even ones]
- Is a regular production schedule of twice a year, plus on demand as needed, feasible?
- Can the second copy of the report be suppressed from printing? [Answer: Yes]
- Can the report be sent to print on local (VPS) printers?

Louise will get answers and draft a proposal for the Project Managers' meeting in June to put this report into production.

6. Review Committee Charge

The previous charge to the Committee was reviewed and revised. The new draft will be distributed to Committee members for their comments. Suggested edits can be FAXed back to Louise at 577-4172. The goal is to have the revised charge ready to go to the DALNET Board in July/August in time for their next meeting.

7. Batch Link Program

The program from the University of Wisconsin that links unlinked item records based on a call number match does not look promising. In initial tests, less than 1% of unlinked records linked. Further work on this program will be put on hold for now.

8. NOTIS PACLoan/InterCampus Loan

The revised new release schedule calls for PACLoan to be put in test after Release 5.1 is installed in production. NOTIS expects to distribute a new release of PACLoan software in late May or early June that will fix problems with the early release. PACLoan testing moves to the Fall.

9. 1993/4 Circulation Forum

Given that PACLoan was to be a major agenda item of the Circulation Forum, the group decided to postpone the Forum until early 1994. The other important agenda item of patron and bill/fine record purging/cleanup was not seen as sufficient to fill the whole Forum session. The group will issue record purge/cleanup recommendations/instructions before the Forum.

A task list/timeline to plan the Forum needs to be developed in September.

10. LUIS Display of LOST/MISSing Items

The Database Standards Committee is working on a policy recommendation to not display items in LUIS that have been lost or missing for a given length of time, e.g., one year. The Circulation group agrees with the need for such a policy. They recommended that such items be suppressed from LUIS display rather than actually deleted, because the links to patron bill/fine records often need to be retained. Terry reported that when individual items are suppressed from LUIS display, blank lines appear in LUIS instead of the copy information!

The NEXT MEETING will be held **September 24, 1993, from 2:00 - 4:00 p.m.** at Wayne State University in the Purdy Library Dean's Conference Room.

Submitted by,

Louise Bugg
May 11, 1993

DRAFT Version 1.0

DALNET Circulation Standards Committee

Charge

The DALNET Circulation Standards Committee is responsible for the shared elements of the circulation module, including:

- developing and recommending standards for shared databases as they relate to circulation;
- determining specifications and priorities for the circulation module's statistical and management reports; and
- recommending policies for implementing automated circulation in a consortium environment.

Committee recommendations will be submitted for Project Managers review and Board approval. After Board approval, the Committee is responsible for procedures to implement and disseminate the standards and policies, as needed.

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LB93-187