

DALNET Circulation Standards Committee
Minutes - February 28, 1994

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

Absent: J. Emahiser

I. DALNET Access Committee - G. Bosler distributed to Committee members copies of the statistics forms DALNET libraries will be using to track interlibrary loan transactions during March and April. The DALNET Access Committee is requesting all DALNET sites to keep these statistics now so that we can compare activity pre- and post- PACLoan implementation. He also reported that the DALNET Access Directory will be sent to libraries shortly.

II. QuikReports

C. Wecker reported that NOTIS is planning a new release of QuikReports which will include some fixes to currently available reports. NOTIS is accepting comments through the beginning of this week regarding desired improvements. C. Wecker will be forwarding DALNET comments on existing reports for all modules. NOTIS has said that some of the enhancements will include the option for different sorts, the ability to produce reports based on location/sublocation, and improvements to the call number sort.

C. Wecker is the process of creating a summary of each of the 52 QuikReports, including a description of each report, DALNET comments, and desired improvements. Samples of each report will also be attached. This will be distributed to DALNET Project Managers at the Project Managers meeting, Monday, March 7. Project Managers will be asked to review the lists with staff and indicate which reports they are interested in receiving on a regular basis (and how frequently) and which they would like on an "on demand" basis. After reviewing the results, the Systems Office will develop a schedule for running reports as well as a time frame for requesting "on demand" reports.

III. Bill and Fine Archive

The Archive was run successfully on January 9. About 500,000 of the almost 900,000 records were archived; of these almost 100,000 represented open bill and fine records which were over a year old and for which less than \$2.00 was owing. Because this Archive was the first one run, there were many more open records archived than would normally be the case during a year. Patron records and subrecords can not be purged if Bill and Fine Records are attached. The Committee decided to re-evaluate the archive parameters at the end of 1994 prior to the next archive and determine whether they wish to use the same parameters or perhaps modify them, e.g. a lower amount owing or longer time frame.

IV. Wording Change on final overdue

Dody has made the change (which will affect overdue notices for Beaumont, Children's, Harper Hospital, and Wayne County) in test. After testing, we will implement the wording change (i.e. THE NEXT NOTICE WILL BE A BILL).

V. Vandy Report

C. Wecker distributed copies of the Vandy report for the period July 1, 1993-December 31, 1993. Committee members should review their report and tell her if they find any problems. The Committee agreed to postpone production of reports for the two years prior to these reports in light of other Circulation-related priorities, e.g. PACLoan and Patron Purge. The Systems Office will continue to run the Vandy reports for DALNET libraries every six months.

VI. PACLoan InterCampus Loan (ICL)

C. Wecker distributed some pages from the new NOTIS PACLoan 1.0 Users Manual; this supersedes documentation distributed to Committee members in 1993. The next step will be to form a subcommittee comprised of staff from Oakland University and Wayne State to plan for and begin testing of ICL this Spring. Procedural issues/questions that arise as the Subcommittee begins its process will be on future agendas for our Committee; policy issues will be recommended by the DALNET Access Committee.

VII. Circulation 5.2 Rewrite

NOTIS recently announced that Release 5.2 has been delayed; it should be released first quarter 1995. The majority of the Release will go to Beta testing this summer; course reserve (which will be available for the public) will go to Beta testing fourth quarter of 1994.

Our Committee's document with suggestions and comments was sent to T. Schneiter of the Rewrite Committee as well as to NOTIS. Many of the specifics were addressed at the Circulation SIG meeting at Midwinter ALA. C. Wecker will forward the minutes of this meeting to Committee members when she receives them.

C. Wecker talked to NOTIS last week regarding our document and desired 5.2 enhancements. NOTIS reported that most of what DALNET wanted will be addressed in the Rewrite in "some way"; NOTIS felt we would be pleased. More specifics might be apparent from the SIG minutes. Also, NOTIS expects to be able to give an "online" demonstration of Release 5.2 (except for the Course Reserve portion) at the annual ALA meeting.

VIII. Patron Purge

The next priority related to Circulation is the Patron Purge. C. Wecker distributed the NOTIS Circulation Users Guide chapter on the Purge as well as a summary she wrote. The Purge is based upon the presence of "delete" dates on the NOTIS patron record. Prior to running the purge, libraries will have to insure that delete dates are on the appropriate records. Libraries felt that student and keyed records would be the ones for which "delete" dates are needed. Staff and employee records may not be able to be purged by a formula.

C. Wecker reminded libraries that for tapeloads, libraries can request "expire" and "delete" dates be added to records in the DALNET database which are not also on the new tape being loaded (for the same patron group). For "keyed" records, libraries should be sure to add delete dates, if appropriate, when creating the patron record.

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VIII. Patron Purge (continued)

Dody is working on two things to assist in getting delete dates on patron records:

1. She is trying to run reports to:
 - a. identify ids which have not been used to charge materials for a certain period of time
 - b. identify ids which have "expire" dates but not "delete" dates
2. She will see if there is a way to programmatically add dates to the delete fields

Meanwhile, libraries should think about which of their records have "delete" dates, begin to systematically add delete dates to new records, and identify the patron groups/categories/time frame for which they want to purge records/subrecords/ids.

The next meeting of the Circulation Standards Committee will be held at Wayne State University on Monday, April 25 at 9:00. It will be held in the Dean's Conference Room in the Purdy/Kresge Library.

Notes by Charlene Wecker
March 15, 1994