

DALNET CIRCULATION STANDARDS COMMITTEE MEETING

Minutes - December 8, 1993

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

Absent: J. Pearson

1. DALNET Access Committee: J. Bosler reported on the recent meeting of the DALNET Access Committee at which L. Bugg asked Committee members to respond to 10 questions related to PACLoan implementation. It will not be mandatory for all DALNET libraries to implement PACLoan. Unless compelling reasons exist, standardization of circulation policies and procedures among DALNET libraries will not be necessary for its implementation. A copy of the minutes of the last Access Committee meeting will be attached to these minutes. In addition, Circulation Standards Committee members will be added to the distribution list for Access Committee meeting minutes.

It was also reported that the DALNET Access Directory is expected to be issued in January. Current plans are to send two copies of the Directory to each DALNET institution.

2. QuikReports Status Report: C. Wecker reported that she is in the process of modifying a chart developed by Virginia Commonwealth University with information regarding each of the 54 currently available reports, including a description of the report, files it uses, DALNET Committee's evaluation of its usefulness and needed improvements, if any. This chart will be sent, along with sample copies of each report, to DALNET Project Managers. Project Managers will indicate which reports they are interested in receiving and if they are interested in them on regular schedule or "on demand". L. Bugg will utilize these responses to develop a schedule for QuikReports.

She clarified that NOTIS confirmed that QuikReport CIR005 (a total of monies paid and monies owed from "active" records) includes all monies owed and paid whether from open or closed records. (Future NOTIS documentation will be modified to indicate this.) In light of this fact, Committee members were interested in having this report run for each Processing Unit both before and after the annual archiving of the Bill and Fine File. C. Wecker will work with D. Fox to test this before the Archive is done in early January 1994.

3. Bill/Fine Archive: J. Pearson and C. Wecker tested the Bill and Fine Archive. They viewed how the new Bill and Fine file will look after the purge (800,000+ records will be reduced to 400,000+), the new patron file after the archiving process ("amount owed" values will be different), and the archived Bill and Fine Records. The program correctly archived the appropriate Bill and Fine Records, based on the parameters agreed upon by the Circulation Standards Committee.

D. Fox will run a "test" Archive one more time to identify any Bill and Fine records which need to be cleaned up (credits), prior to the Archive. Plans are to run the "real" Bill/Fine Archive during the first few weeks of January 1994. Following this, the Systems Office will begin work on planning for the Patron File Archive.

4. Wording on Overdue Notices: D. Adams (Botsford Hospital) has requested a wording change on the final overdue notice. The current wording -- "THIS IS THE FINAL NOTICE BEFORE A BILL WILL BE SENT" -- is confusing to Botsford patrons since Botsford only sends one overdue notice prior to billing patrons. She suggested the note be changed to: "THE NEXT NOTICE WILL BE A BILL". The Committee approved this change.
5. Statistical Reports by Call Number (Vandy): The Systems Office is still planning to run these reports at the end of the year for libraries whose fiscal year is Jan.-Dec. or July-June (everyone except WSU). Following this, the report will also be run for each library with statistics for the two years prior to this first six month report.
6. NOTIS PACLoan/Intracampus Loan: C. Wecker discussed our Committee's involvement in PACLoan implementation. The DALNET Access Committee will be the group dealing with policy issues; our group will be involved with the implementation of this feature. We are expecting receipt of updated PACLoan software from NSI by the end of the December. The next step will be the development of an implementation plan. Oakland University has agreed to work with WSU on testing IntraCampus loan. Testing needs to be done during Spring/Summer of 1994; the target implementation date is Fall 1994. NOTIS will be sending a new release of PACLoan in the Spring which will fix two problems: item record status will be checked as part of the process and there will be the ability for Ill staff to reroute requests. This release will not include the enhancement whereby information from the MDAS/LUIS Plus record will be automatically "carried over" to the PACLoan request screen.

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7. 5.2 Circulation Rewrite Document: The Committee reviewed and made some modifications to a document with comments/questions and recommendations regarding Release 5.2's Circulation Rewrite. C. Wecker will forward this to Tom Schneiter, a member of the Circulation Rewrite Committee. There will be a session at Midwinter ALA at which comments and questions forwarded to T. Schneiter will be addressed.
8. 1994 Circulation Forum: Planning for this forum is "on hold" until more is known about Release 5.2 Circulation and PACLoan implementation -- both of which will be major agenda items for our Committee's Forum.
9. Other: Harper Hospital will be implementing the NOTIS Circulation Module in January.

The Committee decided to hold future Committee meetings on Monday mornings at 9:00 a.m. The next meeting will be held in February; J. Pearson will contact Committee members regarding the specific date.

Notes by Charlene Wecker