

DALNET CIRCULATION STANDARDS COMMITTEE

December 14, 1994

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

Guest: W. Kane

I. Introductions

The group welcomed two new members to the Committee -- Becky Riesterer (Walsh College) and Steven Vest (Wayne State University). Steven has replaced Jeff Pearson as the Head of Purdy/Kresge Circulation; Jeff is now the Media Librarian at WSU. Steven will also be assuming Jeff's role as Chair of this Committee.

II. NOTIS Bill and Fine Archive

Plans are to run the second annual Bill and Fine Archive on Sunday morning, January 8, 1995. Project Managers decided at their November meeting to archive only Bill and Fine records closed for more than one year; all open records, regardless of the amount owed, will remain in the production file. A test run of the Archive Program earlier this month revealed that the Archive will remove over 220,000 of the more than 850,000 existing Bill and Fine records. Committee members need to inform Circulation staff about this Archive.

The question was raised regarding the capability under Release 5.2 to run the Bill and Fine Archive with different parameters for different sites; this would accommodate differing needs of the DALNET libraries to maintain older, open bills on the production file.

III. NOTIS Patron Purge

Plans are to run the NOTIS Patron Purge in early 1995. To delete patron subrecords/records, the patron ID field must have a "delete" date. In order to identify those IDs without "delete" dates that might be candidates for deletion, Dody Fox is running two types of reports for all appropriate patron categories:

1. List of all IDs with "expire" dates but no "delete" dates
2. List of all IDs with no "expire" or "delete" dates which were created over 2 years ago and have had no circulation activity for over 2 years.

III. NOTIS Patron Purge (continued)

D. Fox is testing a program to add "delete" dates to IDs with "expire" dates. Though the program she is testing sets the "delete" date to match the "expire" date, several DALNET libraries would like it to be modified to set the "delete" date to one year after the "expire" date. Committee members agreed that if there are fewer than 100 IDs in any patron category with "expire" and no "delete" dates, libraries can use the printed lists to manually add "delete" dates. It is hoped that the program being tested will be able to successfully add "delete" dates for categories with more than 100 IDs lacking "delete" dates.

D. Fox will also try to programmatically set "expire" and "delete" dates for IDs with no dates in either date field which have been created more than two years ago and for which there has been no activity for at least two years.

Any program that DALNET runs to add dates to patron records will be run only on those patron categories specified by each DALNET site. Each site has certain categories (e.g. pseudo-patrons) for which it is not desirable to run the Patron Purge programs. C. Wecker distributed a list to Committee members of all their patron categories; Committee members annotated those lists indicating which patron categories should be included in the patron purge, as well as for which categories the above two reports would be necessary. (Libraries who tapeload patron records can have "expire" and "delete" dates automatically added to records during tapeloads.)

C. Wecker distributed those reports that have already been run on some of the categories. Libraries can immediately begin to add "delete" dates to records for categories with less than 100 records lacking "delete" dates. C. Wecker also requested Committee members to work with their institutions to determine the date they would like used for "deletion" purposes for their various patron categories when the Purge Program is run next year.

IV. Honoring blocks when money is owed to a different DALNET library

The DALNET Board asked the Committee to review this issue. The Committee felt there were two different scenarios to be addressed:

A. InfoPasses:

Since the person being issued the InfoPass has to go to the home institution to get the InfoPass, the Committee agreed that the home institution should be responsible for insuring that the patron is not blocked for monies owed before sending them to the loaning institution.

B. Patron is a registered borrower at more than one DALNET Institution:

Most of the Committee members' libraries' only honor the block when the money is owed to them. A couple of DALNET libraries have been, in general, honoring financial blocks even when the money is owed to a different DALNET library; overrides are sometimes done on a "case-by-case" basis (which might include calling the library to whom the money is owed.)

G. Bosler will draft the Committee's recommendation on this topic for review at the next Committee meeting.

V. Confiscation of other DALNET libraries' materials which set off the security system of a DALNET library:

This issue was also referred to the Committee by the Board. Only one library reported that this situation had occurred. Circulation staff can look on NOTIS to determine if the title has been charged out from the other DALNET institution. A Committee member will draft the Committee's recommendation on this topic for review at the next meeting.

VI. NOTIS Release 5.2 "Circulation Rewrite":

T. Potvin, S. Vest, and C. Wecker reviewed key changes being made to the Circulation Module with Release 5.2, based on meetings they attended at the October NOTIS Users Group Meeting.

At that time, not all of the coding was completed. Plans were to complete coding by December at which time it would be sent to Beta sites for testing. The general release date was announced as late Spring 1995. The DALNET Circulation Standards Committee has been involved over the last three years in providing input to the "Circulation Rewrite Team". Although most of the enhancements DALNET requested seem to have been made, there were still some areas where either functionality was not clear or additional or different functionality would be desirable. This opinion was shared by NUGM attendees from other NOTIS sites. Ameritech Library Services (ALS) is giving NOTIS sites the opportunity to offer further input through the "Circulation Rewrite Committee"; C. Wecker forwarded additional input to the Committee shortly after the NUGM meeting.

Sample screens and summaries of changes were distributed to Committee members. There will be further discussion and review of Circulation 5.2 at the next meeting.

VII. QuikReports 2.0

DALNET has been serving as a Beta test site for the new release of QuikReports. Staff from Botsford Hospital, Detroit Public Library, Oakland County Community College and Wayne State University assisted the DALNET Office in testing these reports.

DALNET Standards Committees (including this Committee) have been involved in offering input to ALS after review and use of QuikReports 1.0. Most of the desired enhancements have been made to the reports. No new reports were developed; ALS's intention was to improve the existing ones.

C. Wecker distributed descriptions and sample reports for the 20 Circulation QuikReports. Desired reports need to be ordered through DALNET Project Managers.

The next meeting will be held at the Detroit Public Library in the Conant Room on Wednesday, January 25, 1995 at 9:30.