

DALNET Circulation Task Force Meeting

11/18/92

agenda

1. NUGM News
2. Reciprocal Borrowing
3. Statistical Reports
  - a) Vanderbilt
  - b) NOTIS QuikReports
4. NOTIS PACLoan
5. 1993 DALNET Circulation Forum
6. Release 5.0.2 Record Purge - pending
7. Other

## DALNET CIRCULATION TASK FORCE MEETING

November 18, 1992

### Minutes

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

#### 1. NUGM '92 News

Louise and Helen reported briefly on circulation information gleaned from NUGM '92 in October. The DALNET comments on the NOTIS Circ Re-Write Team's enhancement drafts were delivered to Bruce Hulse, WRLC, the Consortium representative. He said the Team especially valued our indicating priorities for the enhancements. They were scheduled to meet with NOTIS in early November to negotiate re-write priorities, including:

- (1) basic functions;
- (2) medium priority; and
- (3) "would be nice".

NOTIS was saying the Circ Re-Write (LMS Release 5.2) would not be available for at least 18 months.

Client/server development was a "hot" topic at NUGM '92. NOTIS is re-designing its user and staff modes to this new architecture. NOTIS strongly recommends that libraries STOP buying "dumb terminals" and begin the transition to microcomputer workstations (Windows-capable; VGA; eventually communicating TCP/IP).

#### 2. Reciprocal Borrowing

Gerry reported that the SEMLOL reciprocal borrowing pilot libraries were experiencing a growing number of transactions. Overdues are still low.

Statistics the pilot group would like to have from NOTIS for the trial period are each institution's charges and renewals by patron category and, further, within patron category by patron code. The pilot libraries have agreed to use standardized patron codes to make the statistics easier to manage.

Jeff announced that WSU would soon be issuing bills for replacement for delinquent Infopass accounts.

#### 3. Statistical Reports

- a) **Vanderbilt:** Louise circulated sample pages of statistics Dody Fox had generated using the Vanderbilt SAS programs and OU circulation data. The samples were charges/renewals by location and by patron category. Dody is still working on the call number breakdown.

Frequency? -- Once a year at end of fiscal year would be the minimum frequency for these reports. They may be too resource intensive to run more often than once or twice a year, though libraries may want them more frequently.

Location breakdown? -- Most preferred locations labeled with the 4.4 NOTIS locations code. There is a 15 character limit to the location label. UDM preferred abbreviations of the locations' LUIS "long" names. Dody can vary these labels by DALNET institution.

Test Library? -- OU agreed to have its data used for testing and to review the results. They need the reports for accreditation visits in Spring 1993.

VPS? -- Louise will check with Dody on the feasibility of distributing these reports via VPS distributed printing.

Dody will continue to work on this project as her top priority (after support of the production circulation modules, of course).

b) **NOTIS QuikReports**

Louise reported that beta testing of QuikReports seems to be delayed, however, NOTIS still plans to deliver the software by the end of 1992. A quick review of the circulation reports to be included did not turn up a statistical report like Vanderbilt's. It still seems to be advisable to get the Vanderbilt report running rather than wait for QuikReports.

4. **NOTIS PACLoan**

To prepare for the arrival and implementation of the NOTIS PACLoan software (to be used for IntraSystem Loan within DALNET), the group discussed these issues:

- a) Role of the DALNET Circulation Task Force -- perhaps key interlibrary loan staff could join the Task Force to work on PACLoan implementation;
- b) Local equipment and telecommunications needs -- a Micrcomputer workstation running Windows and communicating via TCP/IP protocol is needed for the ILL staff workstations to use the ILL client/server management module. Without such a workstation, ILL requests are sent to a local system printer, eg. the

one used for VPS distributed printing. Users can make requests on "dumb" LUIS terminals.

- c) ILL staff training -- DALNET libraries' ILL staff may not be familiar with NOTIS circulation and may need a briefing early in the implementation. ILL staff will also need to learn how to operate and maintain the ILL client/server workstation.

Louise will put PACLoan planning on the January 11th DALNET Project Managers agenda.

5. 1993 DALNET Circulation Forum

A tentative date and place were selected for the 1993 DALNET Circulation Forum: Detroit Public Library on Monday, April 19th.

The group's assignment is to bring ideas for the Forum to the next meeting.

6. Release 5.0.2 Record Purge

The LUIS 5.0.2 patron and bill/fine record purge programs are on Dody's list to implement after the Vanderbilt statistical reports. Team members agreed to find out their institutions' requirements for retaining bill/fine information online and offline by the next meeting.

7. Other

- a) USPS mailing label format -- Louise asked if anyone was experiencing problems with NOTIS's lack of full compliance with the USPS mailing label format. Debbie Adams of Botsford is suspicious about the labels causing delays at the Post Office.
- b) Duplicate patron records/SSN's -- MCC is noticing more problems with patrons having duplicate social security numbers. An increasing number of duplicate patron records was also reported. To ensure that an unwanted patron record will be deleted with the purge program, staff need to input delete dates.

**NEXT MEETING: December 16, 1992, 2:00 - 4:00 p.m. at Detroit Public Library (preceded by a holiday lunch).**