

DALNET Circulation Standards Meeting (2-09-97)

Present:

Anaclare Evans	WSU
Steven Vest, Chair	WSU
Louann Stewart	Oakland U.
Terry Potvin	DPL
Betty Nelson	UDM
Jan Miller (for Gerry Bosler)	Macomb
Bill Kane	UDM
Joan Emahiser	Beaumont
Lois Goode	UDM (Outer Drive)

1. NOTIS 6.3.1 Update

A. 6.2 had bugs: Because there were so many reported problems with NOTIS release 6.2 and decision was made to hold off until release 6.3 was available as v. 6.3.1 contained many fixes to the rewrite of the circulation module.

B. OPAC and Software Changes

1. Revised guide screens : the guide screens for the public will look like the guide screens now available in staff mode. These screens will contain entries for each new heading and may extend to several screens in length. These will replace the guide screens which divide the universe of search results into 14 lines.

2. New versions of CICS & MVS

a. Should make things run more efficiently

**\*ASIDE\* DO NOT USE THE PRODUCTION DATABASE FOR TRAINING.  
\* Use CICSNOTP or CICSNOTD**

2. Expire/Delete date changes

A. Cleanup for patron file: Since the entire circulation file has to be converted to v. 6.3, this is an excellent opportunity to remove some of the "dead wood" from the patron file and some of the other files which support circulation.

B. Program inserted expire/delete dates for "indef" patron ID

A program was written which inserted expire and deletion dates for patron IDs as such dates are required for the next release. While many committee members would have preferred to set a variety of dates, that became impossible, so the DALNET office staff set the date as six (6) months from the last charge. It has since been determined that

this date did not always work as expected. Libraries are free to edit these dates as necessary so long as the dates are 12/31/99 or earlier. Version 6.3 will automatically insert an expiration date of one year from the date of creation which can be overridden.

C. The patron record archive program is currently being tested. This program will be run with the same parameters for all patron groups and categories as it has been determined that the program does not work if too many options are used. The initial test of the program, run on a copy of the production patron file, indicates that about 20% of the patron records will be archived if we select a deletion date of records earlier than 12/31/94. The archive programs will delete expired IDs, expired subrecords, and complete records depending upon the situation. Records and IDs are only purged if they have no circulation activity or open bill and fine records associated with them. Some sample records will be shared at the March meeting for you to see exactly what will happen and help us to determine which dates to use. The exact date on which we will run the patron record archiving program has not yet been determined.

D. The Bill and Fine purge is scheduled for early February (actually run on Feb 22/23, 1997). The same parameters will be used as were used in 1996. That is only closed bill and fine records more than one year old will be archived. All open bills and fines will be retained on the system. A. Evans asked if the group would consider retaining only six months of closed bill and fine records and after discussion, it was felt that this would not be sufficient to resolve patron problems. Reasons for the shorter data retention period were that more records would be removed from the system which would make it easier to find specific transactions, and that the closed bill and fine record is a record of what the patron had charged to them and is an invasion of privacy.

E. Bill and fine records and patron records must be archived, not purged, in case any of the DALNET libraries are ever audited. Archived records are in storage, not mounted on the computer and advance arrangements must be made to have these records put back on the system.

4. 6.3.1. Training: The outline for training for release 6.3.1 was distributed. Wayne State will be the 'guinea pigs' for this training and will receive their training in February and March. DPL will come next because they, too, have many people to be trained. Other DALNET members will follow either singly or in small groups. Anaclare will train the trainers and provide training materials which DALNET members can use. Up to five people will be trained in each session in the WSU training room. Documentation for v. 6.2 was distributed last summer or fall. Documentation for v. 6.3.1 is available on the Ameritech Library Services Web site and can be downloaded. DALNET members without web access will be assisted by the DALNET office in obtaining a copy of the documentation in some useable form.

5. 6.3.1 Testing: A. Evans set forth a plea for volunteers to help with testing 6.3.1. She will need a list of volunteers as authorizations will need to be updated for 6.3.1. A number of committee members volunteered. The list of items to be tested and directions for accessing the circulation module were distributed. All testing should be completed by the end of March, 1997. DALNET libraries are asked to test situations which are unique

to their sites as well as common circulation scenarios. Please make screen prints, document what you were doing, and report all problems to Anaclare Evans (313-577-4006) when they occur.

#### 6 Year 2000

A. The current NOTIS circulation records cannot deal with dates beyond 31 December 1999. One of the reasons for implementing release 6.3.1 is to be able to use dates further into the future.

B. NOTIS uses two types of dates in various records. If the date field in question has four digits for the year, then dates beyond the year 2000 will be accepted. If the date allows only two digits for the year the last date which can be used is 12/31/99. Dates of 00, 01, 02 etc. are not rejected by the system but are understood to be 1900, 1901, 1902, etc. and these could cause records to be archived prematurely.

C. Fixes for the year 2000 and beyond for other modules of NOTIS will be included in release 6.4.

7. Meeting Schedule: Because of the need to make some DALNET wide decisions, this committee will have to meet monthly or more often until 6.3.1 is up and stable. The next meeting will include circulation desk supervisors from libraries not represented on the Circulation Advisory Committee so that all DALNET libraries can be involved in those decisions which affect all of us.

Next meeting 12 March 1997 at Wayne State University, room to be announced later.

April 9, 1997 the committee will meet at Oakland University.

Summary notes by,  
Steven Vest, Chair  
Anaclare Evans, DALNET Office Liaison

2/23/97

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