

DALNET CIRCULATION STANDARDS COMMITTEE

Agenda

February 22, 1996

1. Welcome Anaclare Evans!
2. 6.0.1 Update
3. 6.2 Circulation Module Update
4. Patron Archive
5. MichNUGM (6/6/96 at EMU)
  - a. Training
6. Future NOTIS releases
7. Summer Goals?
8. Other

## **DALNET CIRCULATION TASK FORCE**

### **MINUTES**

#### **22 February 1996--Macomb Community College**

Present: Steven Vest, WSU, Chair; Anaclare Evans, WSU/DALNET; Helen Ma, WSU/DALNET; Becky Riesterer, Walsh, Terrence Potvin, DPL; Jerry Bosler, MCC; Louann Stewart, OU

Steven Vest opened the meeting by welcoming Anaclare Evans, the new DALNET Systems Librarian who will be responsible for staff mode support of the NOTIS system. Helen Ma will be leaving on 15 March 1996.

#### **NOTIS RELEASE 6.0.1 UPDATE**

Helen shared the Project Charter for release 6.0.1 to the Task Force. The implementation date is scheduled for the first weekend in March and is a firm date. Testing for all modules is on track. Anaclare Evans will be conducting a series of Format Integration workshops at WSU in late February and early March. As part of her testing of circulation functionalities in 6.0.1, Helen developed a check list of circulation functions which need to be tested. A copy of this document was distributed to Task Force members. The impact on circulation with release 6.0.1 is minimal, the only effect is related to increased item record security. .

#### **NOTIS RELEASE 6.2 UPDATE**

NOTIS release 6.2 is currently scheduled to be shipped on 2 April 1996. This is the major rewrite of the circulation module. DALNET office staff have held a preliminary meeting to discuss projects which need to be considered in preparation for implementation of 6.2. These projects include, but are not limited to: bill and fine archive, patron record archiving, item record purging and batch linking of unlinked item records. Other projects may be undertaken if there is sufficient time. DALNET is considering installing release 6.2 in late December 1996 or early January 1997. Task Force members present felt that a mid-year implementation might have an adverse effect on user services and indicated a preference for implementation later in the school year. Anaclare Evans mentioned that our implementation of future releases depended upon having 6.2 installed and that timing could be an issue.

The bill and fine archive is the first cleanup task to be undertaken in preparation for release 6.2. This was done in January, on the regular annual schedule, and will be run again just before 6.2 is installed.

The Patron record archive will be done DALNET library by DALNET library. Helen Ma has the parameters for each library and will be testing the archive with OCC because they only want to archive records from one patron category, and their group of patron records is clean. A program to add delete dates to the records for each patron needs to be tested as the first step of this clean up process. Helen Ma hopes to test the software before she leaves. This is another job which might also be run again just before implementation.

Anaclare Evans is gathering data in preparation for the batch deletion of item records previously coded as withdrawn or deleted. Although DALNET libraries have coded records as both D for deleted and W for withdrawn, Anaclare would like to know of any "creative" uses which libraries have made of these codes. Once some of these extraneous item records are deleted, then DALNET staff will look at the batch linker and its use. The batch linker is supposed to match unlinked item records with copy holdings records based on locations and call numbers. If this is successful, regular use of this batch job would relieve staff members from the monotony of item record linking. Because release 6.2 will change the format of many of these records, it is important that we minimize the number of stray records in the system.

MichNUGM

DATE: 6/6/96

PLACE: Eastern Michigan University

All day

Jim Green from the DALNET office and Mary Ross of Western Michigan University are the co-organizers of the program. Phyllis Valentine who is coordinating the circulation workshops planned to be held before and/or after the meeting is circulating a questionnaire relating to 6.2 training needs and desires. Helen Ma circulated this questionnaire to DALNET members and most felt that training closer to the time of implementation would be more appropriate. Ben Shapiro, Ameritech Library Services, only charges \$1000.00 per day plus expenses for training. Oakland University does have a training room with 15 terminals which can connect to NOTIS. After much discussion, the Task Force members suggested that one or maybe two DALNET people attend the training session in conjunction with MichNUGM and that DALNET training be scheduled closer to our actual implementation date, perhaps bringing Ben Shapiro to DALNET for training. DALNET will also provide training for key staff members at its member institutions.

#### FUTURE NOTIS RELEASES

NOTIS releases other than 6.2 (6.1, 6.3, and 6.4) are also scheduled for 1996. Release 6.1 is scheduled for the same day as release 6.2. 6.1 concentrates on improvements to PACLink and PACLoan as they affect the CIC sites. DALNET does not have a site license for PACLoan, so we do not expect to receive its enhancements.

Other improvements in release 6.2 include rewriting the NOTIS code from CICS macro to command level, to make the call number index dynamic (if you add a new title or a new unlinked item record you will be able to search for the record by call number immediately), to make the guide screens more functional, and to make searching in the indexes a bit better. For more details see the Midwinter NLUC report attached. This was also distributed via the DALNETlistserv.

Release 6.3 will arrive in July or earlier and will include a new version of the record transfer software (GTO), some OPAC enhancements, and a few small enhancements for acquisitions. It is believed that the GTO piece can be installed before we install release 6.2.

Release 6.4 will include the updates necessary to allow us to function past the year 2000.

#### SUMMER GOALS

Steven Vest asked the group to do some brainstorming about possible goals for this summer.

Suggestions from the membership included getting ready for 6.2, PACLoan, circulation issues related to UMI full text products especially issues related to the impact on circulation such as the collection of fees, and uniform service policies. Jerry Bosler stated that he would like to see uniform policies for all DALNET libraries which relate to circulation periods, fines, overdues, and bill for non-return of materials. Release 6.2 is supposed to enable a single library card to be authorized at multiple DALNET libraries.

The next meeting will be scheduled at a later date.

Summary minutes by,

A handwritten signature in cursive script that reads "Anaclare Evans".

Anaclare Evans  
Systems Librarian  
11 March 1996

3/11/96ae

# CIRCULATION FUNCTIONS TESTING

## I. Search / Create Patron Records

Print out a few of the real and pseudo patron (Missing and Lost) records.

## II. Locate / Create Linked and Unlinked Item Records

Print out a few of the linked item records.  
Check the default unlinked item record location.

## III. Charge / Discharge

- a. **Charge / discharge:** Perform basic charge function by charging a few of the items to a patron and then discharge.
- b. **Override:** Perform "override" by charging items to a "blocked" patron.
- c. **Back-date:** Back-date the system supplied date and then perform charge and discharge. Use back-date for charge to speed up the testing process for overdues, etc.
- d. **Change the item loan code before charge:** Use this to speed up the testing process for overdues, etc.
- e. **Courtesy charge / discharge:** Check the LUIS routing messages.

## IV. Bill and Fine

- a. **"HAS" screen:** Check the patron's "HAS" screen by using the patron record in III.a.
- b. **"PBIL" screen:** Call up the patron record used in III.b. and perform the "PBIL" command. Print out the screen. Pay on one of the bills and press [ENTER]. Return to the "PBIL" screen to check the amount owed has been reduced.

Perform "forgive" on one of the fines. Return to the "PBIL" screen to check the amount owed has been reduced.

- c. **Discharge an overdue item:** Discharge an overdue item from the patron in III.b. Go to the "PBIL" screen to check that the fine has been added.
- d. **Charge an overdue item to LOST:** Charge an overdue item from patron in III.b. to "LOST". Go to the "PBIL" screen to check that the fees has been added.

- e. **"ABIL" command:** Perform an "ABIL" on a patron for photo copy services. Go to the "PBIL" screen to check that the fees has been added.

#### V. Holds / Recalls

- a. **Holds:** Charge an item to a user, or find an item already charged. Perform "HOLDS" for a different patron. Check the item record to see that the hold is placed properly.  
Try change the queue of the Holds order.
- b. **Recalls:** Charge an item to a user, or find an item already charged. Perform "RECALL" for a different patron. Check the item record to see that the recall is placed properly.
- c. **Discharge:** Test to see if right messages appear.

#### VI. Course Reserve

- a. **Unlinked item record:** Create some unlinked item records and use the Item Load Code "HOUR".
- b. **Course number and professor name:** Have ready the course and professor info.
- c. **Course Reserve item sub-record:** Create an item sub-record for course reserve.
- d. **Charge the item to a student:** Charge the item to a student patron and check if the system ask you to override the due date. Type "y" to override and put in a due date and time.
- e. **Overdue:** Have the student return the item late. Discharge item and check the patron's "PBIL" screen to find out the new overdue data.
- f. **Locate / create linked item records and change to "TEMP LOCATION" for course reserve.**

- Note:
- 1. Perform the test in TD region.
  - 2. Log on to another terminal in TT. Check in LUIS to make sure that the correct circulation status is displayed for each test record and situation. Check LUIS messages for different functions.
  - 3. Make sure to generate some notices of all types during the process for the programmer to test batch jobs.
  - 4. Test operator security for various functions.