

DALNET CIRCULATION STANDARDS TASK FORCE MEETING

March 13, 1992

Minutes

Present: G. Bosler (MCC); L. Bugg (DALNET Office Liaison); H. Ma (DPL); J. Pearson (WSU); L. Stuart (OU); F. Young (UDM)

1. Future NOTIS Circulation Enhancements: 5.0 and 5.2

a) LMS Release 5.0

Louise briefly reviewed the enhancements to circ coming with LMS Release 5.0, including bill/fine record purge and patron record purge. She asked that circ staff find out their institution's audit trail requirements for both online and offline bill/fine records. DALNET libraries using circ will have to agree on bill file purge parameters. Patron records and subrecords are selected for purge based on "delete" date fields. DALNET libraries need to decide how to add "delete" dates, if not already on their patron records/subrecords. Louise will find out our options for storing and retrieving purged records.

b) LMS Release 5.2

Called the "Circ Re-Write", LMS Release 5.2 is being designed with the help of a three-member team from the NOTIS Circ SIG. The Task Force discussed input to Maggie Hogue, FCLA, who is the consortium representative to the team. We want to make sure DALNET's circ requirements are considered. These actions will be taken:

(1) Louise will review and update our written input to the Circ SIG last year in these areas -- patron records, lost books, bill/fine, course reserves, hold/recalls and send copies to Maggie;

(2) Louise will ask all DALNET libraries using the circ module for their suggestions;

(3) The Task Force will compile DALNET's needs for circulation statistical and management reports, based on our prioritized SAS report list;

(4) The Task Force will compile suggestions for basic charge/renew/discharge improvements.

FY & 1 yr at a time, how long.

2. Patron Record Expire/Delete Dates

Jeff distributed draft copies of WSU's plans to expire patron records for students no longer enrolled and for employees no longer on the payroll. Expire dates and delete dates can be added to the WSU subrecords as part of the tape update process. WSU is considering this plan to clean up the patron records before LMS Release 5.0 and MDAS Release 1.2.

Oakland University is already adding expire and delete dates to its patron subrecords. Other DALNET libraries need to make plans to do so by Fall 1992.

3. Maximum Billing Records

Louise reported that Wayne had a patron with over 1,400 bill/fine records. Attempting to display the summary bill screen with a "pbil" command "crashed" the production (CICSNOTP) region. Dody Fox removed all the closed bill records for this patron from the file and stored them in another file. This solved the immediate problem.

Dody Fox wrote a program to scan the DALNET bill file for patrons with large numbers of bill records. She identified a UDM pseudo-patron (ILL) with over 500. Fran reported UDM has already created another ILL pseudo-patron record and discontinued use of the one Dody found.

Until the bill file can be purged (LMS Release 5.0), Dody will periodically scan for patrons with over 500 bill records. Louise will then notify the library involved to stop creating more bills on that record. This problem was reported to NOTIS.

4. Reciprocal Borrowing

Gerry reported on efforts underway to test reciprocal borrowing between DALNET libraries. Two options for patron barcodes/categories in the NOTIS circ tables were reviewed: (1) authorize all barcodes for a patron group/category issued by the home library to borrow from the reciprocating library, eg. all MCC students could borrow from OU; and (2) issue a separate barcode to each patron authorized to borrow from reciprocating library, eg. add a second barcode to the library card.

It is important for either option that statistics can be gathered by NOTIS identifying the numbers of books charged from reciprocating libraries to patrons from other DALNET libraries.

5. Statistical Reports

Dody -
Louise reported that she has not been able to get detailed specifications done for the next circ report: circulation by call number range. This report was promised some time ago. Now, with the urgent situation to install Release 5.0, the programmers will not be starting any new reports until Fall.

Luann stressed that this report is critical to OU, especially as their budget for new materials gets reduced. The Task Force reconfirmed their decision to make this report the next in priority.

To expedite developing the report, Gerry and Luann agreed to draft detailed specifications by Fall. The specifications need to include details such as the call number ranges, the date ranges, collections, report format, data to be included (eg. historical data, current circ information), frequency, totals, types of circulations to count (eg. all patrons, pseudo-patrons, renewals), etc.

6. Third Bill Followup

SSNs
+ phone # 5
Jeff discussed his plans for followup for patrons not responding to the second bill. He is considering referral to a collection agency.

A recent WSU delinquent borrowers list included about 4 pages of Infopass loans. Jeff is having staff look up each record to identify the SEMLOL library issuing the Infopass. He will notify DALNET libraries of their delinquent Infopass patrons.

7. NOTIS PACLOAN

Greg Mollica, UPRLC and Chair-elect of the NOTIS Consortia SIG, drafted functional specifications for a NOTIS Interlibrary loan module. NSI is currently designing an ILL module called PACLOAN with Indiana and SUNY libraries. The Consortia SIG would like to send its requirements for ILL functionality to NOTIS during this development period.

Louise distributed Greg's draft specifications along with some draft comments from DALNET. Task Force members were asked to send their comments to Louise to compile and send to Greg.

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8. DALNET CIRC Forum

The Task Force suggested that Spring 1993 be targeted for another DALNET Circ Forum.

9. Next Meeting

The next meeting of the Task Force was scheduled for May 8, at 2:00 p.m., at Oakland University Kresge Library.

Notes submitted by

Louise Bugg
March 18, 1992

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