

Revised

DALNET ACQUISITIONS TASK FORCE
MINUTES - APRIL 26, 1993

Present: B. Heath, J. Gilbert, H. Ma, A. Sargent, M. Thomann,
C. Wecker, K. Zinterhofer

Absent: A. Iveson, D. Paldan

B. Heath, Chair of the Acquisitions Task Force, welcomed three new members to the Task Force: Jean Gilbert (Beaumont Hospital), Anne Sargent (University of Detroit), and Margaret Thomann (Oakland County Law Library).

The DALNET Acquisitions Task Force had been originally established in 1988 with a very specific charge. Once the issues in the charge had been addressed, the Task Force ceased meeting. The Task Force had not been given a continuing charge in a similar fashion to the other DALNET Committees and Task Forces. Earlier this year, the Project Managers gave two assignments to the Acquisitions Task Force: 1.) to review and prioritize Acquisitions QuikReports and 2.) to review and make a recommendation regarding the desirability of implementing NOTIS's new Serials Control System (CheckMark). With these new assignments in mind, some DALNET libraries who were previously unrepresented on the Acquisitions Task Force chose to appoint a person to the Task Force.

At the last DALNET Board meeting, the Board requested that each DALNET Committee/Task Force review the existing charge to its group and modify, if necessary, to more accurately reflect the group's understanding of its charge and areas of responsibility. Revised charges should be forwarded to L. Bugg by August for review by the Board.

Task Force Charge

The Task Force reviewed its original charge and identified broad areas for which the Task Force might be responsible. B. Heath will draft a new charge for review at the next Task Force meeting. Areas identified include: standards for shared files; standards for records used by Acquisitions staff; review of new NOTIS releases and enhancements in areas relevant to the Acquisitions module; serving as a communication vehicle for staff in DALNET sites regarding Acquisitions Module-related issues; requesting and reviewing NOTIS reports related to Acquisition processes; and assuming an educational role (e.g. sponsoring User Meetings).

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Acquisitions Users Group Meeting

The group discussed the possibility of sponsoring a Users Group meeting on topics of interest to Acquisitions staff -- as has been done by the Database Standards Committee and the Circulation Task Force. At the next Task Force meeting, there will be a discussion of possible agenda items for such a meeting.

CheckMark Implementation

B. Heath and C. Wecker gave some background on NOTIS's new Serials Control System which is part of Release 5.1. (NOTIS formerly referred to it as LSER; they are now calling it CheckMark.) Some members of the Task Force had seen a demonstration diskette of the System a few years ago; others were not very familiar with the concept. Both B. Heath and C. Wecker attended a NOTIS workshop on CheckMark last June and reviewed with the group what, to the best of their knowledge, seemed to be the advantages and disadvantages of implementing CheckMark. It is not mandatory that libraries utilize the new capability at this time. To date, NOTIS has not indicated a deadline by which libraries must begin to use CheckMark.

In order to make a recommendation regarding implementation, the Task Force felt they would like to know more about CheckMark and have another demonstration of its capabilities. C. Wecker will draft a plan for reviewing CheckMark. As a component of the review, we will ask Beth Warner (Head of Systems at University of Michigan) to meet with us and review/demonstrate CheckMark. B. Warner worked on its development while she was employed by NOTIS; the University of Michigan also served as a Release 5.1 Beta Site and tested CheckMark. In addition, NOTIS will be conducting a CheckMark workshop on June 2 at Western Michigan University (the day before the annual Michigan NOTIS Users Group Meeting) if there are sufficient registrants. C. Wecker will attend that workshop, if it is held.

QuikReports

The remainder of the meeting was devoted to discussion of Acquisitions and Cataloging QuikReports. Task Force members had been asked to review NOTIS QuikReports documentation with others at their sites for ranking at this meeting. (The Acquisitions Task Force was asked to consider the Cataloging reports in addition to the Acquisitions reports since many of them are relevant to Acquisitions processes.)

It was acknowledged that, until the reports are run in test, an exact determination of exactly how the reports will look and what they will do is not possible. However, based on available NOTIS documentation, Task Force members rated the reports as to importance at their institution using a scale of: High, Medium, Low, Not Interested. Once the reports are run in test, another ranking will have to be done. If there was a range of responses, or responses varied based on size of library, this information is supplied below.

ACQUISITIONS REPORTS:

- ACQ001 - Order Daily Transaction Report: NOT INTERESTED - LOW
- ACQ002 - Acquired Items Report: MEDIUM - HIGH
- ACQ003 - Acquisitions Cost Report: HIGH
- ACQ004 - Ten Funds with the Largest Balance Report:
NOT INTERESTED
- ACQ005 - Ten Funds with the Smallest Balance Report:
NOT INTERESTED
- ACQ006 - Items Ordered Report: MEDIUM - HIGH
- ACQ007 - Items Received Report: MEDIUM - HIGH
- ACQ008 - Order Status Report: NOT INTERESTED (larger
libraries) - HIGH (smaller libraries)
- ACQ009 - Vendor Order Analysis Report: HIGH
(LOW - MEDIUM for 1 library)
- ACQ010 - Allocations, Encumbrances, Expenditures Report: HIGH
- ACQ011 - Encumbrances/Expenditures Summary: HIGH
- ACQ012 - Over-Expenditures Report: NOT INTERESTED

QuikReports (continued)

ACQUISITIONS REPORTS (continued):

- ACQ013 - Fund Accounting/Management Report:
NOT INTERESTED - HIGH
- ACQ014 - New Subscriptions/Standing Orders Report:
NOT INTERESTED - HIGH
- ACQ015 - Open Subscriptions/Standing Orders Report: HIGH
- ACQ016 - Standing Order Vendor List: MEDIUM
(1 library: NOT INTERESTED)
- ACQ017 - Items Received as Gifts Report:
NOT INTERESTED - MEDIUM
- ACQ018 - Inactive Serial Titles Report: LOW - HIGH
- ACQ019 - Incomplete Orders Report: LOW - HIGH
- ACQ020 - Claimed Items Report: LOW - HIGH
- ACQ021 - Titles Provided by Vendor Report:
NOT INTERESTED (larger libraries)
MEDIUM (smaller libraries)
- ACQ022 - Expense Class Management Report: NOT INTERESTED

CATALOGING REPORTS:

- CAT001 - Cataloged Titles Report: NOT INTERESTED - HIGH
- CAT002 - Titles Received but Not Cataloged Report:
NOT INTERESTED - MEDIUM
- CAT003 - Items Added/Withdrawn Report: HIGH
- CAT004 - Copies Held Report: LOW
(ranked HIGH by 1 library)
- CAT005 - Inventory List Report: NOT INTERESTED (large
libraries) - MEDIUM (small libraries)
- CAT006 - Titles Coded for Deletion Report: NOT INTERESTED
(ranked medium by 1 library)

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QuikReports (continued)

CATALOGING REPORTS (continued)

- CAT007 - Suppressed Records Report: LOW
(ranked HIGH by 1 library)
- CAT008 - Authority Untraced References Report: NOT INTERESTED
- CAT009 - Unlinked Item Records Report: HIGH
- CAT010 - Multiple Locations Report: NOT INTERESTED - MEDIUM
- CAT011 - Multiple Copies Report: NOT INTERESTED - MEDIUM
- CAT012 - Temporary Locations Report: NOT INTERESTED - HIGH

The next meeting of the Task Force will be held on June 15 at Wayne State in Purdy Library, Room 350 at 9:30. The major agenda item will be Beth Warner's demonstration of CheckMark. The Task Force will also review B. Heath's draft revised charge.

Submitted by Charlene Wecker