Auburn Center
1091 Centre Road, Auburn Hills. MI 48326-2671   (810) 540-1500   Fax:(810) 340-6838

December 10, 1999

To: Horizon Course Reserves TF

From: Mary Ann Sheble

Re: NOTIS Course Reserves "History"

As promised at our December 6th TF meeting, I'm sending copies of selected NOTIS course reserves history (from the "archives" of Judy Murray's files ...).

1. NOTIS Release 4.5 Course Reserves Recommendations: Contains list of features in Phase I and Phase II of early NOTIS course reserves, plus "Detailed Recommendations" on DALNET guidelines for entering and using course reserve records.
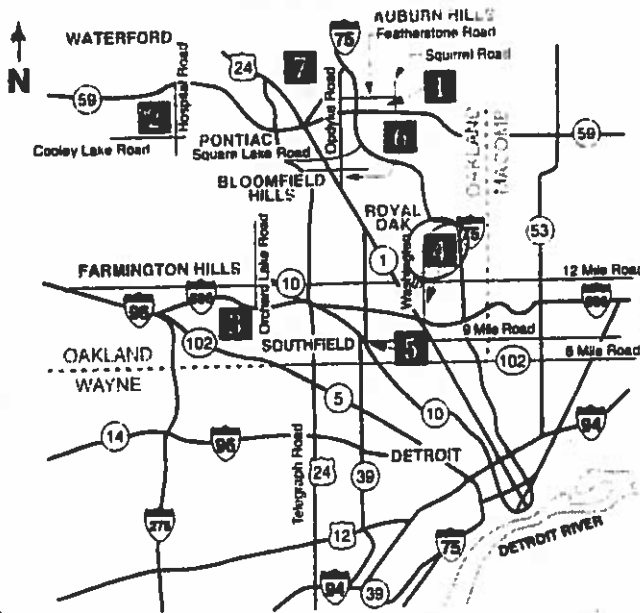
We talked about the possibility of doing something similar for Horizon – and it may help to have an idea of how DALNET approached this issue for NOTIS.

2. NOTIS Course Reserves Module, Columbia University Proposal, Comments from DALNET: Ideas on NOTIS course reserve enhancements requested by DALNET. This may provide some information for our upcoming discussion on what it is that we want Horizon course reserves to do for us.

Bradd has some recent information that WSU put together on possible functionality problems/solutions for Horizon course reserves – which is directly applicable to our upcoming discussion.

Reminder!! Our next TF meeting will be held at the Royal Oak branch of OCC in Room A101 from 9:30-11:00 a.m. A map to the campus to enclosed. There is ample free parking in the two OCC Washington Street garages. To get to A101, walk across Lincoln Avenue (separates parking garages from the campus). Walk into A Building and check the campus guide for the location of the room.
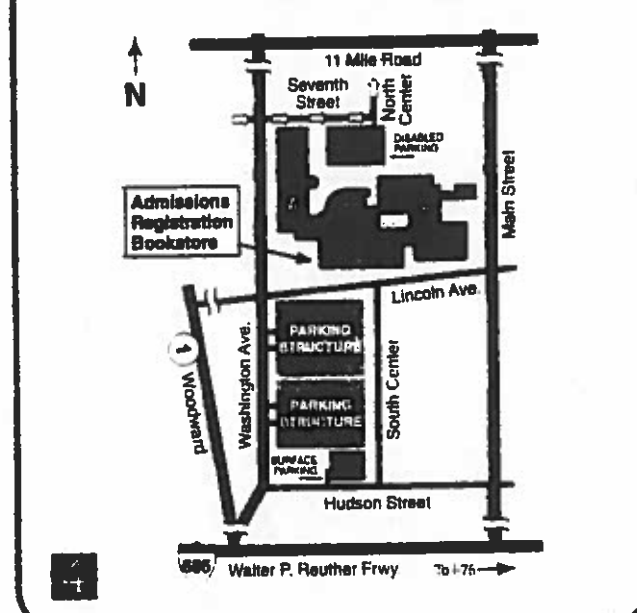
ALL AREA LOCATIONS

CAMPUS/SITE LOCATIONS

1 AUBURN HILLS CAMPUS

2 HIGHLAND LAKES CAMPUS

3 ORCHARD RIDGE CAMPUS

4 ROYAL OAK CAMPUS

5 SOUTHFIELD CAMPUS

6 GEORGE A. BEE ADMINISTRATION CENTER

7 PONTIAC CENTER

N

WATERFORD
AUBURN HILLS
Featherstone Road
Squirrel Road
PONTIAC
Square Lake Road
Cooley Lake Road
BLOOMFIELD HILLS
ROYAL OAK
FARMINGTON HILLS
12 Mile Road
OAKLAND HARDWARE
9 Mile Road
8 Mile Road
SOUTHFIELD
OAKLAND
WAYNE
DETROIT
Telegraph Road
DETROIT RIVER

ROYAL OAK CAMPUS

N

11 Mile Road
Seventh Street
North Center
DISABLED PARKING
Main Street
Admissions Registration Bookstore
Lincoln Ave.
Washington Ave.
Woodward
PARKING STRUCTURE
PARKING STRUCTURE
SURFACE PARKING
South Center
Hudson Street
Walter P. Reuther Frwy
To I-75

NOTIS Release 4.5 Course Reserve Recommendations

The NOTIS Course Reserve module, Phase I, provides these features:

1. Course reserve statements with course number and instructor name added to both linked and unlinked item records;
2. Capability to create item subrecords to track circulation activity for temporary locations;
3. Staff mode course reserve indexes for both linked and unlinked item records, including indexes by author, title, instructor, and course number.

The WSU Libraries' Circ Team recommends that we implement the new course reserve module with Release 4.5, doing data conversion over the summer and going "live" in all Units in August/September 1989 by the beginning of the Fall Semester.

The Team also would like NOTIS to give a high priority to delivering Phase II of Course Reserves, to include:

1. Printed lists of items on Course Reserve by library, instructor, and course number;
2. Patron access to Course Reserve indexes via LUIS;
3. Expired action request list from the action date in the course reserve statements.

Detailed Recommendations

1. Use of NOTIS item sub-records for temporary locations

   The WSUL Circ Team recommends NOT using the NOTIS item sub-records, at least initially, for course reserve locations. The course reserve location can be put in either the permanent location field or the temporary location field of the item record, as appropriate. The Loan Code for the reserve location can be edited as necessary when the item is put on and removed from reserve.

2. Use of Course Reserve statements

   The Team recommends that course reserve statements be created when items are placed on reserve and deleted when items are taken off reserve. "Historical" course reserve statements should not be kept in the online database.

3.   Standards for data entry in Course Reserve statements

   (a)   The course name and number will be the abbreviated
         version from the current WSU class schedule (up to
         the maximum of 15 characters). No section numbers
         will be included.
   (b)   The instructor's name will be input as follows: last
         name space first name space middle name (up to the
         maximum of twenty characters).
   (c)   The begin and end dates of the course will be keyed
         in MM/DD/YY format.
   (d)   The note field may be used as necessary.
   (e)   The action date in the Course Reserve statement is
         not operational and should not be used.

4.   Expired action report listing

   The action date on the item record should be used to
   trigger a listing on the expired action report alerting
   units to items needing to be removed from reserve
   locations. NOTE: This field cannot be used until a
   software "fix" is installed enabling items with action
   dates to be indexed on the patron charge ("has") screen.

5.   Use of unlinked item records for Course Reserves

   Unlinked item records will be used for items on reserve
   that are not owned by the WSU Libraries, e.g.,
   instructors' personal copies.

   Data in the three unlinked item record fields now indexed
   for course reserves will be input according to these
   standards:

   (a)   author: Last name, space First name space Middle
         name
   (b)   title: omit initial article
   (c)   call number (maximum 60 characters):
             NOTIS unit code; e.g., wspk or wslw
             space
             code for material, e.g., pb for personal book,
                 pa for personal article
             space
             instructor's last name
             space
             number assigned to item
         e.g., wslw pb Clark 6

Generic unlinked item records may be used for circulating issues of newspapers, sheets of fiche, article photocopies, and other similar items kept at reserve desks.

6.   Course Reserve lists

NOTIS Release 4.5 does not provide printed lists of items on Reserve. The WSUL Circ Team requests that a Programmer/analyst develop such lists after Release 4.5 is implemented.

WSU Libraries Circ Team
March 21, 1989

LB89-113

March 19, 1990

Mr. Stephen Davis, Subcommittee Chair
Course Reserves Subcommittee
NOTIS Circulation Interest Group
Columbia University in the City of New York
Libraries
535 West 114th Street
New York, New York 10027

Dear Mr. Davis:

Enclosed are comments from Wayne State University/DALNET on the
proposals for enhancements to the NOTIS Reserve Subsystem. We
are most concerned that the needs of a NOTIS consortium site be
considered by your Subcommittee in the Course Reserves Subsystem
proposal to NOTIS.

I would appreciate continuing on your mailing list for future
drafts and the final version of this proposal. Thanks for
considering our input.

Sincerely,

Louise Bugg
Director of Automated Services

Enclosure

cy: DALNET Project Managers
     Julian Stam, WSU

LB90-168

NOTIS Course Reserves Module
Columbia University Proposal
Comments from DALNET

March 19, 1990

LUIS:

1.1 We definitely support course reserves searching (indexes)
     and display of course reserves information in LUIS.

1.2 We can already design our own help screens for LUIS so
     having screens designed by NOTIS is not as high a priority
     for us.

1.3 Keyword searching of fields other than those on the
     bibliographic record may not be worth the effort or
     complication at this time.

1.4 The time due should definitely be displayed in LUIS, based
     on online, real time updates.

1.5 Notes from the reserves fields should be displayable in LUIS
     (similar to the "UM:" note on the copy holdings record).

OPAC Index Displays:

2.1.1. The BI involved may make the idea of charge information
        on the index display ineffective. Most patrons would
        advance to the individual records in order to find out the
        time due anyway.

2.1.2. Deletion of extraneous call number punctuation from
        LUIS displays is a good idea.

2.2.5. A network with libraries together in an institution
        group MUST have the processing unit code display in the
        course reserves index, since it is a joint index for all
        processing units with course reserves statements. This is
        VERY IMPORTANT for DALNET!

2.2.6. Author and title fields in the index should be
        expanded.

2.3.5. Processing unit code displays must be included.
        (See 2.2.5)

2.4.   It is also very important to DALNET to increase the
        title display when searching the reserve author index. .

Additional Suggestions Re: Indexes:

1. Be able to restrict course reserves index searches by processing unit; have a security code to enable display of only your processing unit's reserve items.

2. The reserves indexes should be updated online in "real" time rather than during an overnight batch process.

3. If staff mode indexes include all course reserve statements, we need something to indicate which are not currently active reserves, e.g., display end date or enable search code in staff mode to display only items currently active.

4. We have two index problems in our consortium single institution group environment with multiple processing units in separate files:
   (1) need to be able to display course reserves records (i.e., item records) for all p.u.'s regardless of ltxx transaction used;
   (2) item record displays from the wrong item file.

5. "Has" screen improvements for course reserves:
   (1) needs to display time due for hourly loans;
   (2) needs to display items as overdue when past hourly time due.

Processing and File Maintenance:

3.1 Agreed—the reserve statement begin and end dates should control OPAC display.

3.2 Global "renewals" to the end of the next semester would also be helpful, as well as global deletes.

3.3 An archival capability for course reserve data is not a high priority to DALNET at this time.

3.4 Defaults to be set by the inputter would be nice to have.

3.5 The concept of a "UM:" note display in the OPAC seems useful.

3.6 Inputting added entry information may not be effective for unlinked, temporary entries.

3.7 Definitely; the reserve action date field and expired action report list should be activated.

Processing and File Maintenance Additional Ideas:

1. Batch products needed:
   A. Lists of reserve items, e.g., by instructor and course.
   B. Lists of items nearing their end dates for renewal.
   C. Lists of personal items on reserve for specific instructors.
2. Batch products, like the pseudo-bill and the bill and fine notice, should include the time due in addition to the date due.

Loan Periods, Etc.:

4.1.1. System already calculates time due in hours—using minutes. Would this section refer to calculating to the nearest hour?

4.1.2. If this means to change the loan period so it is due at closing rather than automatically extending the loan overnight, then this proposal is needed.

4.1.3. Variations on loan periods given, e.g., due the next day at opening, are all useful.

4.2.1. Currently fines are charged by the minute. We need an hourly fine rate plus the differential calculation.

4.2.2. Definitely, fines should be calculated based on the library's calendar with the option of not charging fines when the library is closed.

4.2.3. Surcharges with differing fine rates for different time periods sound complicated.

4.3. Blocks that differ for reserve loans sound complicated. If the separate blocks could be activated automatically, so that staff need not check anything, however, they would be very helpful.

4.4. Holds will be complicated for reserves no matter what options are available. Minutes would have to be a capability, and will only be effective if the time due for that item is displayed on the same screen from which the hold is made.

Additional Ideas:

1. Fine rates on an hourly basis with grace periods in minutes.

2. Enable hourly loans to come due after midnight, e.g., for libraries open until 1:00 a.m. or later.

Louise Bugg and Julian Stam
Wayne State University, DALNET
Detroit, Michigan

LB90-168