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potential long-term disaster of the continued settling and sinking of the main library through the purchase of new and lighter carpet with no padding, to help reduce the load on the building. That was being coupled, of course, with the inevitable creation of a special task force to make further creative plans.

Sometimes, naturally, the best humor is unintentional, as was the case with the recent description of an important meeting at the University of Notre Dame Libraries in *Mosaic*, in which it was reported that the meeting moved expeditiously because "the agenda was busy," leaving the imaginative reader to wonder where the agenda was, whether "busy" was just another excuse for a sick day, and if there was some way the agenda could perpetually be "busy" as a way of improving all meetings. That gaffe even achieved notoriety for *Mosaic* through mention in the infamous "Marginalia" column of *The Chronicle of Higher Education* (November 23, 1988) with the editorial comment: "We'll call it back later."

For better—as is sometimes the case—or for worse—as is more often the case—library staff newsletters allow us to demonstrate our creativity, and to publish our humor, in ways that no other aspect of our professional life, and no other element of our professional literature, permits. In that respect such newsletters play an important role both in lightening the work of the library and in demonstrating our truest abilities.

Automating overdues in a non-automated library: The Hypercard solution

By Kitty J. Mackey

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The problem

The problem was overdue notices. As circulation librarian in a medium-sized college library, the most time-consuming task under my direction was the weekly generation of overdue notices. In our non-automated library the manual tasks of sorting overdues, filling out fine slips, updating the notices, and typing the notices and envelopes were assigned to student assistants under my charge. These tasks frequently required up to 40 of my 140 student assistant hours each week. The error rate of transposed call numbers, misspelled names, and "claims returned" items was high, and the standard three-part overdue notices used were expensive.

Yet overdues are too important to ignore, and prompt generation of overdue notices yields a high

Overdue Writer **Flow Chart**

```
        ┌─────────────────┐
        │     Patron      │
        │  Registration   │
        │     Stack       │
        └─────────────────┘
                 │
                 ▼
        ┌─────────────────┐
        │ Overdue Notice  │
        │     Stack       │
        └─────────────────┘
                  ╲
                   ╲
```

3rd Notice

2nd Notice

1st Notice

Billing   Stack

Billing   List
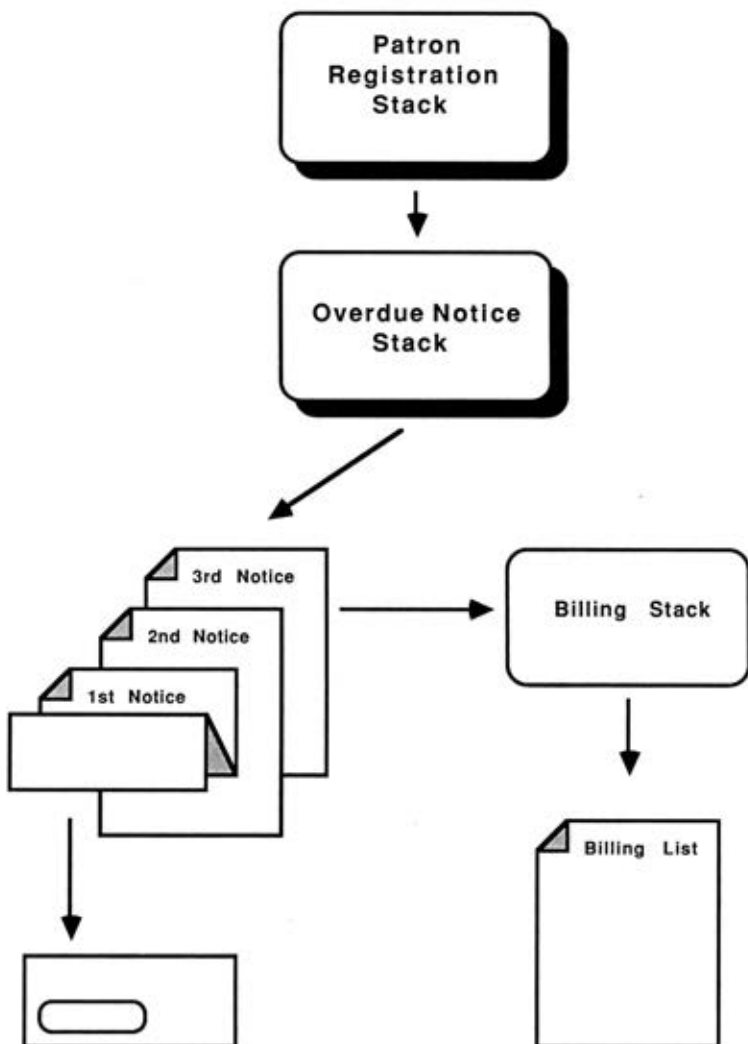
return rate and saves time and paperwork down the road. How could I:

1) design an efficient overdue process?

2) catch the interest of student assistants assigned to overdues?

3) eliminate repetitive manual processes associated with overdue notices?

The search for a solution

The ideal solution of course was to automate the library—but this was neither practical nor possible at this point. The next solution was to find an overdue program written specifically for non-automated libraries, which would run on the Circulation Department's powerful new Macintosh SE. After surveying the literature and spending several afternoons on the telephone with vendors, I began to suspect that such a program was not available. "Call back in six months," one well-known vendor told me; "Put your hands on an Apple IIc and I can fix you right up," another told me; "Why do you have a Macintosh anyway? Get yourself an IBM and we'll get you going," yet another said.

One possibility I investigated closely was *Open Stack*, a $5.00 library automation program written for *Hypercard* and available from Walking Shadow Press. Although *Open Stack* is an impressive accumulation of programming that can handle acquisitions, cataloging, and circulation functions, it is more suited to smaller libraries than to our collection of 167,000 items. However, I had been scrutinizing *Hypercard* since its first appearance in 1987, and had developed a great respect for this deceivingly powerful piece of software which Apple packs free with the Macintosh. A closer examination of *Open Stack* revealed that *Hypercard* was the perfect answer to my problem and that *Hypertalk*, *Hypercard's* programming language was easy to learn. Thus I embarked on a project to design my own overdue program.

The Hypercard solution

True to the spirit of Apple computers, *Hypercard's* basic instructions are written in everyday language and symbols which the average user can quickly master. Information in *Hypercard* is organized by subject or task, and stored in files called "stacks." Each stack is actually a set of "cards" (just like electronic Rolodex cards) in which the user can flip forward or backward, browse quickly, or sort, among other functions. "Buttons," which can appear either as words or as symbols, are the workhorses of *Hypercard*; your click is their command.

The literal beauty of *Hypercard* is that cards can be designed to accept either text or graphics or both; "background" graphics and text can be added to give cards a more familiar appearance. On-screen instructions can be written out as briefly or as fully as necessary.

Hypercard has several features that make it a logical choice for the program I developed, *Over-*due Writer. First, there is no limit to the number of cards one can have in a stack, a necessary requirement when building a database of any type. (Of course, the storage capacity of the computer itself may be limiting. *Hypercard* runs best when used with no less than a 20MB hard disk.) Second, a SORT feature allows cards to be sorted by specified criteria. Third, with *Hypercard's* FIND feature the user can enter a word or value in the message box, and *Hypercard* will go to the card in the stack containing that piece of information. *Hypercard's* newest version (1.2) has enhanced the FIND function and allows a FIND WHOLE option, which will search for an exact match to a string of words. This FIND WHOLE function is one of the cornerstones of *Overdue Writer*.

The fourth and last reason for using *Hypercard* was the programming ease it offers. I am not a computer programmer, but I have had enough programming experience to know that a similar program in COBOL or even in BASIC would have taken me at least six months to write—assuming that I had the expertise. Using *Hypercard's* HELP stack and borrowing ideas from pre-existing stacks and buttons, I learned *Hypercard's* scripting language as I was designing *Overdue Writer*, one function at a time. Although there are enhancements still to be made, the program was generating overdues just two weeks after I launched into the project. It has been a long time coming, but with *Hypercard*, average users finally have the power to make the *machines* fit *us*.

An overview of Overdue Writer

Overdue Writer is based on two main stacks: a Patron Registration Stack and an Overdue Notice Stack. The Patron Registration Stack is a database of all library borrowers, and includes the information previously stored on our paper Rolodex plus a little more. Since student assistants do most of the work with overdues, it is important that the "look" of the stack be familiar and self-explanatory. Thus, each "field" (space for a specific type of information) is clearly identified and on-screen instructions provide direction.

When instructions are too lengthy to put on the card itself, the HELP button becomes an invaluable tool. Cards in the Patron Registration Stack have a button which when clicked will cause the current screen to disappear and be replaced with a screen on which the different patron codes are described. Clicking another button will return the user to the original Patron Registration card. The ease of creating such on-screen help options eliminates the need for a paper procedure manual.

The real labor-saving buttons in the Patron Registration Stack are the "Click here to copy patron name..." arrows, which when clicked will create a new card in the Overdue Notice Stack and copy the patron's name, address, and social security number onto the appropriate fields in the new overdue no-

tice card.

The Overdue Notice Stack is the second stack on which *Overdue Writer* is based. Patron information is automatically transferred from the Patron Registration Stack, thus eliminating typing errors and redundancy. The text field for overdue information is a scrolling field, which provides the flexibility needed to accommodate patrons with one overdue item or thirty, as well as books with longer call numbers or titles. There is simply no limit to the amount of information that can be included in this field, yet it takes up less than a third of the total screen.

The Overdue Stack also contains a field for keeping track of how many notices a patron has been sent and their mailing dates. Clicking in the box next to the First Notice, Second Notice, or Third Notice buttons will enter the day's date on the screen. Not only will this date be transferred to the final printout of the overdue, but *Overdue Writer* allows the user to sort the overdue notices by First Notice date, a handy feature for updating the overdue files.

One weakness with *Hypercard* is the limited option for printing information from stacks in a report format. Although *Hypercard's* print report features are more than adequate for printing out working copies of stacks to use for checking the shelves or other in-house chores, none of the print report formats are of sufficient quality to use as a final copy for mailing to patrons. Printing each card as shown on the screen and using that as the final copy was an option, but again not an acceptable one; information in scrolling fields would be lost and on-screen user prompts would have to be limited and hidden. The solution chosen was Activision's *Reports*, a very versatile program that makes up for the print report weakness in *Hypercard*.

With *Reports* I was able to create my own design for an overdue notice, including a simple ink-saving letterhead, space for overdue item information, and a space for name and address which will show through a windowed envelope. Once the layout is created it can be edited if needed, but more importantly, with just a click of the mouse the printer can be left alone to do what previously required hours of manual typing.

The overdue process, step-by-step

Once overdue items have been identified, circulation cards are sorted manually by patron library card number. The circulation assistant enters *Hypercard's* Home Card and clicks on the picture (icon) for *Overdue Writer*. This takes the circulation assistant to the introduction card of the Patron Registration Stack. Using the FIND WHOLE feature on the screen, the circulation assistant enters the patron's library card number. The card for that patron will appear on the screen. The circulation assistant checks to make sure that this patron is sup-

posed to receive overdue notices (faculty do not) and checks for any special notes in the message field. If overdues are to be sent, the circulation assistant simply clicks on the appropriate "Copy information to Overdue Notice" arrow to transfer the patron's name, social security number, and address to a blank card in the Overdue Notice Stack.

An overdue notice card will now appear on the screen for this patron. Information on overdue items is added to the scrolling text field and the First Notice box is checked which makes the day's date appear. The circulation assistant then clicks a button to go back to the patron registration file and repeats the process until notices have been made for all the overdue items.

Second and third notices can be updated quickly and simultaneously. The circulation assistant simply goes through the stack card by card, verifies that the items are still overdue (by cross-checking the circulation cards), and clicks the appropriate notice button (i.e. Second Notice or Third Notice) to enter the current date. If the "Third Notice" button is checked, an additional message informing the patron of the minimum price of the overdue material and the billing date (two weeks hence) appears on the screen.

Overdue notices for which First, Second, and Third Notices have already been sent are copied to a third stack not yet mentioned, the Billing Stack, by clicking the "Send For Billing" Icon. The cards for these notices are then deleted from the current stack in order to save printing time and costs.

To print out the stack of first, second, and third notices, the user clicks the *Reports* icon, then chooses PRINT from the options given. *Reports* will then take over the process until all the cards in the stack have been printed. The notices are then ready to be separated and inserted into windowed envelopes.

At the end of each month cards in the Billing Stack are updated with the date and replacement costs and items still unreturned are checked against the shelves. Using *Reports*, a billing list is printed and sent to the college Business Office.

In the manual files I still have not found a way of getting the necessity of having a fine slip attached to each circulation card. These fine slips not only serve as a record for unpaid fines—a necessity in a college where students regularly charge their library fines home—but when they are collected in a box as overdue items are returned, they provide an easy way to clear returned materials from the Overdue Notice Stack. After some experimenting with letting *Reports* generate fine slips, I've found that it's still easier to use the standard self-adhesive type fine slips—only now I've abbreviated the process to include only the library card number, call number, abbreviated title, and the due date, which can be copied quickly from the circulation card.

When the computer notices are updated and mailed, the fine slips on the circulation cards are

also updated by manually filling in the date in the appropriate notice box. As materials are returned, circulation assistants complete the fine slips with the date returned, the fines due, and whether or not fines were paid. The fine slips are then put in a box at the circulation desk and are used to update the overdue notices in *Overdue Writer*.

To update notices in *Overdue Writer*, the circulation assistant utilizes the FIND or FIND WHOLE features to look up the call number of the item or the patron's number in the Overdue Stack. The item is deleted from the notice; if all items of a notice have been deleted the notice itself is deleted from the Overdue Stack. If the fine has been paid the fine slip is thrown away; if the fine is to be charged, the circulation assistant sends a postcard to inform the patron of the fine and files the slip in a manual billing file.

Thus the cycle of materials control comes full circle through a "manually automated" set of procedures. The three objectives I set out to achieve have been met: the overdue process is more efficient, students are eager to work with the computer, and the repetitive transcribing processes have been cut to a minimum. The entire overdue process requires less than ten hours per week, a full quarter of the time previously required. (One en-

hancement I would like to add to *Overdue Writer* is to use a digital scanner for inputting book information; this would completely eliminate typing from the overdue process and would save even more time.)

There is a fourth intangible benefit as well: students who formerly simply performed tasks are now receiving an education in computer literacy—no small asset in today's world. Before embarking on *Overdue Writer* students must first work through the Macintosh tutorial disk, achieve some competency with *MacWrite* and *MacDraw*, and work through *Hypercard's* tutorial. I hope that by the end of the year at least one of them will be writing her own overdue stacks or making enhancements to *Overdue Writer*. Then I will know that this clerical chore has been transformed into an educational experience not only for myself, but also for my student assistants. This is my ultimate goal as an educator.

Overdue Writer is available for $5.00 (the price of a disk, package, and postage) from the author. Write Kitty Mackey, Mickel Library, Converse College, Spartanburg, SC 29301. Personalizations and enhancements to Overdue Writer are permitted and encouraged.

■■

Fourth U.S.-Japan Conference on Libraries and Information Science

The fourth in a series of irregularly held conferences of academic librarians from the U.S. and Japan was held at the Wingspread Conference Center in Racine, Wisconsin, Oct. 3–6, 1988. Entitled "Strengthening the U.S.-Japan Library Partnership in the Global Information Flow," the conference followed thirteen years after the third, which was held in Kyoto in 1975. Earlier meetings had convened in 1969 and 1972.

To support the meeting, ALA received grants and services valued at $100,000 from the Japan-United States Friendship Commission and the Johnson Foundation.

Conference co-chairs were: Theodore F. Welch, director of libraries at Northern Illinois University and chair of the ALA Advisory Committee on Liaison with Japanese Libraries; and Haruo Kuroda, professor, Faculty of Science, and university librarian at the University of Tokyo. Seventy-two librarians and educators met to consider conservation and preservation, database and network development in the U.S. and Japan, development and application of CJK files in the U.S. and the development and application of MARC/JIS standards in Japan.

Major U.S. speakers were Patricia Battin, presi-

dent of the Commission on Preservation and Access; John Haeger, Research Libraries Group (RLG); Henriette Avram, Library of Congress; and Rowland C.W. Brown, OCLC. From Japan, the major speakers were Toru Sugawara, Waseda University Library; Masatoshi Shibukawa of Keio University Mita Information Center; Jun Adachi, National Center for Science Information System (NACSIS); Eiichi Kurahashi, University of Tokyo Library; Hisafumi Tanaka, NACSIS; and Kimio Ohno, Hokkaido University Library.

The format of the meeting included general sessions, in which simultaneous translation was available, and discussion groups, in which translation followed paragraph by paragraph as the speaker paused. One impact of this procedure was to drive home how serious a barrier language can be. Even in this optimal translation situation, the need for patience was great and misunderstandings were still possible.

At least one major breakthrough occurred at the Conference, when key participants came to an understanding about the CJK character set and an agreement on implementation.

Nine resolutions were drafted on the final day. They represent measures to strengthen cooperative

relationships between university libraries in Japan and the U.S.

1) A fifth conference should be convened in Japan; date, theme and topics to be determined by representatives; size similar to the fourth.

2) Small-scale meetings on specialized topics will be convened as needed on an ad hoc basis.

3) To promote the international flow of CJK bibliographic data, delegates urged respect for the development of language processing capabilities most appropriate to the countries of East Asia and the freedom of each country to develop its own national standards. Liaisons should be established.

4) Libraries in Japan and the U.S. should endeavor to raise the consciousness of society and take specific actions regarding the use of acid-free paper. Exchange of information should be promoted.

5) Libraries in Japan and the U.S. will endeavor to help each other in their respective collection development activities for both Japanese and U.S. publications.

6) Mutual use of the two countries' databases should be promoted.

7) There should be further study of the need, scope of service, and linkage modalities of networks in both countries.

8) Appropriate clauses in the copyright law of the two countries governing copy services provided in lieu of ILL should continue to be protected.

9) Future conferees should consider issues related to the production of databases and the resulting need for resource sharing in the special libraries context.

This conference has serious implications for academic librarians on both sides of the Pacific. The importance of Japan as a partner in exchanges of information in the future cannot be ignored, as it has been for too long. Our recent recognition of the beauties of Japanese culture must be broadened to include the burgeoning scientific and technological developments and, most practically, to promote the need for knowledge of the Japanese language.

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ACRL executive summary

On November 11–13, 1988, division representatives, staff, and members of ALA's COPES Committee and the ALA Executive Board met to work out some of the basic provisions of a new "operating agreement" between ALA and its divisions. While many details remain to be negotiated, several significant essentials were agreed upon by those present and will be brought to a larger forum at the Midwinter Meeting. Some of the issues are:

• A clarification of ALA financial fundamentals: what do dues pay for?

• Moving some items from the category of ALA indirect costs to division direct costs.

• A framework for supporting divisions when they have financial problems.

• An outline for the written agreement.

Some of us left the meeting feeling for the first time that there may be a new operating agreement in our lifetime!

Amid all the hullabaloo and sandwiched in between meeting preparation, the meeting itself, and a Thanksgiving holiday, ACRL marched bravely forward toward its planned goals.

Professional development

Planning for the Cincinnati conference continued on target. ACRL staff and the Conference Executive Committee visited the Conference Center and the hotels in November, and the preliminary program was mailed. Sales of exhibit space are excellent. See the sections on the Conference in this issue.

Planning is underway for the RBMS Cambridge Conference. Conference chair William Joyce and his committee have been working on logistics and are well along on plans for speakers and a trade fair that will emphasize the antiquarian book trade.

More active marketing of awards resulted in a somewhat larger number of nominations being submitted for ACRL's prestigious awards.

Invitations have been sent for the Humanities Programming Workshop for Historically Black Colleges and Universities and their communities, co-sponsored with the Public Library Association and funded by the National Endowment for the Humanities.

Enhancing service capability

Advisory services continued to keep ACRL staff members on their toes. More than 40 calls from members and others—not all librarians—tested our reference skills in areas relating to academic library services, standards, advisory committees, accreditation, collection development, buildings, funding formulas, serials, and planning.

President Joe Boissé and his program committee have been examining the future of higher education for a "Think Tank" meeting in Cincinnati that will pave the way for the President's Program at the ALA Annual Conference in Dallas in June.

The collection of statistics on non-ARL university libraries is underway, with a non-print version of the statistics being considered.

A proposal is under development for a study of the sources of revenue in academic libraries. It would be carried out by the ALA Office for Re-