Dalnet Circulation Standards Task Force
Summary Minutes
September 21, 1988

1) General NOTIS Circulation Questions
The following issues/questions were raised:
a) The University of Windsor created separate patron files. Is there a way, in a shared system to accomplish this? L. Bugg will check to see how this was done, if indeed it was done.

b) The following problems need to be discussed with NOTIS:
i) Fines/fees in s shared system are geared to each service unit but the total fines/fees are system-wide. This means that any block for fines/fees will be based on a system total rather than a service unit total.

ii) Security in NOTIS should be available that only allows a service unit to view the fines/fees amount for its own service unit.

iii) When, in the circ tables, bill=0 or no bills, the "has =" screen deletes the item after the last overdue has been sent. This makes it impossible for the patron to know exactly how many items he/she currently has charged out. The upcoming Bill and Fine module should keep an electronic trail of the item.

iv) A problem has been identified by OU ~~BPL~~ in which there are no updates on names in a tapeload.

2) ILL
Two different procedures have been identified for charging items out to ILL patrons. A combination of these two has also been used. Separate patron records can be created for each ILL library. An ILL pseudopatron record can be used for all ILL activity. In a combined approach, an ILL pseudopatron record is used for those ILL libraries with few requests while a separate patron record is created for any ILL library which borrows on a regular basis. The major disadvantage to the use of an ILL pseudopatron record is that any fines, bills etc. generated by NOTIS will not have the name of the borrowing library on the notice. A pseudopatron record also requires the creation of a paper file to provide the link between the item charged to the ILL pseudopatron and the borrowing library.

The Task Force recommends the use of separate patron records for each ILL library and recommends that the following procedures/standards be used to minimize the duplication of ILL patron records:

A)   A card file of ILL libraries will be created
     initially by WSU. This file will be distributed
     to each Dalnet library. Each Dalnet library will
     be responsible for updating its own file as new
     entries are made.

B)   When charging out items on ILL, the DAlnet library
     will check the card file for the correct name for
     borrowing library and for its patron ID. If no
     card is in the file or the file is not used, the
     Dalnet library will check on-line for a record.
     (Note: Dalnet library staff will have to be
     instructed on the various ways to search for a
     corporate patron record)

     i)   If a record is found on-line, the Dalnet
          library will create its own subrecord. The
          record will be created according to accepted
          standards. A card will be added to the card
          file, if the file is used.

     ii) If no record is found on-line, the Dalnet
          library will create a record. Standard
          resources and tools will be used to identify
          the official name and address for the
          borrowing library. (Note: Standard sources
          include OCLC, Docline, preprinted label
          provided by the borrowing library etc.)

C)   Any Dalnet library with multiple ILL departments
     will be responsible for providing each ILL
     department with a directory of its ILL library
     patrons complete with patron ID.

3)   Pseudopatron Records
     Pseudopatron records are defined as patron records used for
     internal library use. These records will not be shared by
     Dalnet libraries. The institutional identification must be
     included in the name field either as the suffix or prefix of
     the name. Institutional non-person patrons such as
     departments, extension units etc. should be established
     according to the Dalnet institution's standards.

     These decisions on pseudopatron records supersede the
     decisions made at the September 7, 1988 Dalnet Circulation
     Standards Task Force Meeting.