

DALNET SHARED PATRON DATABASE TASK FORCE
RECOMMENDATIONS
JULY 24, 1998

The Shared Patron Task Force has reviewed carefully the current design of the NOTIS and Horizon records as instructed by the Task Force charge. The following recommendations result from our examination:

- ◆ The Task Force recommends continuing the use of the social security number as a unique identifier for the DALNET shared patron record. Confirming patron identification is an ongoing concern for circulation departments; and only the social security number, by its inherent uniqueness, satisfies this need.
- ◆ The Task Force recommends that the social security number, which will be input in the ID field of Horizon on the first screen, not be displayed to all circulation staff but only to supervisors and designates. This security measure may allay some patron concern.
- ◆ The Task Force recommends that Horizon add two additional address screens, similar to the existing permanent/temporary address screens (with appropriate radio buttons), to accommodate the consortium need for more addresses: for campus, office, parent/guardian. This new design would require that for each btype (borrower type) and barcode that a user could select the desired address [field?].
- ◆ The Task Force recommends that Horizon support multiple btypes instead of the current single btype that is provided for the shared patron record. DALNET needs are varied and require assigning different btypes appropriate to each institution.
- ◆ The Task Force recommends that Horizon security parameters be redefined to only allow changes in the patron record -- social security number, btype, expire date and barcode -- to be made by the 'home' location where the patron was input. This is the current NOTIS procedure and needs to be continued to discourage questionable practices.
- ◆ The Task Force recommends that a field for patron barcode be added to Horizon's first patron screen. This is a critical field and needs to be viewed in tandem with other first screen information. The telephone number is a field which may be moved to a later screen to accommodate addition of the patron barcode to the first screen.
- ◆ The Task Force recommends that a field for organizational ID be added to the first Horizon screen also; it must index and be a match point for Bimport.
- ◆ The Task Force recommends that a field for country of origin be added to the patron address field to allow inputting of permanent information for foreign patrons.

The Task Force recommends deleting the field for 'birth date' from Horizon patron

records. There appears to be no useful need for such an identifier.

- ◆ The Task Force recommends expanding the note field on the first patron screen; it may be expanded by wrapping around but more space for each institution's notes is required.
- ◆ The Task Force recommends that a second note field be added to the patron record that will be used for local purposes by each institution.
- ◆ The Task Force recommends that the DALNET Circulation Advisory Committee develop uniform coding for city names for the metropolitan Detroit area; these codes would be used by member institutions.
- ◆ Finally, the Task Force recommends that flexibility be added to future Horizon releases to allow for notices to be sent to patrons in any combination of standard mail and e-mail that an institution chooses.

Overall, the Taskforce considers the patron records in Horizon to be well-designed, inclusive and clear. Though different from NOTIS, the new format should be favorably received by staff.