

This document includes discussion notes from the meeting at ALA, 30 Jan 99, with Anaclore Evans, Bill Easton, and Ricc Ferrante.

SHARED PATRON FILE SPECIFICATIONS

THIS DOCUMENT HAS BEEN REORDERED TO GROUP LIKE POINTS TOGETHER INTO WHAT APPEAR TO BE CLOSELY RELATED REQUESTS

This list is not in any type of priority order, but lists the functionality DALNET needs to make a shared patron file work.

Priority order was requested as well as notation of need immediacy.

1. The design must work on multiple servers.

Design done. DALNET PRIORITY 1

11. The second ID field shall be computed based upon the patron's month and day of birth concatenated with the last four digits of the social security number. A numerical calculation will be made upon the numbers to create a unique identifying number. This unique number will be used to dedup the patron file and to access protected files.

Mechanism not to be Shared Patron code nor BIMPORT. Discussed web-based Borrower Registration, ALS to investigate cgi/macro options.

DALNET PRIORITY 2 THIS IS A SHOW STOPPER FOR DPL. SEE AMENDMENTS IN EMAIL MESSAGES OF 3/19/99.

12. Provisions shall be made for corporate as well as individual borrowers. Corporate borrowers will have their unique identifying number built without the need for birth date or Social Security information.

Cgi / macros must include ability to flag new record as 'second_id algorithm not required' and bypass standard second_id construction.

DALNET PRIORITY 2A

13. Records for minor children shall include fields for the names and addresses of the parents or guardians. These fields should be multiple and repeatable, or they should be linked to the parent's or guardian's library record.

ALS will investigate if this can be accomplished inside the current design framework.

DALNET PRIORITY 3. THIS IS A MAJOR ISSUE FOR DPL.

14. When a minor child reaches the age where s/he is considered eligible for adult privileges, the record will roll over to an adult Btype.

ALS investigating bstat + btype rollover. Threshold must be a library-defined parameter.

DALNET PRIORITY 3A

2. Must allow each member of the consortium to run "days end" independently according to local parameters

Agreed. DALNET PRIORITY 4

3. Patron records must be capable of being added either by keying in a patron record, by loading a file of records, or by adding an endorsement to an existing record.

Endorsement to mean flagging a patron record for use with a specific database.

Keying – agreed. Loading a file of records – agreed. ALS will report on methodology for 'activating' a record for a given local database.

DALNET PRIORITY 5

15. Multiple addresses are allowed. Addresses can be linked to a location. Each site may select the address they wish to use, or the individual may request that a particular mailing address be used.

Clarification: Ability to set site-specific addresses. **DALNET PRIORITY 6**

16. Patron records will support internal as well as external mailing addresses.

Current Horizon structure sufficient, e.g., Address1, Address2, Address3, Address4.

DALNET PRIORITY 6A

4. The core record will house all essential identifying information about the patron, that is name, address, phone, and unique identifying number which is not the Social Security number.

DALNET PRIORITY 7

5. The charge ID, Btype, Bstat(s) and all transactions shall be retained in each library's database.

Purpose: Statistical tracking.

DALNET PRIORITY 7A

9. Patron accounting information (bills, fines, replacement costs, etc.) will be stored with each charge ID.

Purpose: Local cash management

DALNET PRIORITY 7B

17. There shall be site specific and shared notes.

Clarification: Shared notes (alerts) for use to alert staff at any member library that action is required at next point of contact.

DALNET PRIORITY 7C

18. Any DALNET member library will be able to edit/update core records

Agreed. Standard authorization elements required.

DALNET PRIORITY 7D

19. DALNET libraries will be able to add fields to the agreed upon core record, but they must accept at least the minimal data in the core record.

Acceptable. ALS to provide guidelines for custom fields to be added to core records.

DALNET PRIORITY 7E

6. Any patron can have any combination of privileges based upon the library(ies) where s/he is registered.

Agreed. Clarification: Circulation privileges are location specific, not system-wide.

DALNET PRIORITY 8

7. The patron file must interact with the patron authentication process and allow the patron the full range of privileges irregardless of where the patron is located.

Agreed. Clarification: Based on use of HTML WebPAC 1.3 or higher, patron empowerment privileges are determined according to specific library database accessed.

Physical location of patron is irrelevant.

DALNET PRIORITY 8A

20. Patron empowerment shall not be affected by the location of the patron. A patron standing in Detroit Public Library should be able to renew his books charged out from Wayne State or to place a request (hold) for a WSU book.

See 6.

DALNET PRIORITY 8B

10. Staff in DALNET member libraries should have display only access to outstanding charges and bill/fine, etc. information from all libraries. This information should be viewable so that each library may determine whether they wish to extend privileges or not, based upon local policy.

Clarification: To be accessed after local blocks display. Circ supervisor to have ability to review all blocks for specific patron throughout the system, to determine whether to proceed with the checkout or not.

ALS: Must determine design necessary to reflect blocks in the shared file database, since blocks occur as a result of local Day End processes and are therefore local by nature.

Will report back on the possibilities.

DALNET PRIORITY 9

21. Blocks are institution specific.

Institution = database, then Agreed. This means blocks are local, not shared.

DALNET PRIORITY 9A

22. Each institution will be able to determine its own thresholds for blocks.

Agreed. Circulation privileges will continue to be location specific.

DALNET PRIORITY 9B

23. The limitation on the number of items charged to any patron shall be by the institution and not by the location.

As already mentioned, circulation privileges remain location-specific.

DALNET PRIORITY 9C

8. One record per patron. DALNET requires the flexibility to assign one charge ID per patron for each library or to use one charge ID for all libraries.

Dalnet in process of determining policy on this. Working towards one method, single charge ID. ALS will investigate impact of single barcode on proxy borrower structures, etc. **DALNET PRIORITY 10**

24. Proxy borrowers shall be accommodated.

Agreed.

DALNET PRIORITY 11 (ALREADY IN BASIC PATRON RECORD DESIGN)

25. The process of creating a shared patron file should not unduly complicate the circulation tables.

Given.

PRIORITY INHERENT.