

## SHARED PATRON DATABASE TASKFORCE

The Shared Patron Database Taskforce met on June 19, 1998 at U of D Mercy, Outer Drive Library. Present were: R. Marcelain (DPL), R. Ewald (MCC for J. Miller), B. Finn (Sinai), A. Evans (WSU Systems Office), G. Bosler (MCC & DALNET Circ Standards Comm), F. Young (U of D M), chair. Unable to attend: M. Klein (DMC) and S. Martin (WSU).

The group reviewed the Taskforce charge which was yet unauthorized; the charge was considered complete and reflective of the assignment to be completed for Horizon implementation. It will be forwarded appropriately (copy attached).

Agenda items, "Review of Patron Screens" and "Shared Patron Information Issues," were discussed simultaneously because of overlap of issues.

### Outcomes were:

- 1) Primary concern was expressed concerning the status of the patron social security number in Horizon; questions raised included:
  - a) Is it required as a link for shared patron records in Horizon,
  - b) How will it display: in the shared patron record, to public, to all circ staff, to selected circ staff, or in both public and staff modes,
  - c) Can the social security number be masked or suppressed and viewed only by those with highest security,
  - d) Can the social security number reside only in the home institution's record, and,
  - e) Can a unique institutional ID act as linking substitute.

Consensus: The social security number is the only collective, unique number likely to be found in a patron's record; therefore, at this time, it continues to be needed as a link for shared patron records.

### THE TASKFORCE RECOMMENDS CONTINUING THE SOCIAL SECURITY NUMBER AS THE REQUIRED LINK BETWEEN SHARED PATRON RECORDS.

- 2) Information considered essential in a shared patron record: patron name, complete primary addresses, barcode, social security number, location (institutional), borrower type (btype), notes field, and e-mail address.

Consensus: Barcode is not currently among the information on the first patron screen for

Horizon; the Taskforce feels this needs to be remedied.

THE TASKFORCE RECOMMENDS THAT A FIELD FOR PATRON BARCODE BE ADDED TO HORIZON'S FIRST PATRON SCREEN; IF SOME EXISTING FIELD MUST BE REMOVED, THE FIELD FOR TELEPHONE NUMBER IS RECOMMENDED.

IT IS ALSO RECOMMENDED, THAT THE DALNET CIRCULATION STANDARDS COMMITTEE DEVELOP UNIFORM CODING FOR CITY NAMES IN THE METROPOLITAN DETROIT AREA AND BEYOND AS TIME PERMITS. THESE CODES WOULD BE UNIFORMLY USED IN DALNET.

THE TASKFORCE RECOMMENDS ALSO THAT THE FIELD FOR BIRTH DATE BE DELETED FROM THE FIRST SCREEN BUT BE RETAINED ON A SUBSEQUENT SCREEN FOR LOCAL USE AS NEEDED (EXAMPLE, DETROIT PUBLIC LIBRARY'S YOUNG PATRONS). THE SPACE SAVED BY REMOVING BIRTH DATE FROM THE FIRST SCREEN CAN BE USED TO EXPAND THE NOTES FIELD.

Consensus: Regarding patron name, there is concern that Horizon recognizes that patron name may be corporate as well as individual and that corporate names sort differently. (Example, Ford Motor Co. versus Motor Company, Ford).

3) Other Horizon fields may be designated as specific for local or institutional needs. Some of them should be designated as institution-specific and perhaps not be viewed by other consortium members. Examples are the following:

- a) Proxy borrower information,
- b) Local notes, and,
- c) Information on security groups.

Overall, the Taskforce considers the patron records in Horizon to be well-designed, inclusive, clear and comprehensive. Though different from NOTIS, the Taskforce anticipates staff's response to the new format and information will be favorable.

Points 2 and 3 of the Taskforce's charge were only discussed briefly and will head the agenda for the next meeting designated for JULY 6, 1998, at 9:30am at U of Detroit Mercy, Outer Drive Campus Library. The meeting was adjourned at 12 noon.