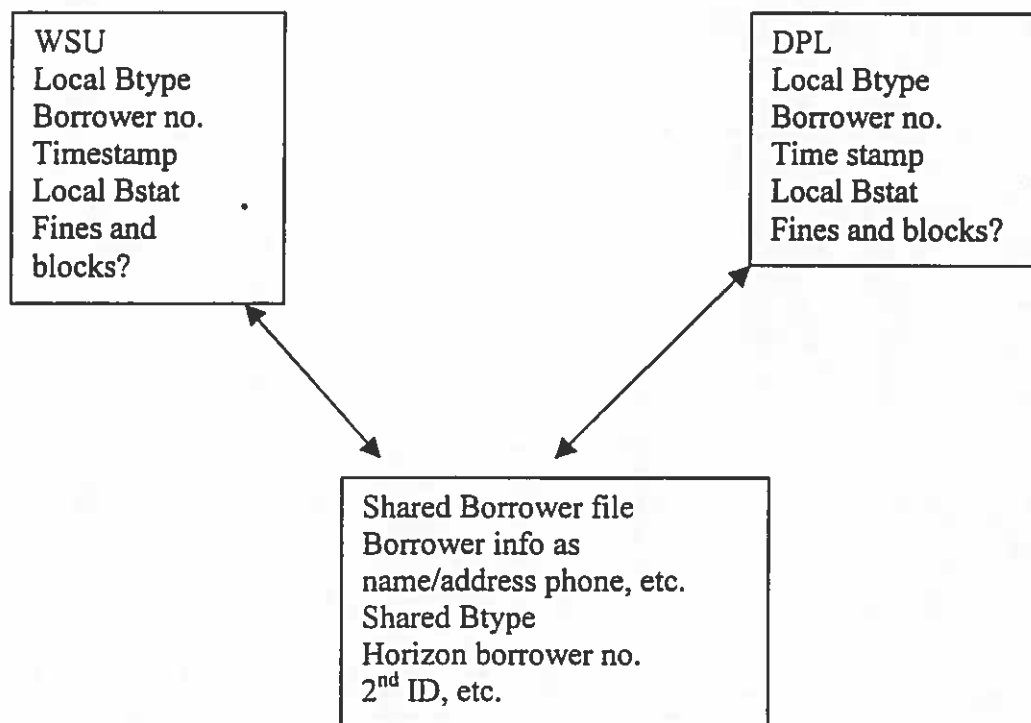


DALNET SHARED PATRON RECORD TASK FORCE

MEETING WITH J. SHEPPARD ON 10/29/98

Jan presented the current Ameritech Library Services (ALS) plans for a shared patron file. The shared file will have all of the common patron data while the individual files will contain the information needed locally.



The Horizon shared Btype would be in all circ tables for all DALNET libraries as a default. This model assumes a shared card but there could be several cards since Horizon supports multiple bar codes for the same person. It is believed that blocks and fines, along with circulation transaction data is stored locally.

One of the issues to be resolved is the matter of the data on which patron records will be matched. In the ideal world, just one numerical field could be used for a match, but there does not seem to be agreement within DALNET on what that number should be. The Social Security number has been used for that purpose, but DPL does not want to ask for SSNs and some academic libraries may not be able to release the number even though it is in their student files. A driver's license or student ID is another option but not everyone has a driver's license from this state and student IDs can vary from school to school. A generated number based upon the month and day of birth plus the last digits of the SSN may be the best option.

Address maintenance is another issue. The question is how many addresses and where the addresses live. There are valid reasons for needing multiple addresses such as the desire to use internal mail to save postage. Do we wish to expire the address segments at a lesser time interval than the patron record? If so, a message will appear on the screen prompting the circulation desk attendant to verify the address.

Authentication issues were briefly addresses. While patron empowerment for circulation functions is addressed in the model, how will RSS interface and how will users be authenticated for access to all of the electronic resources for which they are eligible? It was thought that the generated ID would be used, but just how all of this will really work is unknown.

Another set of issues is related to mirroring the two servers.

Development will need to be done to calculate the shared id field, the multiple addresses, security on blocks. The keyword search on personal names will not be available.

There are security issues to be worked upon as well. Who will be eligible to run batch jobs on the patron file? Who will own the various addresses in the address blinks.

Will DALNET want to beta test the shared borrower concept in Horizon???

Summary notes by,

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11/3/1998