PATRON ENHANCEMENTS

DALNET needs a new strategy for addressing its Horizon Circulation and patron empowerment requirements described below. The solution was originally envisioned as a shared patron file, much like a union catalog. However, DALNET has been unable to identify a single unique patron number or a number combination that can consistently be applied across all members' patron records. The unique identifier appears essential in a shared patron file to facilitate the automatic loading, matching, and overlay of patron records. It is also unrealistic to consider loading a unique Horizon or Sybase identification number into the various institutional sources from which the patron records originate. We do remain open to a shared patron file solution if *epixtech* can offer workable alternatives.

DALNET is seeking solutions to deliver the requirements listed below. The required functionality is described in bolded text. It is followed by examples from DALNET libraries of when or how this functionality would be used.

1. **The eventuality of reciprocal circulation across all DALNET libraries or a subset of libraries. Three possibilities are: 1) a single DALNET-wide card used at all libraries, 2) using one's "home" library card at all DALNET libraries without having to get separate cards from each library, or 3) adding a DALNET barcode to one's "home" library card.**

The DALNET Collection Access Committee has drafted policies for reciprocal borrowing among the academic libraries. For this to work, staff at the circulation desks need to verify that the patrons standing in front of them are not blocked at their home libraries. We do not want to create the scenario where patrons abuse their privileges and just move on to another library. DALNET estimates that one-third of its 650,000 plus registered borrowers have library cards at more than one DALNET library.

2. **The ability of circulation desk staff at one DALNET site to download "common" patron information into their local database for patrons already registered at another DALNET site. In other words, the ability to quickly and efficiently retrieve and download the "public" data from each other's patron records, much like we can share and copy each other's bibliographic and authority records, even at a busy circulation desk.**

At a busy circulation desk at the Detroit Public Library, a WSU student has been in line waiting to get a library card and check out some materials. It must be easier and less time consuming for the DPL staff member to copy the patron information from the WSU patron record than to key in a new record, or the staff member won't use the capability. If copying involves shifting sessions, searching other patron files, executing a download command, and waiting for the local database to accept, upload, and do quality control checking and indexing, the staff member may find this feature unusable.

A WSU medical school faculty member goes to a hospital library to borrow materials in support of his clinical work in the hospital. The hospital library would prefer to copy his data from the WSU patron file rather than key in all of the information. In another scene, an undergraduate student takes some courses at WSU and some at a community college. For a community college that does not batch load its patrons, their staff could copy the data from the WSU patron records.

WSU medical students and residents rotate through the DMC hospitals. Being able to verify or copy a student's record when they get to the DMC would be helpful. Before we set up a DMC patron record for these borrowers, we have to ask for their affiliation and request that a paper form be filled out. The form is then used to key in a new patron record. The DMC also serves nursing and physician assistant students from the University of Detroit Mercy, rotating residents based at William Beaumont Hospital, and practical nurses from the community colleges. Being able to easily copy a "common" record, verify affiliation and honor blocks would be very beneficial.

3. The ability of circulation desk staff at one DALNET site to obtain "blocking" information for patrons and determine they are in "good standing" at another DALNET site.

To determine that a patron is in good standing, we would want to know such things as:

- The person's name and barcode
- Contact information for the patron such as address(es), phone number, email, etc.
- Is the person's home library card current or expired?
- Has the person reached the home library (or DALNET) max fines, max fees, max number of items out, max overdues, etc.?
- In addition, we would like to see some general notes such as an address correction so that we could update, if required, and information that should be conveyed to the patron that would reduce patron runaround.
- Notes from the home library to other DALNET libraries, for example, blocked at home library because patron paid replacement fees with a bad check.

The following are areas where it may not be necessary to see the information:

- List of books checked out
- Enumeration of numerous small fines

A student appears at the circulation desk of another DALNET library armed with an Infopass. To determine if the student should be allowed to check out the requested materials, the circulation staff needs to verify that the patron is not blocked at his home institution. Circulation staff would then issue a library card of short duration, copying the borrower info from one file to another.

4. Patron database and record design to enable DALNET's users to authenticate and use the features of iPAC and RSS/URSA without having to logon and off multiple times, or use multiple IDs or barcodes. The goal is to make this process easy for DALNET's users.

a. The ability for a registered patron to authenticate for all the DALNET resources for which s/he is entitled with a single sign-on, even those resources "tied" to a single DALNET member library or to a group of member libraries.

b. The ability to do "patron empowerment" requests that provide information from all DALNET libraries, e.g., what is checked out, fines/fees owed, request holds, do renewals, etc.

c. The ability to use RSS/URSA to request "inter-library loans" across all DALNET libraries as appropriate to the patron's privileges at all libraries.

I am a patron at a remote location, like home. I'm familiar with the databases and want to search as many as possible. I need access to all the ones that I have "legal" access to.

Regardless of the authentication requirements of the vendor—whether Z39.50 connection, IP address or ID/password—our registered users should be able to authenticate through Im@gine and access all licensed electronic resources from all DALNET libraries, as appropriate to their privileges. For example, a student at WSU who has adult circulation privileges at DPL is also a valid guest borrower at the University of Detroit Mercy. With a single logon, this student should get full access to electronic resources licensed by WSU and DPL but not get access to those UDM has licensed only for its students and faculty.

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