

2019-05-29 User Management Meeting Notes

Meeting info

Zoom: <https://zoom.us/j/488543197>

Attendees

[Tania Fersenheim](#)

[Erin Nettifee](#)

[Uschi](#)

[Edward Merkel](#)

[Annika Schröder](#)

[Maura Byrne](#)

Goals

Discussion items

Time	Item	Who	Notes
5min	Welcome to Annika, who is filling in for Bjorn for a couple of weeks.	Group	
10 min	Discussion of what we might want in documentation of permissions and the Users Module	Maura Byrne	There are many ways to write documentation, so this is a chance for us to consider how we want to get our information. Possibly a template. Erin Nettifee has begun a page describing what we may want to see.
15 min	Fields in the user record: Preferred first name, title /honorific, suffix	Tania Fersenheim	The mockup looked good to the group. There was a discussion of where the preferred first name should appear in the record, and there was a positive response to having that be a locally configurable setting.
15 min	Default expiration date for patrons	Tania Fersenheim	<p>The mockup showed that we could locally set default expiration dates for different patron groups. Any one of them could be rolling, where there would be a set number of days that a patron would be valid; or they could be set to a fixed date, such as the end of the term for a student patron group.</p> <p>If a patron has no expiry date, and they leave, the loan rules would allow them to continue borrowing items. Folio will not, at present, address closing an account with no expiry date, and rely on the external people management system to give a signal when a user is no longer valid.</p>
15 min	How to accommodate multiple ID fields.	Tania Fersenheim	<p>Currently, there are 3 editable fields - User ID, External ID, and Barcode.</p> <p>Additional ID fields would be added as a key/value pair as needed by each institution. There was some discussion regarding the uniqueness of ID fields. They would have to be unique throughout the user record, because each of these fields would have to be searchable. If one field value matches the value of another field in a different user record, there would be trouble with calling up the proper user record. Perhaps getting a daily report of user records where one field matches a field for another user record would help deal with the problem.</p>

Future Meeting Items

June 5 - We look forward to having [Khalilah Gambrell](#) walk us through the Notes function.

June 12 - We hope to discuss managing staff permissions.