Table of Contents

BC Services Card Research Project 1
Patron information in Evergreen 1
Technical details 1
Coop Answers to Questions from March 16 Kickoff Call doc 2
Docs from Other ILS 3

BC Services Card Research Project

Original Proposal

Patron information in Evergreen

Patrons are normally registered via the EG staff client, by staff at the circ desk (docs). We also have custom scripts for importing patron records from student management systems for a few post-secondary libraries. There's no official API or process specifically intended to enable third-party applications to create/import/validate patron records (EG needs more third-party-friendly APIs generally), but there's a feature request to include a standard import script: LP#1786524

Several other Evergreen consortia (PINES and KCLS) use Quipu's eCARD product which has some overlap with BC Services Card use cases. There's been some effort to bring their Quipu integration into mainline Evergreen, ideally in a generic way that could also support similar products: LP#1902937

Evergreen also has a patron self-registration feature (main docs / admin docs). We're not using it, but it's a good fit for this project; if nothing else, it provides a model for how to go about creating patron-initiated "pending" accounts in EG.

There's also a feature request for patron address validation using third-party services: LP#1569889

There is a lack of good documentation on how external applications can use EG's existing APIs, in part because those APIs were primarily designed to be used by EG's own component services. It would be worth investing in better documentation (and more user-friendly APIs, especially for creating/updating patron accounts).

Technical details

Here's an entity relationship diagram for the database tables that store patron information (click to enlarge):

A few notes:

- actor.usr is the primary table for personal information. It is used for both staff and patron accounts.
- Each user has a primary card (actor.usr.card) and may also have secondary cards, all of which are in actor.card.
- Each user also has a username. Usually this matches the barcode of the patron's primary card, but not always.
- The user may have a mailing address and a billing address, but they're not required. These are found in the actor.usr_address table. Multiple users may share the same address.
- Email address is not required, nor guaranteed to be valid or well-formed. However, users can reset their password by clicking a link in the public catalogue which sends a reset email to whatever email address is in actor.usr.email.
- The ident_value and ident_value2 fields may contain driver's license number, student/employee ID (for post-secondary patrons), or other information. These fields are uncontrolled, but we do use them as a matchpoint when importing patron data from student management systems, etc.
- actor.usr.profile contains the user's profile, a.k.a. permission group or patron type. Patron and staff permissions are generally governed by which permission group they belong to.
- actor.usr.home_ou specifies the user's home library. The hierarchy of libraries (branches, systems, federations, etc.) is defined in actor.org_unit.
- Libraries can track additional information about their patrons using "statistical categories," which are found in actor.stat_cat and related tables. The library may use this to capture information not otherwise tracked in Evergreen, such as municipality or electoral district, residency status, student type, or gender. Each library defines its own categories and the permitted values for each category (the value is selected from a drop-down list, not a free text field).
- When patron self-registration is permitted, the data entered by the patron is initially stored in the staging tables shown on the far right of the diagram. Staff then have the ability to review this pending patron information and approve account creation.

Coop Answers to Questions from March 16 Kickoff Call doc

- Inventory of current technologies being used
- List of current library sites and what is being managed for them
- Any additional common challenges today not identified above
- General intro to the library system, what changes and what’s static,
- How are people and accounts created today? Go to branch → some registration and card issuance, create account at home. What identifiers are collected, email, names, ?
- When we say “record” what do we mean?
- How strict are validation rules? How strict would they be with bcsc?
- Is there business value for existing patrons to “link” their BCSC proactively? Or is this mainly only for password resets, new signups/account registration etc?
- Privacy/security requirements and oversight - what are the Co-Ops current approaches?
    - IDENTOS can help identify how this aligns to BCSC onboarding requirements
- Conversation with non-SITKA libraries that would benefit from having access to brokering of BCSC? What are their requirements that differ from Co-Op?
- Is there a desire to have additional / complementary digital library access vs overdrive?
    - Coop Response: Not sure I fully understand; the Coop (and non-Sitka member libraries)

provide a TON of access to digitally licensed products right now. Those 3rd party licensed content providers typically authenticate against accounts from the library ILS through a couple of different methods. The Co-op offers SIP2 interfaces (which were historically developed for in-branch authentication only but have for 20 years been mis-used for cross-internet authentication) as well as an emulation of the "PatronAPI" auth interface, the closest to any sort of industry de facto standard that has emerged that at least looks like a recognizable and securable web pattern. Other libraries offer ezproxy as another option. Longer term we would love to see both libraries and the publshing industry they interact with move towards more 21st century methods like OAuth, but there is a chicken/egg issue there. The only connection I see between this project and that is the extent to which we get some experience as a SAML identity consumer, maybe we get some chops for a day when we need to be an IdP, but right now these are not otherwise directly connected issues. Apologies if I misunderstood the question.

- Any other tables and key data elements that would be helpful (other than those already provided on the wiki) ?

Docs from Other ILS

While our initial focus is on validating potential Sitka patrons via the BC Services Card, actually making this work will require standing up some sort of SAML server on our end and liasing with the BC Services Card to integrate. There are approx 20 other BC libraries using ±4 other ILS who, if they also wanted to offer validation via the Services Card, would need to standup similar SAML servers. So a secondary goal of this project is to see if we can architect our solution in such a way as it is the sector-wide integration against the Services Card, with us doing integration with the libraries. To that end, I asked other libraries (via the BC Libraries and IT list) to share any API docs they might have that can inform the consultants in architecting a solution. Below is what resulted:

Non-Evergreen ILS in BC	Library Name	Expressed Interest
Innovative Polaris	Coquitlam Public Library	x
	Okanagan Regional Library	
Innovative Sierra	Fraser Valley Regional Library	x
	Richmond Public Library	x
	Thompson-Nicola Regional District Library	
	Vancouver Island Regional Public Library	
	West Vancouver Memorial Library	
SirsiDynix Horizon	Burnaby Public Library	x
	Cranbrook Public Library	
	New Westminster Public Library	
	North Vancouver District Library	
	Penticton Public Library	
	Port Moody Public Library	
	Surrey Public Library	x
	Vancouver Public Library	x
SirsiDynix Symphony	Greater Victoria Public Library	x
	North Vancouver City Library	
	Powell River Public Library	
	Prince George Public Library	