OLE Core Workflows

Current LMS workflow

Patron records, which may correspond to *ANSI/NISO Z39.69-199X* (proposed) Record Format for Patron Records are durable records which are loaded into the Library Management System (LMS)

LMS systems can load personnel data from personnel management systems and registrar systems. This load is usually accomplished nightly.

When a resource is checked out, the resource information is placed in the patron record. The information remains until the resource is returned. If the resource is returned late or damaged, the information may be retained indefinitely. It may also be maintained in transaction snapshots indefinitely.

Problems:

1. Data load is generally nightly. Occasionally there is a gap between the loading of patron information and request for service.
2. Significant privacy issues that must be explicitly addressed by libraries and LMSs.
3. Patrons who are not hired by the university or enrolled in a course may not be included.
4. Cross-institutional resource sharing is extremely cumbersome.

Proposed OLE workflow

1. The directory record (LDAP, Active Directory, etc.) would be used instead for dynamic authorization and authentication
2. A workflow "event" would document transactions in an audit trail that persisted only as long as necessary and then reported the event to aggregated statistics .
3. Shibboleth and trust communities would be used to provide seamless cross-institutional resource sharing and other activities.

Problems

1. State for the handle assigned to a user needs to persist as long as the workflow event persists
2. LDAP attributes need to be more fulsome and reflective of library categories of use

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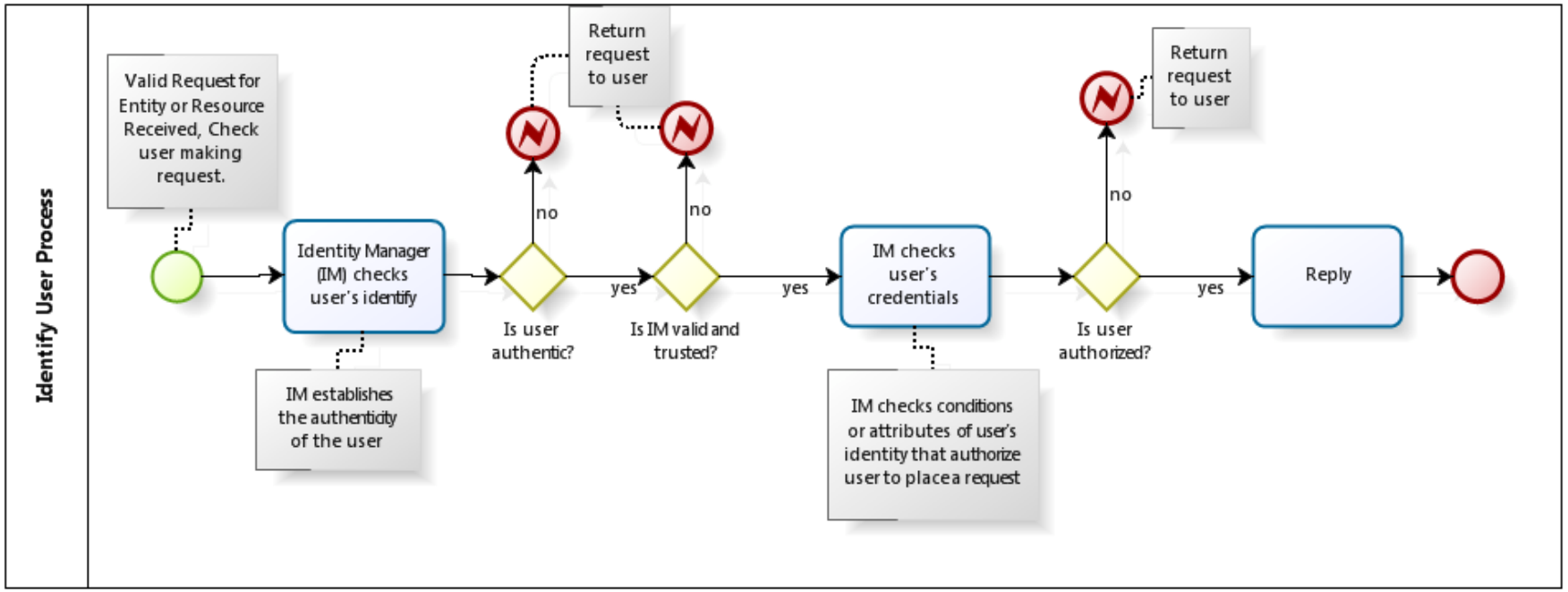

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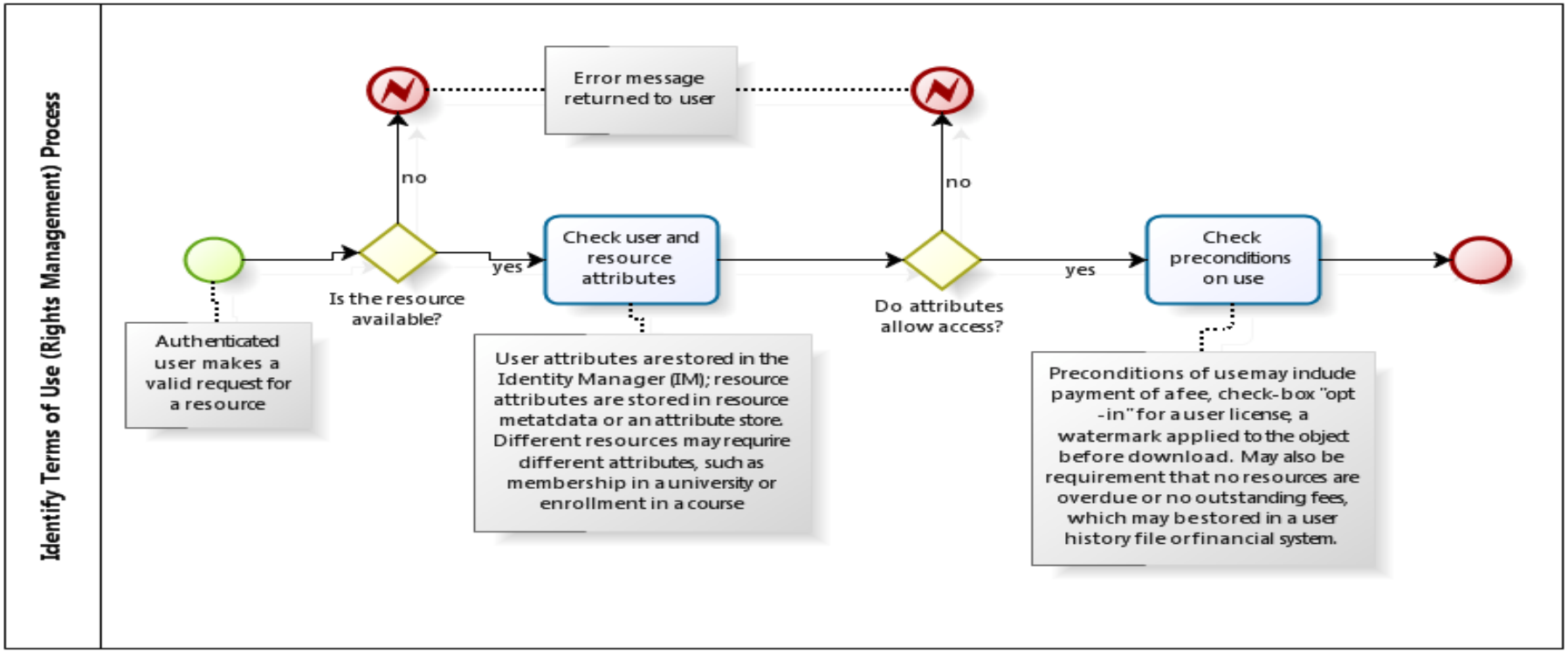

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