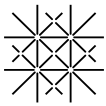


# Offer for the Zentralbibliothek Zürich : Registration Service for private users

Based on :

- Solution Concept Approach 1 of SWITCH (Case Cantonal & University Libraries, on Google Drive, status August 18th 2017, [link](#))
- Projektbeschrieb from Claudius Luethi, sent on June 30th 2017.
- Remarks from meeting of August 22nd 2017
- Meeting with ZB and Switch of September 7th 2017



## Package Initialization and Documentation

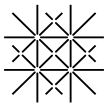
- mockups / design
- set-up organization
  - meetings, weekly calls, ...
  - documentation
  - clarification of roles : ZB, Swissbib, Switch.
- set-up test system in swissbib and in the switchaaai test federation (for the test switch edu-id IdP)
- Documentation of the code and the technical solution for the whole project

Estimation : 7-10 days

## Package Database and Integration in Vufind

- Separate the current table nl-users in two tables : edu-id-users and nl-users. Edu-id-users would contain information which are the same for all libraries (edu-id number, persistent id number)
- create a table for ZB-users (similar to nl-users)
- allow the operations for that table
- integrate and link with other Swissbib Tables
- Create a table of publishers. This table should contain at least the publisher name and the id of the group used by switch to store the shared property.
- Create a table which contains all libraries-publishers relations.

Estimation : 6-8 days



## Package Back-End

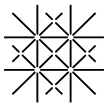
- 1 Login pro teilnehmender Bibliothek
- View pro teilnehmender Bibliothek, wo nur die eigenen User sichtbar sind
- Ablaufdatum für Benutzereinschreibungen
- Funktion: Freischalten, Sperren, Bemerkung hinzufügen, Nutzer suchen.
- Maybe : offer the possibility for the staff to add NEBIS number
- On admin.swissbib.ch, similar to the libraries management module :

The screenshot shows the 'Institution bearbeiten' page in the Swissbib Libadmin system. The page is titled 'Institution bearbeiten' and has three buttons: 'Speichern', 'Schliessen', and 'Löschen'. The main content is organized into several sections:

- Allgemein:** Bib-Code (Z01), System-Code (Z01), and Ist Aktiv (checked).
- Anzeige:** Adresse, Gruppen & Views.
- Display Namen:** Fields for German (ZB Zürich), French (ZB Zürich), Italian (ZB Zürich), and English (ZB Zürich).
- Bibliotheksnamen (offiziell):** Fields for German (Zentralbibliothek Zürich), French (Zentralbibliothek Zürich), and English (Zentralbibliothek Zürich).
- URL Bibliotheksinformationen:** Fields for German (http://www.zb.uzh.ch/), French (http://www.zb.uzh.ch/), and English (http://www.zb.uzh.ch/index.html.er).
- Notizen:** A text area containing 'Interne Notizen + Z02, Z03, Z04, Z05, Z06, plus später Z0SBI' and 'twitter: https://twitter.com/ZBZuerich'.

On the left side, there is a search bar with 'zb' and a 'Suchen' button. Below it is a list of library entries, including 'A150: ZB Solothurn - Teilbestand', 'A268: Uni Basel - DUW NLU Naturschutzbiologie', 'BZBC: Biblioteca cantonale Bellinzona', 'HMA: Museum Aargau, Schloss Lenzburg', 'MBZBC: Biblioteca cantonale Bellinzona', 'UUSZB: Uni Zürich - UniversitätsSpital USZ-Kliniken', 'Z01: ZB Zürich', 'Z02: ZB Zürich - Graphische Sammlung', 'Z03: ZB Zürich - Handschriftenabteilung', 'Z04: ZB Zürich - Kartensammlung', 'Z05: ZB Zürich - Musikabteilung', 'Z06: ZB Zürich - Sammlung Alte Drucke', 'Z07: ZB Zürich - Bibliothek Schlag', 'Z08: ZB Zürich - Verlags-Bucharchiv', and 'ZBSO: ZB Solothurn'.

Estimation : 8-10 days



## Package User Registration and Verification

### Option 1 was chosen : print and go to desk of the library

- user can register for the service (and create a SWITCH edu-ID if he doesn't have one)
- offer the possibility for the user to print a form with a barcode for the registration (this might be in a pdf sent by email)
- when the validity date is over, send an email to the person with the form that they can bring to the desk to reactivate the account (by default email is sent via [swissbib-ub@unibas.ch](mailto:swissbib-ub@unibas.ch))

Estimation : 5-7 days

## Package Shared Property (Based on Switch approach 1)

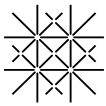
- implement the validation rules
- for the ZB-users which are validated, set the shared property via SWITCH edu-ID rest API, for all publishers which have a contract with ZB. This includes National Licences.
- if a ZB-user is not validated any more, remove the shared property via SWITCH edu-ID rest API for all publishers, except if that person is registered with another library (or national licences) which has a contract with that publisher
- if a library adds a contract with a publisher or cancels it, the shared properties should be updated accordingly (checking if the user is registered with another library which still has a contract with this publisher)
- set-up ongoing verifications (the date of validity is over, ...)

Estimation : 15-18 days

## Package Reports and statistics

- every month sends a report per email of the number of new registrations and total active accounts

Estimation : 2 days.



## Needs to be done by SWITCH

SWITCH operates the shared property database

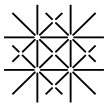
- One shared user list per publisher.
- If a user complies with a library's subscription terms an entitlement is set as shared property for all publishers who have a contract with the library.
- The registration service can set and reset for each edu-ID user the publisher shared properties via a REST API.
- The permission to set a publisher's shared property is limited to a single registration service

SWITCH operates the SWITCH edu-ID IdP

- For a user who accesses a publisher's SP,
  - if the publisher has a national contract with the consortium check the user's status in the shared property list 'national-license-compliant' (the shared property national-license-compliant can be seen as a shortcut for "De Gruyter+Oxford University Press+Cambridge University Press+Springer")
  - If the publisher has a contract with a cantonal library check the user's status in the according shared property list. (SWITCH maintains a list that maps publisher's entity IDs to shared property lists.

## Needs to be done by ZB

- Provide an url where the user is redirected after successful registration. There he can see the list of available resources for him which are provided by the ZB. At best, this page should support an authentication via Switch edu-ID, but this is not mandatory.
- Check that the publishers support the authentication mechanism that will be implemented. The publisher must :
  - Support authentication via Shibboleth
  - Support SAML 2
  - Be able to check that the SAML attribute *eduPersonEntitlement* has the value *urn:mace:dir:entitlement:common-lib-terms* to grant access.
  - Must be a [SwitchAAI Federation Partner](#) (interfederation is not enough).
- Provide a person to lead the project and that could provide regular feedback on the project advancement (~1 hour phone conference every 3 weeks + preparation)
- Provide the texts that should be used on the user interface
- To be able to test the processes, the ZB staff must be able to test on a computer which is outside ZB IP range (a dedicated workstation might be useful, or otherwise a laptop which is connected to a public network, for example monzoon or a network provided via a mobile phone)



## Calendar

Lionel Walter can work 2 days a week on that project, starting on October 1st 2017.

Matthias Edel can work 2 days a week on that project, between January 8th and February 9th 2018.

Days available for the project

*Lionel Walter :*

2.10.2017-15.12.2017 : 20 days (one week off)

8.1.2018-30.3.2018 : 22 days (one week off)

*Matthias Edel :*

8.1.2018-9.2.2018 : 10 days

Tasks	Timeframe	Swissbib (Lionel Walter)	Swissbib (Matthias Edel)	ZB	Switch
Package Initialization	2.10-3.11	8 days		1 day	
Package Database and Integration in Vufind	6.11-1.12	7 days			
Package Back-End	8.1-9.2		9 days	1 day	
Package User Registration and Verification	4.12-12.1	6 days		1 day	
Package Shared Property	15.1-23.2	16 days			see Switch offer
Package Reports and Statistics	26.2-16.3	2 days		0.5 day	
Tests by ZB, training, corrections	26.2-16.3	5 days		3? days	
<b>Go live</b>	<b>19.3.2017</b>				