Strawman 39: Update following the Working Group meeting of May 22, 2013

Goals:

- Allow the server to have policy (at either the connection or patron level) excluding particular data from a 64 response.
- Allow the client to request only particular data be sent in a 64 request.
- The server needs to be able to declare which data it's leaving out as a result of privacy (regardless of whether that's a result of server-side policy or the client's request), to aid in troubleshooting or in case the client wishes to throw an error when the server's policies aren't open enough.

General question: Our working group is proposing to define new groups in the 64 response: ADDRESS, PHONE, and EMAIL. This strawman assumes that a server either supports sending a group or not; in other words, a server can choose whether or not to send any addresses at all, but if it does, then it must send all information about all addresses. This assumption simplifies the specification. But is it an oversimplification? Would there be a time when, for example, a ZIP code might need to be sent for some kind of authentication?

Step 0: Trim the required fields.

The required field subgroup will look into this, but I believe that the only required fields will end up being TD (transaction date), AA (canonical patron identifier), and of course AY (message sequence identifier). These required fields will be included in every 64 response.

Step 1: Add a new repeatable, optional UY field to the 63 request.

Each UY field will contain the field identifier of data which the client DOES want included in the 64 response. The client can request an unfiltered response by not including any UY fields in its 63 message. (This means that clients ignoring this feature entirely will simply work as expected.)

Here's an example 63 request which asks for only patron status, language, last name, and phone numbers:
63|UL000|TD<date>|AA<patron_id>|UYSP|UYUL|UYUQ|UYPHONE|AY1

Step 2: Add a new repeatable, optional UY field to the 64 response.

Each UY field will contain the field identifier of data which the server WOULD send if it were available. The UY fields are generated without respect to what data is actually available for the particular patron, meaning that a field listed in UY may not actually be included in the response. For example, the patron middle name (field UP) might be listed in the UY fields, but the UP field may still be omitted, indicating the patron has no middle name.

Absence of any UY fields means the response is unfiltered. If the server sends any UY fields, it must send at least UYAA, UYTD, and UYAY. (NOTE: at least one of these is required in order to
differentiate between “unfiltered” and “no fields to send”. Including all three might simplify client code.)

The server should take into account the following when determining which fields to include:

- The server's policy for the connection (based on IP address, 93/94 login, or something else)
- The client's request for what data to include (if the client's request included any UY fields, then the server SHOULD only include those fields, plus any required fields, in its response)
- The server's policy for the patron account in question (in case any ILS wishes to implement patron-level or patron-type-level privacy options)

A client which requests particular fields, but gets back an unfiltered response, or a response including non-required fields which it did not request, should probably throw an error.

**If the librarian wishes to not give out information on patron passwords to the SIP client (either connection- or patron-level):**

The SIP server must be configured to ALWAYS give error 102 (Invalid patron password) whenever an AD (patron password) field is included in a 63 request.