Third-Party Hardware and Software

Many PINES libraries contract with what are termed "third-party" software vendors (because they are outside of the purview of the PINES/GPLS relationship with the PINES library system) for products that need to connect with the PINES software to work. This is governed by PINES policy (see section below) which requires that libraries expecting full compatibility with PINES software must consult PINES/ GPLS staff in all negotiations with vendors to ensure that their products are compatible. Assurances from other users of the product or from the third-party vendor that the product will work as expected should not be taken at face value.

In certain cases, software development is required to make the third-party's product connect correctly with PINES. In these cases, the cost of developing, supporting, and maintaining the custom interface will fall to the library purchasing the product. When contracting out for SIP-specific technology, it is the responsibility of the third-party vendor to build the crosswalks necessary for compatibility with Evergreen, as it is the responsibility of the vendor when providing compatible technology for any ILS. In order to collaborate with the PINES libraries in contracting for 3rd party technology, PINES/GPLS will provide a test environment within which the library and/or the vendor may develop and test the crosswalks necessary in order to insure compatibility with Evergreen.

Once the third-party product has been proven to work with Evergreen and for those products that are currently in use, PINES/GPLS staff is responsible for Evergreen server-side administration. Support for the third-party product continues to be the purchasing library's responsibility.

 These same guidelines apply to any product or service that would require any sort of data export, either one-time or ongoing, from PINES/GPLS staff. Many catalog added content services and statistical analysis services require this. Please consult with PINES staff about these requirements before entering into an agreement.

Policy & Procedure for Libraries Considering Library Management Products

Policy & Procedure for Libraries considering third-party products that need an interface with PINES (i.e. Library Management Products)

The PINES staff has been asked to make the PINES database available to outside vendors via library management products. The PINES staff should be consulted during all negotiations with vendors to ensure that their product(s) are compatible with the PINES Database.

Some examples of third-party software and/or services that require access to PINES resources:

- Self-checkout stations
- PC Time Management Systems that require access to patron accounts
- E-book providers who need to authenticate against the PINES patron database
- RFID systems, including security gates that automatically check out items

- Collection Management software that requires data extracted from the PINES system
- Cataloging/Bibliographic database cleanup vendors who need staff client access and/or bibliographic data extracts
- Added content providers who depend on modifications to the Evergreen OPAC

In order to collaborate with the PINES libraries in contracting for 3rd party technology, PINES will provide a test environment within which the library and/or the vendor may develop and test the crosswalks necessary in order to insure compatibility with Evergreen. Contact the Help Desk for access.

Submit the following information to the Help Desk prior to making a purchase decision for evaluation of functionality, security, and support by PINES and so that the PINES team can work out a project timeline for implementation.

- What need are you trying to fulfill? (PC reservation, Internet Access, print management, etc.)
- What are the requirements for your product to interface with PINES? (SIP2 connection, data extracts, etc.)

Some things to keep in mind when selecting a product:

- Third-party products and services must align with PINES and Board of Regents policies.
- The Board of Regents legal affairs team may be consulted where applicable. For example, BOR legal has ruled that personally identifiable information, such as patron names, addresses, circulation, and hold data, must be excluded from third party data exports at this time.
- GPLS/IT and BOR/ITS will review some third-party product proposals where applicable.   For example, current BOR/ITS policy mandates that no data export can be made to off-shore servers.
- PINES staff will work with these units to be sure proposed services are compliant with security and legal policies.
- If PINES server-side processes are required for the third party product or service to work, PINES system staff will need to evaluate the feasibility of implementation during the testing phase. Security, policy adherence and staff time are factors that will be considered.
- In cases where the administrative burden on PINES system staff is determined to be prohibitive, PINES staff will not be able to accommodate the product or service.
- If customization is required in order for Library Management products to work, the cost of developing and supporting those customizations will fall to the library purchasing the product and/or the vendor.
- Software upgrades may break these external connections. Libraries may want to consider using a product that does not depend on the PINES server.
- During PINES system upgrades or downtimes, Evergreen functionality will be the priority. Maintenance to external connection(s) will be prioritized accordingly after Evergreen is stabilized.
- If it is determined that a third-party software product or service is causing system instability or other problems, the GPLS/PINES staff reserves the right to remove access to that product or service until the issues are resolved by the product or service provider.
- In the event of vendor error or damage, the PINES staff will consult and recommend how to clean up any problems. Some types of problems may be solved by PINES

staff, but the PINES Program Director may request that the vendor make the repair/corrections or contract with approved vendors (such as Emerald Data Networks for ESI for example) to complete this work.

PINES policy approved September 2002. Updated December 2012.

Adding a New SIP Device

To add a new SIP device, you will need a couple of pieces of information:

1. The public IP address for the device, which PINES/GPLS staff will add to the firewall whitelist to allow access
2. An Evergreen account that will be used by the device to log in and manage Evergreen users and transactions. This will be created by PINES/GPLS staff for you.

Include as much information as you can in a [Help Desk](#) ticket and PINES/GPLS staff will assist.

PC Reservation

See: [PC Reservation Tips](#)