Summer Reader - Authentication

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Authentication is the means by which the Summer Reading application connects to your ILS system and confirms that a patron record exists for the library card number used. The 2 methods supported by Summer Reader are "III (Patron API)" and "SIP2". *This article applies to version 8 and newer of the Summer Reader software. Â You must be logged in as administrator to see the links described below.* Configuring Summer Reader to use authentication is a matter of configuring the connection and opening the path to the ILS server. Similar to what would be done when adding a self-checkout station. Configuring the connection is done through the Summer Reader software from the 'Authentication Setup' link on the main maintenance page. Opening the path to the ILS server can consist of many devices and configurations. **Opening the path to the ILS system** You will probably need to enlist the help of your IT staff and/or ILS company to open the path from the Summer Reader application and the ILS system. Because the equipment used can be considerably different for each application we cannot cover the actual configuration changes needed. Instead, here is a list of the most common devices and what should be done. Firewall - The Firewall in front of the ILS server will need an exception added to allow the Summer Reader application through. The IP used will be the IP of the server Summer Reader sits on and the port is usually determined by the ILS system. There are some standard ports used (like 4500 for Patron API) but the ILS system should be checked for this value. Â Here is the most updated list of Evanced servers to account for if your application is hosted on our servers:

107.23.147.38

107.23.135.42

207.250.85.106

207.250.104.106

207.250.104.108   Router/Port Forwarding - A router or other device that handles port forwarding will need a new rule that forwards requests from the Summer Reader site to the ILS server. These rules can usually be added with an originating IP (See above for the list of Evanced IP addresses) and port (specified by the ILS system). If the server housing the ILS system is directly accessible then this step is unnecessary.   ILS Configuration - In most cases the ILS system needs to have a rule added that is similar to the port forwarding rule to allow the connection from the Summer Reader server. This is usually done in the ILS configuration and is very specific to the system you have. Some ILS vendors require an additional license to enable this connection. **Authentication Setup** The 'Authentication Setup' link on the main maintenance page is how you configure the Summer Reader application to authenticate with your ILS system. You will need to log in as an administrator to see this link. Clicking on the 'Authentication Setup' link will bring up the configuration page. The major components of this page are; the authentication configuration, a 'Field Setup' button, a 'Patron Type Setup' button and a 'Test' button. There is also a 'Save' button and a 'Save and Test' button that can be used for convenience. **Authentication Configuration** The following list is from the authentication setup screen. Authentication - This item is used to enable or disable authentication. Edit Patron Authentication Info - Select 'Yes' to allow patron authentication information to be edited on registration page. Click 'No' to not allow patron authentication to be edited on registration page. This only affects the patron information that is maintained in the Summer Reader application. The connection Summer Reader uses is a read-only connection and cannot affect the data in the ILS system. Â *(Note: this setting only appears in Authentication Settings is "Advanced Security" is disabled. If "Advanced Security" is enabled, this setting is controlled via the "Patron" role in "Security Setup.")* Authentication Type - Select the type of authentication used by the ILS system. Currently only SIP2 and III (Patron API). Authentication Path - IP or URL address of the ILS authentication server. The syntax (including backslashes) for this field is important. Be sure to review the examples. Â Overdue Fee Level - Set the overdue fee level for not allowing program registration. Enter a dollar amount between 1 and 1000. Enter 0 to ignore overdue fees. Example SIP path - 192.168.1.201:7304/ or subdom.domain.org:7304/ Example III path - 192.168.1.201:4500/PATRONAPI/   Residency Checking - Enable/Disable residency checking. If enabled then only residents determined by library card prefix(es) entered in Patron Type Setup are allowed to register for the program. Use Residency Check Prefix Characters to set the number of prefix characters to compare from the card number entered by patron to card

number prefix(es) entered in Patron Type Setup. See 'Residency Checking' below for more details. Residency Check Prefix Characters (visible only if 'Residency Checking' is enabled)- Set the number of prefix characters to compare from the card number entered by patron to card number prefix(es) entered in Patron Type Setup. Enter a number between 2 and 25. Enter 0 or 1 to disable this feature. Patron Hold Checking - Enable/disable patron hold checks. Enable this setting to not allow registration when there is 1 or more holds on the patron card. Disable this setting to ignore all holds on the patron card and allow all patrons to register for a program. Patron-Side Last Name/Pin Entry - Set patron-side pin/last name entry option. This setting only applies to authentication requested from the patron-side of the application. ILS sip server settings ultimately controls what is required. Staff-Side Last Name/Pin Entry - Set staff-side pin/last name entry option. This setting only applies to authentication requested from the staff-side of the application. ILS sip server settings ultimately controls what is required. Patron-Side Library Card Field Type - Set patron-side library card field type option to either password (entered text is not visible) or text. This setting only applies to authentication requested from the patron-side of the application. Staff-Side Library Card Field Type - Set staff-side library card field type option to either password (entered text is not visible) or text. This setting only applies to authentication requested from the staff-side of the application. **Residency Checking** If 'Residency Checking' is enabled then the system must be told how to determine if a patron is a resident. There are 2 methods possible; using the "P TYPE[p47]" value from the patron information record (usually used with III Patron API) and using the first few numbers of the patron barcode (usually used with SIP2). To use the "P TYPE[p47]" value with a III Patron API system you will need to enable 'Residency Checking' and configure the 'Residency Check Prefix Characters' to 0 or 1. Then you will need to configure the values by clicking on the 'Patron Type Setup' button. On this screen you will enter all of the values that represent a resident and non-resident that are used in the "P TYPE[p47]" field in the ILS system. Summer Reader will then pull the "P TYPE[p47]" value and compare it to this list to determine who is a resident. To use the first few digits of the barcode value you will need to enable 'Residency Checking' and configure the 'Residency Check Prefix Characters' to the numbers to compare against. If you set this value to 5 then the first 5 characters will be compared. Then you will need to configure the values by clicking on the 'Patron Type Setup' button. On this screen you will enter all of the values that represent a resident and non-resident that are made up of the first few digits of the patron barcode. Summer Reader will then pull the barcode value and compare it to this list to determine who is a resident. **Testing and Troubleshooting** The 'Test' or 'Save and Test' buttons will allow you to not only test the connection but also will display some of the message level text to help you determine the cause of any problems you may be having. When you run a test it will ask you to enter the barcode and last name or just the barcode (depending on your configuration) for a patron. A screen will then display the results of this test. The test result screen consists of 3 areas; the 'Communication Result', the 'Error Result' and the 'Data Result'. Communication Result - This area will typically give you the connection string (the URL used to grab the patron information) and the returned values. The returned values can be quite long depending on the amount of information that is stored for each patron in your ILS system. Error Result - The error result will be blank if the connection was successful and the patron would be allowed to register. If there is a problem communicating or the patron information indicates that there is a reason to not allow them to register, then it will display the information it can gather about the error. If 'Residency Checking' is enabled then a non-resident will generate an error and it will be displayed here. Data Result - The data result area displays information the Summer Reader application was able to gather from the response to the request for patron information. This is where their name and address will appear.

Custom Fields Applicable To: Admin Users**Attachments:** No**Summary:** An article summarizing the needed work to successfully understand and allow functionality of authentication within Summer Reader.

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