ILS Authentication in Events and Room Reserve

Article Number: 255 | Rating: 5/5 from 1 votes
| Last Updated: Fri, Oct 27, 2017 at 10:05 AM

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and the port is 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.

Note: If your Events/Room Reserve application is hosted on your own server, then your IT folks will most likely be able to provide you with its IP address.

- Â Router/Port Forwarding - A router or other device that handles port forwarding will need a new rule that forwards requests from the Events/Room Reserve site to the ILS server. These rules can usually be added with an originating IP 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 Events/Room Reserve 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 Settings

Again, configuring authentication is done through the Events/Room Reserve software fromÂ 'Authentication Settings' . This is a page that can only be accessed by system administrators. Evanced support will have to send you the link for it, please email support@evancedsolutions.com; as it is not published.

Below are the major components of this page (Please make sure your settings are filled out according to your ILS system requirements for the connection to work. Evanced staff will not be able to advise on the proper settings here as they differ from one system to another):

- First, you will see the settings to enable/disable authentication per module. You can leave enabling this

until the end after you have tested and confirmed that the connection to your ILS system actually works. Continue to next item to be able to do this.

Note:

 * For Events, you can select to require authentication for certain events by simply enabling the per Event option from here, and then enabling the library card field when creating the event, or choose to require it for every event in the system that requires registration.
* For Room Reserve, you can select to just validate the provided card number against your ILS system by selecting Enable or also validate residency status. See residency section below for more information.

- Authentication Type - Select the type of authentication used by the ILS system. The 3 supported methods "III (Patron API)" , "SIP2", and "Custom 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.
  - Example SIP path - 192.168.1.201:7304/ or subdom.domain.org:7304/
  - Example III path - 192.168.1.201:4500/PATRONAPI/
  - Note that only the IP address is needed, not the http://
- Overdue Fee Level - Set the overdue fee level for not allowing program registration. Enter a dollar amount between 1 and 100.
- 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.

Residency Checking

If 'Residency Checking' is enabled in your system 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 values on the Patron Type Maintenance page (See sample link at the bottom of this section). 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. Events/Room Reserve 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 with SIP2, you will need to enable 'Residency Checking' and configure the values on the Patron Type Maintenance page (See sample link at the bottom of this section).Â 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. Events/Room Reserve will then pull the barcode value and compare it to this list to determine who is a resident. Please also email support@evancedsolutions.com in this case to have Evanced staff set the number of digits used for residency checking in your case (For example first 4 or 5 characters, etc), as this setting is not currently published on the user's web interface.

[Your Evanced system unique path]/ptypemaint.asp

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 Events/Room Reserve application was able to gather from the response to the request for patron information. This is where their name and address will appear.
- Verify that the first and last name appear in the correct order. If they do not, please contact support@evancedsolutions.com to make a back-end switch to the name order.

So basically, if you were able to retrieve data from your ILS system associated with a real card number, then your configuration was successful. But if you were not, then the connection was not successful. Please research received error code/text. Alternatively, if you test with an invalid card and get a message that the record was not found, then most likely the connection was successful, as it is an enough indication that the system at least searched the ILS database. But always confirm by testing with a real card. Once the connection is confirmed to be successful, you can enable authentication. Please make sure you test again either by submitting a test registration or a reservation to make sure it is working as expected.

- If you are using Polaris with "sockets" rather than "Telnet" you may have some additional tweaks:

Try enabling SIP2 UserName & Password Required. Disable "ILS Connection User Name & Password Required".

Custom Fields

- **Applicable To:** Admin Users
- **Attachments:** No
- **Summary:** This article is intended to be used by Evanced Events/Room Reserve administrators to either setup or troubleshoot the connection of the system to the library's ILS system; for the purpose of validating library card numbers used by patrons.

Online URL: https://kb.demcosoftware.com/article.php?id=255