

ConnectLib
**Remote Patron
Authentication**

SA Guide



Ameritech Library Services

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Getting Started

This chapter gives an overview of Remote Patron Authentication and Authorization (RPA) and tells how to install its software.

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Overview

Welcome to Remote Patron Authentication and Authorization (RPA). This product lets you specify who accesses your subscription services' web sites (services such as Impart, EBSCO, IAC, and so forth) from your library web site. You can use RPA with your Horizon, GEAC, or Innovative library system.

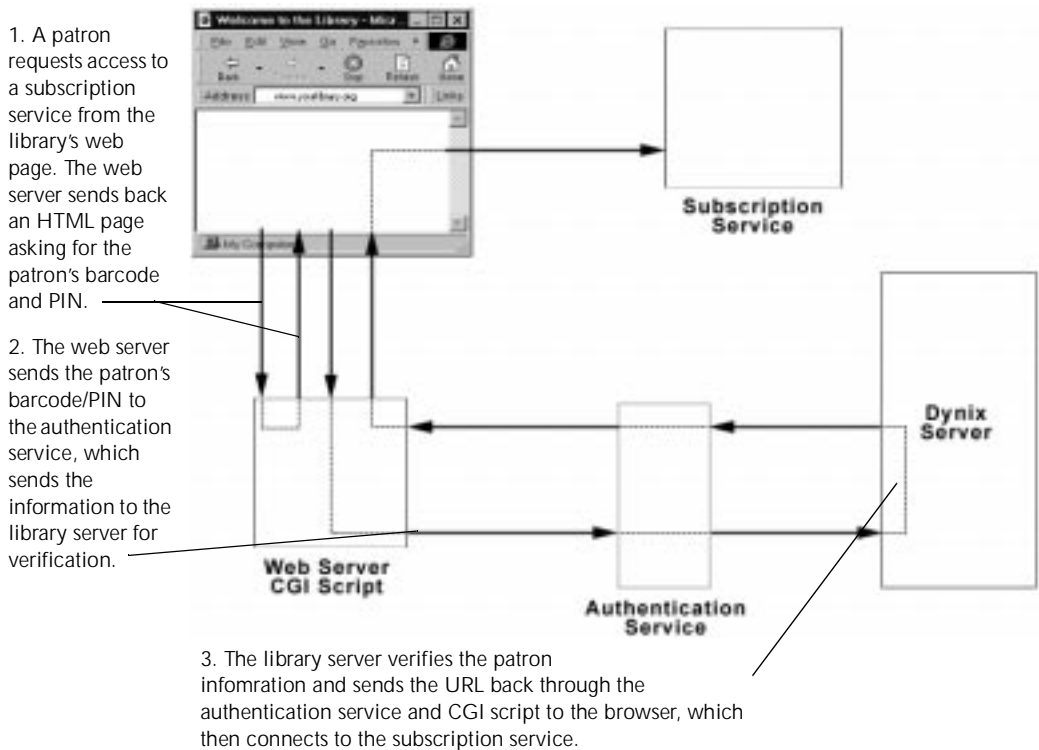
NOTE

If a subscription service does not support referring URLs, then use HTML WebPAC 1.2 or higher with its Z39.50 capabilities to access databases.

When the RPA service is running, a patron may click a link to a subscription service web site. If the patron's IP address is valid, RPA lets the patron access the site. If the patron's IP address is not valid, then your library system displays the RPA login screen. The patron must complete the login fields, and RPA checks the information against your library system's patron file. Patrons that have been successfully authenticated are granted access and patrons that have not been successfully authenticated are denied access.

RPA runs on a Windows NT web server platform. To use RPA, you should understand the patron authentication pieces and how they work.

This diagram shows how RPA handles the flow of information between a patron's browser and your library system server:



When a patron attempts to access a subscription service, the authentication service first checks to see whether the patron is attempting access from within your library or from your web site by checking a list of IP addresses you create. Patrons accessing a subscription service from within the library are immediately connected to the service, while patrons accessing the subscription service from your web page are asked to enter their barcode or other information.

The authentication service sends the barcode or other information the patron enters to your library server for verification. If the patron's information is valid, they are allowed to access the subscription service.

Here are the pieces to the RPA system:

- The RPA server running on Windows NT server
- The CGI (Common Gateway Interface) script
- Login.cfg and <Resource name>.cfg configuration files
- HTML pages

The Patron Authentication Server

The authentication server that runs on Windows NT does these things:

- Maintains the connection between the web server and the library server.
- Passes information from the web server to the library server.
- Passes information from the library server to the web server.

NOTE

See the diagram on page 6 for an illustration of these authentication server tasks.

The CGI Script

RPA's CGI script (and related HTML pages) reside on your library's web server. The CGI script does these things:

- Determines whether a patron is attempting to access a subscription service from inside your library or outside (based on IP addresses you create)
- Redirects the patron's browser either to the subscription service (if the patron is physically located within your library) or to an HTML page that prompts for a login to start authentication
- Sends the patron's information to the RPA server
- Redirects the patron's browser to the subscription service after the library system has verified the patron information

Login.cfg and <Resource Name>.cfg Files

A configuration file is a file with named value pairs. The Login.cfg is the configuration file for the login site. The CGI script uses the Login.cfg file to determine general setup for RPA, such as:

- Which HTML pages need to be sent to the patron's browser (for example, the template that the system displays when a patron is unsuccessful at login or the template the system displays when there is a server error)
- The PAC flavor you want patrons to use if you are on a Horizon system
- The information for which you want the system to prompt to validate the patron (for example, barcode or PIN)
- Whether the information the patron enters for validation will be masked by asterisks (***)

(Setting up the Login.cfg file is explained on page 18.)

The <Resource name>.cfg file is a default delivered with RPA. The CGI script uses the <Resource name>.cfg file to determine specific setup for each subscription service, such as:

- Whether the IP address being used by the patron is inside a library or outside the library, based on a range of IP addresses you enter
- The URL of the subscription service that RPA sends to the patron's browser

You can make copies of the <Resource name>.cfg file and customize each copy for each subscription service patrons will access (for example, you may create "Ebsco.cfg" from <Resource name>.cfg). (Creating and customizing <Resource name>.cfg is explained in "Creating a Resource File" on page 20 and in "Setting Up a Resource File" on page 21.)

HTML Pages

When you installed RPA, a default HTML file was installed (rpalogin.html). This HTML file is only a template for information that RPA needs. You can customize this page to fit your library's needs. (Customizing this HTML page is explained in "Setting Up the Default HTML Page" on page 24.)

You also need to customize your library home page in some sections so RPA will work. (Customizing HTML pages is explained in more detail in "Setting Up Your Library HTML Pages" on page 23.)

Installing Patron Authentication

You must have administrator privileges on the Windows NT server where you want to install Remote Patron Authentication and Authorization (RPA). If you do not have administrator privileges, see your library system administrator to install RPA with administrator privileges.

To install RPA, you must download it from the web site. Call your customer service representative if you want to download RPA.

Before you install RPA

- 1 Make sure you know the database connection information for your library system:
 - **Horizon.** For this system, you should know the server name, the location of the Sybase Open/Client Software and interfaces file, the database name and password, and you should setup the PAC flavor you want patrons to use. (Setting up PAC flavors for Horizon version 5.0 is explained in "PAC Flavors" on pages 157–180 of the *Horizon System Administrator Guide*. Setting up PAC flavors for Horizon 5.1 is explained in "PAC Flavors" on pages 212–230 of the *Horizon System Administrator Guide*.)
 - **Innovative.** For this system, you should know the name of the server running Innovative's Patron API (which your library must purchase).

- **GEAC.** For this system, you should know the name of the server running the Z39.50 interface into the GEAC database.
- 2 Determine the subscription services (resources) that you want patrons to access through RPA.

To install RPA

- 1 Double-click the executable you downloaded from the web site or received from Ameritech Library Services.

NOTE

To order RPA and to download the software, call your customer service representative.

- 2 Read the information and licensing agreement in the Welcome window and click **Next** to continue.
- 3 Do one of these options:
 - Click **Next** to install RPA in the default directory. (If you have HTML WebPAC, you should place RPA in the same directory as HTML WebPAC.)
 - Click **Browse** to choose the directory in which you want to install RPA, then click **Next**.
- 4 Choose the library system your library uses (for example, choose **Horizon**).
- 5 Click **Next** to continue.

6 Use this table to enter the information for your library system:

Horizon	Innovative	GEAC
<p>1 Enter the server name you want to connect to.</p> <p>2 Enter the user ID and password needed to connect to the database.</p> <p>3 Enter the database you want to connect to.</p> <p>4 Enter the PAC flavor you want.</p> <p>5 Click Next to continue.</p>	<p>1 Enter the host name of the database you want to connect to.</p> <p>2 Click Next to continue.</p>	<p>1 Enter the IP address of the database that you want to connect to.</p> <p>2 Click Next to continue.</p>

7 Enter a unique name that describes the database RPA will be connecting to.

The default is “profile.dt”.

8 Enter the port number you want the daemon listening on.

The default is “4999”.

9 Enter the number of threads to use. (A thread is a program within a program.)

The default is “1”.

NOTE

Ameritech Library Services recommends using the defaults for the **Name**, **Port#**, and **Threads#** fields.

10 Click **Next** to continue.

- 11 If you are using a GEAC or Innovative system, complete the steps in the table; otherwise, skip to step12:

If you are using a GEAC or Innovative system
1 Mark all the login parameters you want a patron to enter (for example, mark Barcode , PIN , SSN , and Last Name), and click Next to continue.
2 Enter the prompt you want to appear when a patron must enter authentication information (for example, “Enter your barcode:”), and click Next to continue.
3 Mark if you want to echo on the screen the information the patron entered, and click Next to continue. Marking this option shows asterisks (***) on screen in place of the information.
4 Repeat steps 2–4 in this table for each option you marked in step 1.

- 12 Check your setup information and make sure it is correct.

- 13 Do one of these options:

- If the information is correct, click **Next** to continue.
- If the information is incorrect, click **Back** as many times as necessary to correct information in previous screens. When you have made your corrections, click **Next** until you reach the setup summary screen again. Then click **Next** to continue.

The system installs the RPA software.

- 14 Set up a virtual directory for the path to webauth.exe on your Windows NT machine. (To set up a virtual directory, see your Windows NT documentation.)

You are now done with installation. Next, you should finish setting up RPA by doing these tasks:

- Check your setup in the Login.cfg file.
- Create and set up a resource file for each subscription service to which you want RPA to authenticate patron access.

- Update your library HTML pages and the default HTML page (explained in “Setting Up HTML Pages” on page 23).
- Start the RPA service.

Setting Up and Using RPA

This chapter explains how to set up resource files and the login file. It also explains how to set up your library HTML pages. This chapter also explains how to start and stop the Remote Patron Authentication service.

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Overview

Here is a list of things you should do before you start setup:

- 1 Determine the valid IP addresses for computers with automatic access to subscription services (resources).
- 2 Determine the subscription services (resources) that you want patrons to access through RPA, if you have not already done so.
- 3 Know the database connection information:
 - **Horizon.** For this system, you should know the server name, the location of the Sybase Open/Client Software and interfaces file, the database name and password, and you should setup the PAC flavor you want patrons to use. (Setting up PAC flavors for Horizon version 5.0 is explained in “PAC Flavors” on pages 157–180 of the *Horizon System Administrator Guide*. Setting up PAC flavors for Horizon 5.1 is explained in “PAC Flavors” on pages 212–230 of the *Horizon System Administrator Guide*.)
 - **Innovative.** For this system, you should know the name of the server running Innovative’s Patron API (which your library must purchase).
 - **GEAC.** For this system, you should know the IP address of the server running the Z39.50 interface into the GEAC database.

Once you have installed RPA and completed the tasks listed above, you can set up Remote Patron Authentication and Authorization (RPA) by doing these tasks:

- Checking the setup in the Login.cfg file
- Creating a resource file for each subscription service (resource) you want patrons to access
- Setting up each resource file
- Setting up your library web page and the default HTML page
- Starting the RPA service

Setting Up the Login.cfg File

After you have installed RPA, you should check the setup of the Login.cfg file. The installation program prompted you to set up the items in this file, but you may want to look at the file to check things you may want to change now or in the future.

You can configure RPA with other preferences in the login configuration file. These preferences determine things like what will appear when a patron has been successfully or unsuccessfully authenticated.

To set up the Login.cfg file

- 1 Locate the Login.cfg file on the server that is running RPA.
The default location of the Login.cfg file is in the \config directory.
- 2 Double-click the configuration file to open it in NotePad.
- 3 Use this table to complete the setup information:

NOTE

All values and other information you enter in the .cfg files must be entered between the brackets [].

For this field	Enter this
SUCCESS_TEMPLATE	Enter the file name of the template or URL you want to display when authentication is successful.
LOGIN_TEMPLATE	Enter the file name of the template or URL you want to display when a user logs in for authentication. (The default template will determine which fields to prompt for.)
INVALID_PATRON	Enter the file name of the template or URL you want to display when authentication is unsuccessful.

For this field	Enter this
SERV_ERROR	Enter the file name of the template or URL you want to display when the system has an error on the server side.
HORIZON_FLAVOR	Enter the file name of the PAC flavor you want to display for Horizon authentication.
AUTHFIELD1-4 (optional line you add)	Enter the names of the fields that the system will prompt the user to enter to authenticate. (Use the table below this one to determine which fields your system can use.)
PROMPT1-4 (optional line you add)	Enter the corresponding prompts associated with the AUTHFIELD text.
MASKED1-4 (optional line you add)	Enter "TRUE" or "FALSE". (Entering "TRUE" shows asterisks instead of the information the patron enters for validation. Entering "FALSE" shows the actual information the patron enters.)
QUICK_LENGTH (optional line you add)	Enter the number of characters your library's barcode contains without its prefix (or without its suffix). (If the length of the barcode is less than or equal to this value, then complete the BARCODE_PREFIX line for the barcode.)
BARCODE_PREFIX (optional line you add)	Enter the barcode prefix you want automatically added to the shortened barcodes you specified the length for in the QUICK_LENGTH line.
BARCODE_SUFFIX (optional line you add)	Enter the barcode suffix you want automatically added to all barcodes.

- 4 Use this table to enter the values with which you want RPA to authenticate a patron in the AUTHFIELD1-4 lines:

Authfield Value	Horizon	Dynix	Innovative	GEAC
BARCODE	X	X	X	X
PIN	X	X	X	

Authfield Value	Horizon	Dynix	Innovative	GEAC
USERNAME	X	X		
PASSWORD	X	X	X	X
SSN	X	X	X	X

NOTE

The value for USERNAME will be only the patron's last name.

- 5 Save your changes.
- 6 Exit Notepad.

IMPORTANT

If you make any changes to any configuration or HTML files, you must stop and restart the RPA service (explained in "Starting or Stopping the RPA Service" on page 25).

Creating a Resource File

Each resource (or subscription service) should have a configuration file. The configuration file is kept in the /cgi-bin/config directory. The name of the default resource configuration file is <Resource name>.cfg. You should copy this configuration file and customize it for each resource you want patrons to access. Giving each resource a configuration file lets you determine authentication and customization for individual resources.

To create a resource file

- 1 Go to the /cgi-bin/config directory and copy the <Resource name>.cfg file.
- 2 Rename the file (for example, "Ebsco.cfg").

- 3 Open the configuration file in Notepad.
- 4 You can now finish setting up the rest of the new configuration file (explained in “Setting Up a Resource File” on page 21); otherwise, exit Notepad..

IMPORTANT

If you make any changes to any configuration or HTML files, you must stop and restart the RPA service (explained in “Starting or Stopping the RPA Service” on page 25).

Setting Up a Resource File

You can configure RPA with other preferences in the resource configuration files. These preferences determine things like valid IP addresses for computers that can access a subscription service’s site.

To set up a <Resource name>.cfg file

- 1 Locate the resource configuration file you want on the server that is running RPA.
The default location of the <Resource name>.cfg file is in the cgi-bin\config directory.
- 2 Double-click the configuration file to open it in NotePad.
- 3 Enter the port number on which RPA listens in the PORT field.
Remember that the port number must be the same number you entered when you set up RPA. If you do not remember the number and you are running RPA on Windows NT, do these steps:

- 1 Choose **Start, Programs, DynixPAC, Verify Service Control**.
- 2 Write down the number in the **Port** field.
- 3 Click **Close**.

4 Use this table to complete the setup information:

NOTE

All values and other information you enter in the .cfg files must be entered between the brackets [].

For this field	Enter this
VALID_PATRON	Enter the URL to which you want the system to send the patron when authentication is successful.
RESOURCE_DESCRIPTION	Enter the description used in the HTML page for the subscription service.
VALID_IP_LIST	Enter the list of valid IP addresses that will not require a login for authentication. Separate each IP address with a comma. For example: VALID_IP_LIST=[205.10.10.10,205.20.20.20,205.30.30.30].
VALID_IP_FILE (optional line you add)	Enter the file name of a list of valid IP addresses. This list is used in combination with the VALID_IP_LIST.

5 Save your changes.

6 Exit Notepad.

IMPORTANT

If you make any changes to any configuration or HTML files, you must stop and restart the RPA service (explained in "Starting or Stopping the RPA Service" on page 25).

Setting Up HTML Pages

You need to set up your web server so that it can process patron authentication requests from web users. This section explains how to:

- Set up your library HTML pages to work with RPA.
- Set up the default HTML page if you want.

Setting Up Your Library HTML Pages

You need to modify your library HTML pages so that the pages can access RPA when a patron enters a request for access to a subscription service.

To set up your library HTML pages

- 1 Locate the HTML files that contain the references to subscription services.
- 2 Double-click the HTML file you want to open it in NotePad.
- 3 Add these lines for each subscription service (resource):

```
<FORM METHOD="GET" TARGET="top">&nbsp;  <SELECT  
NAME="SITE3">
```

```
<OPTION VALUE="webauth.exe?rs=<Resource  
name>.cfg">
```

For example:

```
<FORM METHOD="GET" TARGET="top">&nbsp;  <SELECT  
NAME="SITE3">
```

```
<OPTION VALUE="webauth.exe?rs=EBSCO.cfg">
```

- 4 Save your changes.
- 5 Exit Notepad.

IMPORTANT

If you make any changes to any configuration or HTML files, you must stop and restart the RPA service (explained in "Starting or Stopping the RPA Service" on page 25).

Setting Up the Default HTML Page

The HTML page `rpalogin.html` is also installed with RPA. This page contains the default login for the URL you want when a patron logs in for authentication. You can set up this page if you want.

To set up the `rpalogin.html` page

- 1 Locate the `rpalogin.html` file.
The default location is in the `\docs` directory with the rest of your HTML pages.
- 2 Double-click the HTML file to open it in NotePad.
- 3 Use this table to complete the setup information:

NOTE

All values and other information you enter in this HTML file must be entered between the brackets [].

For this field	Enter this
LOGIN_TEMPLATE [rpalogin]	Enter the file name of the template or URL you want to display when a user logs in for authentication. (The default template will determine which fields to prompt for.)
INVALID_PATRON [rpainvalid]	Enter the file name of the template or URL you want to display when authentication is unsuccessful.
SERV_ERROR [rpaerror]	Enter the file name of the template or URL you want to display when the system has an error on the server side.

- 4 Save your changes.

5 Exit Notepad.

IMPORTANT

If you make any changes to any configuration or HTML files, you must stop and restart the RPA service (explained in “Starting or Stopping the RPA Service” on page 25).

Starting or Stopping the RPA Service

You must keep the Remote Patron Auth Server running at all times so that RPA works when a web user tries to access a subscription service’s web site. However, when you make changes to files for RPA, you must stop and restart the service to have the changes take effect.

IMPORTANT

When you first start RPA, Ameritech Library Services recommends you set RPA to automatic startup (explained in these steps).

To start or stop the authentication service program

- 1 Choose **Start, Settings, Control Panel**.
- 2 Double-click **Services**.
Windows displays the Verify Server Control box.
- 3 Choose **Remote Patron Auth Server**.
- 4 Click **Start** or **Stop**.
- 5 If you are starting RPA for the first time, click **Startup** and choose **Automatic**. This will make RPA automatically start when you start your server.
- 6 Click **Close**.

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