

Basic Authentication to Remote Authentication using Ezproxy

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Agenda

- What is Remote Authentication?
- Advantages of Remote Authentication
- Advantages of Remote Authentication with Ezproxy
- Getting Ready for Implementation
- Ten Easy Steps of Implementation
- Illiad Processing Once Implemented
- Issues We Encountered
- Discussion

What is Basic Authentication?

By default, all ILLiad installations are setup with Basic ILLiad authentication. This type of authentication allows anyone with access to the registration pages to register him or herself, choose a username and password, and then use that username and password to login to the ILLiad web later.

The Basic ILLiad authentication does not verify user information against any external system upon registration or login. Once a customer registers with ILLiad s/he is allowed to login to the web interface until staff either blocks the user from submitting any further requests or disavows the user from the system.

-Several times a day, the staff user would select the Clear New Customers option from the Pre Processing menu in ILLiad. This will show a list of all newly registered users.

-After reviewing each one, they can click the Clear, Disavow, or Merge buttons. Each will send the user a note regarding their current ILLiad status. Disavow cancels all of their requests. Merge will allow you to merge two accounts together.

<https://prometheus.atlas-sys.com/display/illiad/Basic+ILLiad+Authentication?src=search>

What is Remote Authentication?

In previous versions of ILLiad, this type of authentication was known as PubCookie, Cookie, CoSign or WebAuth authentication. Starting with ILLiad Version 7.2, all of those authentication models have been combined under one setup now called RemoteAuth Authentication.

RemoteAuth authentication is slightly different than other authentication methods in that there is no logon page used for customers to enter a username and password. In most installations, sites add an isapi filter to the ILLiad web server that intercepts the request for the illiad.dll in the RemoteAuth folder. If the username value has not been set, it redirects the user to the authentication server. If the username has been set, it checks the authentication server to see if the session is still active. RemoteAuth authentication expects a server variable that is set to the authenticating system and passed to ILLiad via the http header. ILLiad installations have successfully authenticated users via PubCookie, CoSign and Shibboleth using this type of authentication. Currently, ILLiad only checks for the username and does not look for other customer information (i.e. name, status, contact information etc.).

<https://prometheus.atlas-sys.com/display/illiad/RemoteAuth+Authentication?src=search>

Please note that the testweb will not function under RemoteAuth

The system is designed to use RemoteAuthentication based on the location of the actual web pages as specified by the RemoteAuthWebPath customization key. Therefore, you cannot use the testweb pages with RemoteAuth.

Advantages

- Eliminates Another Password to Remember
- Save Staff Time
 - Allows AutoClearing of Patrons
 - Eliminates Forgotten Passwords

Single Sign-on

- Patrons now use their HVCC username and password for ILL, E-mail, Blackboard, etc.
- Patrons can't create multiple accounts.
- First time users are directed to NewAuthRegistration.html

When unavailable from HVCC:



[Request this item through interlibrary loan](#)



Secure Login

You must log in with your college-issued username and password to continue.

Username:

Password:

Warn me before logging me into other sites.

[LOGIN](#)

Information

[Login Help](#) | [Computer Use Policy](#) | [Privacy Policy](#) | [Contact HVCC](#)

MyHudsonValley Portal/Blackboard Users

I understand that my e-mail address will be visible to students, faculty, and support staff when participating in discussion groups. By entering my username, password and clicking login, I am giving my written consent for Hudson Valley Community College to display my student e-mail address in discussion groups.

Patron Access

If you don't Disavow patrons they still have access to request material through ILLiad. We started using ILLiad for Borrowing in January 2008. As a summer project I would look up patrons in Banner and Disavow them.

I never got very far as other projects had more priority. Now I know patron's can't get into ILLiad if they shouldn't have access.



The credentials you provided cannot be determined to be authentic.

| User Name | Expirati... | Last Name | First Name | Status | SSN | EMail Address | Phone | Department | NVTGC |
|-----------|-------------|-----------|------------|--------|-----------|---------------|-------|------------|-------|
| Lending | | User | Lending | Staff | 123123123 | | | None | ILL |
| Unmatched | | User | Unmatched | Staff | 123123123 | | | None | ILL |

Save staff time

1/1/2012-12/31/2012 448 patrons were manually cleared

1/1/2013-12/31/2013 634 patrons were manually cleared

ILLiad Reports

Borrowing Lending Document Delivery **Administrative**

Administrative Reports

Copyright

This report shows all requests that have been submitted within the date range and received copyright payment information. The report is split into a top section that shows items filled that would need to be paid, a middle section that shows items still outstanding and may need payment and a bottom section of items that were paid through the CCC Gateway order form.

Borrowing Invoices Received

This report lists all of the invoices noted from other lending libraries within the Borrowing module. The date range is based off of the entry date in the Invoices table which is created when the invoice notes are added on the General Update form.

Lending Library

This report shows all borrowing requests that were submitted by customers within the date range and their current status. The only requests displayed are those with a lending string that contain the text typed in the Lending String field of the into web page to this report. This allows you to see where that library is being placed in lending strings and how often they're filling requests successfully.

Customers Cleared

This report lists each user who has a "last changed date" within the date range given. The last changed date is updated any time a customer registers or edits their information via the web, but not when staff save changes to a customer through the client.

Outstanding Requests

This report lists all borrowing requests that are at a status of Request Sent for more than X days. This allows you to check on the status of those requests to make sure they are still in process a lending library.

Requests by Username

This report lists all borrowing requests submitted by customers within the date range given, grouped by username and the articles and/or loans received. This only counts requests submitted by customers and does not differentiate between those filled or cancelled.

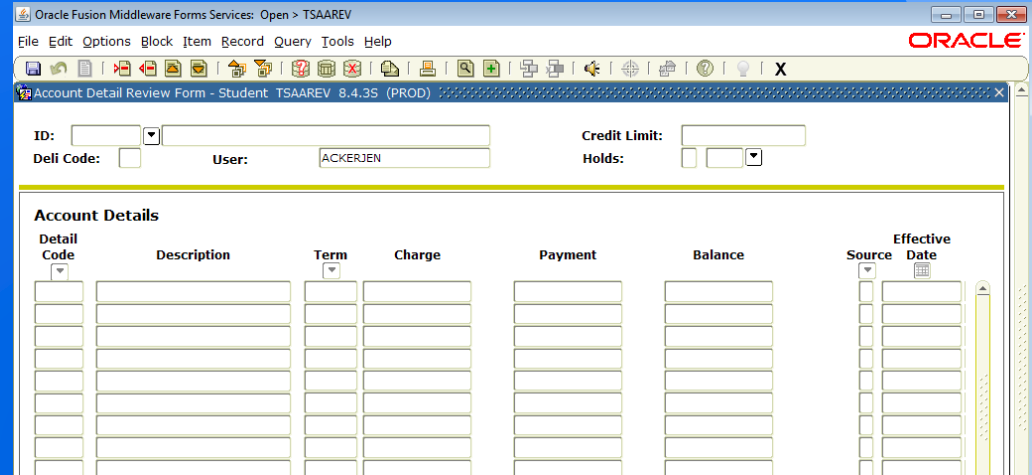
Staff Activity by Username

Clearing patrons required:

Banner Search

Checking for duplicate accounts

Contacting patrons if they created more than one with no requests



Oracle Fusion Middleware Forms Services: Open > TSAAREV

File Edit Options Block Item Record Query Tools Help

Account Detail Review Form - Student TSAAREV 8.4.3S (PROD)

ID: Credit Limit:
Deli Code: User: ACKERJEN Holds:

Account Details

| Detail Code | Description | Term | Charge | Payment | Balance | Source | Effective Date |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
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| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Can't Remember MY....

We would suggest patrons use their HVCC Username and Password but many did not. Patrons could only reset their password if they remembered their Username. Time was spent looking up Usernames and walking patrons through how to reset passwords



Getting Ready

- Student Accounts:
 - Left Alone
- Faculty, Staff, NTP, and Administration:
 - Fixed in advance
 - Checked if these patrons were still employed
 - Created New Account Where Username did not exist
 - Merged Accounts where Disavowed HVCC Usernames existed
- Changed Merge E-Mail in Customization Manager.
- Cleared all new patrons for one semester.

E-mail we sent

Dwight Marvin Library will transition to the use of campus usernames (j.staff, m.faculty3, etc.) and passwords for ILLiad, the Interlibrary Loan system, later this summer. In preparation, interlibrary loan staff are changing the usernames of existing employee ILLiad accounts.

Your new username: HVCC Username

Your temporary password: Phone Extension

After logging into ILLiad change your password by clicking on the Change Password link under Tools in the menu on the left hand side of the screen. We recommend that you change your ILLiad password to the same password that you use for other campus systems; your password is securely encrypted and will be unknown to library staff. Later this summer, you will be required to use your campus IT username/password combination to access your ILLiad account.

We hope that our adoption of the common campus logon will make it easier for you to successfully access your ILLiad account. Your interlibrary loan history remains available and is unaffected by this revision to your username.

Contact Jennifer Acker at ill@hvcc.edu with any questions or concerns. Thank you!

E-mail for student accounts

- After turning on Remote Authentication.

Changed Merge email again.

Dwight Marvin Library has transitioned to the use of campus usernames (j.staff, m.faculty3, etc.) and passwords for ILLiad, the Interlibrary Loan data management system. You are receiving this message because you had an old ILLiad account and we have merged the old account with your new account.

We hope that our adoption of the common campus logon will make it easier for you to successfully access your ILLiad account.

Contact Jennifer Acker at ill@hvcc.edu with any questions or concerns. Thank you!

Patrons are now Auto Cleared!!!!

The screenshot shows the ILLiad Customization Manager interface. The title bar reads "ILLiad Customization Manager (ackerjen)". The main window has a navigation pane on the left with a tree view containing categories like Lending, Odyssey, System, System Billing, Web Interface, and Authentication. Under Authentication, "AutoClearPreRegisteredUsers" is selected. The main area displays the configuration for this setting, including a "Key Value" section with radio buttons for "Yes" (selected) and "No". Below this is a "Description" section with the text: "Determines if users in UserValidation, LDAP or PatronAPI server are automatically cleared when registering." At the bottom, a table shows the change history for this setting.

ILLiad Customization Manager (ackerjen)

Home 239.50 E-mail Templates Server Addons

Search All Tables and Keys

auto clear

Search

AutoClearPreRegisteredUsers

Settings

Key Value

Yes No

Description

Determines if users in UserValidation, LDAP or PatronAPI server are automatically cleared when registering.

| Value Changed From | Value Changed To | Changed Time | Changed By |
|--------------------|------------------|--------------------|------------|
| No | Yes | 1/21/2014 11:22 AM | ackerjen |
| Yes | No | 7/8/2013 9:10 AM | ackerjen |

Advantages of Ezproxy

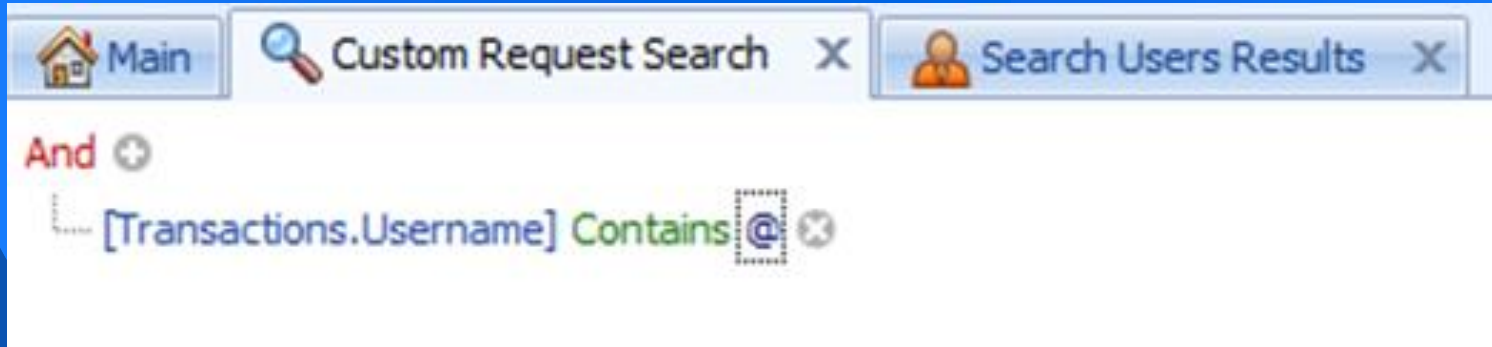
- Bypasses LDAP Compatibility problems
 - e.g CC and Shibboleth
- Ease of Implementation
- Piggybacks on Existing System
- Circumvents IT Obstacles
- Makes ILL a Seamless Part of Research

Ten Easy Steps to Implement

1. Merge Users.
2. Edit Ezproxy config.txt.
3. Edit OpenURL settings in Services that Update Overnight.
4. Verify that OpenURL settings have updated and then proceed.
5. Edit SystemURL in Illiad Customization Manager.
6. Edit illiad\logon.html to redirect from logon page.
7. Turn On RemoteAuthSupport in Customization Manager.
8. Edit OpenURL setting in Services that Update in Real Time.
9. Update SystemURL in Customization Manager Contact Information.
10. Update RemoteAuthWebLogoutURL in Customization Manager.

Merge Users

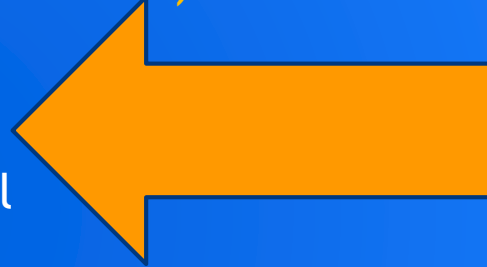
- Usernames must be in LDAP
- Other Usernames will no longer work.
- If you have been doing patron uploads, less of a problem.
- Checked Outstanding Requests and Delivered to web
 - Where UserName Did Not Equal Email Stem
 - Or Where UserName Contained @



Ezproxy config.txt

Place ILLiad Configuration before E (Excluded lines)

AddUserHeader HTTP_REMOTE_USER
Title ILLiad
URL <http://cdlc-sage.cdlc.org/illiad/illiad.dll>



E 10.200.201.9
E 10.200.201.1

T Value Line
U <http://www3.valueline.com/secure/vlispdf/stk5000/index.aspx>
D www3.valueline.com
H valueline.com

Edit OpenURL

- Add proxy string to front of ILLiad OpenURL:

<http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll/OpenURL?>

- Identify Services the Update Overnight:
e.g. SerialsSolutions
- Update OpenURL in these the night before you turn on Remote Authentication.

Edit logon.html to redirect

<http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll>

```
<html>
<head>
<meta http-equiv="Pragma" content="no-cache">
<script type="text/javascript">
  window.location.href = "http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll"
</script>
<title>ILLiad Logon</title>
</head>
```

Set Remote Authentication In ILLiad

RemoteAuthSupport

Settings

Key Value

Yes No

Description

Yes/No value to determine if borrowing web authentication is getting a username fr

Set OpenURL in OCLC Resource Sharing

<http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll/OpenURL?>

FirstSearch Authorization: 100196079 | Symbol: ZRS

Resource Sharing > OpenURL Links

OpenURL Links

Add OpenURL Server:
Select the URL you want to add from the list, or type the URL if it is not in the list, and click Add Server. Then specify the Icon URL and/or Link Text below.

— Select an OpenURL server URL —

 ISBN

Select OpenURL Server:
Select the URL that you want to rename or delete.

- <http://LC2YE4EA9K.search.serialssolutions.com/>
- <http://library.sage.edu:2048/login?url=http://cdlc-sage...>

Add OpenURL Icon File:

Set Contact Information

<http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll>

| Edit Row | |
|-----------------|---|
| NVTGC | ILL |
| SystemName | ILLiad |
| SystemURL | http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll |
| InstitutionName | The Sage Colleges |
| LibraryName | The Sage Colleges Libraries |

Page Displayed When Logging Out

RemoteAuthWebLogoutURL

ILL

Settings

Key Value

http://library.sage.edu

Description

The URL or local file to display when a user logs out of the ILLiad web directory controlled by remote authentication.

Update OpenURL in worldcat.org Config



Welcome **Christopher White** (S)

The Sage Colleges Libraries (2000) ▾

Go

My WorldCat.org

Metasearch Content

Inbound Links and A-Z

Mobile Client

WorldCat Registry

OpenURL Resolvers

Does your institution have link resolvers that deliver appropriate electronic resources to a Web user? List them here.

| Base URL | Resolver Name |
|---|-------------------------------|
| http://LC2YE4EA9K.search.serialssolutions.com/ | Find Full Text |
| http://library.sage.edu:2048/login?url=http://cdlc-sage.cdlc.org/illiad/illiad.dll/OpenURL | Sage ILLiad Interlibrary Loan |

Problems at Sage

Customization Manager and Long URLs

- Contact Information Box Rejects
- OCLC has a fix
- Redirecting logon.html - serviceable work around

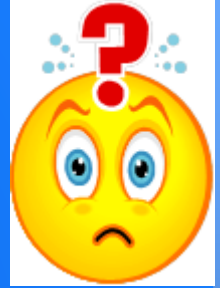
Courtesy Users Not in LDAP

- Edit ezproxy users.txt
- example - johnsmith:swordfish

Problems at HVCC

- When we first turned Remote Authentication on, Shibboleth failed to pass the UID to EZProxy, causing all users to share one "shibboleth" user account. This issue was solved by the EZproxy administrator adding "Set login:loguser = auth:uid" to the shibuser.txt file.
- We have patron accounts with the only information in them in their Expiration Date, Username, and NEW in the Cleared Status
- Patrons do not select status or how they want to be contacted.

Questions???



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