

Linking CASSIE to the Evergreen Authentication Server at NTRLs

This document will illustrate the process of configuring your CASSIE System to link to the NTRLs Evergreen Authentication Server for patron authentication.

Note: Support for linking to the Evergreen ILS was added in version 2.9.0 of the CASSIE Manager (released on July 30, 2008). If your CASSIE System is not running version 2.9 or later, you will need to upgrade it before linking to the Evergreen ILS. To determine your CASSIE System version, log in to CASSIE as the Super Administrator, and then go to Setup / Global Configuration / Version.

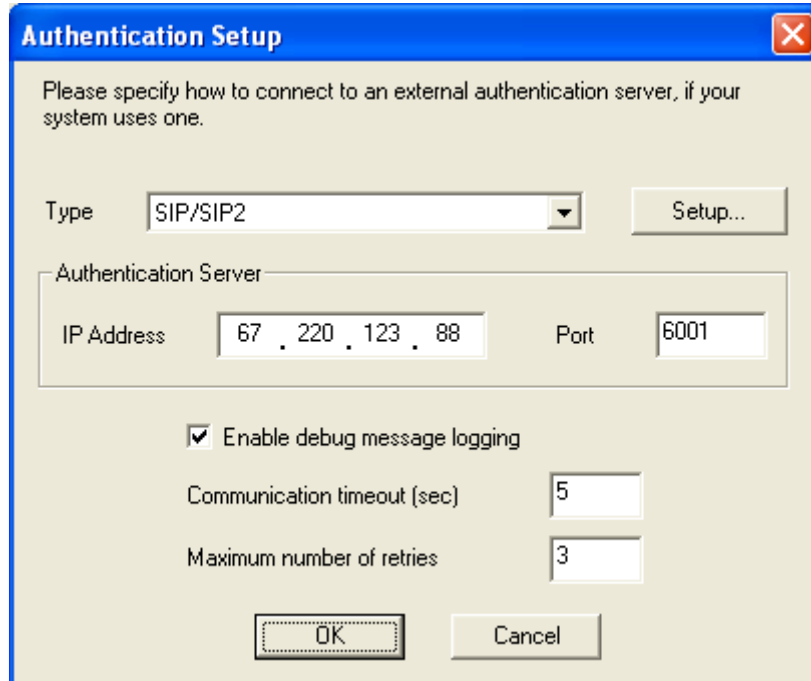
Note: Once you link your CASSIE System to the Evergreen authentication server, only those patrons with a valid record in the Evergreen ILS system will be allowed into CASSIE. If your existing CASSIE users do not have a record in the Evergreen ILS system (e.g. they use a 4- or 5-digit card number from your old ILS system), they will no longer be recognized by CASSIE.

Log on to Windows as an Administrator on the computer running your CASSIE Manager.

Double click the CASSIE Manager Setup (yellow cat icon) on your desktop.

Click *Authentication Setup*.

Carefully type in the following information on the first screen:



The screenshot shows the 'Authentication Setup' dialog box. The title bar is blue with the text 'Authentication Setup' and a close button. The main area is light beige. At the top, it says 'Please specify how to connect to an external authentication server, if your system uses one.' Below this, there is a 'Type' dropdown menu set to 'SIP/SIP2' and a 'Setup...' button. Underneath is a section titled 'Authentication Server' containing an 'IP Address' field with the value '67 . 220 . 123 . 88' and a 'Port' field with the value '6001'. Below the IP and Port fields, there is a checked checkbox for 'Enable debug message logging'. At the bottom of this section, there are two input fields: 'Communication timeout (sec)' with the value '5' and 'Maximum number of retries' with the value '3'. At the very bottom of the dialog are 'OK' and 'Cancel' buttons.

On this same screen, click *Setup...*

Make the entries shown below, subject to the following site-specific caveats:

- (1) If the new library card numbers in the Evergreen ILS are other than 14 digits, substitute the correct value.
- (2) In the “Deny access to patrons with” section, check the boxes that meet your policy.
- (3) In the “Deny access to patrons with a balance over (\$)” section, make the entry that meets your policy.

SIP/SIP2 Interface Setup

Please consult your automation system documentation for information on how to set up this interface.

Initial account password: Password (PIN) in automation database

Use Telnet-style login when connecting Telnet Login Setup...

Use SIP2 login when connecting SIP2 Login Setup...

Use vendor-specific SIP2 extensions Extensions Setup...

Allow only numeric characters in Patron IDs

Require Patron IDs to be of this length (characters)

Deny access to patrons with:

<input checked="" type="checkbox"/> Charge privileges denied	<input type="checkbox"/> Too many renewals
<input checked="" type="checkbox"/> Renewal privileges denied	<input type="checkbox"/> Too many claims of items returned
<input checked="" type="checkbox"/> Recall privileges denied	<input type="checkbox"/> Too many items lost
<input checked="" type="checkbox"/> Hold privileges denied	<input type="checkbox"/> Excessive outstanding fines
<input type="checkbox"/> Card reported lost	<input type="checkbox"/> Excessive outstanding fees
<input type="checkbox"/> Too many items charged	<input type="checkbox"/> Recall overdue
<input type="checkbox"/> Too many items overdue	<input type="checkbox"/> Too many items billed

Deny access to patrons with a balance owed over (\$)

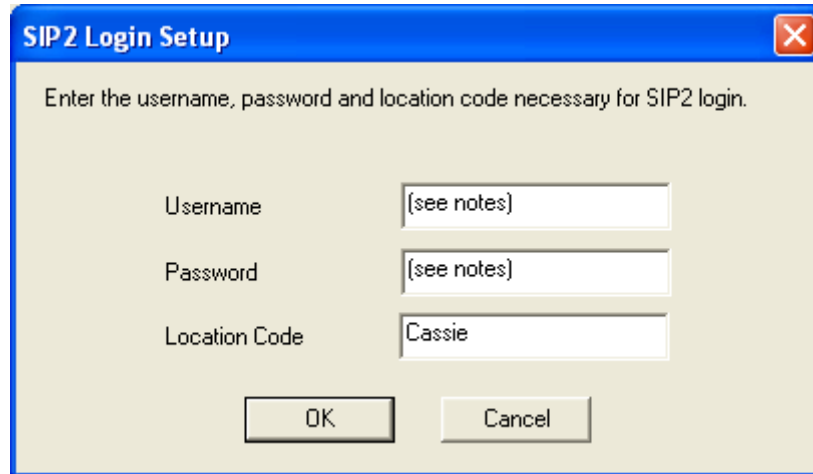
OK Cancel

On this same screen, click *SIP2 Login Setup...*

The Username and Password are site-specific, and for privacy reasons, we shall not include them in this general document.

Make the entries as provided in the email sent to you by us or NTRLIS.

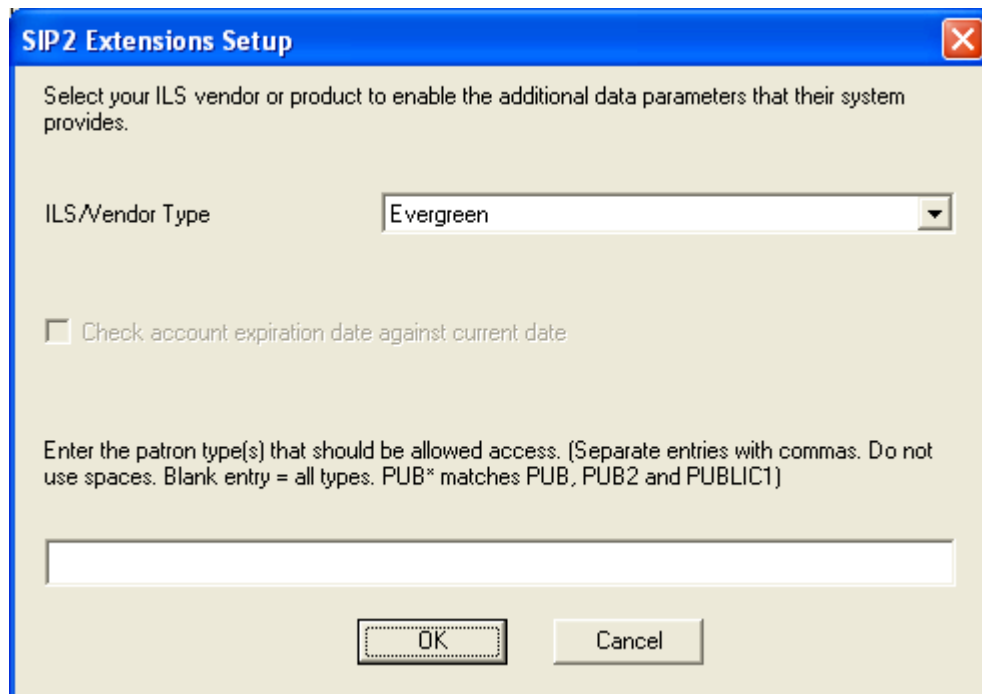
Leave the Location Code as “Cassie”.



The screenshot shows a dialog box titled "SIP2 Login Setup" with a close button (X) in the top right corner. The main text reads: "Enter the username, password and location code necessary for SIP2 login." Below this, there are three input fields: "Username" with the text "[see notes]", "Password" with the text "[see notes]", and "Location Code" with the text "Cassie". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Click *OK* to go back one screen, and then click *Extensions Setup...*

Select *Evergreen* for the ILS/Vendor Type.



The screenshot shows a dialog box titled "SIP2 Extensions Setup" with a close button (X) in the top right corner. The main text reads: "Select your ILS vendor or product to enable the additional data parameters that their system provides." Below this, there is a dropdown menu for "ILS/Vendor Type" with "Evergreen" selected. There is an unchecked checkbox labeled "Check account expiration date against current date". Below that, there is a text field with the instruction: "Enter the patron type(s) that should be allowed access. (Separate entries with commas. Do not use spaces. Blank entry = all types. PUB* matches PUB, PUB2 and PUBLIC1)". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Do not make an entry for the allowed patron types on this screen unless you have a specific need to allow system-wide only a subset of the patron types defined in the Evergreen ILS. **Making an incorrect entry here will most likely have the effect of blocking all patrons in CASSIE.**

If you would like to allow patrons to specific computer groups based upon their age or patron type, that is done in the CASSIE Setup Console (see optional section below).

Click *OK* all the way back to the main CASSIE Manager Setup screen.

Click *Stop Manager*, then *Start Manager* to make your changes effective. This is best done after hours so as to not disrupt patron activity on CASSIE.

Optional Configuration: Blocking Patrons by Computer Group

You must perform the steps above (including the restart of the Manager) before proceeding with these steps.

You may allow or block patrons by computer group in your CASSIE System by following these steps.

Log in to CASSIE as the Super Administrator, and go to Setup / Configure Groups.

Select the desired group, and then check the box “Use group access / filter rules”.

Click *Setup...*

You may add rules to allow certain patron ages/types into the group in question.

Here is how the processing works:

- (1) Rules are processed in order, starting with the first rule.
- (2) All components of a given rule are logically ANDed together.
- (3) The first rule a patron meets allows them access to the computer group. All subsequent rules are ignored for that patron.
- (4) A patron failing all rules is not allowed access to the computer group.
- (5) When specifying multiple patron types, separate them with commas and **do not** use spaces.
- (6) A patron is treated as being their current age until the day of their next birthday. For example, a 17-year-old is still considered 17 on the day before her 18th birthday.
- (7) A patron with a blank birthdate in their ILS record will **fail** all age-based rules.

Several simple examples are given below.

Here is the rule for a group that allows only patrons ages 18 and over.

Group Access / Dynamic Filtering Setup

Define the access rules for this group. Parameters within a given rule must all be met for a match to occur. The first rule matched is applied. Users (except guests) not matching any rule are not allowed access.

Access Rule - Allow access to patrons who meet the following specifications:

Minimum age

Maximum age

Patron Type

Filter Spec

Specify permitted content filtering profile(s)

Guests (filtering profiles only; guests are always allowed access)

Access Rule List

Ages	Types
18 -	Patron Type=(Use Global)

Here is the rule for a group that allows only patrons with patron type “ADULT” or “RES”. Note that there is no space after the comma.

Group Access / Dynamic Filtering Setup

Define the access rules for this group. Parameters within a given rule must all be met for a match to occur. The first rule matched is applied. Users (except guests) not matching any rule are not allowed access.

Access Rule - Allow access to patrons who meet the following specifications:

Minimum age

Maximum age

Patron Type

Filter Spec

Specify permitted content filtering profile(s)

Guests (filtering profiles only; guests are always allowed access)

Access Rule List

Ages	Types
(All Ages)	Patron Type<contains ANY of>ADULT,RES

Please see the CASSIE Installation / Configuration / Staff Reference Manual for complete details on access rules. We also have a rich collection of Informational Video walkthroughs on this and other topics in the Support Area of our web site.