



Configuring PDS for Primo

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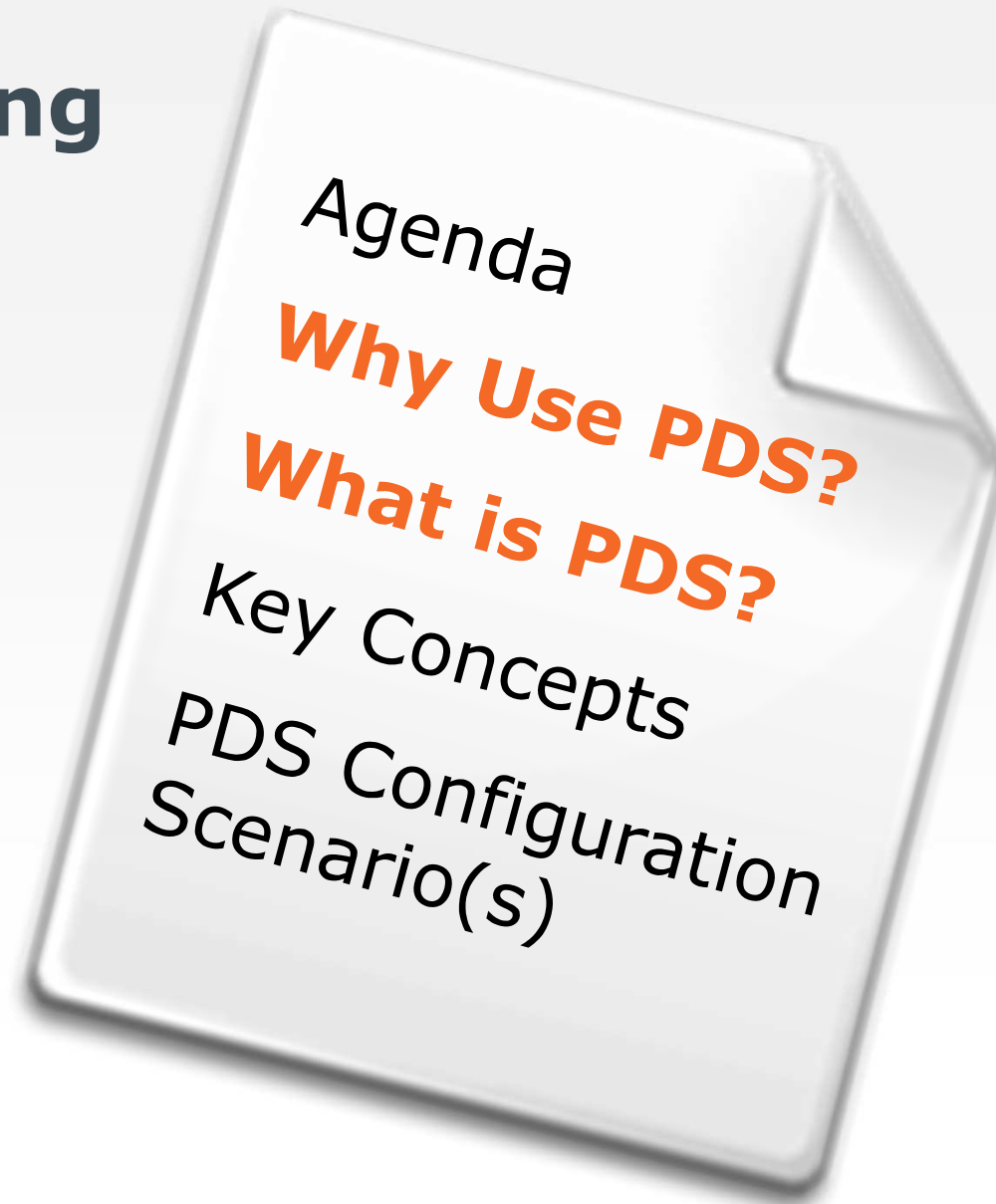
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Configuring PDS for Primo



Why Use PDS?

Resolves access issues for researchers

- “How do we allow access?”
- “How do we get patron information?”

Flexibility, Ease of use & support

- “Query PDS the same way we did before!”

Extendable

- “Does PDS work with our authentication source?”
- Support any application (yes, even non-ExL applications)

What is PDS?

PDS = Patron Directory Services

PDS developed to serve as single point of integration for external authentication systems (such as SSO systems) with Ex Libris Products

💡 Think of PDS as a **switchboard** or a **universal translator**

What is PDS?

PDS has 2 main functions:

- 1. Authentication**
- 2. Patron Info**

- 🧠 This is *the* most important distinction in PDS!
- 🧠 Authentication = requesting **Y/N**
[BOR_AUTH]
- 🧠 Patron Info = which **borrower attributes**
should PDS request/know/bring back
[BOR_INFO]

Configuring PDS for Primo

Agenda

Why Use PDS?

What is PDS?

Key Concepts

PDS Configuration
Scenario(s)

PDS: Key Concepts

- 1. Authentication vs. Patron Information**
2. Local vs. Remote
3. SSO vs. SSO vs. SA
4. Institute
5. Mapping

Key Concept: Auth vs Info

💡 Keep in mind the concept of PDS as a **switchboard** or a **universal translator**

PDS has 2 main functions:

- 1. Authentication**
- 2. Patron info**

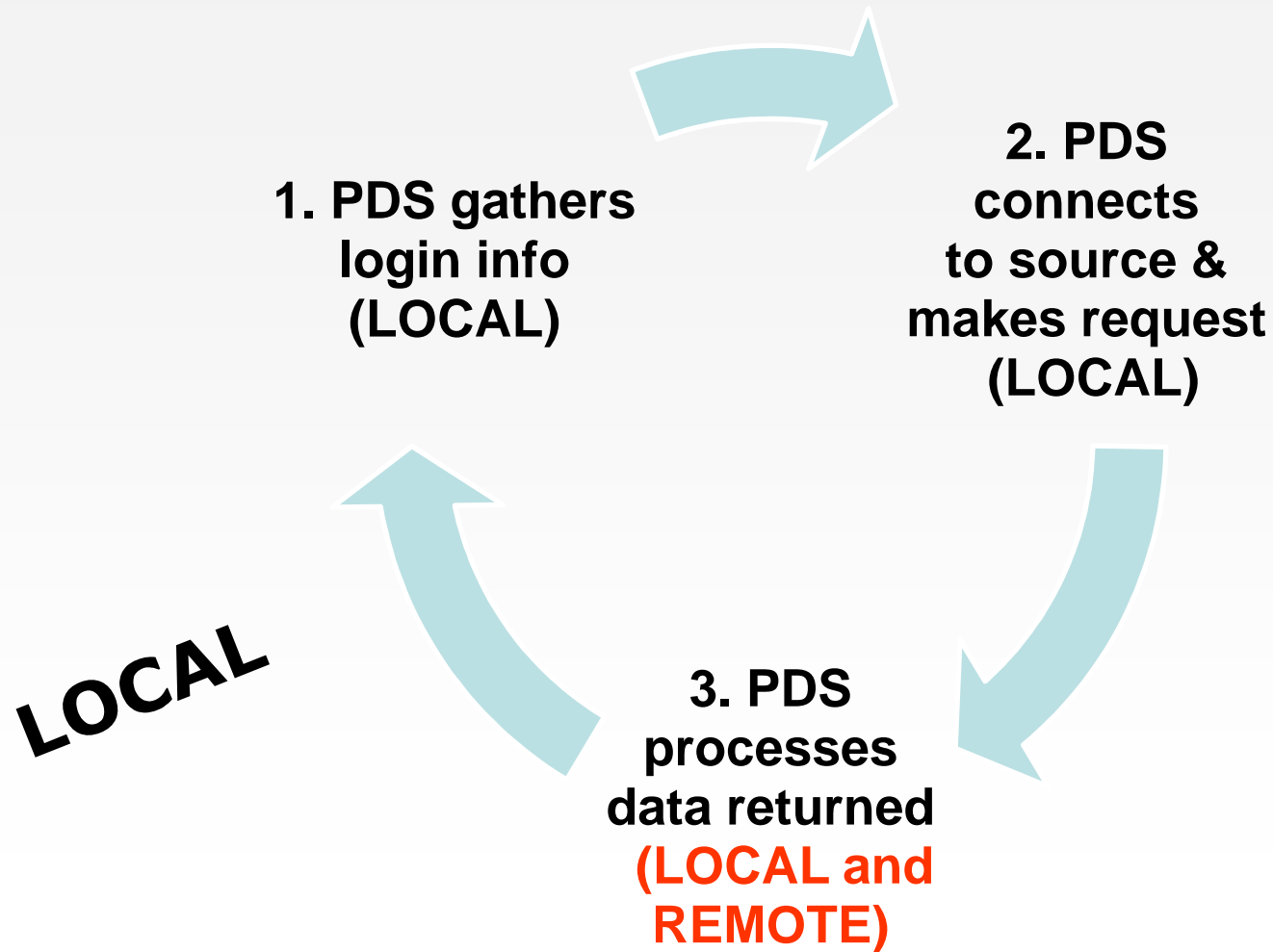
🔒 Authentication = requesting Y/N

💡 Patron Info = which **borrower details** should PDS know/bring back

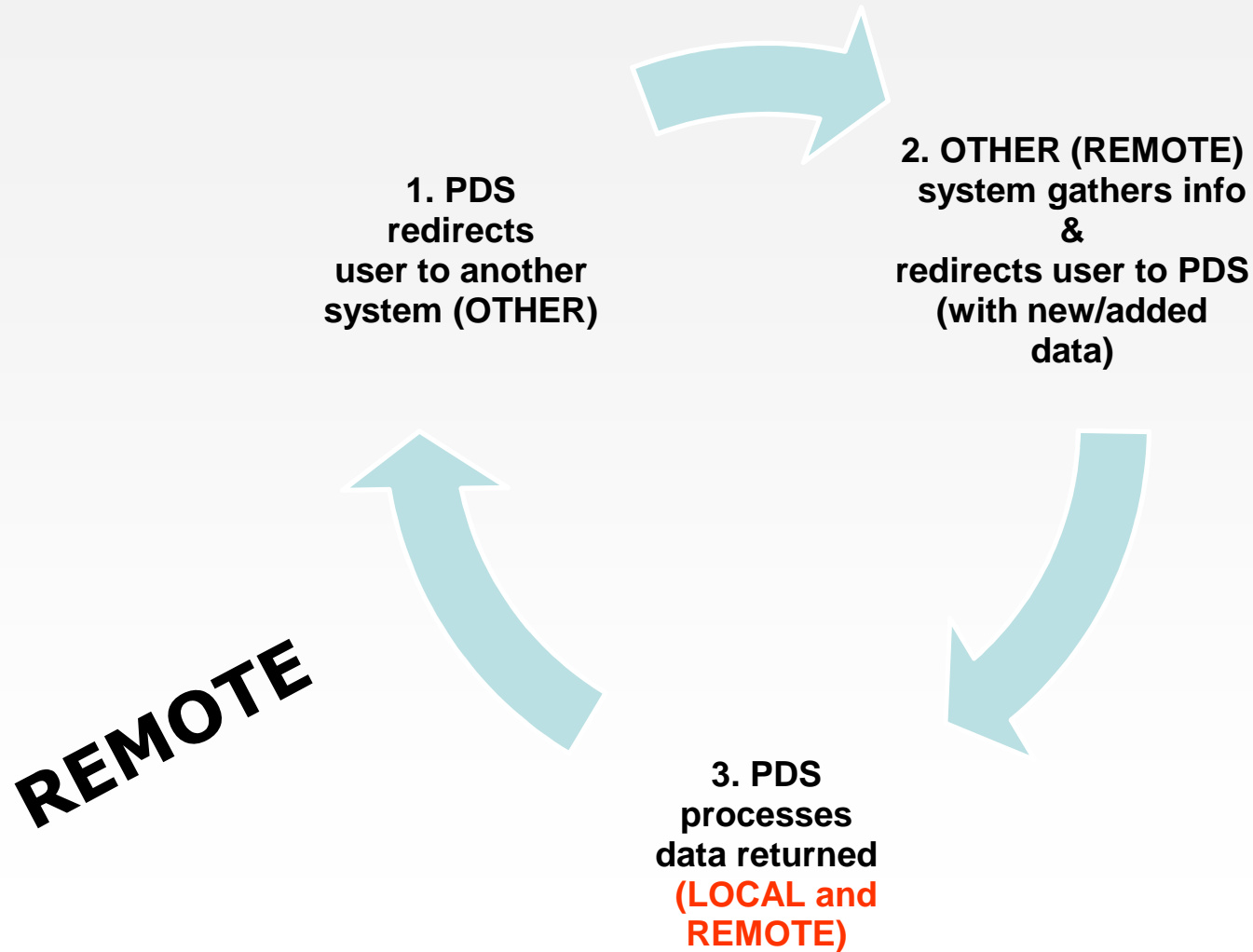
PDS: Key Concepts

1. Authentication vs. Patron Information
- 2. Local vs. Remote**
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Key Concept: Local vs. Remote



Key Concept: Local vs. Remote



PDS: Key Concepts

1. Authentication vs. Patron Information
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Key Concept: SSO vs SSO vs SA

Single Sign **On**

VS

Single Sign **Off**

VS

Shared Authentication

Key Concept: SSO vs SSO vs SA

Shared Authentication example:

- Primo/Metalib users authenticate via PDS using Voyager as the authentication & patron info source
- Library Patrons may still need to use same Voyager account to login to Voyager



PDS: Key Concepts

1. Authentication vs. Patron Information
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- 4. Institute**
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Key Concept: Institute

PDS has one main configuration file =

tab_service.institute

The tab_service file is organized by services:

1. [AUTHENTICATE]
2. [BOR_INFO] (aka Patron Info)

Plus

3. [INSTITUTE_DISPLAY]

Key Concept: Institute

List of main PDS services (per Institute):

- AUTHENTICATE – user authentication (Y/N)
- BOR_ID – get patron ID (used by PDS)
- BOR_INFO – get patron attributes
- LOAD_LOGIN – redirect user to remote login
- REMOTE_LOGIN – handles remote login response
- LOAD_SSO – redirect to Remote SSO System
- REMOTE_SSO – handles remote SSO callback
- BOR_VERIFICATION – provides application with user's credentials to pass on to EZProxy-SSO
- REMOTE_REDIRECT – redirects user after logout to specified page/URL

Key Concept: tab_service.Institute

```
[AUTHENTICATE]
program      = ldap.pl
params      = ldap_INSTITUTION.conf
program      = voyager.pl or aleph.pl
params      = ILS_PDS_BASE_URL:7044,auth
[END]
[BOR_INFO]
program      = voyager.pl or aleph.pl
params      = ILS_PDS_BASE_URL:7044,info
[END]
[INSTITUTE_DISPLAY]
code        = INSTITUTION CODE
lang        = ENG
desc        = LIBRARY NAME
voyager     = VOYAGER CLUSTER NAME
primo       = PRIMO INSTITUTION CODE
metalib     = METALIB INSTITUTION CODE
[END]
[BOR_ID_FROM_LDAP]
params = Y
[END]
```

PDS: Key Concepts

1. Authentication vs. Patron Information
2. Local vs. Remote
3. SSO vs. SSO vs. SA
4. Institute
- 5. Mapping**

PDS Key Concept: Mapping

Attributes Mapping is the default PDS workflow.

This default mapping is according to the attribute mapping table called **`./pds/program/conf/bor_info.tags`**

This file `bor_info.tags` should *not* be updated locally.

PDS Key Concept: Mapping

Attributes & Values Mapping

1) LDAP as BOR_INFO Source

Within **ldap_institute.conf** file, **[attributes mapping]** section can allow LDAP attributes to be mapped to BOR_INFO.tags attributes.

2) INSTITUTE.tags file

Within local tags file
(./pds/conf_table/INSTITUTE.tags), map (and combine BOR_INFO source data fields to confirm user group affiliation (in Primo and/or MetaLib, for example)

Key Concept: ldap_institute.conf

[GENERAL]

```
host_name = LDAP Server Name
port      = LDAP Port
init_bind_dn = cn=,ou=,dc=,dc=
init_bind_password = PASSWORD
search_base = ou=,dc=,dc=,dc=
search_filter = (uid=USERNAME)
secure_ldap = Y
```

[END]

[XML_SETTING]

```
xml_root_node = bor_authentication
```

[END]

[ATTRIBUTES_MAPPING]

```
uid = user_name
mail = email_address
libraryID = voyager_ldap_pass
sn = voyager_ldap_id
displayName = name
```

[END]

PDS Key Concept: Mapping

INSTITUTE.tags Aleph User Group Mapping Example

```
[attributes+values mapping]
```

```
z305-bor-status,01 = group,UNIV
```

```
z305-bor-status,01 = academic-status,Undergraduate
```

```
z305-bor-status,02 = group,UNIV
```

```
z305-bor-status,02 = academic-status,Advanced_Studies
```

```
z305-bor-status,03 = group,UNIV
```

```
z305-bor-status,03 = academic-status,Graduate
```

INSTITUTE.tags Defaults Example: expiry-date

```
[defaults]
```

```
expiry-date,today +1y+6m
```

Format is as follows: expiry-date,today +Xy +Xm +Xd

(where X is any number and y signifies years, m signifies months and d signifies days). For more info, check documentation, as well as SKB # 7068:

How can a user's expiry date be set dynamically?

Configuring PDS for Primo

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What is PDS?

Why Use PDS?

Key Concepts

**PDS Configuration
Scenario(s)**

PDS for Primo: Scenario 1 of 3

LDAP/Active Directory for Primo & MetaLib
in institution = MARC

1. Gather info regarding LDAP connection
 - Primo Integration with LDAP / Active Directory Worksheet
2. Update ldap_marc.conf with above info
3. Update tab_service.marc with ldap.pl services
4. Stop/start PDS Apache
5. Test with known working LDAP user account

PDS for Primo: Scenario 2 of 3

Primo to Aleph Patron Database

1. Confirm WWW-X user exists with correct permissions
2. Update tab_service.marc

```
[AUTHENTICATE]
```

```
program      = aleph.pl
```

```
params       = aleph20.marc.edu,8991,BOR_AUTH,MRC50,N,WWW-  
X,34%62ft9h&s
```

```
[END]
```

```
[BOR_INFO]
```

```
program      = aleph.pl
```

```
params       = aleph20.marc.edu,8991,BOR_INFO,MRC50,N,WWW-  
X,34%62ft9h&s
```

```
[END]
```

3. Test with known working user

PDS for Primo: Scenario 3 of 3

Switch Master PDS from Primo to Aleph

1. Activate & test all authentication services on Aleph server
 - May require making Aleph PDS Aware (tab100)
2. Test/confirm all ports open
3. Modify Primo environment to use Aleph PDS
 - Back Office > Advanced > Installation > **PDS_URL**
 - Save, deploy & stop/start Primo PDS Apache
4. Test Primo login (resolve to Aleph PDS login?)
5. Repeat with MetaLib

PDS for Primo: Scenario 3 of 3

Remote Login / Load Login

1. Update tab_service.marc [institution_code]
2. Create load-login-marc
 - Location = pdsroot/html_form/global
 - Contains address of remote authentication system, plus parameters required

Example:

```
var url = "http://www.bu.edu/htbin/library/primo-login.pl?" +  
         "pds_handle=$0100&" +  
         "calling_system=$0200&" +  
         "institute=$0300&" +  
         "url=$0400";
```

```
top.location = url;
```

```
}
```

PDS for Primo: Scenario 3 of 3

Example tab_service.marc for Remote Login

!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!-!!

[LOAD_LOGIN]

program = remote_load_login.pl

params = load-login-marc

[END]

[REMOTE_LOGIN]

program = remote_login_gen_marc.pl

[END]

[BOR_INFO]

program = z312.pl

[END]

[INSTITUTE_DISPLAY]

code = MARC

lang = ENG

desc = Boston University

[END]

PDS for Primo: Scenario 3 of 3

More info using example = load-login-marc

- Location = pdsroot/html_form/global
- Contains address of remote authentication system, plus required parameters
- Example snippet:

```
{  
var url = "http://www.marc.edu/htbin/library/primo-login.pl?"  
+  
        "pds_handle=$0100&" +  
        "calling_system=$0200&" +  
        "institute=$0300&" +  
        "url=$0400";  
  
    top.location = url;  
}
```


Tips on Configuring PDS

- 1) If a patron successfully authenticates, lower services not called. Thus, place new services at bottom of list
- 2) When all BOR_AUTH & BOR_INFO services have been successfully tested, list the sources in order of most-to-least used
- 3) Use `./pds/program/pds_check.pl` as another testing tool

Tips on Configuring PDS

- 4) Connection to LDAP allowed? Initial troubleshooting focus on firewall/security
- Ask LDAP administrator to prove PDS connections visible within the LDAP server/Apache logs
 - Error = Cannot instantiate logged?

SKB Item Number 16384-6802: (Does PDS connection have READ access to all LDAP user record data fields?)

For more information

Relevant Ex Libris Documentation (check for latest versions):

Cross Product

Patron Directory Services Guide

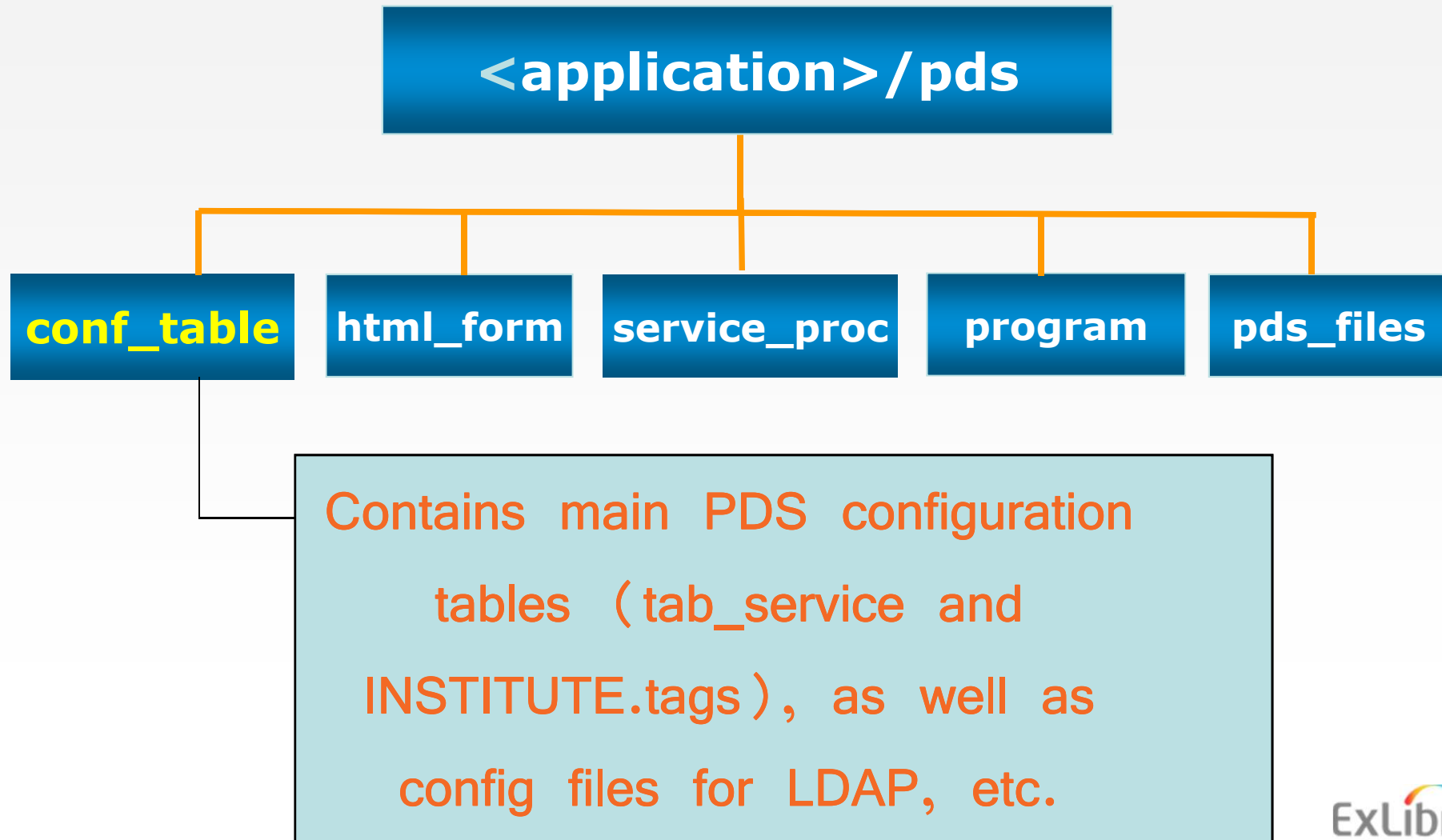
Primo Documents

Interoperability Guide

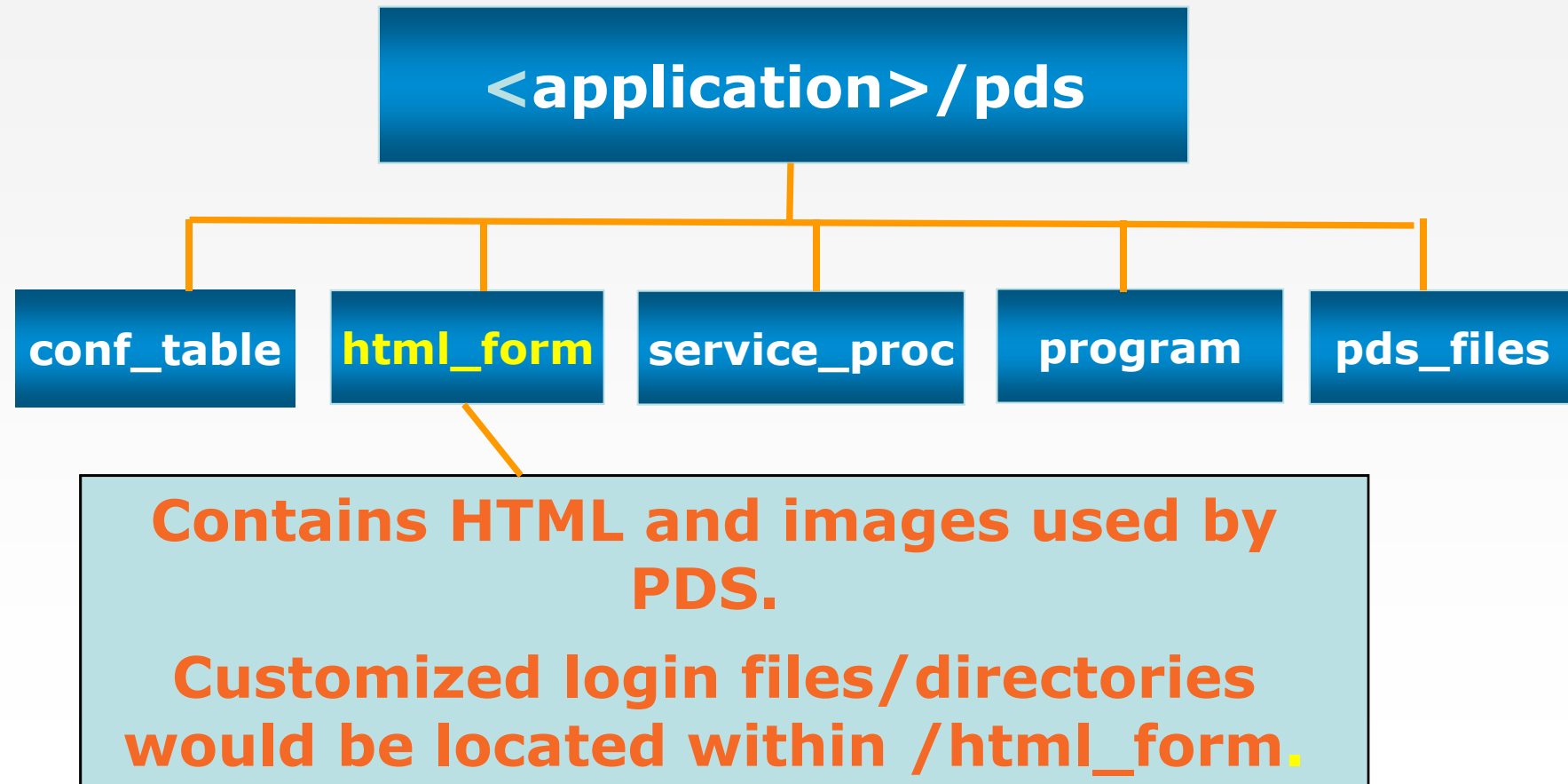
Primo Back Office Guide

Primo System Administration Guide

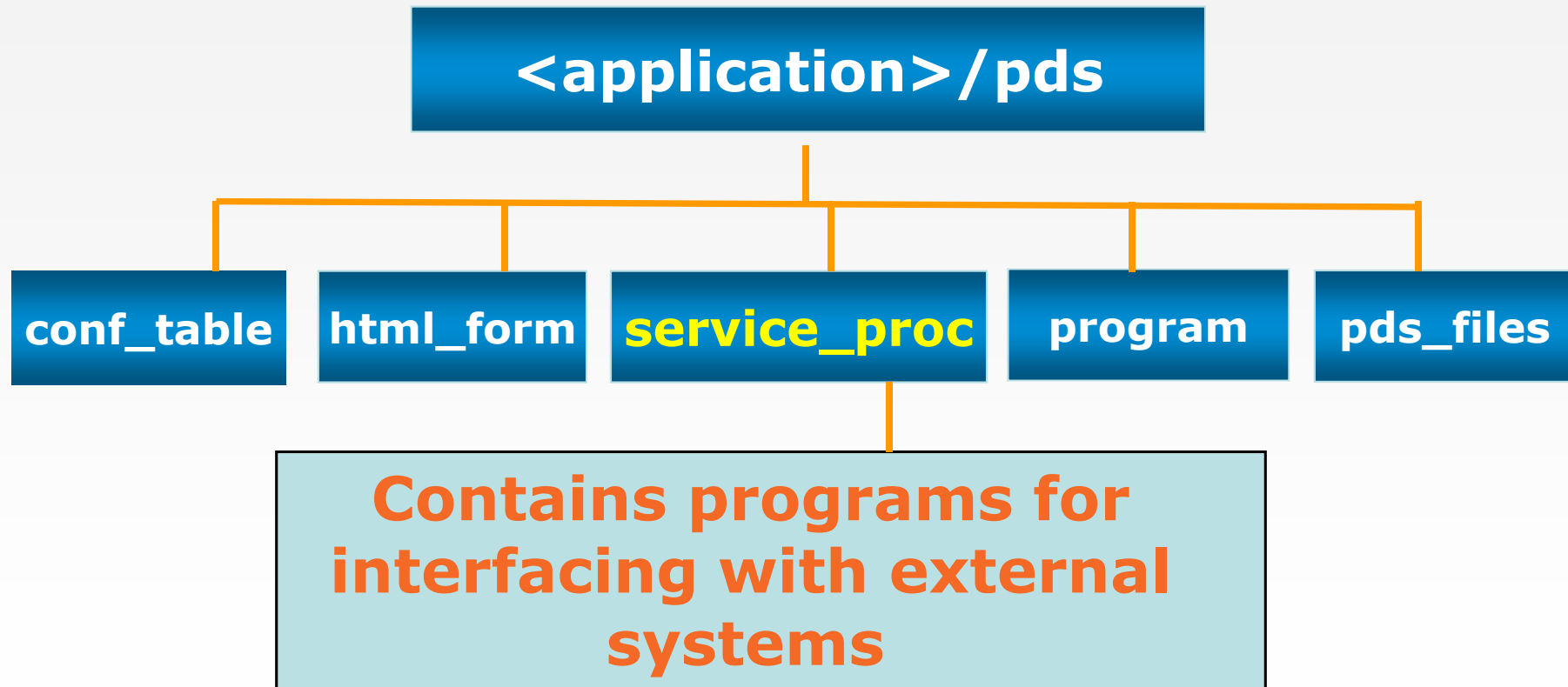
PDS Directory Tree



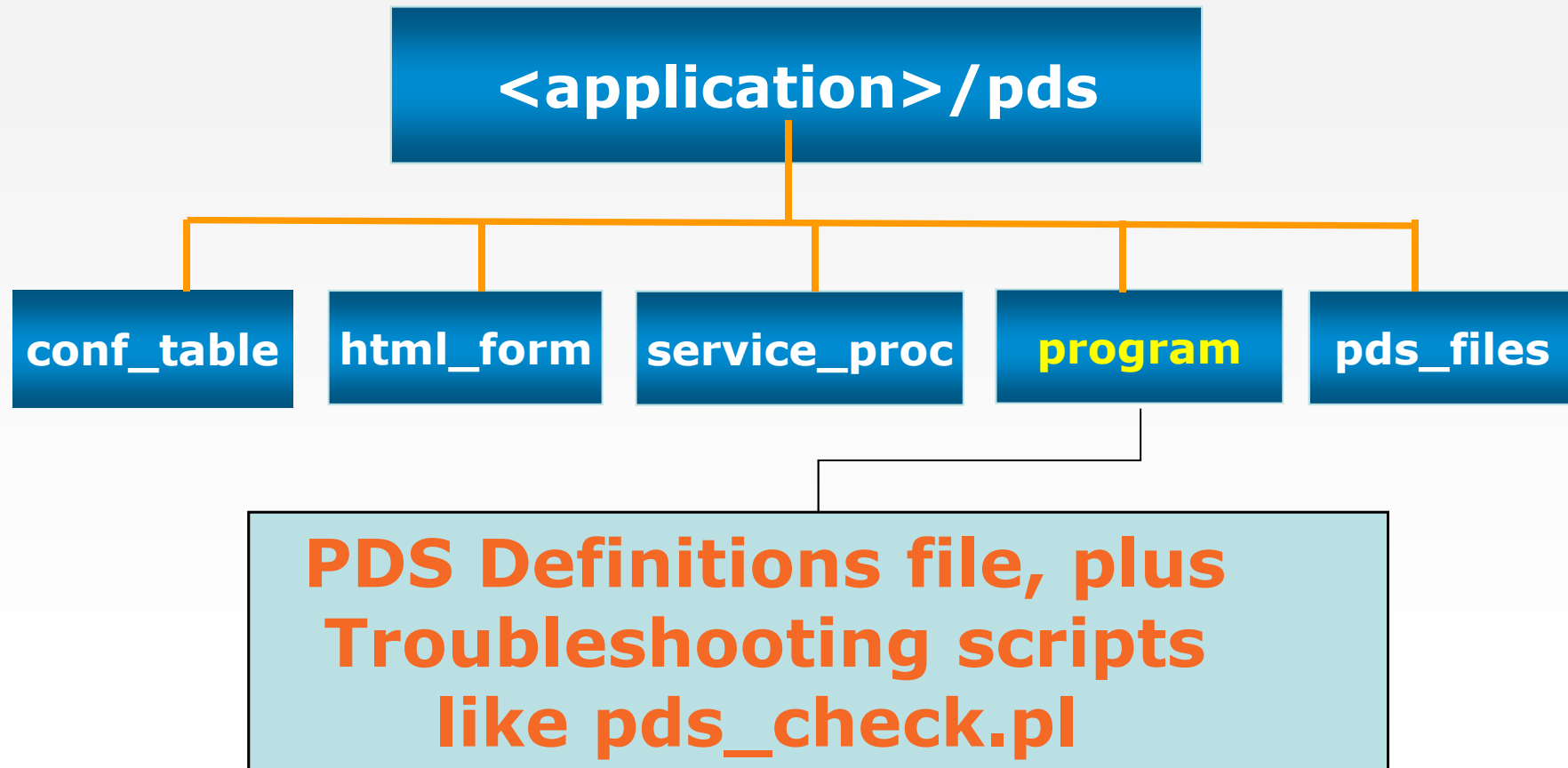
PDS Directory Tree



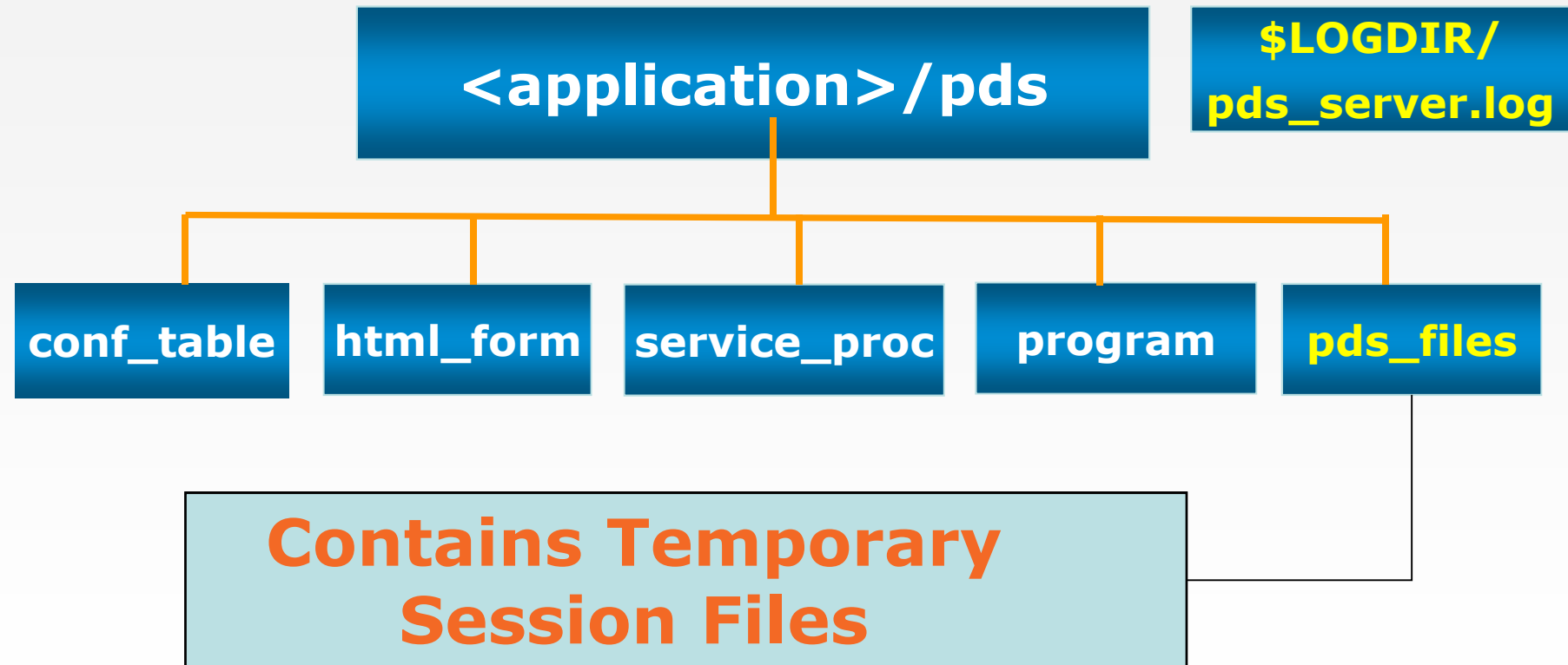
PDS Directory Tree



PDS Directory Tree



PDS Directory Tree



Resources

Primo Technical Guide

- Chapter 11
- Appendix C

Testing & Troubleshooting Assistance

[Primo Home](#) > [Primo Utilities](#) > **System Tests & Monitor**

- **DEDUP test utility**
- **FRBR test utility**

Resources

Documentation

- 1. Patron Directory Services Guide**
- 2. Patron Directory Services Upgrade Guide**

Testing & Troubleshooting Assistance

Back Office @ Ongoing Config Wizards

1. PDS Configuration Wizard

Server Side @ pdsroot/program

2. Script: pds_check.pl
3. Script: ldap_check.pl

Thank You!

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