

Implementing no-PDS Authentication

Nathan Mealey, Portland State
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PDS vs. no-PDS

- **P**atron **D**irectory **S**ervices - separate layer from Primo that handles patron authentication
- no-PDS removes this supplemental layer, and Primo handles authentication itself

What method does no-PDS support?

- Shibboleth (SAML)
- LDAP
- Alma
- CAS is planned for May 2017 implementation

Key no-PDS features

- Parallel authentication profiles
 - Patrons can choose one of two authentication options
- Cascading authentication profiles
 - Only works for Alma and LDAP methods
- Silent login (demo), i.e. auto-login

Why implement no-PDS?

- Resolves known issue with quoted searches (the dreaded white screen)
- Gives you local control over sign-in page and configuration of your sign-in options
- Removes a point of failure
- Integrates well with the new Primo UI

Implementation steps

Note that authentication setup affects all views for the instance (production vs. sandbox).

1. Confirm whether you need multiple profiles or just one
 - a. Do you need to authenticate both campus and community patrons?
2. Create a new profile
 - a. Config wizards > User authentication wizard
3. Select the authentication method
 - a. Alma is very simple and may be good for just getting the ball rolling
4. Set configuration for the new profile and save

Implementation steps (2)

5. Set which profile is the main and which is secondary
6. Save settings
7. Deploy authentication
8. Change PDS setting in Alma
 - a. General Configuration > General Configuration > Other Settings
 - b. Primo_pds_url: http://alliance-primo.hosted.exlibrisgroup.com/primo_library/libweb/webservices/rest/PDSUserInfo? (for implementing no-PDS on production)
 - c. Primo_pds_test_url: http://alliance-primo-sb.hosted.exlibrisgroup.com/primo_library/libweb/webservices/rest/PDSUserInfo? (for implementing no-PDS on sandbox)

Implementation steps (3)

9. Change labels for authentication options
 - a. Advanced > Code tables > Front end > User login
 - i. Default.parallel.login.link1
 - ii. Default.parallel.login.link2

Implementation steps (4)

10. 10. Other labels to update
 - a. Advanced > Code tables > Front end > User login
 - i. Default.login.dual.title
 - ii. Default.login.title (if not using two auth methods)
 - iii. Default.login.error.message
 - iv. Default.login.login (text for login submit button)
 - v. Default.login.cancel (text for login cancel button)
 - vi. Default.login.userid (label used for Alma username field)
 - vii. Default.login.password (label used for Alma password field)

Implementing Shibboleth/SAML

IDP_LOGIN_URL	<input type="text" value="https://sso.pdx.edu/idp/profile/SAML2/Redirect/SSO"/>
IDP_ISSUER	<input type="text" value="https://sso.pdx.edu/idp/shibboleth"/>
USER_ID_ATTR_NAME	<input type="text" value="uid"/>
IDP_LOGOUT_URL	<input type="text" value="https://sso.pdx.edu/idp/profile/Logout"/>
SILENT_LOGIN_ENABLE	<input type="text" value="True"/>
EMAIL_OVERRIDE	<input type="text" value="False"/>
AUTH_BASE_URL	<input type="text"/>
Certificate File: ⓘ	<input type="button" value="Choose File"/>

Select User Information Method:

USER_INFO_URL	<input type="text" value="http://na01.alma.exlibrisgroup.com"/>
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Implementing Shibboleth/SAML (2)

1. Update settings
 - a. Note about `auth_base_url` setting
2. Upload certificate file for your Shib server (steps at end of slides)
3. Download metadata
4. Upload metadata to your Shib server (IdP)
 - a. Note about Incommon participation
5. Test!

Steps for downloading shib cert

1. Navigate to the sign-in page for your shib server.
2. Click the padlock icon in the FF url bar.
3. Click the right-hand arrow to get into the details.
4. Click More Information
5. Click View Certificate
6. Click the Details tab
7. Click the Export... button
8. Save the .pem file to your local drive.
9. When you open it up, it should be a LONG string of characters and numbers starting with -----BEGIN CERTIFICATE----- and ending with -----END CERTIFICATE----- . For instance, mine was 48 lines in total.