

Implementing no-PDS Authentication

Version 2/24/2017

Resources

- [Ex Libris' documentation for setting up no-PDS authentication](#)
- [Slides from Alliance Summer Meeting no-PDS session](#)

Authentication methods supported

- SAML (Shibboleth)
- LDAP
- Alma
- CAS

no-PDS vs. PDS

- **Patron Directory Services** - separate layer from Primo that handles patron authentication
- no-PDS removes this supplemental layer, and Primo handles authentication itself

Benefits of implementing no-PDS

- no-PDS resolves a known issue with quoted searches (the dreaded white screen), where users who sign-in after conducting a quoted search will be left at a blank white screen
- Gives you local control over design of the sign-in page, the labels for sign-in options, and configuration of your sign-in options
- Removes an unneeded point of failure
- Integrates well with the new Primo UI

Known issues (updated 10/6/2016)

Implementation steps

- [ExL's documentation](#) is pretty thorough for setting this up, and it's recommended to follow those, in conjunction with the supplemental implementation notes below.

Supplemental implementation notes

- When you first begin work on setting up no-PDS using SAML CAS, or LDAP, it's recommended to let your campus IT staff know so that they are prepared to help you with any questions along the way.
- You should use Alma as the user information method for all authentication profiles that you set up.
- When setting up SAML, you'll need to upload your IdP's security certificate to the PBO. Steps to download this certificate can be found below.
- If you are using SAML, CAS, or LDAP authentication for Alma, you can find all of the settings that you'll need for setting up no-PDS there. That being said, it is still recommended to take a screenshot of the no-PDS SAML, CAS, or LDAP setup screen,

share that with your campus IT staff, and ask them for the appropriate values. The ExL documentation also includes info explaining the various settings for each authentication method.

- SAML settings [explanations](#)
- CAS settings [explanations](#)
- LDAP settings [explanations](#)
- Ex Libris does not currently share metadata via Incommon and does not make their metadata available via a URL. So institutions will need to upload the Primo metadata XML file to their IdP in order for SAML authentication to work.
- If SILENT_LOGIN_ENABLE is set to “True” (for SAML), then a user who has already signed-in to SAML with another service in the same browser will be automatically signed-in to Primo.
- Don’t forget to change the primo_pds_url (for implementation on production) and primo_test_pds_url (for implementation on sandbox) settings in Alma when implementing no-PDS. This ensures that Primo and Alma can talk to each other correctly!

Known issues

- If you use a custom URL for Primo and set up your SAML authentication with this in the auth_base_url setting, then patrons **must** begin the sign-in process from your custom URL. If they begin from the out-of-the-box Primo URL (alliance-primo.hosted.exlibrisgroup.com/primo-explore/search?vid=[inst_code]), then authentication will not work and they will be caught in an infinite loop. This is because your SAML configuration is only expecting them to have initiated the sign-in process at your custom URL, and so ignores that they’ve signed-in successfully if they come from the out-of-the-box URL.
 - ***This is planned for a fix in the May 2017 release.***
- Silent login: users following an openurl from outside Primo, and who have not previously signed in, are being prompted for authentication before seeing results in Primo. This is highly problematic, particularly for in-building users, and has caused us to turn off this feature. PSU (240258) and UW (343141) have cases about this.
 - ***Resolution scheduled for May 2017 Release***
- LDAP anonymous authentication: no-PDS is allowing users to submit anonymous authentication requests, and may be overriding institutions' LDAP settings that do not allow anonymous authentication (this last part is not confirmed). COCC has a case about this (330079).
 - ***Resolution scheduled for Q2 2017, and ExL has shared a workaround for libraries to use in the meantime.***
- Most institutions find that the getit tabs do not display fulfillment options after no-PDS is setup. Ex Libris recommends this [KB article](#), though in many cases institutions need to work with ExL Support for this to be resolved.

Changing labels for no-PDS authentication

- Advanced > Code tables > Front end > User login
 - Default.parallel.login.link1 (text for main profile label in Primo)
 - Default.parallel.login.link2 (text for secondary profile label in Primo)
 - Default.login.dual.title (title text used if not using two authentication methods)
 - Default.login.title (if not using two authentication methods)
 - Default.login.error.message
 - Default.login.login (text for login submit button, used for LDAP and Alma)
 - Default.login.cancel (text for login cancel button, used for LDAP and Alma)
 - Default.login.userid (label used for username field, used for LDAP and Alma)
 - Default.login.password (label used for password field, used for LDAP and Alma)

Steps to download IdP security certificate

1. Open Firefox
2. Navigate to the sign-in page for your shib server.
3. Click the padlock icon in the FF url bar.
4. Click the right-hand arrow to get into the details.
5. Click More Information
6. Click View Certificate
7. Click the Details tab
8. Click the Export... button
9. Save the .pem file to your local drive.
10. 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, PSU's was 48 lines in total.