

LDAP: What Is It, Do I Want it, *and* How Do I Make It Work for Me?

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Overview

- LDAP: more than random letters?
- Determining if you have LDAP
- Advantages/disadvantages
- Making ILLiad play nice
- Working out the kinks



But First...

- Show of hands:
- How many of you already use LDAP?
- ILLiad Authentication?
- Something else?
- Not sure?
- Want to set up LDAP?

Disclaimer:



I am not a trained IT Person
(The upside is I can spare you the jargon)

My knowledge comes solely from the
ILLiad side of the equation

As far as I'm concerned, the backend is
wizard magic!

LDAP...?

- Stands for **L**ightweight **D**irectory **A**ccess **P**rotocol
- Standardized way of storing user permissions and directory information
- Installed on a centralized server
- Works in the background to authenticate sign-in for various services

Do we have that?

- Do you or your users use the same username/password for multiple services like:
 - EZ-Proxy (or other off-site database access)
 - Email
 - Library accounts
 - Course Management Platforms



From the Documentation...

- ⦿ According to the Atlas Documentation there are actually five methods of authentication:
 - Basic ILLiad
 - Default setup
 - ILLiad Exclusive
 - Users are pre-populated/approved, users can't self-register and staff can't add them
 - LDAP
 - Has to exist at institution
 - User Gateway
 - Really complicated
 - III Patron API
 - Only if you use Innopac and have the module

Default Setting

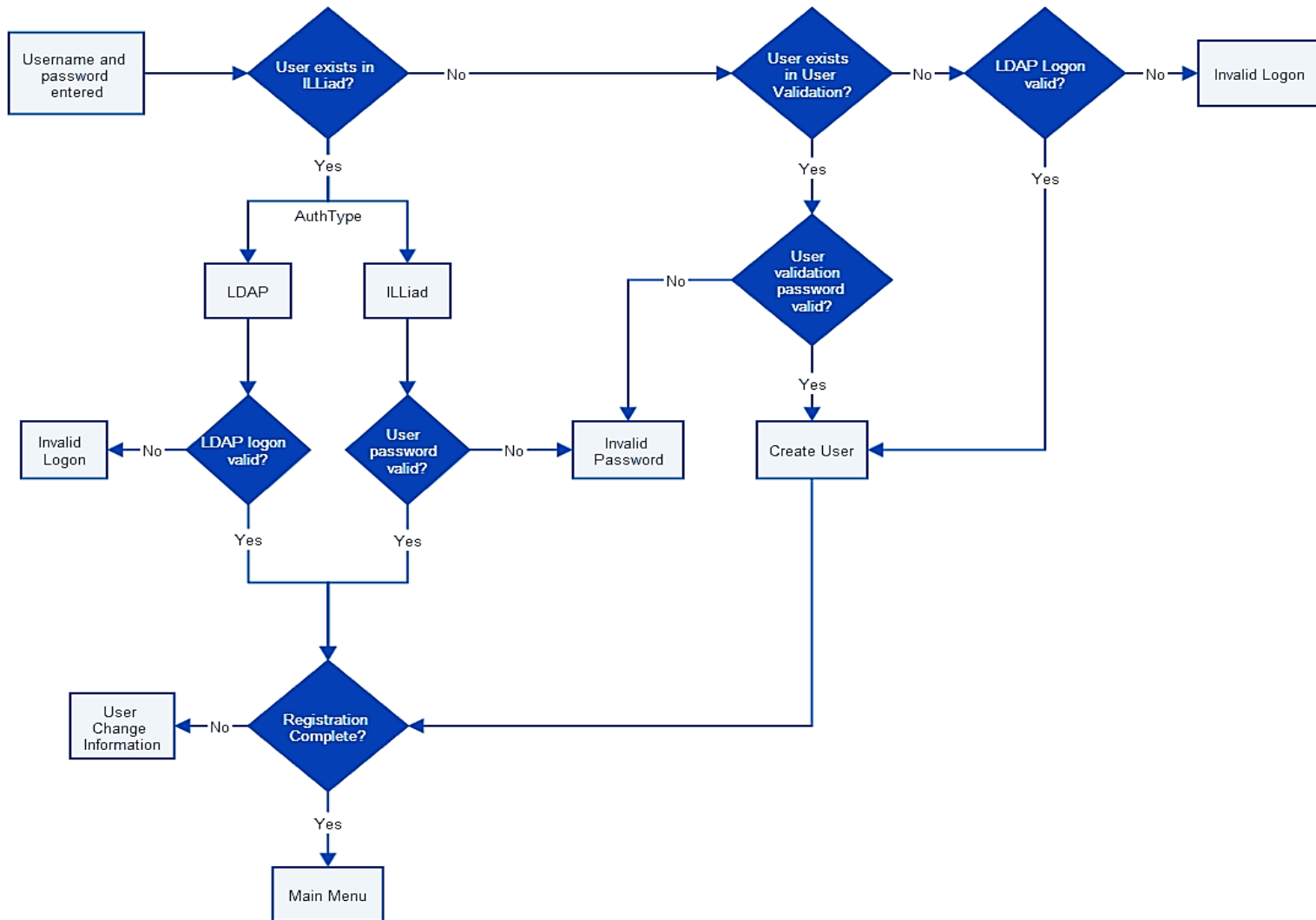
- By default ILLiad uses “ILLiad Authentication”
 - Username/password stored in the ILLiad user database
- When a new user approaches the system they need to click a “new user” link and go to the New User Registration form
- After they fill the form they get placed in the Clear Users queue in ILLiad

With LDAP

- Everyone (new and existing users) use the same logon box
 - If the LDAP username has no match in the ILLiad database, the user is brought to NewAuthRegistration to fill out a registration form
 - If the LDAP username matches a name in the ILLiad database, they are taken to the Main Menu
- ILLiad database does not contain LDAP passwords.
 - Passwords are used only to match on the LDAP authentication
 - Password resets cannot be done by ILL Staff

Lovely Atlas Flowchart:

LDAP Authentication



Making the Decision



- If you have the buy-in from IT and have an LDAP Server at your institution considerations include:
 - Time spent clearing users
 - Handling existing vs. new users
 - Is it feasible to make a correlation table?
 - Will the reference/instruction folks support the changes?
 - Are you hosted?
 - If you're self-hosted you may have way more to grapple with

The Good



- One fewer username/password to remember for your users
 - At Maritime our users now have the same login for ILLiad that they have for campus wifi, desktop workstations, their email, off-campus database access, and Angel
- No more clearing users manually
 - LDAP authenticates only if they're active

The Bad

- Need to get buy-in from the keeper of the LDAP (likely IT)
 - They may need to help with configuration and testing
 - There may be firewall or security issues
- If the LDAP Server is down, no one can sign into your ILLiad page
- If you already have users you *may* have a mess on your hands...



The (possibly very) Ugly



- If you already have users in your ILLiad system you have three options:
 1. Grandfather in existing users with their ILLiad usernames/passwords, make new users use LDAP.
 2. Start everyone over with LDAP, creating new accounts for existing users.
 3. Make a correlation table of existing usernames and their corresponding LDAP names. Have OCLC do some magic.

Option 1: Grandfathering

- Keeps the existing accounts in the system as-is
 - Existing users will continue to log in as they have in the past (ILLiad authentication)
 - Only users that create accounts after LDAP implementation will go through LDAP
- Can cause many headaches for Reference/Instruction folks
 - Users might not know which camp they're in

Option 2: Burn and Rebuild

- All users to use LDAP log-in
- Everyone has the same log-in process
- Existing users also have to reregister
- Existing users lose account history
 - Which can be disastrous if they refer back to their old requests for citations



Option 3: Down and Dirty

- “You’re probably not going to want to do this but...”
- Create a table of existing usernames and their LDAP equivalents
 - Can be super involved if usernames are not predictable or obvious
- If you’re hosted, OCLC will merge the LDAP usernames and existing user data
- End result is that everyone uses LDAP and existing users remain in the system with their history

	A	B
1	ILiad Username	LDAP Username
2	abdullahkoc.09	abdullahkoc.09
3	Acolleran	acolleran
4	AlexanderSha	AlexanderSha.12
5	AlexCarela	alexandracar.08
6	alexcar.11	Alexcar.11
7	alexvug.11@sunymaritime.edu	alexvug.11

Down and Dirty Cleanup



- Maritime chose option #3
- Ran a report of all registered users (we only had about 240)
- Added a column for LDAP name
- In some cases a single user had more than one account so they had to be merged
- Made sure everyone had the right delivery and notification preferences set
 - Users who created accounts before those were hidden default fields sometimes skipped them or put weird preferences

Correlating Names:

If their username already followed one of our LDAP patterns, I copied it to the LDAP name column



```
graph TD; A[If their username already followed one of our LDAP patterns, I copied it to the LDAP name column] --> B[If they used their campus email, I copied that, trimming off the @sunymaritime.edu suffix]; B --> C[If they were faculty or staff I used the first initial + last name LDAP pattern]; C --> D[If they were a student I looked them up in the campus directory (because our pattern includes their year of entry)]; D --> E[If they weren't in the campus directory I flagged them (9 users) because they're presumably no longer valid];
```

If they used their campus email, I copied that, trimming off the @sunymaritime.edu suffix

If they were faculty or staff I used the first initial + last name LDAP pattern

If they were a student I looked them up in the campus directory (because our pattern includes their year of entry)

If they weren't in the campus directory I flagged them (9 users) because they're presumably no longer valid

The Easy Part

- Once LDAP was enabled for ILLiad we made some tweaks to the log-in page
 - (for about 10 days we had a Grandfather solution)
 - 6 requests in that entire time
 - We did the whole process in early January when everything was quiet
- OCLC support ran a bunch of scripts and did testing to make sure things were right

IT and the Fun Stuff

- There are several keys in Customization Manager that deal with LDAP
- You will almost definitely need someone from IT to assist
- If you're lucky they'll just give you the information you need
 - (If you're me you have two guys come and bumble for a bit before getting it right)

By the way...

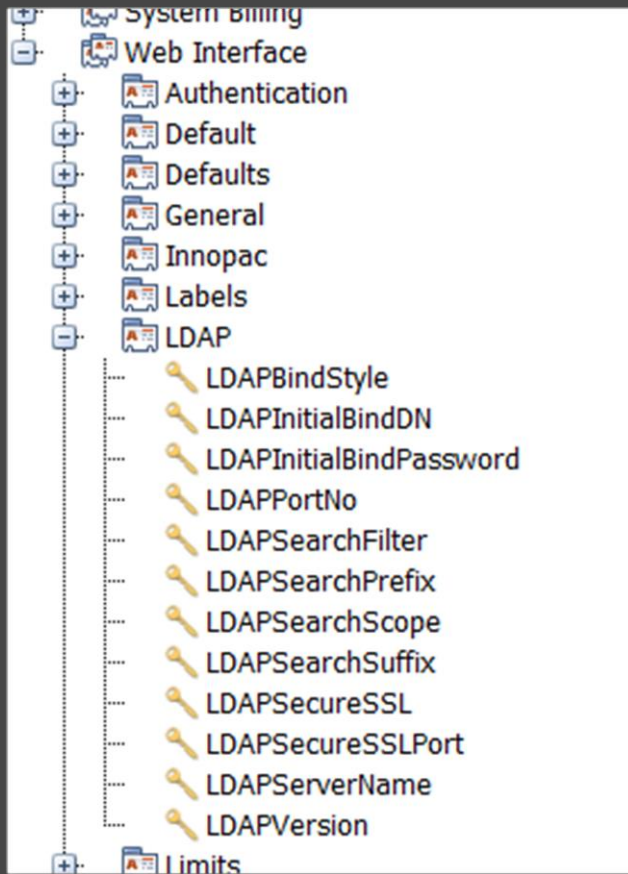
- ⦿ There are two styles of LDAP, one-step and two-step
 - Two-step is more secure (but whatever your institution uses is what you'll use here)
- ⦿ They require different keys in Customization Manager
- ⦿ Set type in LDAPBindStyle
 - OneStep or TwoStep

About Setup

- Your local friendly IT person *should* be able to provide the information
 - The required information appears to be similar from platform to platform
- They may need to open the firewall to allow communication between ILLiad and the LDAP server



Your Keys



- All the keys you need are located under Web Interface → LDAP in Customization Manager



Info You'll Need:

- LDAPPortNo
- LDAPSearchPrefix
- LDAPSearchSuffix
- LDAPServerName
- LDAPVersion
- LDAPInitialBindDN
- LDAPInitialBindPassword
- LDAPSearchFilter
- LDAPSearchScope
- LDAPSearchSuffix
- LDAPSecureSSL
- LDAPSecureSSLPort
- LDAPServerName
- LDAPVersion

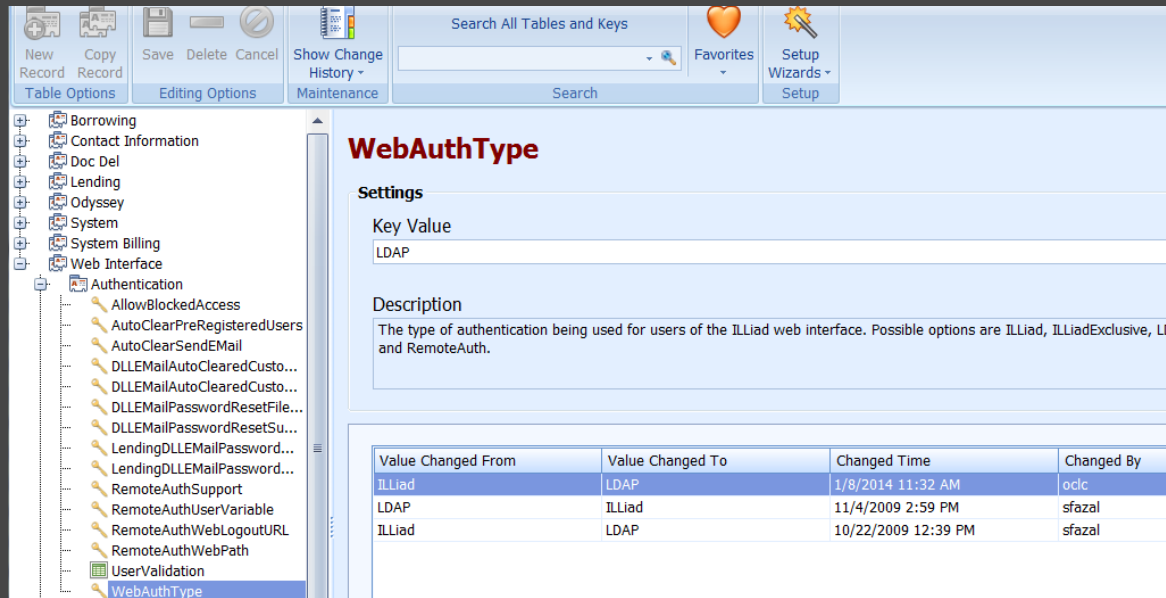
One-step LDAP

Two-step LDAP

What Do I Put For...?

- I can show you what we have, but...
- Every setup is going to be different
- Variables include how many directories you have, OneStep vs. TwoStep
- The keeper of your server should know what works with your LDAP

Super Important!



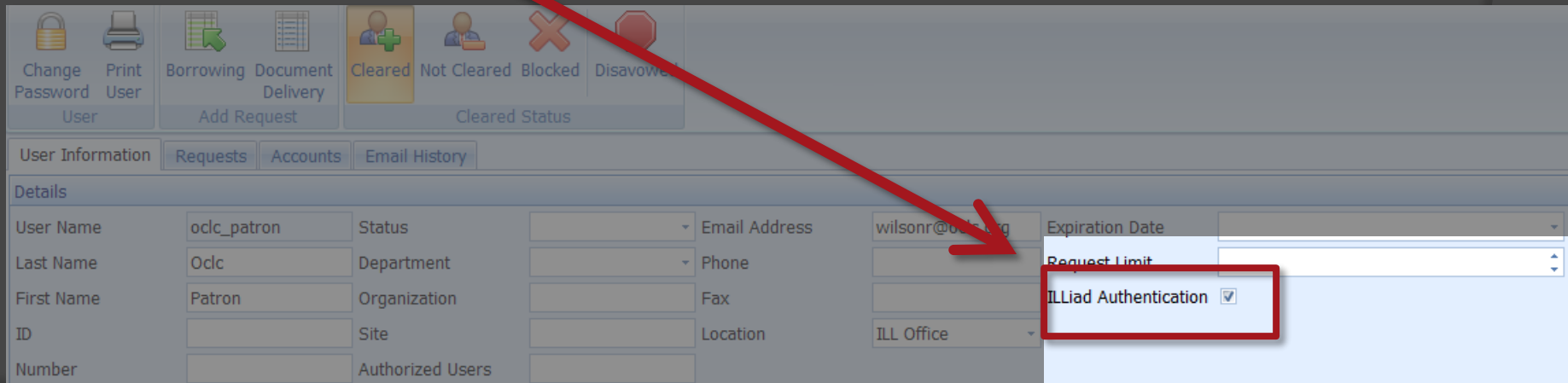
The screenshot shows the Customization Manager interface. The left sidebar lists various categories, with 'Authentication' expanded to show 'WebAuthType' selected. The main pane displays the 'WebAuthType' settings, including a 'Key Value' field set to 'LDAP' and a 'Description' field. Below the settings is a table showing the history of changes to the 'WebAuthType' key.

Value Changed From	Value Changed To	Changed Time	Changed By
ILLiad	LDAP	1/8/2014 11:32 AM	oclc
LDAP	ILLiad	11/4/2009 2:59 PM	sfazal
ILLiad	LDAP	10/22/2009 12:39 PM	sfazal

- For ILLiad to know which type of authentication you're using by default you need to set the key in Customization Manager
- Web Interface → Authentication → WebAuthType

Also Good to Know

- Even if you have LDAP Authentication as default, you can still have users that use ILLiad Authentication
 - “ILLiad Authentication” box ***MUST*** be checked off for them to log in to their account



The screenshot shows a user profile page with the following details:

User Information							
Details							
User Name	oclc_patron	Status		Email Address	wilson@oclc.org	Expiration Date	
Last Name	Oclc	Department		Phone		Request Limit	
First Name	Patron	Organization		Fax		ILLiad Authentication	<input checked="" type="checkbox"/>
ID		Site		Location	ILL Office		
Number		Authorized Users					

Coexistence

- It's complicated, but LDAP and ILLiad authentication can co-exist, even for new users
 - Nassau Community College has students use LDAP and Faculty/Staff use ILLiad authentication
 - Page has to have both sets of instructions
 - (And sometimes students don't follow them and try to create accounts manually)

The screenshot shows the top header of the Nassau Community College website. On the left is the NCC logo with the text 'NASSAU COMMUNITY COLLEGE LIBRARY'. On the right, it says 'NASSAU COMMUNITY COLLEGE A. HOLLY PATTERSON LIBRARY' with contact information: '(516) 572 - 7401 ext. 2-6035' and 'libill@ncc.edu'. Below the header, the page title is 'Nassau Community College Interlibrary Loan'. There are three main sections: 'Instructions for Login' with sub-sections for 'Students' and 'Faculty/Staff', and an 'ILLiad Login' form. The form includes fields for 'Username' and 'Password', both marked as required, and a 'Logon to ILLiad' button. Below the form are links for 'Faculty only' and 'Students only' who have forgotten their credentials.

Nassau Community College
Interlibrary Loan

This is the interlibrary loan system for the Nassau Community College Library.
Use ILLiad to request materials from other libraries, view your requests, and access electronic articles that you have requested.

[Return to the NCC Library Homepage](#)

ILLiad Login *Indicates required field

Enter your user information below.
Then press the Login to ILLiad button to continue.

*Username

*Password

[Logon to ILLiad](#)

Instructions for Login

Students

Your username is your N number and your password is your PIN. This is the same login used for the computers in the Information Commons, campus WiFi, and off-campus database access. If you have trouble logging on, please call 516-572-7620 for assistance.

Faculty/Staff

If this is your first time using the system, please create an account. [Click here to create an account.](#)

If you have already created an account, use your ILLiad account information (username should be your LionNet username) to login.

Faculty only: Created an account but forgot your password? [Click here](#)

Students only: Trying to use ILLiad but forgot your PIN? Call 516-572-7620 for assistance.

On the Web Side...

Biggest problem is that there is only one way to view NewAuthRegistration as your users will see it:

- Log in with a valid LDAP username that does not exist in your ILLiad database
- Essentially a one-shot page

```
<#INCLUDE filename="include_header.html">
```

Library Home >> Interlibrary Loan

Luce Library Interlibrary Loan

```
<#INCLUDE filename="include_menu.html">
```

<#STATUS>

New User Registration for ILLiad * Indicates required field

* First Name	↕	<#PARAM name=	↗
* Last Name	↕	<#PARAM name=	↗
* Library Barcode Number	↕	<#PARAM name=	↗
<small>(This can be found on the back of your Maritime ID card)</small>			
* E-Mail Address	↕	<#PARAM name=	↗
* Daytime Phone	↕	<#PARAM name=	↗
* Address Line 1	↕	<#PARAM name=	↗
Address Line 2	↕	<#PARAM name=	↗
* Address City	↕	<#PARAM name=	↗
Address State		<#PARAM name="State">	▼
Address Zip	↕	<#PARAM name=	↗
* Status	↕	<#PARAM name="StatusGroup"	▼
* Department/Major	↕	<#PARAM name="Department"	▼

Maritime's Experience

- ⦿ There had been a previous unsuccessful attempt to set up LDAP when we installed ILLiad in 2009
- ⦿ Over 4 ½ years prior to LDAP implementation approx. 240 users registered for accounts
 - Some of those were duplicate accounts
 - (one faculty member had created three separate ones!)
- ⦿ Added approx. 30 new accounts post-LDAP so far
 - Tied for best spring for registration with Spring 2011

Our Current Logon Page:

Interlibrary Loan Logon - Stephen B. Luce Library - Mozilla Firefox

maritime College | Interlibrary Loan | Library News | Help

maritime College
Stephen B. Luce
Library

New! Compass Search
Books - Articles - Media

Google™ Custom Search

About Us | Find Resources | Ask a Librarian | User Services | Archives | News | Events | Exhibits | Friends

Library Home >> Interlibrary Loan

Interlibrary Loan - ILLiad

Logon Info:
Logon to ILLiad using your Maritime email username and password.

Looking for a book not in The Sextant?
Try searching our partner libraries:

ILLiad Logon * Indicates required field

*Username
@sunymaritime.edu

*Password

Useful Links

- Sextant Catalog
- Compass Search
- Guides & Tutorials
- Research Assistance
- Access the Archives
- Interlibrary Loan
- Remote Access
- Library Policies
- Library Hours
- Borrowing Privileges
- Library FAQs

About Interlibrary Loan

Interlibrary loan (ILL) is a service that allows SUNY Maritime College students, faculty, staff, and administrators to request books, articles, and other library materials from libraries throughout the United States.

ILLiad is a web-based resource sharing system that allows you to place interlibrary loan requests at any time. By creating your personal ILLiad account, you can:

- place ILL request online and check the status 24/7
- receive article requests electronically via your account
- request renewals of your ILL books online

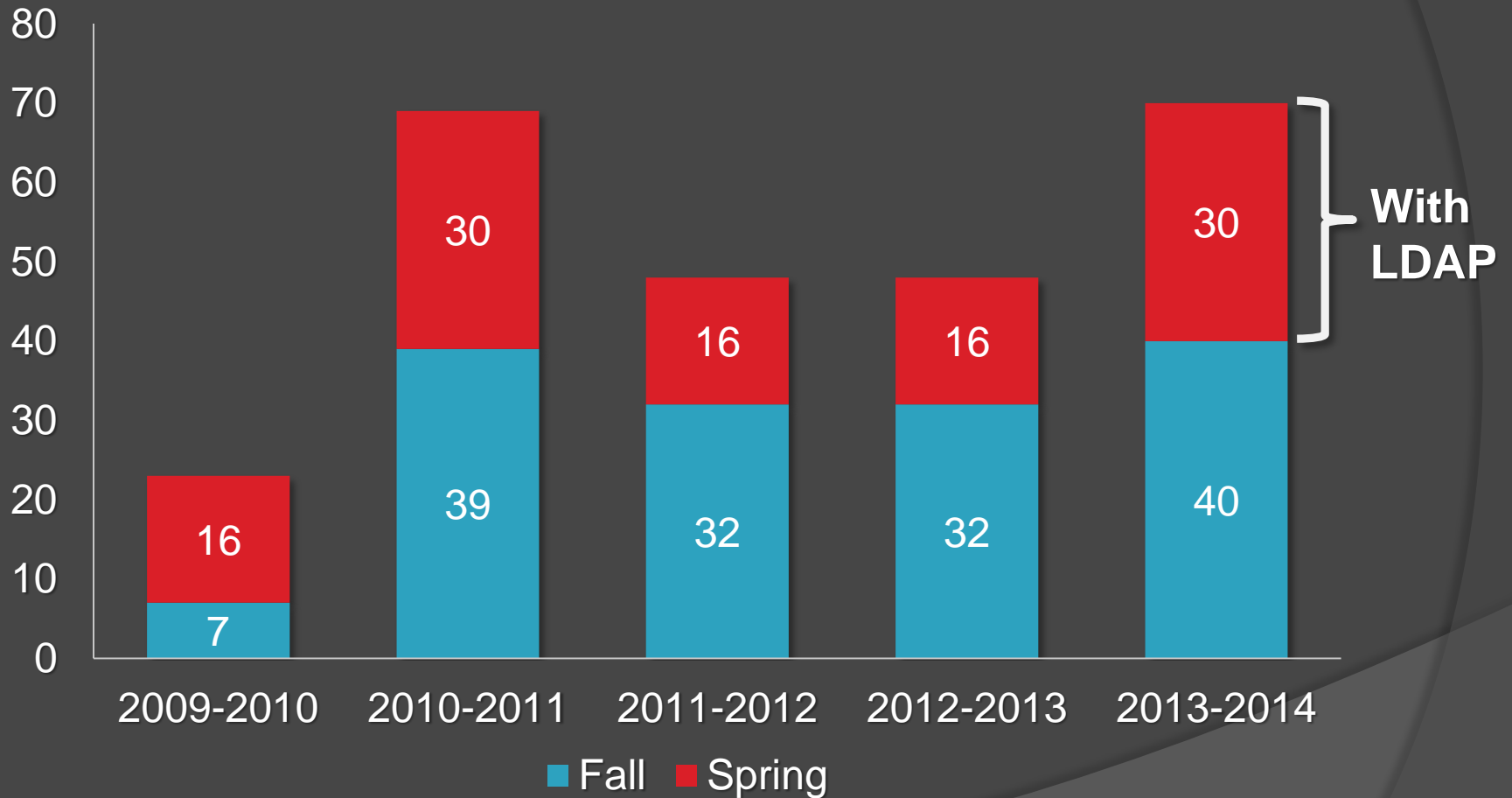
Forgot Password?

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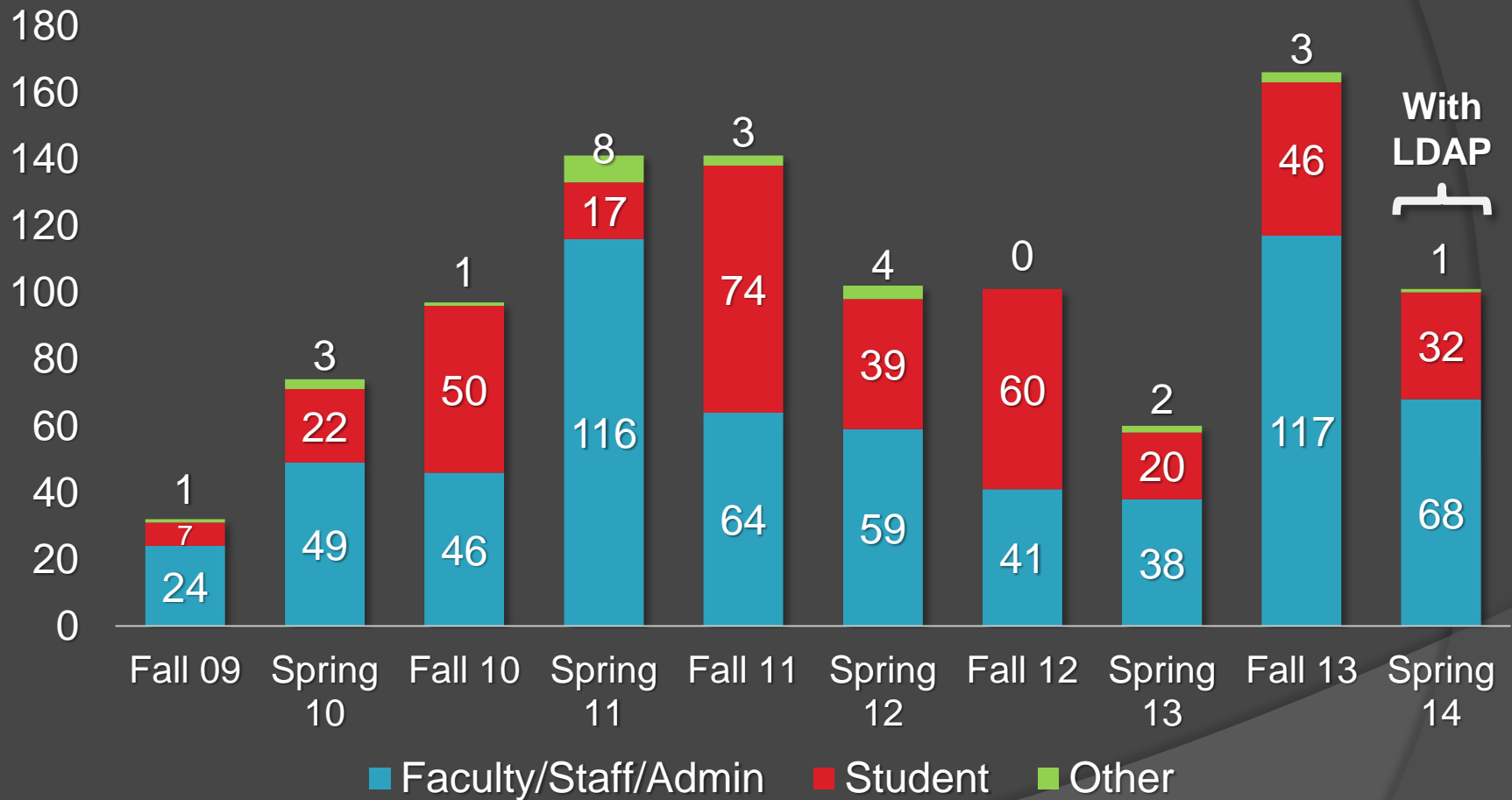
Stephen B. Luce Library || SUNY Maritime College || 6 Pennyfield Avenue, Bronx, NY 10465 || Phone: (718) 409-7231 || Email: library@sunymaritime.edu

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New Users



Requests by User Status



A Few Factors

- Shortly before adding LDAP, we also added OpenURL links
- Some librarians have been encouraging new students to make accounts at orientation to speed the request process when they actually need something
- Fall is peak time for new accounts, so the payoff may be a few months away

There's Always Issues

- ⦿ We stumped OCLC Support with a bug:
 - If a user skipped any of the required fields in NewAuthRegistration, hit submit, and then tried to correct their mistake, the form would clear and their registration could not be completed
 - After the initial attempt the username was added to the ILLiad database, but no other data was added to the record
 - Had to manually add user info in ILLiad so they could use their account
 - Problem may have stem from missing `<#STATUS>` line in code of page

In the End...

- Was it worth it?
 - Minus the one bug the registration process has been simplified
 - No more worry that users will forget their usernames/passwords
 - Can do preemptive registration
 - Dual benefit of early exposure for students plus avoiding the conflict between OpenURL and the need to register for ILLiad

Questions/Comments?

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