

Training

SIERRA CIRCULATION How to Enable PINs

Library staff may choose to enable PIN functionality at any time. If PIN functionality is enabled, patrons must input a PIN in addition to other personal information in order to access their accounts or perform other tasks that require patron verification.

Set-up Steps

Set-up of PINs requires a series of steps, some of which are performed by library staff and some of which are performed by Innovative staff. Library staff may complete library tasks 1-5 in any order; however, the library cannot complete step 7 until Innovative has completed step 6.

1. Library Task: Supply Innovative staff with the answers to the following questions. Open a ticket with Support for set up or additional assistance on this matter.
 - Should the system prompt the user to create a PIN if he/she does not already have one?
 - Does the library use self-check devices with numeric-only keypads? If so, Innovative can disable PINs in Self Check to prevent patrons with alphanumeric PINs from being blocked by the system.
2. Library Task: Determine the library's settings for PIN web options (example, MIN_PIN_LENGTH, PIN_ALPHA_NUM, etc.) See [Patron Record Options](#).
3. Library Task: Customers who use [Innovative Integrated Login](#) should take the appropriate action for the type of form in use at the library:
 - ipssso.xml: add the {ifneedspin} token to the custom [ipssso.xml](#) form.
 - ipssso.html: add the needed HTML to the [ipssso.html](#) form.

NOTE: The {ifneedspin} token will not expand until the feature is enabled.

4. Library Task: Customers not using Innovative Integrated Login should customize the [Patron self-identification prompts & examples](#).

Customers not using Innovative Integrated Login should also add PIN-related tokens to the pverify*_web.html forms. These include (but are not necessarily limited to):

- [pverify2_web.html](#) (Web Access Management Patron Verification Form)
- [pverify_web.html](#) (View Your Own Record Patron Verification Form)

NOTE: These tokens will not expand until the feature is enabled.

For more information, see [Verifying Patrons By Using the Innovative Server and Patron Records and Customizable Web Forms](#).

5. Library Task [optional]: The library may ask Innovative to enable (or disable) name matching. As part of enabling name matching, make sure that the following tokens are included in the [pverify_web.html](#) form.
 - {ifneedpatronname}
 - {nameexample}
 - {nameprompt}
 - {name}
 - {xif}
6. Innovative Task: Innovative staff complete the 'behind the scenes' set-up steps.
7. Library Task or Innovative Task [optional]: Update m2btab.p. Innovative staff will advise the library of the field tag used for the PIN variable-length field. In most cases, this will be the '=' (equal sign).

PINs are always protected from overlay by default. If the library wishes to include PINs in patron record loads, staff should check the overlay protection setting for the PIN field in m2btab.p. (To check the setting, view the load table in Admin Corner and choose 'Data not overlaid'.) The overlay protection setting in each load table can be directly edited and the PIN field added or removed by a staff member at the library who has had Load Profile Training, or the library can request that Innovative staff adjust the table(s). Overlay protection for PINs may not be edited in the Database Maintenance System Option [Edit overlay protection list](#).

Additional Information

Can PINs in the WebPAC be staged or tested in advance?

No. This is a system-wide setting that will be live to patrons as soon as it is enabled.

Can PINs be enabled selectively, function by function, in the WebPAC?

No. PINs are either on or off for all WebPAC functions; however, it is possible to have PINs on for WebPAC and off for other programs, such as Self Check and Express Lane.

Can the PIN field be enabled in advance for Circulation so that we can pre-populate patron records with PINs?

Yes. Contact the Help Desk for assistance.

What happens when a user tries to log in for the first time after PINs have been implemented?

The system will respond in one of two ways:

- If the library stipulated that the system should not prompt the user to create a PIN if he/she does not already have one, then the user will need to see library staff to get a PIN added to his/her patron record.
- If the library indicated that the system should prompt the user to create a PIN if he/she does not already have one, then the system will ask the patron to create a PIN the first time the patron selects a function that is protected by PIN verification.

What happens if patrons can't remember their PINs?

A patron can ask circulation staff to delete the PIN or reset it. The library may also enable the ability for patrons to reset their own PINs. See [Resetting PINs in the WebPAC](#).

What happens if the library does not provide a form to enter the PIN, but PINs have been turned on?

Patrons will not be able to access their records.

Can the library pre-populate the PIN field with some default PIN?

Yes. The library can load PINs as part of a patron record load.

NOTE: Pre-population of PINs in patron records may only be accomplished via a patron record load. Do not use rapid update or global update to add PINs. PINs added via these two functions will fail to work properly.

Can all occurrences of the word "PIN" be changed to something else, such as "Password"?

Wording controlled by system options and the text of pverify*_web.html screens may be adjusted by library staff. The initial prompt to input and confirm a new PIN, however, uses the word 'PIN' as hard-coded text. This prompt is seen only when inputting a new PIN.

Can we prevent a third party from using any patron's surname and University ID and creating a PIN?

If the third party has obtained this information, then that person can create a PIN. (The creation of the PIN is what will stop a third party in future from accessing the record of anyone whose personal information he/she may have obtained.) One option available to the library is loading PINs into patron records. For example, the library might create a default PIN based on the patron's personal information, such as last four digits of telephone number. The library could load that default PIN into the patron record and instruct patrons to change it.

NOTE: The library may load either encrypted or non-encrypted PINs. Creation of PIN data for loading into patron records is the library's responsibility.

As a related question, can the library prepend information to the barcode field so patrons do not need to enter all the digits?

Yes, set the OPAC Option [Patron Self-Identification Barcode Overlay](#). Note, however, that if your library uses the Patron Self Registration product, you may not enable Patron Self-Identification Barcode Overlay, as the two are not compatible.

This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system.

© 2022, Innovative Interfaces, Inc.