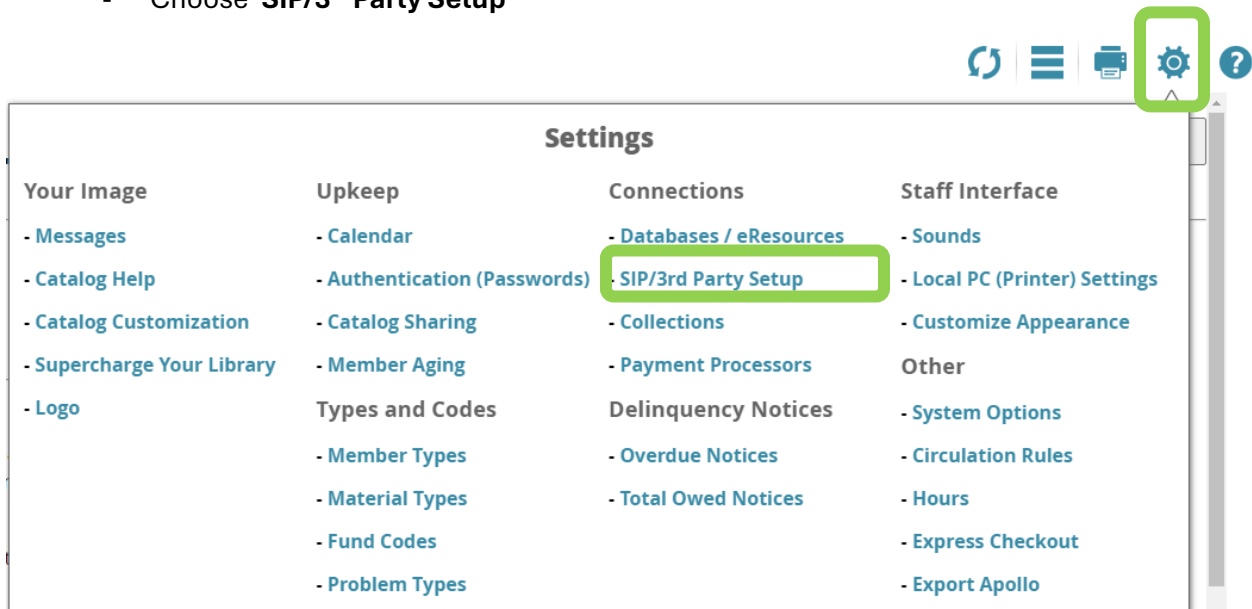


E-Read Texas Boundless Site Set-Up Form Instructions for Biblionix Apollo libraries

This document will help you find your Apollo system information to answer the form section titled 'Boundless Site Authentication' that starts on page 2 of the form.

1. From the Apollo Dashboard, click on the **Settings** menu (gear icon at the top right)
 - Choose '**SIP/3rd Party Setup**'



The information needed is in the section '**For software/servers inside your library which support TLS**'. Locate the fields '**Server hostname or IP address**' and '**Login ID**' as shown in the green circled areas in the screenshot below.

For software/servers inside your library which support TLS:
(such as Librarica CASSIE or CYBRARIAN)

1. Select the IP addresses you wish to allow to log in via SIP/TLS:
2. Configure the third-party software (this is usually on a page or screen called something like "ILS Configuration"):

Server hostname or IP address:

Server port:

Login required: yes

Login ID:

Password: a password created specifically for this third-party use ([see the bottom of this page for instructions](#)) — make sure to set a long, random password.

The table below maps the Boundless form fields to what you will see in Apollo.

Boundless Form field	Apollo
What catalog system/ILS do you use?	Click the box next to Biblionix Apollo
Select your method of patron authentication	Choose SIP2
ILS Vendor Contact	Enter sip@biblionix.com
ILS Vendor Contact Phone	Enter 877-800-5625 x259
ILS Server URL or IP	Provide the value from 'Server hostname or IP address'
ILS Server Port	Enter 9500, unless you see something different in Apollo
ILS Server Account/Login	Provide the value from 'Login ID'
ILS Server Password	Enter 'n/a', and follow Step 2 below to enable access
Location/Institution Code	Enter 'n/a'
If your library/school needs to allow access only to specific locations...	Enter 'n/a' as this option is not supported by Biblionix
Do you require your patrons to use a PIN/Password?	'Yes' is the recommended option
	If you select 'No', you also need to check the check the "Expose Member Information Despite Authentication Failure (not recommended)" box – see Step 2

- The next steps need to occur IN APOLLO. These steps will allow Baker & Taylor to connect to your Apollo account.
 - Scroll down to the section: **'For third-party services elsewhere on the Internet'**
 - In the chart listing various 3rd party services, find **'Baker & Taylor (Boundless)'**
 - Click the checkbox in that row under the column **'Allow Access'**.

1. Check the remote services which should be allowed (don't worry if one you need is not listed):

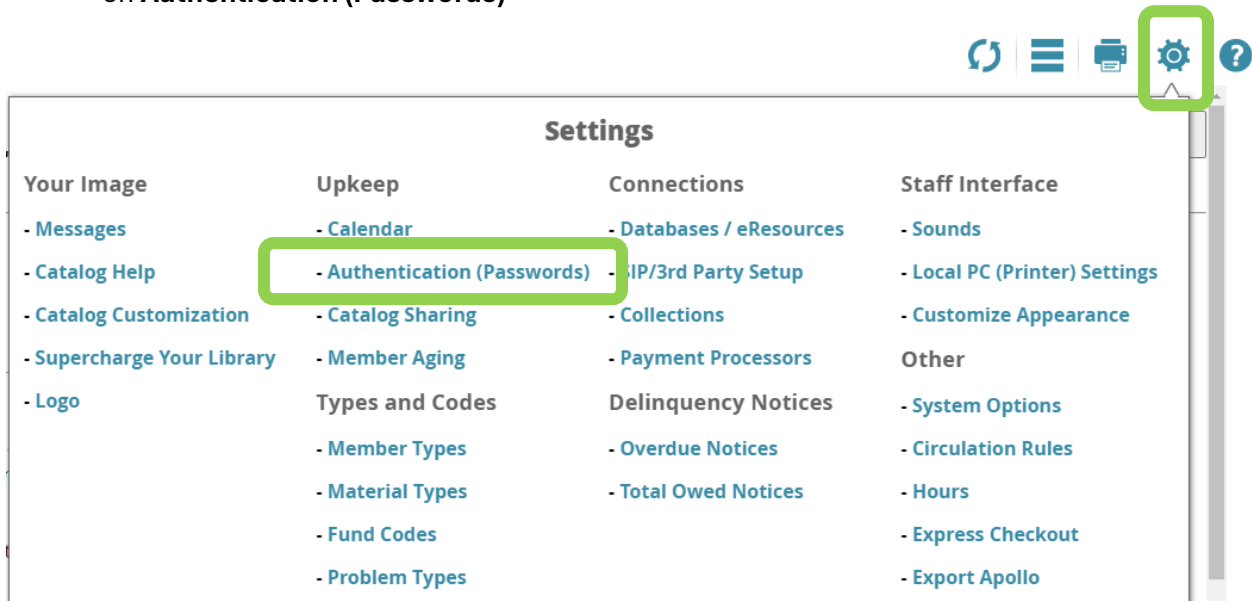
Service	Allow Access	Allow Vendor to Circulate Library Items (Almost never needed)	Expose Member Information Despite Authentication Failure (not recommended)
ABCmouse	<input type="checkbox"/>		
Auto-Graphics	<input type="checkbox"/>		
Baker and Taylor (Boundless)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- If you also answered 'no' to the question 'Do you require your patrons to use a PIN/Password', also click the checkbox under the column **'Expose Member Information'**. This is NOT recommended – most of you will not do this and can skip this step.

Enabling IP Addresses

The next set of instructions is for the section of the Set-Up form titled **'All Libraries: Please verify that access is allowed to the following test and production environments for Boundless'**. The IPs should be added in Apollo so that Boundless can connect to your catalog.

1. From the Apollo Dashboard, click on the **Settings** menu (gear icon at the top right) and click on **Authentication (Passwords)**



2. Click on the **'IP Addresses'** tab. Scroll down to the box **'Add new address or range'**.

Add new address or range:

Copy/paste the IP addresses from the Baker & Taylor form until you have added them all.

3. **(Optional Step)** Once you have added the addresses, you can add a note next to each address to indicate why it was added. This isn't strictly necessary, but it can help keep things organized. For example, you can add a note like 'B&T Boundless, October 2024' to tell you that the IP is related to your Boundless setup when you added it.

13.82.134.120	<input checked="" type="checkbox"/> Staff	<input checked="" type="checkbox"/> Public	B&T Boundless - added 10/	Remove
172.171.206.4	<input checked="" type="checkbox"/> Staff	<input checked="" type="checkbox"/> Public	B&TBoundless - added 10/2	Remove

Test Barcodes

You will need to create a **total of 4** test barcodes in Apollo. To create a test barcode, you'll follow the same process you use to create new accounts for patrons. In Apollo, go to **Members** → **Edit Members**, then click on **'New Account'**.



Enter a name for your new member, such as 'John Doe', 'Test One', etc. You don't need to enter a mailing address or an email address unless you want to.

There are a couple of options for setting a password. By default, Apollo uses the phone number as the password, unless a secure password is set. If your patrons typically use their phone number as their password for their library account, enter a phone number – you can use your office number or your library's main phone number for all 4 test accounts.

The other option is to set a secure password for each test account. The 'Secure Password' field is right under the member number field, and it will say 'Not set' until you set a password (see screenshot on the next page). If you set a password, use something simple like '1234' or 'library1'. The password can be the same for each of the four test accounts.

Save	Actions:	Save	Copy	Delete
	Last Updated:	10-8-2024 12:24:05		
Copy	Member Since:	10-8-2024		
	Expiration:	10/08/2025	<input type="checkbox"/>	Standard Renewal
	Number/Type:	10095	Full number: 29152000100954	
Delete		1 - New Member	<input checked="" type="checkbox"/>	<input type="checkbox"/> Business
	Secure Password:	Not set.		
	Last Name:			
	First Name:			

On the Boundless site set-up form, provide the member number/barcode in the **Test Barcode** field, and the password or phone number in the **PIN/Password** field.

Two of the test barcodes should be accounts in good standing, with no blocks or problems that would prevent the account from checking out materials. Those will go in the **'Valid Accounts'** section of the site set-up form.

You will also need to provide **at least two** accounts that are blocked and would not be able to checkout materials. Examples of blocks can be expired accounts/cards, excessive fines, lost materials, etc. To create the blocked accounts in Apollo, first create the accounts using the steps outlined above.

- To create an expired account, go back into the account and click on the calendar icon in the **'Expiration'** field, and choose a date in the past. Click **'Save'**.

Save	Actions:	Save	Copy	Delete
	Last Updated:	10-8-2024 12:24:05		
Copy	Member Since:	10-8-2024		
	Expiration:	10/08/2025	<input type="checkbox"/>	Standard Renewal
	Number/Type:	10095	Full number: 29152000100954	
Delete		1 - New Member	<input checked="" type="checkbox"/>	<input type="checkbox"/> Business
	Secure Password:	Not set.		
	Last Name:			
	First Name:			

- To add fines to a test account, go back into the account and click on the **'Problems/Fines'** box on the right-hand side of the screen.

Changes take effect immediately
Problems / Fines: Member Owes: \$0.00

- Click **'Add New'** and enter an amount in the **'Total Charge'** field that would cause the patron to be blocked from further checkouts. Click **'Update Problem'**, then **'Confirm'**.

On the Boundless set-up form, in the Blocked Accounts section, provide the member number/barcode in the **Test Barcode** field, and the password or phone number in the **PIN/Password** field. You will also need to complete the 'Reason for Block' field, where you will enter something like 'fines', 'expired account', etc. depending on the reason for the block.

In the form field 'If using Patron API (III) please provide the maximum fine limit for blocking', enter 'N/A'.

Sections 2 and 3 of the set-up form should be left blank. You've completed the form!