SIP2 Configuration

Use this screen to specify the settings for your SIP2 client (such as a self checkout machine).
To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Integrations, and then select the SIP2 Configuration link.

Use this screen to specify the settings for your SIP2 client (such as a self checkout machine).

• Settings can be configured for each library branch in your institution.
• It is recommended to have a good understanding of your SIP2 client before configuration.

You need to contact OCLC Support if:

• You are setting up SIP2 for WMS for the first time
• You are establishing a SIP2 connection via the open internet (through an unencrypted (http) protocol)

Create or edit a SIP2 Configuration

1. On the SIP2 Configuration screen, click Create New, or click the Policy Name you want to edit.
2. On the Create New or Edit Policy screen, fill in the fields.
   ◦ Policy settings
   ◦ Supported messages
   ◦ Bill Reason to Fee Type
   ◦ Payment Method to Payment Type
   ◦ Sort Bins
   ◦ Material Properties
3. Click Save.

Policy settings

Use this section to set up additional settings for your SIP2 client.

Policy settings fields:
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Send Personal Data in Patron Information Service | When selected, the Patron Information Service will send:  
  - Email address  
  - Home address  
  - Telephone number  
  - Items on hold  
  - Items unavailable  
  - Items recalled  
  - Items overdue  
  - Outstanding fee  
  Even if you do not select to send this personal data, patron name, barcode, number of items on hold, number of items unavailable, number of recalled items, and number of overdue items will always be sent. |
| Available Hold Allowed                        | Indicates if the client allows a hold to be placed on an item that is available.  
  - **Yes**: Hold can be placed on an item that is available (not on loan). Hold can be placed on an item that is unavailable (checked out)  
  - **No**: Hold cannot be placed on an item that is available. Hold can be placed on items that are unavailable. |
| Use SortBin (CL) field in Checkin response    | Indicate if you want the value of the SortBin field to be set according to the Routing Reason of the Checkin transactions:  
  - **Yes**: The [Routing Reason to Sort Bin](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_… - tab appears in Mapping section. The value of the SortBin field will be set according to the Routing Reason of the Checkin transactions.  
  - **No**: SortBin field (CL) in the Checkin response will not be sent. |
| Number of Retries Allowed                    | The maximum number of retries before the connection is closed. |
Timeout Periods in Seconds

- This number should be the same as the number specified in the client's configuration.

Number of second the client should wait before the connection is determined to be unresponsive.

- This setting may be ignored by some clients, as they prefer to use the value configured within the client settings.

Terminal Location

Optional text field to add a description of where the client is located.

Supported Messages

Select an option from each drop-down menu to indicate which messages are supported by your SIP2 client.

- Some SIP2 messages can be protected by patron authentication.
  - SIP2 patron authentication is an optional configuration that requires individual library users to provide their circulation barcode and a valid password or PIN to complete specific actions via SIP2.
  - SIP2 patron authentication is only available to WMS libraries using WMS Authentication or an LDAP service. WMS will verify the user by their circulation barcode and password. For all other IdPs, please contact OCLC Support for information about loading user PINs.
  - The SIP2 connection must be encrypted to make use of patron authentication. If the connection is not encrypted, the WMS SIP2 Service will send back an error response.
  - SIP2 Messages that can be protected by patron authentication have three configuration options:
    - **Enabled – Authentication Not Required**: WMS will respond to this message.
    - **Enabled – Authentication Required**: WMS will respond to this message.
      - An error will be returned if the patron authentication fields are empty or fail validation.
      - If the connection is unencrypted, WMS will respond with an error warning because of the unencrypted connection.
    - **WMS Authentication and LDAP IdPs only**
    - **Disabled**: WMS will not respond to this message.
  - All other SIP2 Messages are not capable of protection by patron authentication and have two configuration options:
    - **Enabled**: WMS will respond to this message.
    - **Disabled**: WMS will not respond to this message.
• Supported Messages fields:
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
<th>SIP2 MESSAGE CONFIGURATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron Status Request</td>
<td>Indicates the client can send the Patron Status Message.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Enabled – Authentication Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Disabled</td>
</tr>
<tr>
<td>Patron Information</td>
<td>Indicates the client needs the Patron Information message to request additional information regarding a patron.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Enabled – Authentication Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Disabled</td>
</tr>
<tr>
<td>Checkout</td>
<td>Indicates the client serves in checkout mode.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Enabled – Authentication Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Disabled</td>
</tr>
<tr>
<td>Hold</td>
<td>Indicates the client supports sending of the Hold message.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Enabled – Authentication Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Disabled</td>
</tr>
<tr>
<td>Fee Paid</td>
<td>Indicates the client is configured to send the Fee Paid message.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Enabled – Authentication Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Disabled</td>
</tr>
<tr>
<td>Renew</td>
<td>Indicates the client supports the Renew message.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Enabled – Authentication Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Disabled</td>
</tr>
<tr>
<td>Renew All</td>
<td>Indicates the client can send a Renew All message.</td>
<td>◦ Enabled – Authentication Not Required</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Default Setting</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Item Information</td>
<td>Indicates the client uses the Item Information message to request additional information about an item.</td>
<td>Enabled – Authentication Required&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>Item Status Update Service</td>
<td>Not implemented. This setting should be disabled.</td>
<td>Enabled&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>ACS Status</td>
<td>This setting should always be enabled.</td>
<td>Enabled&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>Request SC Resend Service</td>
<td>This setting should always be enabled.</td>
<td>Enabled&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>Block Patron</td>
<td>Indicates the client can send a Block Patron message.</td>
<td>Enabled&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>End Patron Session</td>
<td>Indicates the client is configured to send the End Patron Session message.</td>
<td>Enabled&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>Login</td>
<td>Indicates if you want to enable the Login service.</td>
<td>Enabled&lt;br&gt;Disabled&lt;br&gt;This setting should always be enabled.</td>
</tr>
<tr>
<td>Offline Mode</td>
<td>Indicates that it is possible to use the SIP2 client in offline mode and upload all recorded transactions to WMS.</td>
<td>Enabled&lt;br&gt;Disabled</td>
</tr>
<tr>
<td>Checkin</td>
<td>Indicates the client serves in</td>
<td>Enabled</td>
</tr>
</tbody>
</table>
Bill Reason to Fee Type

This tab allows you to map the bill reasons you created on the Bill Reasons screen to SIP2 fee types.

1. Select a Bill Reason from the list.
2. Select a Fee Type from the list.
3. To add a row, click the Add button (.BigDecimal).
4. To delete a row, click the Remove button ((BigDecimal).

Payment Method to Payment Type

This tab allows you to map the payment methods you created on the Payment Methods screen to SIP2 payment types.

1. Select a Payment Method from the list.
2. Select a Payment Type from the list.
3. To add a row, click the Add button (BigDecimal).
4. To delete a row, click the Remove button (BigDecimal).

Sort Bins

When Use SortBin (CL) field in Checkin response is selected, it is possible to map Routing Reasons to a value to be set in the SortBin field of the Checkin response.

At check-in, the Sort Bins table will be read from top to bottom, left to right. If no bin value is found, CL will not be sent in the response.
• When the system comes to the row where all the elements match the transaction, it applies the policy contained in that row and will not continue to the next row. If no bin value is found, then the CL field will not be sent in the response.

• Put your most restrictive rows at the top of the map.

• Include a row at the bottom of the map to cover any exceptions or unexpected items by setting all values to All and specifying a bin for exceptions.

Sort Bin map example - Image

1. Select a **Routing Reason** from the list. Available values include:
   - **Reshelve**: Item should be returned to the shelf.
   - **Hold**: Item is needed to fulfill a patron hold request.
   - **Schedule**: Item is needed to fulfill an item scheduling request.
   - **ILL**: Item requires further processing in your interlibrary loan system.
   - **Withdrawn**: Item has been withdrawn from the collection.

2. Select an **Item Holding Location** from the list if:
   - Routing reason is **Reshelve** and items need to be sorted in a specific bin for local reshelving or routing to a different branch.
   - Routing reason is **Withdrawn** and items from certain collections need to be sorted in specific bins for processing.

3. Select an **Item Shelving Location** from the list if:
   - Routing reason is **Reshelve** and items in certain collections need to be sorted in a specific bin for reshelving.
   - Routing reason is **Withdrawn** and items from certain collections need to be sorted in specific bins for processing.

4. Select an **Item Destination Branch** if:
   - Routing reason is **Hold** or **Schedule** and items need to be sorted in a specific bin to be routed to other branches for pickup.
     Note: You must select **All** to sort items that should be reserved at the current branch or to route reserved items for pickup at other institutions in your circulation group.

5. In the **Sort Bin** column, enter text.

6. To add a row, click the **Add button** (➕).

7. To delete a row, click the **Remove button** (➖).
Material Properties

This tab allows you to configure which material formats are magnetic and can be sensitized and/or desensitized. Values within the tab are only seen after you have saved your policy for the first time.

Material Properties fields:

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material Format</td>
<td>As defined in the item's WorldCat record. For more information, see <a href="https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...">Material Type Names and Codes</a> to determine how the WorldCat record provides material format.</td>
</tr>
<tr>
<td>Magnetic</td>
<td>Indicates if the material format is magnetic.</td>
</tr>
<tr>
<td>Sensitize</td>
<td>Indicates if the material will be sensitized when it is checked in.</td>
</tr>
<tr>
<td>Desensitize</td>
<td>Indicates if the material will be desensitized when it is checked out.</td>
</tr>
</tbody>
</table>