iboss filtering FAQ

What's an "iboss"?

- The name "iboss" refers to a network security services company.
- "The iboss" is short for "the iboss Secure Web Gateway appliance", a.k.a. "the appliance".
- The iboss is a bundle of hardware and software that provides content filtering, with granular controls and bypass options.
- The iboss appliance is a product that WiscNet supports for its optional filtering service.
    - SCLS proposes to contract with WiscNet for this content filtering technology.
- A demonstration unit is currently installed at SCLS HQ for pilot test purposes.

Will the iboss allow SCLS to provide filtering as an opt-in service?

- Yes. The iboss initially sets a filtering policy based on network address ranges.
- The SCLS Network already distinguishes each library by address ranges.
    - Also distinguished by address: staff/patron/wireless/other.
- The default policy of the SCLS Network as a whole can be "no filtering".
- Libraries will be able to opt in to a secondary iboss policy which enables filtering.

How does the iboss work?

- The appliance is installed at SCLS HQ, attached to our firewall (where the Internet feeds in).
- All SCLS Network Internet traffic thus flows through the appliance, and may be filtered.
- Only the traffic of participating member libraries would actually be filtered.
- Content is blocked based on website domain names (much like OpenDNS does).

Will the iboss overblock, restricting desirable content?

- Possibly, but not frequently. If it does, we should be able to correct that.
- Website names are primarily put into iboss filtering categories by people.
    - Overblocking occurs only if people make mistakes when assigning sites to categories.
- Website name filtering is substantially different from filtering on key words or flesh tones.
    - Older filtering systems often overblocked based on flawed filtering methods.
- When its "Porn" category is activated, the iboss is blocking "known providers of porn".
    - It is *not* dynamically inspecting page content for "indicators of nakedness or sex acts".
- Accidentally blocking access to art, literature or medical information is possible but unlikely.
- Outside of the Porn category, things might be fuzzier, but that is not likely an issue.

Will the iboss underblock, permitting undesirable content?

- **Yes, it will.** No content filtering solution is bulletproof.
- Users may find creative ways of evading the filtering technology.
- Sites may not be marked as needing blocking, particularly brand new website names.
- CIPA compliance is about reasonable efforts to block bad content, not about perfection.

How will iboss impact patrons, when blocking content?

- The iboss will display a "block page" instead of the website requested by the patron.
- When blocks occur, adults may bypass the block:
    - (A) if and only if the iboss policy settings permit a bypass
    - (B) but, for library CIPA compliance, adults *must* be able to bypass the filter.
- These constraints are not incompatible. Imagine:
    - Children's Room computers where filtering blocks cannot be overridden.
    - Select Adult computers where blocks may be bypassed, for CIPA compliance.

How will the adult bypass work?

- Bypassing, permitted under FCC rules for "lawful purposes", requires proof of adult age.
- However, per court rulings, libraries may not ask an adult what their purpose is!
    - Adults may self-certify that they have a lawful purpose.
    - It would seem to be ideal if this process could be automated.
- The native iboss user authentication won't work for SCLS purposes, but has been replaced by a hook into SCLS Patron Authentication web forms.
- To perform a bypass, a user must enter a valid library card number and PIN.

Which library cards may be used for a bypass?

- Because adult PTYPE codes are not defined consistently across libraries, and because those definitions do not necessarily coincide with CIPA's definition of "adult" (17 and older), the bypass mechanism determines eligibility based only on the patron record's date of birth field.
    - As an added constraint, the patron's PIN is required so as to authenticate user identity.
    - As such, only cards having both a valid date of birth field and PIN may use the bypass.
- The type of card (staff or patron, temporary or permanent, etc.) is not relevant to the bypass.
- At this time, only SCLS Koha card numbers may be used; other SCLS member library ILS systems are not consistently exporting date of birth or PIN data into the SCLS patron authentication database, so their patron ages cannot be automatically verified.
- MyPC Guest Passes do not correspond to Koha patron records; they cannot be used for bypass.
- The bypass system is able to query Koha in real time; brand new cards or cards where the date of birth and/or PIN has been recently updated should function for bypass within a few minutes.

Which library computers will be subject to iboss filtering?

- During the staff pilot test phase, only wired staff computers on the SCLS Network.
- In production, all of the SCLS Network at your library location, staff and patron alike.
    - This includes wireless patron devices, even if you don't have Enterprise Wireless.
- If you have computers not on the SCLS Network, they must be treated separately for CIPA compliance (you must have an alternative "Technology Protection Measure").

How long does an adult bypass permission last?

- Bypass permissions are fairly short-lived ---- 30 minutes.
- Bypass permissions should not bleed over to the next user of the computer in question.

- The bypass timeout setting is global; we cannot choose different values for different contexts.

Can we see it in action? Touch it? Try to break it?

- Yes, each site signing up for filtering will have a staff pilot before going live with the filtering for patrons.
- You may also see a canned video of SCLS iboss filtering in action, through the SCLS Vimeo training videos channel (password required): https://vimeo.com/150913870
- The SCLS block page may be previewed directly at https://tpm.scls.info/

Will I need to avert my eyes during a filtering demo?

- No. SCLS has configured a custom blocking policy using benign website content.
    - If blocking is bypassed, this site will not require anyone to avert their eyes. http://scls365.pbworks.com
- When prompted to log in, to bypass the filter:
    - User name (or library barcode): **your Koha library card**
    - Password (or PIN): **your Koha PIN**

What should I do if there are problems with the staff pilot test?

Most iboss filtering problems are likely to be something less than urgent. While you may call any issue in to the help desk by phone, it is probably best if you can enter the relevant information into a trouble ticket directly using the SCLS Help Desk Portal. See https://www.scls.info/technology/help.html.

Overblocking

If you are redirected to the SCLS block page when accessing a website that you believe should not be filtered, use the adult bypass mechanism to continue using the website, and report the overblocked website on the Help Desk Portal. SCLS will review the site and consider follow up action.

Underblocking

If you are able to access a website that you feel should be subject to filtering, without being directed to the SCLS block page for adult bypass, report the underblocked website on the Help Desk Portal. SCLS will review the site and consider follow up action.

Patron Authentication / Adult Bypass Failure

If you find that a particular library card will not permit the use of the adult bypass mechanism of the SCLS block page, first validate the patron record in Koha. The date of birth field must be filled in with valid data; the bypass cannot rely on PTYPE classifications. If corrections are made in Koha they should allow the card to function for the adult bypass within a few minutes.

If the patron record already had a valid birthdate, one which should be recognized as an adult, report this on the Help Desk Portal so that SCLS may investigate and find the reason why it doesn't work.

Questions? Concerns?

Please contact the SCLS Help Desk: https://www.scls.info/help-desk

You may also share questions and concerns, or compare your implementation plans with your peers, using the iboss project mailing list for participating SCLS libraries: scls-iboss at warden.wiscnet.net.