

When faced with confusing terms, frame your questions in the “Is that like....?” Format. For instance, a vendor might say:

Example Vendor Statement: *“Our Geebleforp Fillibuster™ algorithm, which has been seriously considered by the top ninety Fortune 500 companies and was recently awarded “Best in Show” by the Mayflower Kennel Club parses data traffic requests pre-gateway and post-firewall using proprietary granular packet analysis with five nines of reliability. Updates to the software and control lists are managed via IP Sec version 3-dot-oh-seven-two (*not the troublesome 3-dot-oh-seven-one-b) SSL-ellemenopee (L-M-N-O-P) tunneling protocol. As you can see, it’s a superior, secure, and scalable web-enabled on-box content management SuperCenter, especially when you compare it to our competition, which uses obsolete cups-and-strings to transmit its data requests, and relies on the laughable Tesla-coil filtering mechanism, which everyone knows is better suited to zapping insects than providing serious content management. Geebleforp – it’s the only way to go.*

Example follow-up question: *“So...it’s a proxy server?”*

The Players in your filtering discussion

It takes a team of folks to determine what works best for you; the players below are equally important:

- Library Manager/Staff
- In-house Technology Staff (or outside tech help contracted by the library)
- Network Services Provider
- Internet Service Provider

In smaller libraries, perhaps only the first bullet applies. Even in larger ones, there may be overlap between all four bullets.

Advice: designate a single person as a project manager, and treat your filtering as a project. The project manager doesn’t have to be the most technical; in fact, having a non-tech go through the processes of understanding the steps and tending to deadlines might help keep everyone on track.

imagine, individual technical setups can range from (best case) fairly simple to (worst case) frighteningly complex.

Which method is the best? It depends completely on your individual circumstances. See **“The Players in your Technical Filtering Discussion”** below.

How Does Filtering work?

A basic analogy could be to compare it to a sieve. You can get sieves with large or tiny holes; sieves that have a very large or very small capacity. Anything larger than the holes in the sieve stays in the sieve; anything smaller pass through.

Blocking Methods include site blacklists (a list of “no go” sites), keywords (bad words) or a combination of both. Each vendor takes their own approach to filtering methods.

There are no stupid questions

Because technology is a different world of its own, and some technicians and vendors like to keep folks at an arms length, words can be the biggest barrier to understanding different technology solutions. Your only defense is to keep asking questions until you understand.

The arms-length thing doesn't just happen between techs and non-techs. It's also a sort of hazing ritual between geeks. If you don't believe me, join the human comedy of a high-pressure technical sales visit sometime! It's a great joy to watch – or enter into – a conversation containing a flurry of acronyms meant to out-geek each other.

Here are some situations and terms you might encounter in your technology travels:

Branding – or the practice of associating a solution with a brand name -- can make the conversation confusing. For instance, I'm sure when referring to a photocopy, Xerox is just fine with you calling it “a Xerox” – but competitors like Canon probably like the more generic term instead. It's like in places of the country when you order a “Coke” and the server asks “What kind of Coke would you like, Sug? We have Orange, Sprite, Dr Pepper, and....Pepsi.”

Box: “Box” is a generic term – it can refer to any piece of equipment, including a general Windows, Linux, or Unix server, a dedicated appliance, or a container for shoes.

Plug and Play: There is no such thing. Some solutions are easier than other, but all need to be managed to some degree – either by your own staff, or through an agreement with the vendor.

Picking a Vendor: Since we all live in unique environments, the best vendor will be one who asks lots of questions about, well, your unique environment, and then determines if his/her solutions are appropriate. Run away from anyone who doesn't take the time to ground themselves in your environment. Run especially fast if the vendor requires that you change everything at your site to accommodate their product.

A short, practical lesson in communication:

Be smart. Ask questions. If the explanation is too complex for you to understand, then keep asking questions until it starts making sense. If the explanation can't be broken down in increasingly simpler terms or broader approaches, it's a warning sign. Complex systems have more opportunities to fail; simple ones have fewer opportunities to fail. If the explanation is too complex, then perhaps the solution is as well.

Filtering Basics:

a Geek-to-English Interpretation

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CAL FilterFest Pre-Conference

Objectives:

- **Provide non-techs with a basic overview of filtering technology and related issues.**
- **Prepare folks for the technical side of the filtering presentations.**

This is simpler than it might look

What is a filter? For the purpose of our discussion, it is both a thing (a filter) and a method (the process of filtering) – using software, hardware, or a combination of both – to block certain web content.

For some folks, the filter is a piece of software loaded on a personal computer. For others, the filtering is a function of a general or special server that provides filtering for a number of computers. For others, it's a service they purchase from someone else, such as their Internet Service Provider.

Filtering generally comes in two flavors: software loaded on a PC, or another computer (including a general-purpose server or a special, dedicated "appliance") that performs the filtering function for a number of computers.

PC Software examples include Net Nanny and Cyber Patrol. In this case, the blocking takes place at the PC.

Server approaches include Smart Filter and Websense Enterprise. With the server approach, the blocking is provided by another computer that is (in a network traffic sense) sitting in-between one or more PCs and the Internet. This is generally referred to as a "proxy server" because it acts as a middle-man to mediate web requests between PCs and the Internet. The server that these products run on could be one you already own (running Linux, Unix, Windows Server, Mac OS X Server, etc); a new server you buy for the purpose; or a dedicated "appliance" that provides filtering.

Servers themselves are interesting things with a number of building blocks required to provide the filtering service. For instance, at Fort Collins Public Library, we run our filtering system on a server running the Linux operating system. As well as Linux, we also need another component for the filter to work: proxy server software called SquidGuard. Those two pieces provide the basic environment for the third piece – the actual filtering software – to perform correctly. Filters running on servers with other operating systems require a similar setup. Dedicated appliances have all of the pieces combined in a tidy package, but generally less flexibility to do other server-type things.

The server approach could be taking place at your own facility or at another location, such as your Internet Service Provider, or from a vendor at another location on the Internet. Each has its own implications – some good and some bad. As you might