



OpenAthens

Overview of Phase 2 Implementation
for CARLI I-Share libraries

Agenda

- What is OpenAthens? quick recap
- Phase 1 implementation: recap
- Phase 2 implementation: what to expect
- Frequently Asked Questions
- Recommended resources, training, and documentation
- Questions and discussion



What is OpenAthens?

- Single sign-on service
- Identity and access management tool
- Powers log-ins to digital resources
- Access management tool that allows librarians to say *who* can access *what*
- Supports secure access using SAML 2.0
- Fully cloud-based service

What will change?

What will change for librarians and administrators?

- Settings managed in single dashboard
- Permissions rules to say who can access what
- Robust usage reporting
- Built-in security features to identify misuse at the account level
- Ability to create user accounts for guests

Phase 1 implementation: recap



connect to local directory *or*
plan for account creation in
some other way



connect log-ins to
ExLibris Alma and Primo VE

Phase 2

1. OpenAthens Phase 2 Questionnaire

CARLI library gathers information needed to finish the OA configuration, including:

- Vendor list
- Group permissions details
- End-user experience preferences

The Phase 2 questionnaire to be completed by CARLI libraries [can be found here](#).

Please note, a CARLI library will be put in queue to receive their Implementation Project Manager upon submission of their Phase 2 questionnaire.



Phase 2

2. Vendor contact

EBSCO contacts all service providers to give them OpenAthens account details.

This is a quiet point in the implementation for the library, so a good time for OpenAthens administrator training with EBSCO's trainers:

- Schedule of monthly online training sessions led by EBSCO's experts [can be found here](#)
- Self-led trainings can be found at [OpenAthens' Virtual Learning Environment](#)



Phase 2

3. Pre-launch testing

When EBSCO is finished contacting all service providers, they will provide a list of A-Z database links to the CARLI library in OpenAthens format.

These links can be tested on-site as well as off-site (EBSCO) to ensure the user experience is ideal in both locations.



Phase 2

4. Choose launch date

Planning for launch: EBSCO and the CARLI library will discuss when to launch. When we “launch” OpenAthens, we deploy OA links to your end users.

- Links in EBSCO platforms will be updated by EBSCO’s team
- Links in other library platforms (website, LibGuides, LMS, etc.) will be updated by the library; EBSCO will help and advise where possible
- EBSCO working with ExLibris to compile guidance for updating links in Alma/Primo VE

See also: [Communication to library patrons](#)

See also: [OpenAthens user journey](#)



Phase 2

5. Go live

Launch OpenAthens (update all links): on a scheduled date (to minimize transition time for end users), EBSCO and the CARLI library will update links in all platforms where end users access electronic resources.

Links will be updated to use OA syntax/prefix.

See also: [Communication to library patrons](#)

See also: [OpenAthens user journey](#)



8. Testing

User acceptance testing (UAT): EBSCO will provide ongoing support during a period of UAT to ensure everything is working as needed.

- CARLI library will report any issues to EBSCO so implementation
- Training can be provided at any time during the implementation; the library may wish to take on additional sessions at this time





OpenAthens

Frequently Asked Questions

OpenAthens FAQs

Is OpenAthens compatible with my subscriptions?

OpenAthens is compatible with any providers that support IP or SAML access. To see a list of providers who are known to be compatible, [check here](#). Keep in mind that any “new to OpenAthens” providers might not appear on this list but can be set up as long as they support IP or SAML.

Is OpenAthens compatible with other tools and applications my library uses?

OpenAthens can power log-ins into any subscription, tool, or application that supports IP or SAML access. Here is an example of a library that uses OpenAthens to log users into their ILLiad service; this means that the library can also track how many log-ins to ILLiad are occurring over time: [Screencast, screenshots](#).

OpenAthens FAQs

Can we continue to use IP access for on-site users and only use OpenAthens for remote users?

Yes. OpenAthens can defer to IP authentication when a user is on campus. On-site users would get right in, and remote users would log in once through OpenAthens at the beginning of their browser session.

In this scenario, the same URLs can be used for both on-site and off. Please note that usage via IP access will not appear in your OpenAthens usage reports.

See also: [IP bypass settings](#)

OpenAthens FAQs

Will librarians need to be involved in their OpenAthens implementation?

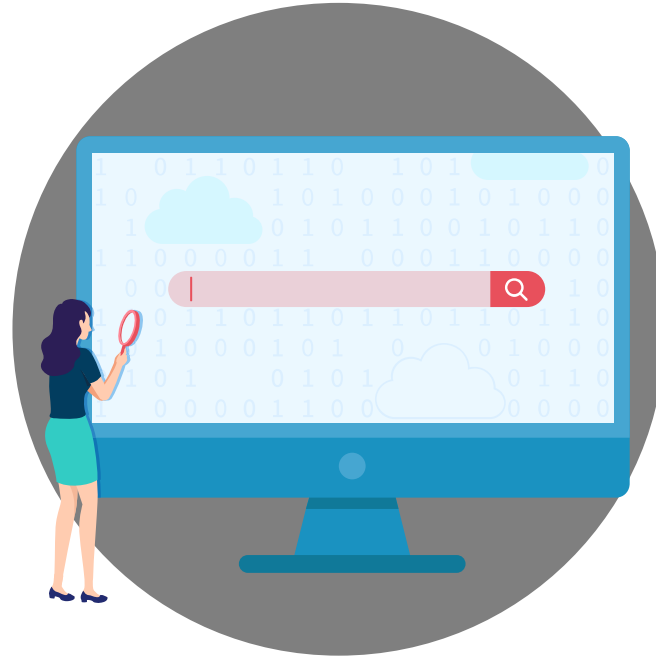
During the Vendor Contact phase of the implementation, the librarian or e-resource manager may need to assist if a vendor asks to receive authentication requests directly from their customer. Library administrators are also responsible for updating links in any non-EBSCO platforms, such as their ILS, LMS, and link resolver.

EBSCO's implementation team can help advise this process or point toward the correct support team.

OA reporting: what stories can we tell?



user accounts activity: successful vs. failed log-ins, total vs. unique log-ins



resource usage activity: total log-ins to each platform



breakdown reports by group, permission set (where applicable)

See also: [OpenAthens Reporting](#)

OA reporting: what stories can we tell?



breakdown reports by any attribute (library branch, department, etc.)



optional user-level reporting if library needs to compare with academic outcomes



on the roadmap: reporting API to share OA data with your reports applications

See also: [OpenAthens Reporting](#)

documentation to reference / quick links

[OpenAthens Onboarding Guide](#), a “users’ manual” for the implementation process and beyond. Reference this guide for the step-by-step setup process, information you will need to gather, tips for communicating changes to library stakeholders, and much more.

[OpenAthens Virtual Learning Environment](#), self-led courses on OpenAthens Administration, the product, and beyond. Time spent in this resource is highly recommended for libraries adopting OpenAthens.

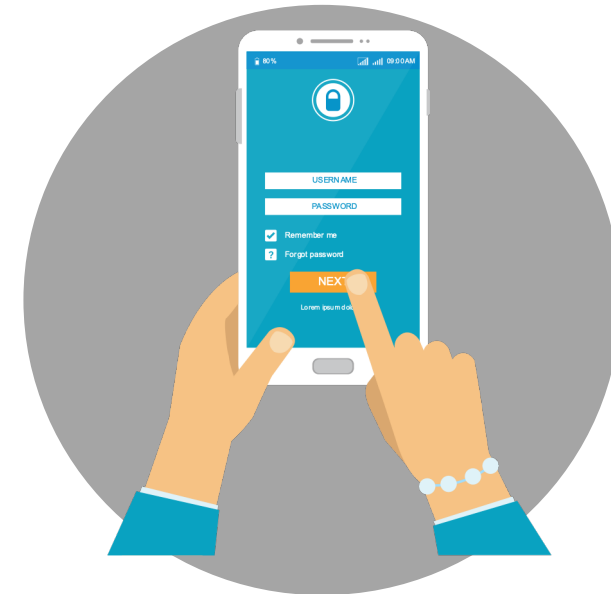
[EBSCO-led OpenAthens training](#), with sessions scheduled monthly on various topics

[OpenAthens documentation page](#)

documentation to reference / quick links

[Phase 1 Questionnaire](#), to be completed by individual CARLI libraries for initial OpenAthens setup.

[Phase 2 Questionnaire](#), to be completed by individual CARLI libraries for remaining OpenAthens setup, once Phase 1 is completed.





Questions?