EBSCO | OpenAthens | CARLI

OpenAthens
for CARLI
I-Share libraries

Agenda

- What is OpenAthens?

- Implementing for CARLI I-Share libraries

- Frequently Asked Questions

- OpenAthens usage reports: demonstration

- Recommended resources, training and documentation

- Questions and discussion

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What is OpenAthens?

- Single sign-on service

- Identity and access management tool

- Username/password system for logging in to digital resources; can use institutional accounts or create accounts in OpenAthens

- Access management tool that allows librarians to say *who* can access *what*

- Supports secure access using SAML 2.0, which transmits user data securely

- Fully cloud-based service with 24/7 customer support

What will change?

What will change for the end user?

- Streamlined user experience: personalized single sign-on

- No need to remember more than one account

- Log in from anywhere using any device

- Consistent access point when first logging in; after first log-in, seamless SSO experience

- Subscription renewals informed by OA usage reports mean end-users see more of the resources they prefer and find useful

See also: Communicating with library patrons

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The end-user experience:

From an initial search box:

In this example, users are encouraged to begin their research at an EDS search box; the initial log-in creates an authentication cookie that supports SSO into subsequent platforms. Screencast, screenshots.

In this screencast, the user first authenticates into EDS and subsequently:

- Finds articles previously saved in MyEBSCO*host* folder

- Accesses PDF full text on EBSCO platform

- Accesses ILLiad request form

- Accesses full text at IEEE and ScienceDirect platforms

...all via OpenAthens single sign-on.

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The end-user experience:

Using individual permalinks:

If a user has bookmarked individual permalinks to an article or database, the user journey remains the same; the first click of their browser session requires a log-in, but subsequent clicks do not. Screencast.

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The end-user experience:

When a federated resource is found via Google:

Resources in the OpenAthens federation typically have an institutional Where Are You From log-in option on their web page, offering an additional access point for users who begin their research on the open web. Screencast, screenshots.

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The end-user experience:

Starting at an LMS, LSP, or some other third party application:

Many libraries situate their library resources in something like Moodle, Canvas, or D2L, requiring that end users first log into those applications using their institutional account.

In this scenario, we would aim to use *OpenAthens* as the initiating log-in to the third party application.

This means that the initial log-in to Moodle, Canvas, etc. will begin the SSO session, and subsequent clicks on OpenAthens links will *not* prompt the user for another log-in.

See also: *Working with third party applications*

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What will change?

What will change for librarians and administrators?

- Puts administrative power back in the library; authentication settings are handled in one dashboard by the library, rather than IT

- Manage permissions rules to say who can access what

- Visibility of usage statistics for all platforms in one place

- OA security features mean misuse can be identified at the user-level, allowing a more targeted response instead of all access being shut down after misuse is detected on an IP

- Ability to create and manage user accounts for temporary/guest users

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|	Proxy and Shibboleth	OpenAthens
maintenance	Proxy and Shibboleth configured by IT; library must request assistance with new or broken resources. Updated wildcard certificates needed occasionally.	Proxy and SAML settings maintained by OpenAthens; library selects resource in OA catalog and connection is established. No need for updated wildcard certificates.
user journey	If Proxy and Shibboleth reference same directory (IdP), same log-in used for both. Personalization not supported if only using proxy access.	True single sign-on; can be used both on- and off-campus. Personalization supported for all SAML-compliant platforms.
reporting	Minimal; Proxy (IP authentication) does not support usage reporting.	Supports usage reporting for all library resources, proxy, and SAML.
security	Proxy (IP authentication) is not secure and is vulnerable to misuse.	SAML 2.0 is considered to be an industry standard in secure authentication; securely supports personalized access.
administration	Configured by IT; library must request assistance with new or broken resources.	Library-centric; settings contained in a single dashboard.

See also: IP proxy vs. OpenAthens

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OpenAthens
Implementation: what to expect for CARLI libraries

OpenAthens for CARLI

OpenAthens setup for CARLI I-Share members will be completed in two phases:

- *Phase 1* includes all account setup and configuring log-ins to Alma/Primo VE; timeline will be in line with Alma/Primo VE launch timeline (late June 2020)

- *Phase 2* includes the remainder of all resource setup and launch
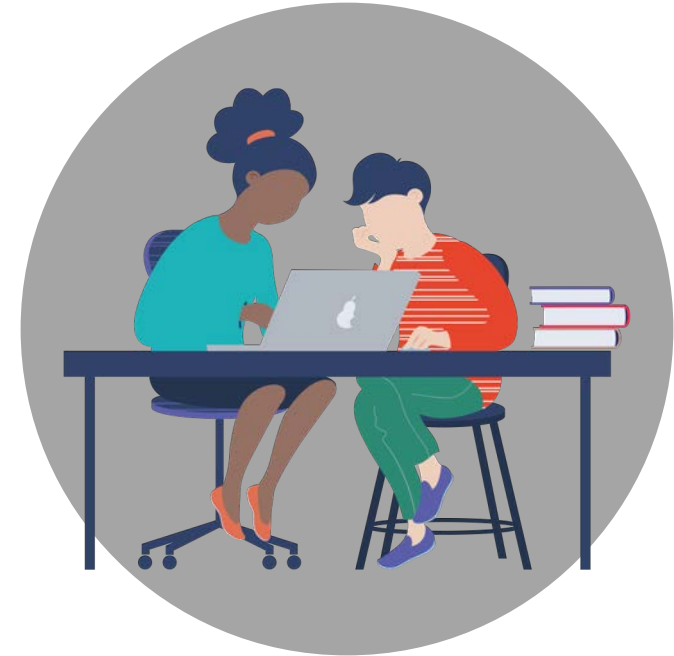
Your implementation team

- EBSCO's team performs technical configuration and launch work

    - Implementation Project Manager (IPM), your point of contact for all things OpenAthens

    - SaaS Specialist, who performs all technical back-end setup

- EBSCO's Customer Engagement team provides training on various topics: administration, maintenance, reporting

- OpenAthens' team (technical solutions specialists, product managers, service provider relationship managers) support EBSCO's team. Jisc/OpenAthens are located in the U.K.

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Phase 1

1. OpenAthens Phase 1 Questionnaire

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

- Who in the library or IT will be included on correspondence?

- Information about Identity Provider connection (need assistance from IT)

- Information about ExLibris Alma/Primo VE setup, including attribute mapping

The *Phase 1* questionnaire to be completed by CARLI libraries can be found here.

Phase 1

2. Accounts setup

Upon receipt of your library's Phase 1 Questionnaire, EBSCO works with the your library and/or IT staff to establish a connection to the school's Identity Provider, or directory of user accounts.

OpenAthens can work with a variety of IdP applications, including Active Directory (ADFS/LDAP), SAML (such as Shibboleth, PingFederate, Okta, GoogleSuite), CAS 5.x. if your institution does not have a central directory of user accounts, EBSCO's team can help you set up accounts in OpenAthens.

Expanded information on compatible IdPs and step-by-step requirements can be found in the CARLI Phase 1 Questionnaire.

Phase 1

3. Alma/Primo VE log-ins

EBSCO's team will work with ExLibris to configure log-ins to Alma/Primo VE using the library's OpenAthens. Once this is configured, users will be able to log into Alma/Primo VE using their institutional account.

To complete this step, EBSCO's team needs the following:

- Temporary test account from library's directory

- Assistance from ExLibris to configure settings for Alma/Primo VE

Expanded documentation on Alma/Primo VE dashboard configuration can be found in the CARLI Phase 1 Questionnaire.

Phase 1 completed

Once a CARLI library's *Phase 1* OpenAthens setup is completed, their users will be able to log into Alma/Primo VE using their institutional account.

This phased implementation is designed to prioritize Alma/Primo VE in line with CARLI's launch timeline for those applications.

After *Phase 1* is completed, the library can then begin gathering information needed to complete *Phase 2* of their implementation. The CARLI Phase 2 questionnaire [can be found here](#).

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Phase 2

1. OpenAthens Phase 2 Questionnaire

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

- Vendor list, a list of subscriptions with account number, access URL (need input from librarians, e-resource managers)

- Group permissions details: Which groups have access to which subscriptions? What IdP attributes can identify groups?

- End-user experience preferences; use IPs on-campus?

The *Phase 2* questionnaire to be completed by CARLI libraries
can be found here.

See also: OpenAthens Onboarding Guide

Phase 2

2. Vendor contact

EBSCO contacts all service providers to give them OpenAthens account details. This is a quiet phase 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

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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

See also: Communication to library patrons
See also: OpenAthens user journey

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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

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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 can be completed and optimized

- Training can be provided at any time during the implementation; the library may wish to take on additional sessions at this time

A smooth OpenAthens implementation …

Follow these tips to ensure a smooth OpenAthens implementation.

Consistent engagement throughout. Your IPM will provide regular progress updates and anything we need the library's help with

- Vendor contact: IPM may ask the library to reach out to unresponsive vendors

- Pre-launch planning: the CARLI library will be responsible for updating any links that the EBSCO team doesn't have access to (any non-EBSCO link resolvers, ILS, LMS, webpage, etc.)

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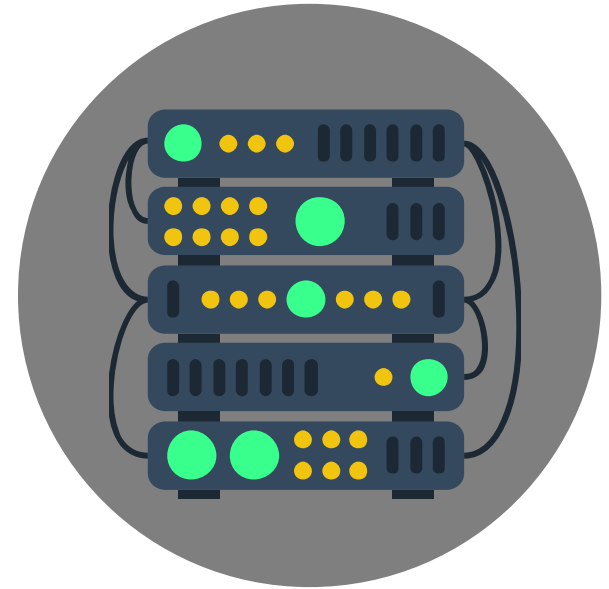
OpenAthens
FAQs

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 can be set up as long as they support IP or SAML.

OpenAthens FAQs

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.** This means that OpenAthens can log end users into databases and journals as well as the library's LMS, catalog, Interlibrary Loan application, and so on, as long as those tools use IP or SAML access natively.

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.

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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 OA usage reports.

See also: <u>IP bypass settings</u>

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OpenAthens FAQs

What if our institution doesn't have a local directory, or some users don't have accounts in our local directory?

For any libraries who do not have a local directory (such as Active Directory), OpenAthens can store user accounts and act as the library's directory. Accounts can be created, modified, or deleted in bulk using a *bulk upload* process during the implementation. This process does not incur any added fees.

Alternatively, if the library chooses to create OpenAthens accounts for community or walk-in users, they can do so on a one-off basis (rather than in bulk) or use a shared *access account* for all walk-ins.

See also: Types of accounts for OpenAthens set-up
See also: Creating personal accounts, access accounts within OpenAthens

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OpenAthens FAQs

Will librarians need to be involved in their OpenAthens implementation?

Yes. The customer typically needs to provide information needed by EBSCO's team to complete the implementation (OpenAthens Questionnaires).

During the Vendor Contact phase of the CARLI I-Share sites' Phase 2 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.

OpenAthens FAQs

Will my IT department need to do anything to help us set up OpenAthens?

IT involvement is usually needed to help establish a connection to your institution's user directory, a fairly quick process at the start of the implementation.

We recommend that your IT department be involved in early conversations for this reason.

See also: FAQs for IT

OpenAthens: Data Security and User Privacy

For more information regarding OpenAthens' ability to enforce data security and user privacy, see also:
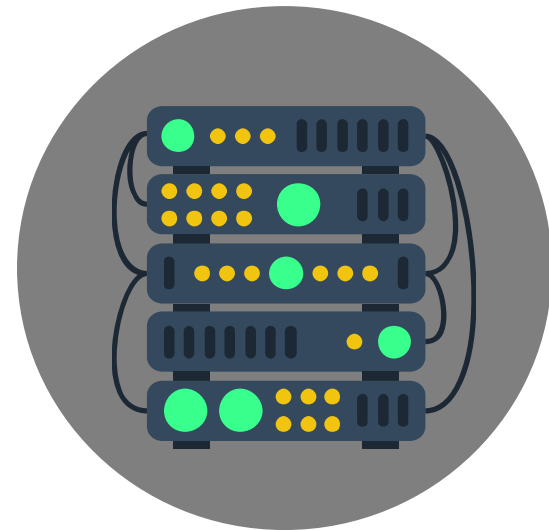
OpenAthens Security Guide

OpenAthens Privacy Policy

Security and Privacy FAQs

About usage reports and privacy

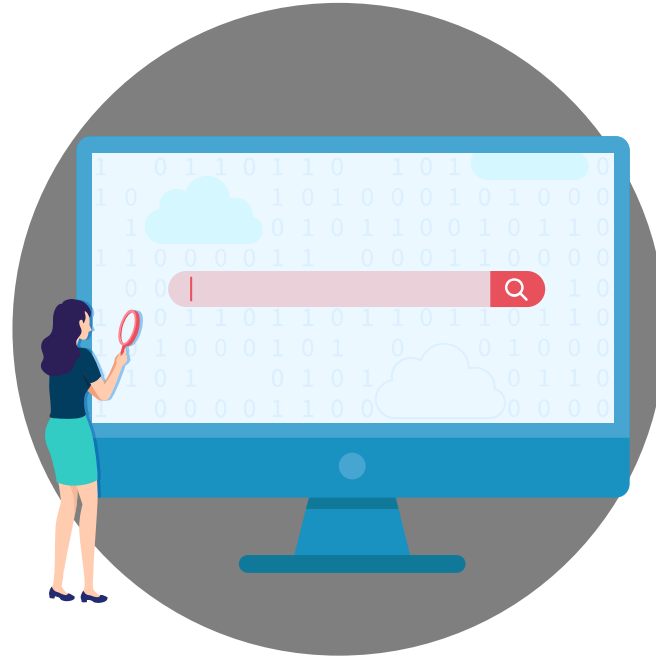*The library's control over attribute release*

For additional questions regarding OpenAthens' security and privacy protocols, contact OARequests@ebsco.com.

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 migrating to OpenAthens.

FAQs for IT, a doc that's designed to answer initial questions from IT regarding IdP connection and beyond.

OpenAthens documentation page

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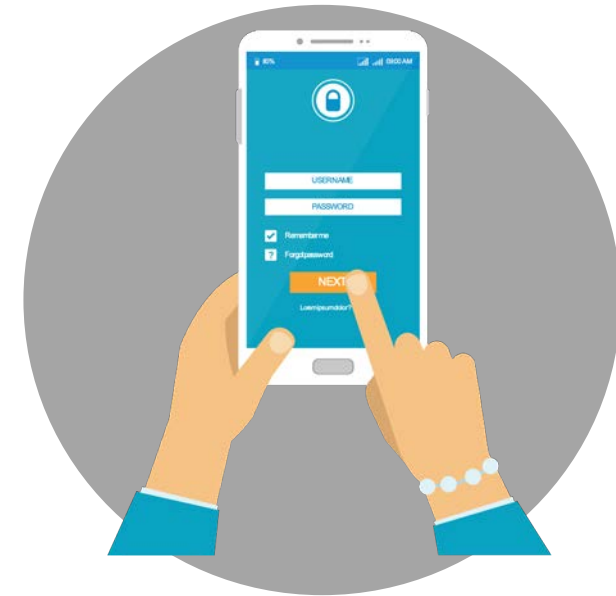# Where can OpenAthens customers find training?

EBSCO's Customer Engagement Services team provide training materials to new SaaS administrators and are available to schedule one-on-one training with libraries who would like to learn more about managing and leveraging their OpenAthens service.

Current OpenAthens customers can also use OpenAthens' Virtual Learning Environment to complete interactive training courses.

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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.

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Questions?