

## Phase 2 OpenAthens questionnaire for CARLI I-Share members

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OpenAthens is a single sign-on service that offers library end users a seamless SSO experience and the benefit of secure SAML access. Library administrators can use OpenAthens to manage group authorizations and access, pull granular usage data, and consolidate both SAML and proxy IP authentication into a single, fully cloud-hosted solution.

This questionnaire outlines the information needed from CARLI I-Share members to configure OpenAthens log-ins to all remaining library content, tools, and applications. EBSCO's Implementation team will use the information submitted to assist the library in launching OpenAthens.

Name of your CARLI I-Share site:

EBSCO Customer ID:

Name of person in your library who will be point of contact for the OpenAthens setup:

Contact's email address:

Contact's direct phone number:

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### Information about your library's subscriptions, tools, and applications to be set up with OpenAthens log-ins.

Please note, your library's e-resource staff may be needed to help answer questions in this section.

If you have completed Phase 1 of CARLI's OpenAthens implementation, then you will have already enabled log-ins to ExLibris Alma and Primo VE. The remaining configuration for your implementation will focus on setting up log-ins to the remainder of your content, tools, and applications.

The **Vendor List** is a list of any subscriptions your library currently purchases. It should include any content your users authenticate into (so no need to include open access content here). A template for the Vendor List [can be found here](#).

- Some details are required to help your IPM expedite the vendor contact process, such as your subscription / account number and your point of contact at the service provider.
- It is important to include all of the online resources that you would like to log into with OpenAthens — this includes all databases, journals, individual journal subscriptions via publisher access or subscription service, and point of care resources used by your library. If you subscribe to full journal packages, you only need to include the package name — not a title list. Subscriptions purchased by a consortia or governing body must also be included.
- Please note, any subscriptions not included during this information gathering can be set up by EBSCO's Support team after the initial implementation.

Please upload your Vendor List here:

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### Information about group authorization, and how OpenAthens should manage access for different groups.

Are all user groups (e.g. *faculty*, *staff*, *students* or *location*) entitled to access all library subscriptions?

Yes, all users have access to the same set of resources  No, different user groups have access to different sets of resources

Will your library require usage reporting broken down by different groups?

Please provide details for group authorization. What groups need to be defined, and which resources are accessible to each group?

For example: a library might purchase their JSTOR subscription specifically for faculty and staff, but not students. So, EBSCO's team needs to know that "JSTOR should only be accessible to faculty and staff, but not students."

Yes, we would like to see group breakdowns in our usage reports  No, we do not require group breakdowns in our usage reports

For example: libraries may want to see usage data broken down by faculty department, or major, or something similar. Please note, group breakdowns are available only if the corresponding group attributes are tracked in your institution's directory of user accounts. IT may be required to help with this question.

For the purposes of usage reporting, what attributes from your institution's directory should be used to identify groups? Please note, your IT may be required to assist with this question.

For example: many IT departments track a "memberOf" attribute on each user's account that can contain information about groups they belong to. For this question, we'd like to know (a) what attribute contains group information, and (b) what values within that attribute correspond to each group. A library might have "Faculty" in the "memberOf" attribute to identify that a user is a Faculty member.

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### Information about where your users access library subscriptions.

Please select the applications used by your library where links will need to be updated to use OpenAthens:

Full Text Finder  Non-EBSCO link resolver (e.g. SFX, 360Link, etc.)  LibGuides   
Other library web page  LMS (e.g. Canvas, Moodle, etc.)  ILS  Something else

EBSCO's Implementation team will update links in any EBSCO platforms, like in Full Text Finder and permalinks in EBSCO databases.

Your library will be responsible for updating links in non-EBSCO platforms, such as LibGuides or your LMS. Some resources are available to assist with this process:

- [Using OpenAthens in third-party applications](#)
- [Public redirector link generator](#), a handy tool to distribute to faculty if they are responsible for managing their own links in LMS pages, syllabi, etc.

**Please note**, when working with third-party applications like an ILS or LMS, the ILS or LMS vendor will also be a strong resource for instructions and advice.

### Information about your preferred end user experience.

Would you prefer that on-campus users continue to use IP access, or would you like all users (on-campus and off) to use OpenAthens as their primary access method?

We would prefer to continue using IP access for on-campus users.  We would prefer to use OpenAthens for all usage, both on-campus and off. If you choose to continue using IP access for on-campus users, it is a very easy update to your implementation. Please note, though, that using IP access means that on-campus usage will not be reflected in your library's OpenAthens usage reports. If you would like to use OpenAthens log-ins for all usage but need to support walk-in users, please speak with your IPM about creating Access or Personal Accounts for walk-ins.

#### Supporting walk-in users when using OpenAthens log-ins on campus

A common use-case amongst academic libraries is that the library would like to use OpenAthens log-ins for on-campus usage in order to accrue all usage data, but needs a way to create OpenAthens accounts for walk-in or community users. To support walk-in users, the library has several options:

- Continue using IP access for on-campus users, including walk-ins. This can be set up in the library's OpenAthens settings using an [IP Bypass](#). When an IP bypass is in use, on-campus users will continue to use IP access even when they click on an OpenAthens link. In this scenario, OpenAthens will only be the remote access solution, and the library's OpenAthens usage reports will only reflect data for remote usage.
- Create accounts on a one-off, as-needed basis within OpenAthens. OpenAthens allows the library to manually create accounts on the fly for walk-in users; the librarian can specify when the account is valid until. There are two types of accounts created in OpenAthens: [personal accounts](#), which are assigned to a single person and can be used on-campus and off; and [access accounts](#), which is a username/password that can only be used within the library, as it is tethered to the library's IP address. Access accounts can be shared within the library because they cannot be used off-campus.

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**Upon submission of this form, your EBSCO Implementation team will continue work with your library to complete your OpenAthens setup and help launch the service for your remaining subscriptions.**

Once completed, your end users will be able to log into all of your library's subscribed content using OpenAthens. When they start a new browser session, they will be prompted to log in using their institutional account. A single log-in through OpenAthens will represent the beginning of their single sign-on session, so additional clicks to full text options will not require an additional log-in.

Please list email addresses for any additional contacts who should receive a copy of this questionnaire submission:

One email per field.

[Add another email address](#)

For additional information and documentation on the OpenAthens service during this time, please reference the following:

- [OpenAthens documentation](#)
- [OpenAthens Onboarding Guide](#), a reference manual for libraries approaching an OpenAthens implementation
- [Virtual Learning Environment](#), self-led training courses for new OpenAthens administrators. Please note, an OpenAthens Administrator username is required to log into the VLE; this will be provided to your library by your EBSCO Implementation team once your dashboard is available.
- [EBSCO-led OpenAthens training sessions](#), held weekly, open to any participants and covering topics from administration basics to usage reporting

**Thank you for your submission! Your EBSCO Implementation team will be in touch soon.**