



Making the Move to OpenAthens

Walking away from WAM: Tips and Lessons Learned

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Who We Are

Who we are: Three Institutions - One Solution

- Azusa Pacific University, Azusa, California
 - Private Christian university with 10,000+ students
 - Main campus + regional centers + support Los Angeles Pacific University
- Indiana Wesleyan, Marion Indiana
 - Private Christian university with 14,000+ students
 - Traditional: residential campus + Seminary: blended, online only and onsite + National and Global: onsite and online
- University of Arkansas, Fayetteville
 - Land Grant R1 public university with 27,000+ students
 - Main campus + remote users around the state and globe



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What is OpenAthens

And why we switched

What is OpenAthens

- A **Federation** of institutions
- AND a **Solution** for authentication and access

- Provides a SSO experience (Single Sign On)
- Can use your campus IdP (Identity Provider)
 - Microsoft Azure
 - Google
- OR can use a manually maintained patron list
- Works with hundreds of providers (publishers or platforms)
- Offers a traditional proxy in addition to federated access

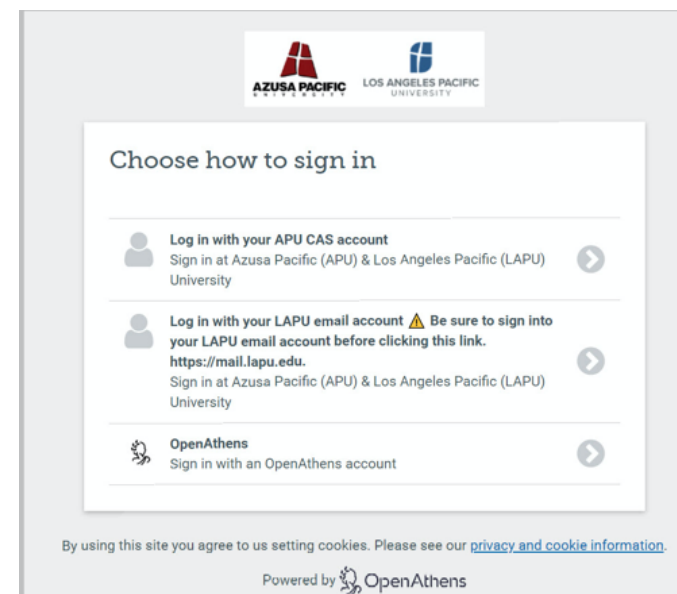


Why We Switched FROM WAM

- Caching, cookie, and network issues
- Maintenance overhead
 - Forwarding table maintenance and domain / vendor website troubleshooting
 - For APU: maintaining two separate proxy interfaces for APU (brick & mortar w/online) and LAPU (online only) patrons using different logins
- Need for a wildcarded / SANs certificate to support https
- IP-based legacy authentication problematic with remote and mobile users
- Lack of integration with other campus sign ons and authentication systems
- Lack of robust reporting

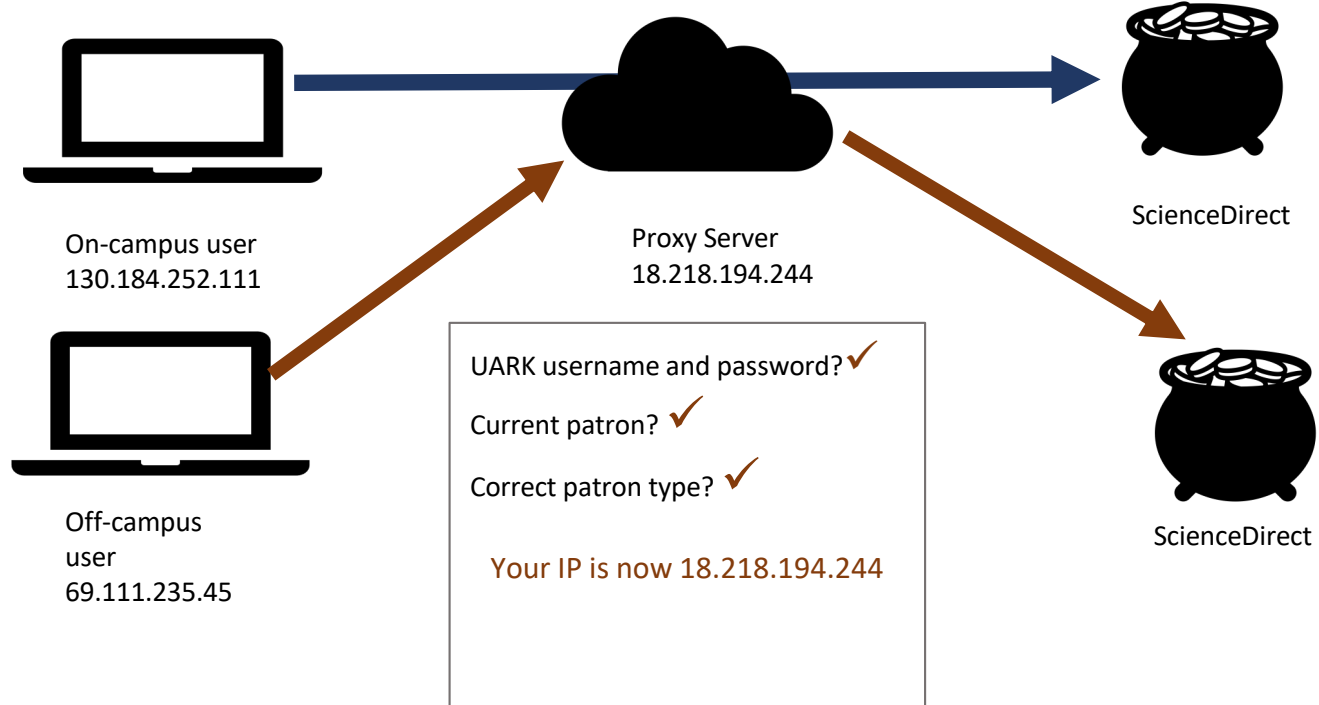
Why We Switched TO OpenAthens

- Consistent login experience
 - Single-sign on for all students, faculty, and staff
 - Supports multiple identify providers (important for APU & LAPU)
 - Users can sign in from anywhere on the web: Standardized WAYF (Where Are You From?) interface
- Reduce error messages that students get when accessing electronic resources
 - Users stay authenticated longer and are authenticated to multiple campus services
- Maintenance handled by OA
 - No local forwarding table
 - Worldwide user community, 2600+ libraries and consortia
- Robust reporting and usage data
 - Track usage by user groups* and by platform
- Additional benefits
 - More secure
 - Automatic personalization is available for some databases: example folders in Ebsco



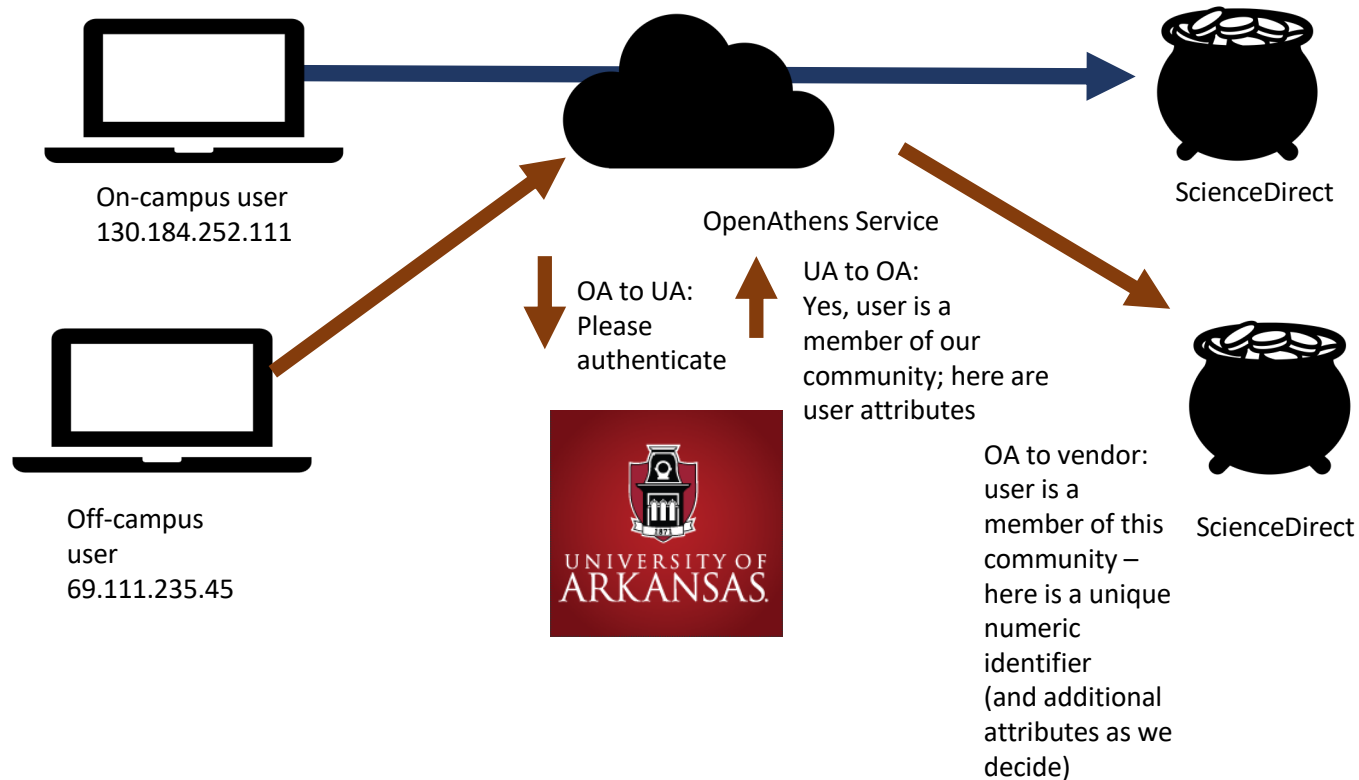
WAM Proxy

<http://0-www.sciencedirect.com.library.uark.edu>

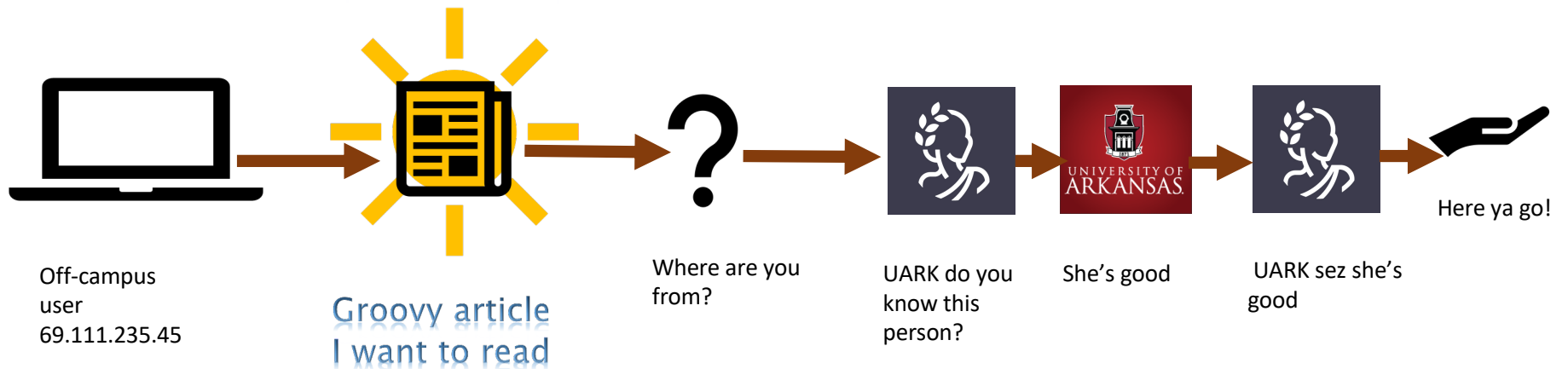


OpenAthens

<https://go.openathens.net/redirector/uark.edu?url=http%3A%2F%2Fwww.sciencedirect.com>



Wild Wild Web



The Implementation Journey

Implementation Journeys

- Azusa Pacific
 - Configuration and Testing began April 2018
 - Go-Live August 2018
 - Updated SSO IDP August 2018 (no more double proxy)
 - Cleanup through May 2019
- Indiana Wesleyan
 - Configuration and Testing began in October 2018
 - Attempted first Go-Live February 2019, reverted to WAM
 - Second, successful Go-Live April 2019
 - Cleanup through Fall 2019
- University of Arkansas
 - Configuration and Testing began August 2019
 - Go-Live January 2020
 - Cleanup through Summer 2020
 - WAM decommissioned Fall 2020



Implementation Phases - YMMV

1. Project Kickoff
2. Authentication Setup
3. Resource configuration and testing
4. Promotion and training
5. Go-Live process
6. Cleanup and tweaking
7. New workflows and procedures

1. Project Kickoff

- Initial meetings with Ebsco
 - Ebsco is the vendor for OA in the US
- Ebsco assigns an Implementation Coordinator and a SaaS engineer to your project
 - The Implementation Coordinator will be your contact through the project
- Onboarding your campus IT team and IdP partners – essential
- Assembling your library OA team
 - Serials / Eresources specialists
 - Server / Proxy admin
 - Don't forget your communicators and communication plan
 - *(all of these may be YOU!)*

2. Authentication Setup

- Mapping Campus Identity Provider (IdP) metadata and schema to OA schema
- Define user groups such as students, faculty, or staff
 - Or students in a specific program
 - Or students at a specific campus
 - User groups will be used to limit access to specific resources
- Determine user attributes such as name, email, campus, department or major
 - to be anonymized / collected for statistical reports
 - to be passed to vendors and publishers for personal accounts
- Determine if locally-created OpenAthens accounts will be needed
 - Manually administered
 - Examples might be summer programs, alumni, community users
- Determine if on-campus users will be authenticated or not (pass-through with IP)
- Set up test campus account
 - Used by OA for setups
 - Also used by vendors for troubleshooting

3. Resource Configuration and Testing

The most time-consuming and complex step

- Step 3A : Identifying all your vendors and platforms
 - Clarifying your rights and holdings, especially post-cancellation access
 - UARK combined a number of reports and then deduped for a master list:
 - WAM Forwarding Table domains
 - Vendor records
 - Serials Solutions KB Data Management reports
 - Deduped list of URL domains in catalog
 - Report to Ebsco:
 - Provider name
 - Access URL (database- or platform- level link)
 - Sample ejournal or ebook title-level links
 - Account number
 - Special permissions (Law only; PhD students only)

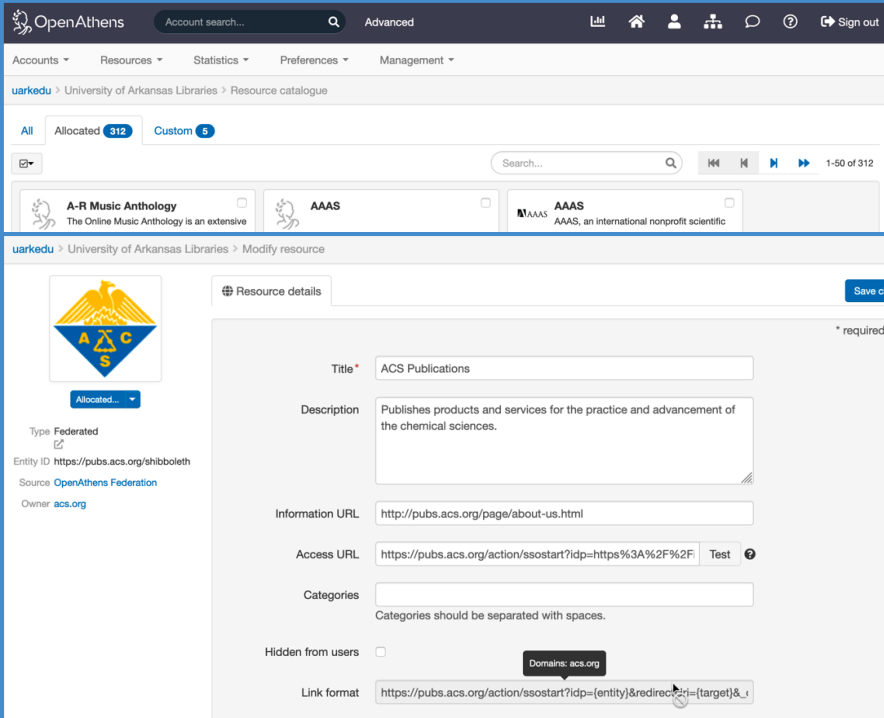
ID	Account Number	Access URL	Resource Name	Sample Database
18	#15000434	call.org	CAJL	CAJL Lessons
19	#15000461	websearch.com	Chemical (Websters Kluwer)	Chemical (Websters Kluwer)
20	#15000581	corpjournal.com	Corporate Counsel	Corporate Counsel
21	#15000679	mcgraw.com	Corporate Counsel Profiler	Corporate Counsel Profiler
22	#15000984	ebscohost.com	Ebsco	Legal Collection
23	#15000937	ebscohost.com	Ebsco	Legal Periodicals Full Text
24	#15000925	ebscohost.com	Ebsco	Index to Legal Periodicals Retrospective
25	#15000926	fatfree.com	FatFree	FatFree
26	#15000924	galegrp.com	Gale (Library@nyounglaw)	LegalTrac
27	#15000925	galegrp.com	Gale (Library@nyounglaw)	Making of Modern Law: Legal Treatises 1800-1900; Making of Modern L
28	#15000937	galegrp.com	Gale (Library@nyounglaw)	U.S. Supreme Court Records and Briefs 1832-1978; U.S. Supreme Court F
29	#15000922	healthaffairs.org	Health Affairs	Health Affairs
30	#15000929	news-on-line.org	News-Online	American Association of Law Libraries (News-Online); American Associa



3. Resource Configuration and Testing

Step 3b : Wait while Ebsco contacts vendors and “allocates” resources for you

- Expect a great deal of back and forth
 - Contact publishers to verify access and holdings
 - Contact publishers new to OpenAthens
 - Explaining proxied access



The screenshot displays the OpenAthens interface for configuring a resource. The top navigation bar includes 'Accounts', 'Resources', 'Statistics', 'Preferences', and 'Management'. The main content area shows a list of resources, with 'A-R Music Anthology' and 'AAAS' visible. Below this, the 'Modify resource' page for 'ACS Publications' is shown. The resource details include:

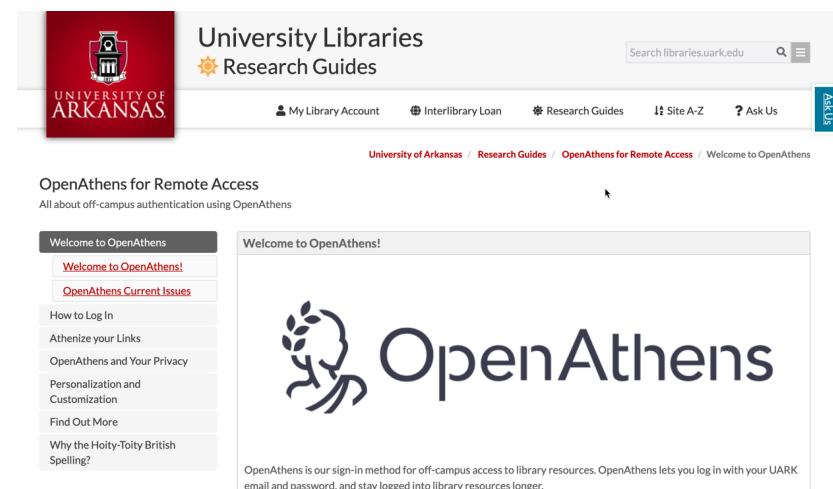
- Title***: ACS Publications
- Description**: Publishes products and services for the practice and advancement of the chemical sciences.
- Information URL**: <http://pubs.acs.org/page/about-us.html>
- Access URL**: <https://pubs.acs.org/action/ssostart?idp=https%3A%2F%2F> Test
- Categories**: Categories should be separated with spaces.
- Hidden from users**:
- Link format**: [https://pubs.acs.org/action/ssostart?idp=\(entity\)&redirect=\(target\)&_](https://pubs.acs.org/action/ssostart?idp=(entity)&redirect=(target)&_)

3. Resource Configuration and Testing

- Step 3C: Testing, Testing, Testing
 - Both on and off-campus; multiple testers
 - Track issues on shared spreadsheet with Ebsco
 - Verify actual full text access, not just site access
 - Call to the entire library for guest testers

4. Promotion and Training

- Synchronous with other tasks
 - Blog posts for users
 - Communication with campus partners:
 - IT
 - LMS / Blackboard / Canvas / Moodle
 - LibGuides and LibAnswers FAQ updates
 - Staff Awareness
 - Emails
 - Training / demos / update sessions



5. Go-Live

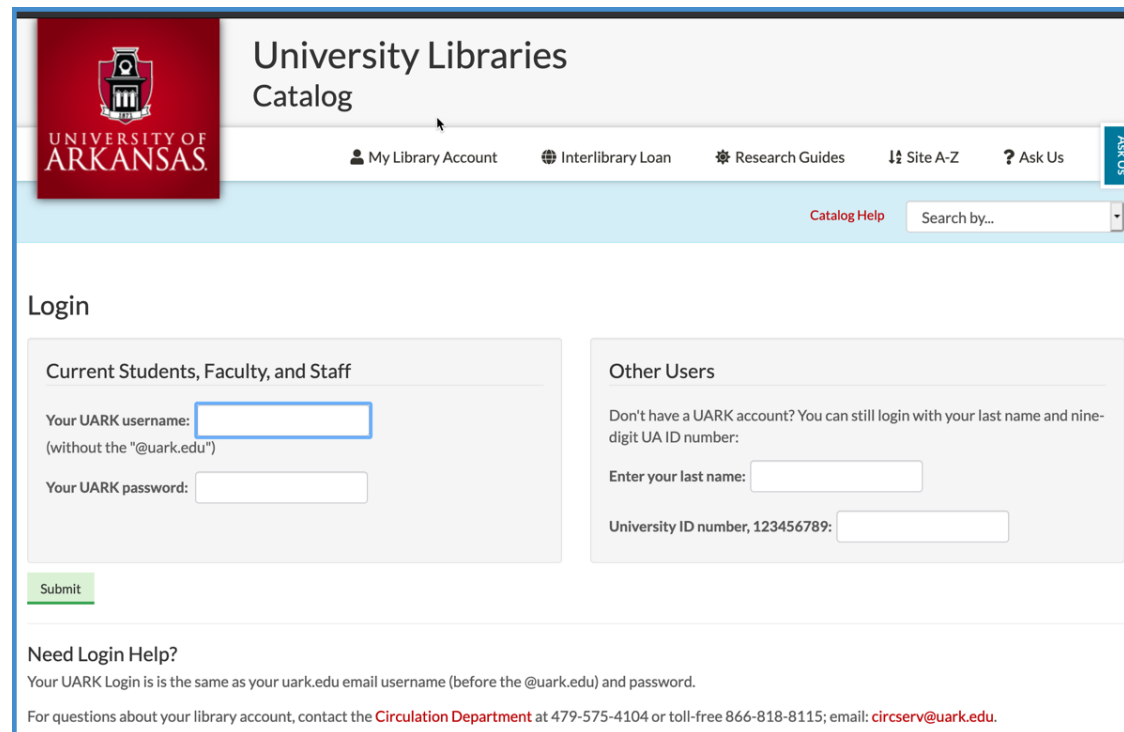


- Not just a “day.” It’s a process
- Some things can’t be done in advance
 - “Go Live” Providers
 - Ebsco
 - Gale
 - ProQuest Academic and ProQuest Ebook Central

Image source: Unsplash

Fortunately

- WAM is still working



The screenshot shows the University Libraries Catalog login page. At the top left is the University of Arkansas logo. The main header reads "University Libraries Catalog". Below the header is a navigation bar with links for "My Library Account", "Interlibrary Loan", "Research Guides", "Site A-Z", and "Ask Us". A search bar is located on the right side of the navigation bar. The main content area is titled "Login" and is divided into two sections: "Current Students, Faculty, and Staff" and "Other Users". The "Current Students, Faculty, and Staff" section has two input fields: "Your UARK username:" and "Your UARK password:". The "Other Users" section has two input fields: "Enter your last name:" and "University ID number, 123456789:". A "Submit" button is located below the "Current Students, Faculty, and Staff" section. At the bottom of the page, there is a "Need Login Help?" section with contact information for the Circulation Department.

University Libraries
Catalog

My Library Account Interlibrary Loan Research Guides Site A-Z Ask Us

Catalog Help Search by...

Login

Current Students, Faculty, and Staff

Your UARK username:

(without the "@uark.edu")

Your UARK password:

Other Users

Don't have a UARK account? You can still login with your last name and nine-digit UA ID number:

Enter your last name:

University ID number, 123456789:

Need Login Help?

Your UARK Login is is the same as your uark.edu email username (before the @uark.edu) and password.

For questions about your library account, contact the [Circulation Department](#) at 479-575-4104 or toll-free 866-818-8115; email: circserv@uark.edu.

5. Go-Live Day



- Ebsco, ProQuest, and Gale
 - New authentication method must be reconfigured on the Go-Live Day AT the provider
 - ProQuest only allows 1 authentication type
 - The ProQuest ebook user accounts created previously can be wiped out
 - For Ebsco, if you retain both IP AND SSO authentication types, can cause conflicts for your off-campus users who may also have access through their local school or campus
 - Ebsco folders created previously need to be merged
- This is nerve-wracking

Image source: KC Green, "On Fire" 2017

6. Cleanup and Tweaking

- Updating and “Athenizing” URLs

- <https://www.sciencedirect.com>

To

- <https://go.openathens.net/redirector/uark.edu?url=https%3A%2F%2Fwww.sciencedirect.com>

- So, Many, Places.

Library catalog

- Global Update
 - MarcEdit for new batch loads
 - Load Profile Updates
- LibGuides and LibAnswers
- Website
- Campus CMS
- Alert faculty and students

7. New Workflows and Procedures

- New processes for database setups and trials
 - May have to open a ticket at Ebsco to allocate a new resource
- Clarifying staff roles
- New processes for remote access troubleshooting for front line staff
- New load profiles
- Tools for Athenizing / URL encoding / URL unencoding

Lessons Learned

Azusa Pacific Successes



- Login statistics on the resource level
- Dedicated EBSCO rep to help us at the beginning
- Easy to create personal accounts for vendor testing, proctors, visiting scholars, etc. that may not have an APU email.
- OA often making upgrades to the resource. We have not encountered problems because of the time difference.
- Configured our own homemade resources in OA – for Link+, Encore, etc. Uses institutional email address as the key to make sure there is a match to the Ill patron database.
- Alternative proxy since we are maintaining the legacy proxy address. Code SQL switch in the A-Z list to go to the legacy proxy if something goes down.
- Resources are now independent of the ILS. If Ill goes down or if there is an upgrade users still have access to research.
- No longer maintaining a double proxy access for LAPU that we maintained for 8 years.
- Less time handling proxy configurations
- Our biggest problem for an entire year that impacted patrons everyday - **No more cookie/timeout errors for users**



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Azusa Pacific Challenges



- Juggling of multiple entities within APU/LAPU and EBSCO from the beginning - communication between everyone.
 - Working with EBSCO as the middleman - communication disconnect since we can't directly communicate with OA.
 - When OA updates or replaces a resource script - EBSCO clients are not being informed proactively - typically we find out when a patron complains (we maintain a log of all changes - run an API script weekly to compare differences)
- Legacy WAM is tied to the patron accounts, however with OA we can't do anything about that - for instance - student has a fine, etc.
- OA does not use FTE but actual number of user accounts, so if alumni are added and continually increase we may have to pay more for it in the future.
- Google suite error messages that LAPU students encountered after we went live - exploding robot
- Wrote our own API to report on the permission sets since our institution has not provided us with full attributes - only provide us with faculty/staff and students.
 - Usage tracking by groups (undergraduate, graduate, doctoral, etc.) that we had hoped to be able to do is not possible since we can't get the attributes from our institution.
- Accounts management tool - it's not complete
 - functionality is not the same for all account types (local authentication accounts vs personal accounts)



Asuza Pacific Future implementation ideas / Recommendations for improvement



- Provide access to alumni (vendor allows or we have subscribed to alumni access)
 - Hassle to maintain this manually
- Attribute integration – for groups of users to track login statistics. We started to do this manually but it was very time consuming so we stopped.
- Move LAPU off of GSuite
- Other places on campus that could make the use of OA when interacting with LAPU - like the writing center
- Use an API call from OpenAthens to the Sierra system patron database to see if there is a block and apply it in OpenAthens.
 - Explore the future iteration of Sierra which will be IDP compatible – we can then pull in user attributes from Sierra rather than through the university.
- Statistics feature is clunky – would love to see it updated.



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Indiana Wesleyan University Successes



- Users are able to authenticate using our university login page which is a single point of entry for all campus resources
- The load is automatic so the library doesn't have to load users into the OpenAthens system.
- Links
 - ProQuest links actually work better
 - EBSCO and Gale links work without having to be "Athenized"
 - Redirector link generator is now available for all users that don't have admin access

A screenshot of the Indiana Wesleyan University login page. At the top is the university logo. Below it, the text reads "Sign in with your Indiana Wesleyan University account". There are two input fields: the first contains the username "pam.childers" and the second contains a masked password ".....". Below the password field is a checkbox labeled "Keep me signed in". A blue "Sign in" button is positioned below the checkbox. At the bottom of the form is a blue link that says "Forgot Password".

Indiana Wesleyan University Challenges



- Users must still authenticate in Sierra WebOPAC for “My Library Account” – confusing
- IWU identity provider did not contain the same user groups as Sierra; could cause blocked access
- Ebsco folders created previously must be manually merged with new folder created with the OA account
- Ebsco IP and Guest authentication types can cause conflicts with multiple campuses and locations
 - Ended up creating separate profiles in Ebsco and login links for various campuses and groups
- Some vendors do not correctly encode Athenized URLs (example, Ovid jumpstarts)
- Updating links in catalog, LMS, and elsewhere

Login

IWU Network Login

Please enter your IWU network username and password
(Your username is typically your firstname.lastname)

Username:

Password:

Alternate Login

Name:

OR **Enter last name only.**

Library Access Number:

Your fourteen digit Library Access Number is found on your IWU ID card and starts with 292240.

Submit



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Indiana Wesleyan Lessons Learned



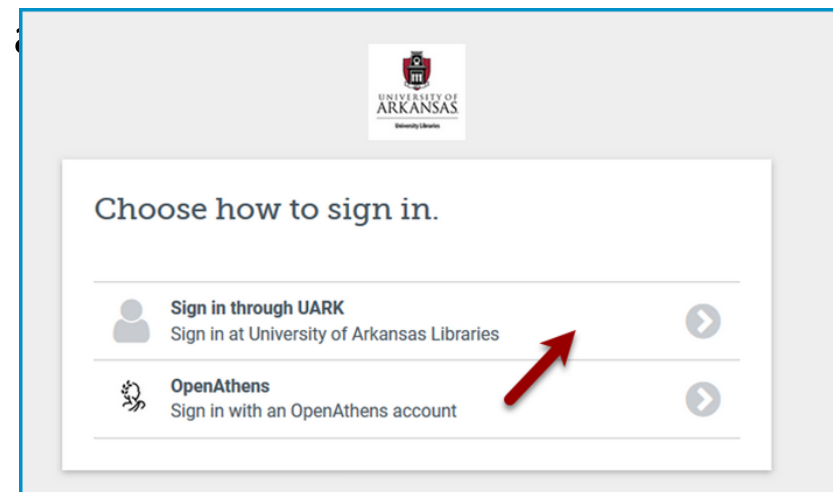
- Be better prepared for updating links in the library website, Sierra, LibGuides, and LMS
- Check on how vendors provide permalinks and share links
- When adding a “new” resource check the catalog and use WAM as a backup in case it takes a while to get it set up
 - If a resource isn’t available in the OpenAthens catalog, then it can sometimes take over a week to have it added by EBSCO
- Check with vendors to make sure that they have all of your campus ips. Test links off campus to make sure that remote users don’t have issues
- Make sure that you have correctly input ALL IPs into the OA “bypass authentication” instructions



University of Arkansas Lessons Learned



- “same”
- Would now avoid using the “brand name” OpenAthens when describing the service.
Users try to login under OpenAthens rather than UARK signin.
- Remote access to resources now separate from My Library Account
- Wish there was better documentation on the “Go-Live” vendors, Ebsco, ProQuest etc.
- A pandemic is a great time to test off-campus



Additional Resources

- Check our session handout for
 - Search and replace and Athenization strategies
 - Staff guides
 - Helpful links



THANK YOU

Denise Gehring -- Azusa Pacific University

Pam Childers -- Indiana Wesleyan University

Beth Juhl -- University of Arkansas, Fayetteville

