

# Making the Move to Open

## *One Library's Experience*

 #IUG2019

**IUG2019**   
**Phoenix, AZ**

**EBSCO**

Sunday, May 5<sup>th</sup> | Pre-Conference

Monday, May 6<sup>th</sup> – Wednesday, May 8<sup>th</sup> | Main Conference

# Your Presenters

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# Today's Session...

1. Introduction
2. Brief Overview of OpenAthens
3. Azusa Pacific's Experience with OpenAthens
4. Questions



Helping over **2,600 organizations**  
in **50 countries**, enable access to  
hundreds of thousands of journals,  
databases and e-books for over  
**4 million end users.**

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# OpenAthens vs IP/proxy

- ✓ Uses latest SAML 2.0 security protocol (end to end encryption)
- ✓ Provides a Federation framework
- ✓ Works across all devices and locations
- ✓ Supports user personalization
- ✓ Easily create statistical reports
- ✓ Always fully hosted
- ✓ Designed by librarians for librarians

# EBSCO/OpenAthens Partnership

We've heard from our customers and users that authentication continues to be a problem with the **user experience**

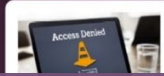
EBSCO and OpenAthens have partnered for a fully integrated, librarian administered, single sign-on solutions for libraries

EBSCO

OpenAthens 

discover → authenticate → access

OpenAthens 



Removing barriers to knowledge

The end-user only needs to remember **one username and password**, opening up access to all available e-resources



Connecting people to information

# OpenAthens for End Users

Single sign-on

Username

Password

Databases & Apps



Research & Journals



News & Publications

No need to sign in again as the end-user moves from resource to resource



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Personalization

Mobile  
access

Multiple  
devices

## Changing User Requirements: 1990 - today





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Outline

Abstract

Keywords

References



ELSEVIER

### Energy Procedia

Volume 105, May 2017, Pages 3068-3074

open access

## Research on the Status of Water Conservation in Thermal Power Industry in China ☆

Weiwei Shao, Jie Feng, Jiahong Liu, Guiyu Yang, Zhiyong Yang, Jianhua Wang

Show more

<https://doi.org/10.1016/j.egypro.2017.03.639>

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### Abstract

Based on the present situation of water consumption, this paper analyzes the factors affecting the selection of water technologies in the thermal power industry in China. Based on the water consumption standards and water conservation indicators in 345

Ebsco Publishing - Ipswich, IP Access

Change organization

### Details & settings

My account & privacy

Change password

Manage alerts

Sign out

Edited by Prof. Jinyue Tan Prof. Fengchun S Prof. SK Chou Prof. Umberto Desideri Prof.

### Other articles from this issue

Design Strategy of a Compact Unglazed Solar... Energy Procedia, Volume 105, May 2017, pp. 1-6

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Effect of Divergent Chimneys on the Performa... Energy Procedia, Volume 105, May 2017, pp. 7-13

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TEG Maximum Power Point Tra

discover → authenticate → access

OpenAthens 



**Removing barriers to knowledge**

The end-user only needs to remember **one username and password**, opening up access to all available e-resources



**Connecting people to information**

# OpenAthens for Library Staff



No need to sign in again as the end-user moves from resource to resource

# Changing Librarian Requirements



1960  
2007

1992

Clinical Knowledge Network, Department of Health (Queensland)

Not activated 1

+ Add account

64 Accounts

107 Resources

Security

2 Downloads

Organisations

Summary for the last thirty days

▲ 19 ▼ 12 Accounts

▼ 16 Users joined/left

▲ 8 Resource allocation

127 User logins

- Resources renamed

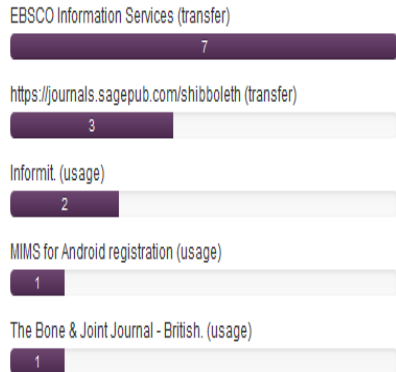
- Resources changed

Recent activity for this organisation

1-1 of 1

- ✓ Resource access URL for 'Rightsphere.' changed from 'http://proxy1.athensams.net/athens?url=https%3a%2f%2frightsphere.com' to 'http://proxy1.athensams.net/athens?url=https%3a%2f%2fwww.rightsphere.com'  
Yesterday at 04:49

Most popular resources this week



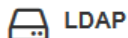


Organisation	Administrator	Unique ID	Entity ID	Scope	Total accounts
<b>All organisations</b>					<b>12204</b>
Clinical Knowledge Network, Department of Health (Queensland)	<a href="#">cknzz</a>	68176746	<a href="https://idp.ckn.qldhealth...">https://idp.ckn.qldhealth...</a>	ckn.qldhealth.com	64
› Cairns & Hinterland HHS	<a href="#">ckncairms</a>	➔ 69450621		69450621.ckn.qldh...	753
› Central Queensland HHS	<a href="#">ckncqhhs</a>	➔			338
› Central West HHS	<a href="#">ckncwhhs</a>	➔			25
› Department of Health	<a href="#">ckndoh</a>	➔			145
› Children's Health Queensland	<a href="#">cknchildhhs</a>	➔			474
› Darling Downs HHS	<a href="#">cknddhhs</a>	➔			546
› Mackay HHS	<a href="#">cknmackayadm</a>	➔ 68928465		68928465.ckn.qldh...	408
› Mater Hospital HHS	<a href="#">cknmater</a>	➔			485
› Metro North HHS	<a href="#">cknmnhhs</a>	➔			2376
› Metro South HHS	<a href="#">cknmshhs</a>	➔			1737
› North West HHS	<a href="#">cknnwhhs</a>	➔			88
› Other	<a href="#">cknother</a>	➔			150
› Gold Coast HHS	<a href="#">ckngcshhs</a>	➔			1550



Select local authentication system type. ✕

Save changes

**LDAP**

Connect to an LDAP directory, including Microsoft ActiveDirectory.

**ADFS**

Connect using Microsoft ActiveDirectory Federation Services.

**API**

Connect via the OpenAthens Local Authentication REST API.

**SirsiDynix**

Connect to a SirsiDynix library system for authentication.

**CAS**

Connect to a Client Access Server (version 5.x) using SAML.

**SAML 1.1/2.0**

Connect to an local identity provider using SAML.

Cancel

Configure



Accounts ▾

Resources ▾

Statistics ▾

Preferences ▾

Management ▾

ebgzzz &gt; cknzzz

Catalogue

Permission sets

Redirector link generator

All

Allocat



Search...



1-50 of 1,132



**123Doc: Medical exam preparation, ejournals, and online courses**



Allocate...



**123Library: eBooks for corporate, healthcare, academic and professional**



Allocate...



**A R R B Group Ltd.**  
ARRB is the leading provider of road research and best practice workshops in...

proxied



Allocate...



**AAAS.**  
The American Association for the Advancement of Science, "Triple A-S"...

proxied



Allocate...



**AACCC (American Association of Cereal's Chemists)**  
AACCC provides scientific and technical...

proxied



Allocate...



**AACN Journals.**  
Includes American Journal of Critical...

proxied



Allocate...



**AACR.**  
The American Association for Cancer Research (AACR) is the authoritative...

proxied



Allocate...



**AAP eBooks**  
AAP eBooks includes over 130 pediatric clinical and consumer parenting titles...



Allocate...



**AAPG Datapages.**  
AAPG Datapages, from the American Association of Petroleum Geologists...

proxied



Allocate...



**ABC-CLIO.**  
Publisher of reference books, CD-ROM products, and research publications.

proxied



Allocate...



**Academic Emergency Medicine.**  
AEM publishes information relevant to...

proxied



Allocate...



**Academic IC Live**  
World Market Intelligence also called as Academic IC

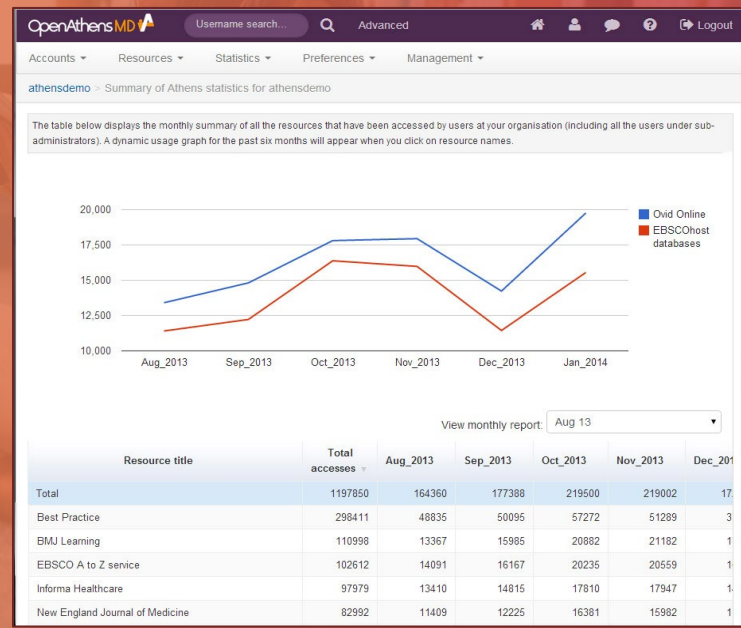
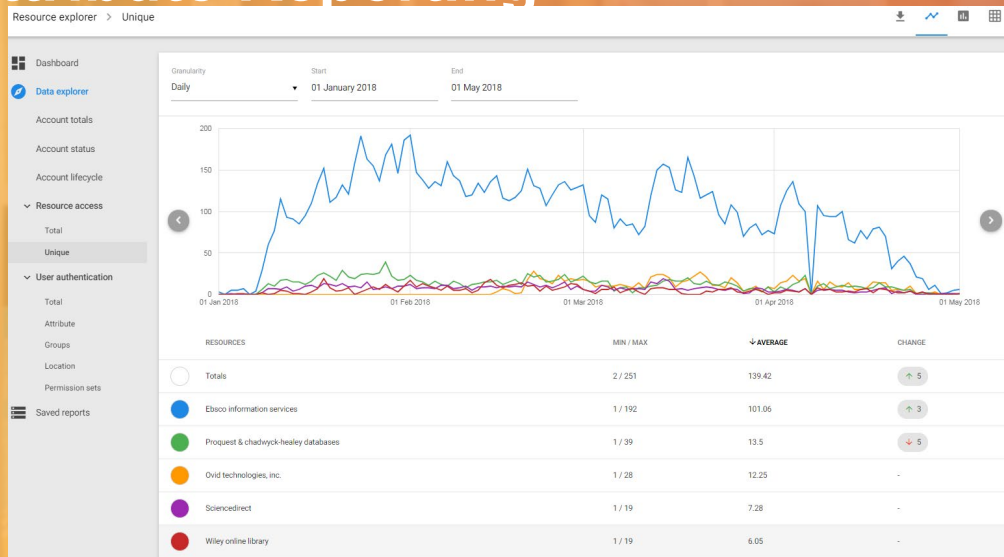


Allocate...



#IUG20

# Attribute Reporting



## Correlate Procurement to Use

“Attribute” reporting by users, groups, or other customized category

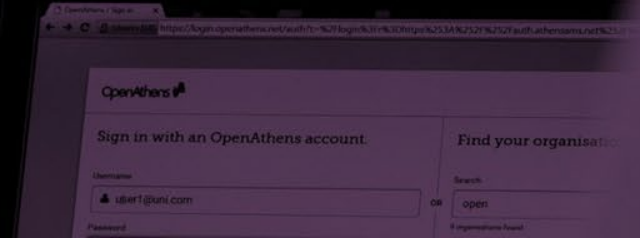
—E.g.; alumni, faculty, graduate, undergraduate, law library, health science library, primary major, etc.

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# OpenAthens at APU



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# About APU...



For more information about APU or our  
libraries, see <http://www.apu.edu/>

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# Why Change?

- Resolved our HTTPS errors we were getting with WAM (APU) & EZ Proxy (LAPU)
- User information is secure
- Single-sign on for all students
- Standardized access for all students (APU & LAPU)
- Track login usage of groups and individuals
- Reduce error messages that students get when accessing electronic resources
- Proxy configurations handled by OA
- Migrate to new single sign on server in the process

# Process

- ❑ June 2017 - Viewed demos and requested a quote after Frank attended the EBSCO User Group meeting. Quotes are based on number of users and not on FTE.
- ❑ June 2017 - After looking at the demos and having discussions with EBSCO we received permission to present this to APU systems engineers
- ❑ September 2017 - Decided it would be best implemented during the summer since all domains would have to change.
- ❑ October 2017 - Initial test site available - however we never configured it.
- ❑ March 2018 - Submitted a request for funding for OA & reconfigure III SSO server to latest version of Redhat. Received approval on funding a few days later.
- ❑ April 2018 - Met with APU systems engineers and EBSCO OA team to discuss next steps.
- ❑ April 2018 - Worked with IT project management team to approve the SSO migration and OA implementation.

# Process continued

- ❑ May 2018 - OA test site available for us to review.
- ❑ May 2018 - Received initial IT approval but they needed more information.
- ❑ June 2018 - Received final IT approval and confirmation that no new contract needed to be signed (and that it didn't need to go through University Counsel) since it falls under the EBSCO umbrella where we already have a signed contract.
- ❑ June 2018 - Assigned a project manager, set up questionnaire filled out, started the resource provider configurations
- ❑ June 2018 - Created a shareable google sheet instead of the excel spreadsheet that EBSCO sent for all of our vendors - a-z list, EBSC holdings management, SCELK consortia, WAM log file, and catalog 856 for a list of domains.
- ❑ July 2018 - Project manager worked with vendors for configuration - SAML aware, federated open athens environment, proxied, etc. We only had to intervene if they needed to hear it from APU.

# Process continued

- ❑ August 2018 - SSO configuration took a bit of time, bulk upload of user accounts, setup permission sets that did not work well.
- ❑ August 21, 2018 - The week before fall classes started we finally went live, dealt with errors messages that we we not expecting after we went live.
- ❑ December 2018 - Permission sets clean up - Tried opening a ticket with EBSCO - they could not figure it out
- ❑ January 2018 - Frank's son wrote an API to clean up the permission sets
- ❑ March 2018 - Updated permission sets for groups - working with the permission sets we ended up deleting all resources! We had a back up fortunately
- ❑ April 2018 - update catalog links

# Successes

- login statistics on the resource level
- login statistics for groups of users & individuals (ie undergrad, grad, faculty, staff, lapu, alumni, etc.)
- dedicated Ebsco rep to help us
- easy to create personal accounts for vendor testing, proctors, visiting scholars, etc. that may not have an APU email.
- We created a script that uses an API call to open athens to report on the permission sets (can't get it to update yet).



## Successes continued



- 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.
- 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 7 years.
- Resources are now independent of the ILS.
- Less time handling proxy configurations
- Our biggest problem for an entire year that impacted patrons everyday - **No more cookie/timeout errors for users.**



# Challenges

- Juggling of multiple entities within APU/LAPU and EBSCO from the beginning - communication between everyone.
- Google suite error messages that LAPU students encountered after we went live - exploding robot
- Wrote our own API to report on the permission sets.
- Legacy WAM is tied to the patron accounts, however with OpenAthens we can't do anything about that - for instance - student has a fine, etc.
- OpenAthens often is down with upgrades, etc. But we have not encountered any problems so far because of the time difference.
- Working with EBSCO as the middleman - communication disconnect sometimes since we can't directly communicate with OpenAthens



## Challenges continued

- Accounts management tool - it's not complete
  - ◆ functionality is not the same for all account types (local authentication accounts vs personal accounts)
    - permission set allocation does not work for local accounts
    - can't update local accounts
  - ◆ sorting feature for alphabetical order does not work
  - ◆ advanced search does not work for local accounts

**Challenge**  
A challenge is a  
A difficult task or ac  
The act of appealin  
to take part in a co  
sense of difficulty  
-ges com

← Refine search

You searched for all **live** accounts that are **activated** or **not activated** that are **not banned** and belong to **me** and all my **sub-administrators** where **Email address** matches *drgehring@apu.edu*

Personal 0

Access 0

Organisation 0

Deleted 0



Username	First name(s)	▲ Last name
----------	---------------	-------------



No accounts found.

<input type="checkbox"/>	azusa.w	
<input type="checkbox"/>	azusa.fd	Frank
<input type="checkbox"/>	azusatesting	A

# Future implementation ideas / recommendations for improvement

- Use the access account for alumni in the future
- Attribute integration
- Move LAPU off of GSuite
- Other places on campus that could help them work 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.

# Thank you!

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