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Short on Staff and Time: An OpenAthens Implementation

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Land Acknowledgement

We wish to acknowledge this land on which the Electronic Resources & Libraries conference is taking place, the ancestral territory of the Tonkawa and Comanche peoples. We pay our respects to their Elders both past and present, as well as living descendants and future generations. Hundreds of different groups of native peoples lived on what we now call Texas for thousands of years before the arrival of Europeans. We are grateful to have the opportunity to present and work on this land.


Texas State Library and Archives Commission. Native American Relations in Texas.

Outline of Presentation

• About the University of San Francisco (USF) and the Gleeson Library/ Geschke Center
• Authentication at USF: What led to the implementation of OpenAthens?
• OpenAthens at USF: Why did we decide on OpenAthens?
• Path to OpenAthens: A Timeline
• Project planning
• OpenAthens connector configuration
• Resources
• Go-Live
• Communication plan
• Ongoing maintenance
• Lessons learned
Private, Jesuit Catholic

Est. 1855

~10,000 FTE

4 Schools
1 College

75% students of color in freshmen class

Among the top 10 most diverse universities in the U.S.
Gleeson Library | Geschke Center

People
• 42 employees
  • 18 librarians

Systems
• Sierra (Innovative Interfaces)
• Full Text Finder (EBSCO)
• EDS
• 70 EBSCOHost databases
Authentication at USF: What Led Us to OpenAthens?

- Using Innovative Interfaces’ Web Access Management (WAM)
  - Security certificate warnings
  - Proxy errors
  - Vendors less familiar with WAM
OpenAthens at USF: Why Did We Decide on OpenAthens?

- Long-standing relationship with EBSCO
- Only OpenAthens vendor we knew of that would contact vendors on our behalf to set up access
- Wanted a system that would give us more than IP authentication offered:
  - SAML-based authentication technology for Single Sign-On (SSO)
  - Hosted service for ongoing maintenance of resource configurations
  - Proxy server
  - Granular usage statistics
  - Personalization features
  - Ability to detect data breaches
Path to OpenAthens: A Timeline

2016
- EBSCO pitches OpenAthens

2017
- Feb: Call with EBSCO, EduServ and ITS
- Oct: Systems Librarian retires
- Nov: Restart conversations with EBSCO; Project put on hold

2018
- Mar 19: OpenAthens ordered
- May 9: Anders joins project
- Jul 24: Go-Live
Project Planning Using Low-tech Tools

- Project Plan
- Project Tasks
- General Notes
- Team Drive
Project Plan

Project Title: OpenAthens Implementation
Project Manager: Sherise Kimura
Systems Library Assistant: Anders Lyon
Project Advisor: Erika Johnson

Purpose
Implementation of OpenAthens, an identity and access management service, at Gleeson Library | Geschke Center and Zief Law Library.

Description/Need
The library has long used Innovative’s Web Access Management (WAM) as its proxy server for remote patron authentication. While it has generally met the library's needs, in the last couple of years, more issues have arisen with access via proxied links and to specific resources:

- Persistent, ongoing proxy error issue that our users encounter every day. To address the issue, Innovative recommends restarting web processes daily. We also provide contextual instructions for users to clear their browser cache if they encounter the error. These two approaches have proved insufficient, as restarting web processes has not eliminated the problem and clearing the browser cache is only a temporary fix, as the error will recur. Innovative says the issue is in software development, but we have no sense of when it will be resolved.
- Migration of vendor platforms from http to https for greater security. As more platforms move to https, we started seeing “security certificate warning” messages when accessing https sites through WAM beginning in early 2016. That fall Innovative formally offered the wam_sslhost_replace option with a wildcard certificate, which we obtained from ITS, that converts the periods in the resource domain portion of proxied https URLs to hyphens, allowing the certificate to cover all proxied domains. Once this option was configured, users did not get this browser warning. If a platform migrates to https,
Project Stakeholders

Head of Acq

EBSCO

Interim Head of Systems

OpenAthens

Head of Reference

ITS

Law Library

Associate Dean
# Staying on Track: Project Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Subtask</th>
<th>Responsible person(s)</th>
<th>Start</th>
<th>End</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft project plan</td>
<td>Draft Project Plan</td>
<td>Sherise</td>
<td>3/12/2018</td>
<td>3/22/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td>Erika reviews plan</td>
<td></td>
<td>Sherise</td>
<td>3/19/2018</td>
<td>3/26/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td>Contact OA customers</td>
<td>Email OA customer(s) to schedule call</td>
<td>Sherise</td>
<td></td>
<td></td>
<td>DELAYED</td>
<td></td>
</tr>
<tr>
<td>Contact EBSCO</td>
<td></td>
<td>Sherise</td>
<td></td>
<td></td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Confirm implementation start</td>
<td>Sherise</td>
<td>3/13/2018</td>
<td>3/13/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OpenAthens order signed</td>
<td>Erika</td>
<td>3/13/2018</td>
<td>3/13/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Follow up call with Matt and Mike from EBSCO and Dor</td>
<td>Sherise</td>
<td>4/19/2018</td>
<td>4/19/2018</td>
<td>COMPLETE</td>
<td>Currently in the implementation phase of the IAM project, which includes the upgrade of the CAS servers. The CAS servers upgrade will be happening in the summer.</td>
</tr>
<tr>
<td></td>
<td>Setup SAML connector with ITS</td>
<td>Sherise</td>
<td>3/12/2018</td>
<td>3/16/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Discuss SAML/CAS S.x with ITS</td>
<td>Sherise</td>
<td></td>
<td></td>
<td></td>
<td>submitted to EBSCO and Matt LePage, complete, reviewed by Thanh and Huu</td>
</tr>
<tr>
<td></td>
<td>Complete EBSCO questionnaire with ITS</td>
<td>Sherise, Dora, and Huu</td>
<td>4/9/2018</td>
<td>5/1/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SAML configuration</td>
<td>Huu</td>
<td>5/24/2018</td>
<td>6/8/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Test suspend roles</td>
<td>Huu and Sherise</td>
<td>5/23/2018</td>
<td>6/26/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Multiple roles</td>
<td>Sherise</td>
<td>6/12/2018</td>
<td>6/18/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mapping of roles from directory to OpenAthens</td>
<td>Sherise</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Test usage reports with roles</td>
<td>Sherise</td>
<td>6/15/2018</td>
<td>6/26/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Coordinate move from forge (test) to idp (production) set</td>
<td>Sherise, and Huu</td>
<td>6/19/2018</td>
<td>7/18/2018</td>
<td>COMPLETE</td>
<td>Are we able to release email address at all?</td>
</tr>
<tr>
<td></td>
<td>Test generic OpenAthens account for ACU/Chatstaff etc</td>
<td>Anders and Sherise</td>
<td>6/20/2018</td>
<td></td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delete test connection (forge)</td>
<td>Sherise</td>
<td></td>
<td></td>
<td>DELAYED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Compile masterlist of resources from forward table, Lib</td>
<td>Sherise</td>
<td></td>
<td></td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add Subscriber ID and/or Account Numbers</td>
<td>Sherise, and Ava</td>
<td>4/26/2018</td>
<td>5/1/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Collections and URLs in catalog</td>
<td>Justine</td>
<td>4/20/2018</td>
<td>5/2/2018</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Send Law Resources to EBSCO</td>
<td>Sherise</td>
<td>5/23/2018</td>
<td>5/23/2018</td>
<td>COMPLETE</td>
<td>22 resources; sent final list to Matt; see General Notes for details and decisions</td>
</tr>
<tr>
<td></td>
<td>Add Law Library databases and Athenized links (create)</td>
<td>Anders</td>
<td>6/26/2018</td>
<td></td>
<td>COMPLETE</td>
<td></td>
</tr>
</tbody>
</table>
Major Steps

- Configure connector
- Compile list of resources
- Test access to resources
- Prepare for Go-Live
- Go-Live
OpenAthens Connector Configuration

Questionnaire

1. Select your connector(s)
   - Ensure IT has reviewed the connector options before completing this section. Complete the connector preferences with IT and send IT an email.

   1.1. Are all your users in a single user directory? *
       - Yes - all my users are in one directory. I need one connector.

   1.2. Select your connector *
       - SAML Identity Provider

2. SAML Connector
   - Your SAML Identity Provider (IdP) (e.g. PingFederate / OKTA) needs to exchange metadata with the OpenAthens Service Provider (SP).

   Contact your IT Department to supply your IdP metadata and attach it to this form. The OpenAthens metadata will be created once your metadata is loaded. We will send you instructions after you submit this questionnaire.

   Note: Your IT Department should start reviewing SAML set-up documentation and the SAML interoperability requirements. If your system does not accept metadata, see the SAML set-up documentation they can input the data manually.

   2.1 How will you provide your SAML metadata?
       - XML address  ○ File attachment  ○ I will provide this later (waiting on IT response)

   2.2 Enter the URL/address:
       - https://forge.usca.edu/idp3/shibboleth

   2.3 Enter the name of your SAML Identity Provider product for our reference (e.g. PingFederate, Microsoft Azure, OKTA, OneLogin etc.)
       - Shibboleth
Attribute Configuration

```
[root@idp1 shibboleth-idp3]# bin/aacli.sh -n htlam -r https://login.openathens.net/saml/2/metadata-sp/usfca.edu/la/3401

{
  "requester": "https://login.openathens.net/saml/2/metadata-sp/usfca.edu/la/3401",
  "principal": "htlam",
  "attributes": [
    {
      "name": "principal",
      "values": [
        "StringAttributeValue{value=htlam}" ]
    },
    {
      "name": "mail",
      "values": [
        "StringAttributeValue{value=htlam@usfca.edu}" ]
    },
    {
      "name": "member",
      "values": [
        "StringAttributeValue{value=msdn-aa}"
        ]
      }]
  }
}
<table>
<thead>
<tr>
<th>Platform / Content Host</th>
<th>Database/Title</th>
<th>Original Access URL</th>
<th>New &quot;Athenized&quot; Access URL</th>
<th>USF's Testing Con</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAAS (American Association for the Advancement of Science)</td>
<td><a href="http://science.sciencemag.org/content/">http://science.sciencemag.org/content/</a></td>
<td><a href="https://go.openathens.net/redirector/usfca.edu?url=https%3A%2F%2Fwidgets.esebohost.com">https://go.openathens.net/redirector/usfca.edu?url=https%3A%2F%2Fwidgets.esebohost.com</a></td>
<td>Persistent link to article (<a href="http://science.sciencemag.org/content/">http://science.sciencemag.org/content/</a></td>
<td></td>
</tr>
<tr>
<td>AAPP (American Academy of Pediatrics)</td>
<td><a href="http://pediatrics.aappublications.org/content">http://pediatrics.aappublications.org/content</a></td>
<td><a href="https://go.openathens.net/redirector/usfca.edu?url=https%3A%2F%2Fwidgets.esebohost.com">https://go.openathens.net/redirector/usfca.edu?url=https%3A%2F%2Fwidgets.esebohost.com</a></td>
<td>Persistent link to article (<a href="http://pediatrics.aappublications.org/content">http://pediatrics.aappublications.org/content</a></td>
<td></td>
</tr>
<tr>
<td>Academy of Management</td>
<td>Academy of Management titles</td>
<td><a href="https://amr.acl.org/content/by/year">https://amr.acl.org/content/by/year</a></td>
<td><a href="https://go.openathens.net/redirector/usfca.edu?url=https%3A%2F%2Famr.acl.org%2F">https://go.openathens.net/redirector/usfca.edu?url=https%3A%2F%2Famr.acl.org%2F</a></td>
<td>Persistent link to article (e.g., <a href="https://amr.acl.org/content/by/year">https://amr.acl.org/content/by/year</a></td>
</tr>
</tbody>
</table>

Resources: Testing “Athenized” URLs
Testing “Athenized” URLs: Internal Workflow

<table>
<thead>
<tr>
<th>Platform / Content Host</th>
<th>Database/Title</th>
<th>New “Athenized” Access URL</th>
<th>USF’s Testing Comments</th>
<th>Your initials</th>
<th>Does the Athenized link work (go to the MyUSF login) and the resource?</th>
<th>Access via SAML or proxy IP?</th>
<th>Is a personal account created on the vendor site? (SAML resources)</th>
<th>For SAML resources: Notes personal account auto-creation (works? prompts to enter email? if existing account etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EBSCO</td>
<td>EBSCO Discovery Service</td>
<td><a href="https://search.ebscohost.com/login.aspx?authtype=shib&amp;group=main&amp;profile=eds&amp;custid=381422">https://search.ebscohost.com/login.aspx?authtype=shib&amp;group=main&amp;profile=eds&amp;custid=381422</a></td>
<td></td>
<td></td>
<td>no personal EBSCOHOST account</td>
<td>SAML</td>
<td>No</td>
<td>no personal account created</td>
</tr>
</tbody>
</table>
Preparing for Go-Live

- Decide on date
- Coordinate with ITS
- Cataloging considerations

You got this!
- Website and Catalog: Add Athenized links (Gale, ProQuest, and EBSCO priority)
- Update Full Text Finder link resolver base URL in origins/sources
- Test HLM links
- Test on-campus links
- Test Athenized links
Post Go-Live

- Continue to migrate resources
- Troubleshoot non-functioning Athenized URLs
- Cataloging: Update existing WAM links
- Check EDS customlinks
- Check proxy settings updated in HLM for migrated journals

- Contact vendors: permalinks
- User documentation on accessing SAML resources
- Workflow for new resources
- OpenAthens documentation for staff
Communication Plan

• Objectives
• Stakeholders
• Tools
• Timetable
Communication Plan

Objectives

- Announce changes in service and project milestones
- Educate stakeholders
- Manage the project
- Know your audience
- Allow for flexibility
Communication Plan

Tools

- G Suite
- Marketing email
- Slack
- LibGuides
- In-person meetings

Dear USF Community,

Gleeson Library and Zief Law Library are implementing OpenAthens, which will go live on Tuesday, July 24. OpenAthens is a cloud-based system that provides access to our licensed online content (e-journals, ebooks, and streaming video) using single sign-on for a more secure and reliable experience for users. This solves the "proxy error" access issue many users have been encountering.

On July 24, the experience of accessing online resources will be significantly improved and more secure.
# Communication Plan

## Timetable

<table>
<thead>
<tr>
<th>Date</th>
<th>Event/milestone</th>
<th>Stakeholder(s)</th>
<th>Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 18</td>
<td>Implementation update</td>
<td>Library staff</td>
<td>Gmail</td>
</tr>
<tr>
<td>July 11</td>
<td>Go-live</td>
<td>USF</td>
<td>Marketing email</td>
</tr>
<tr>
<td>July 27</td>
<td>Permalink training &amp; standard email to faculty</td>
<td>Liaisons</td>
<td>Gmail</td>
</tr>
<tr>
<td>Nov 15</td>
<td>WAM retirement</td>
<td>USF</td>
<td>Marketing email</td>
</tr>
<tr>
<td>On-going</td>
<td>Individual databases successfully configured with OpenAthens</td>
<td>E-resources, Cataloging, Reference</td>
<td>Slack</td>
</tr>
</tbody>
</table>
OpenAthens

This guide offers information about OpenAthens, the library’s authentication system for online resources.

OpenAthens

OpenAthens is an identity and IP-based authentication system that provides access to the library’s licensed online resources via single sign-on (SSO) technology. It is replacing our previous system, Web Authentication Management (WAM). OpenAthens offers a more secure and reliable experience for USF library patrons and should resolve the "proxy error" access issue many users have been experiencing.

Almost all resources have migrated to OpenAthens. To avoid broken links, please update your permalinks.

If you have questions about updating permalinks, please contact eresources@usfca.edu.

Access

USF students, staff, and faculty must use their myUSF credentials to access online resources regardless of whether they are on or off campus. Users will only need to authenticate to OpenAthens once per session. An OpenAthens session stays active for up to 8 hours, unless you clear your browser cache and cookies. The authentication process will differ based on whether resources are accessed via library websites or directly from a content provider website.
Ongoing Maintenance

From go-live to maintenance

• Switch from implementation team to EBSCO support
• Systems staffing change
• OpenAthens documentation
  • Workflows
  • Troubleshooting
  • Technical vetting for new resources
Areas for Improvement – EBSCO & OpenAthens

- Multiple roles skew statistics
- More information upfront from EBSCO
- OpenAthens URL syntax varies and is assigned at the resource level
- OpenAthens does not work with iFrames
Lessons Learned

• Do your research

• Coordinate timing of implementation early

• Anticipate the needs of stakeholders early

• Be flexible
Image Credits

- **Wikipedia Edit-A-Thon**
  https://gleesongleanings.files.wordpress.com/2015/03/women_s_history_month_art_and_feminism_-_011.jpg
- **Shawn Calhoun. USF Spring 2012 Commencement.** https://flic.kr/p/c4h2wq
- **Shawn Calhoun. 2011 Welcome Week – 02.** https://flic.kr/p/afHYEt
- **Shawn Calhoun. Christina Purpora Nursing Students- 2.** https://flic.kr/p/bBkS8T
- **Asa Rodger. Monkey in Krabi, Thailand.** https://unsplash.com/photos/nezHaCwch2w
- **Google Suite images.** https://gsuite.google.com/setup/resources/logos/
- **Freepik. Questions and Rocket vector icon.** https://www.flaticon.com/
- **geotatah. Investigate vector icon.** https://www.flaticon.com/
- **John Schultz. To-Do list.** https://flic.kr/p/7YFeSB
- **OpenAthens user journey diagram.**
  https://docs.openathens.net/display/public/MD/Using+a+local+authentication+system+with+OpenAthens
Thomas Hawk. Salesforce Tower. https://flic.kr/p/CnaDVf
Stellan Johansson. Photo of gray metal tower satellite. https://unsplash.com/photos/1PP0Fc-KSd4
Cesar Carlevarino Aragon. Handheld tool lot. https://unsplash.com/photos/NL_DF0Klepc
Penubag. Caution sign used on roads. https://commons.wikimedia.org/wiki/File:Caution_sign_used_on_roads_bn.svg
Shawn Calhoun. USF Campus Hawk. https://flic.kr/p/88u9tK
Thank you!

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