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Access Management for Libraries

A Joint SCONUL/JISC Briefing Day, Friday 7th March 2008



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Federated access management for libraries

Rolling out the new service to library users

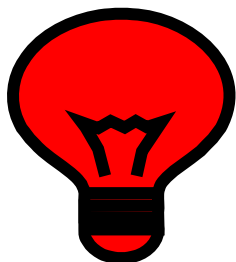
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- Before you start
- Next steps
 - Library review
 - Planning a course of action
 - Managing the change
- Other things to consider
 - Institutional login
 - Embedded links
 - Personalisation
 - User statistics
- Further information



1) Ensure that your institution has signed the UK federation membership agreement (even if you plan to continue subscribing to the Athens service)



2) IT Services and Library Services need to work closely together to ensure a successful outcome (A painful subject for some institutions, but think of the long-term benefits!)

'The collaboration between the ICT Services and Library has been vital to our success, and has helped with the increased communications between these departments.'

Kidderminster College, an early adopter

■ Step 1: Library review

- Compile a list of all online resources the library subscribes to (e.g. using Excel), specifying for each resource
 - Access method(s) currently used (e.g. Athens, IP, IP proxy server etc)
 - Licence period
 - Current Federation status
- Create a master list of all the user groups within your institution (e.g. 'member', 'staff', 'student', 'alumni')
- Review existing user information (both print and online)
- Review existing e-resource management practices, e.g.
 - How is licensing information currently managed & stored?
 - Is there an e-resource mgmt system, capable of storing user access rights info?

■ Step 2: Plan a course of action

- Consider the best access route for each resource (taking into account all your user groups, including ‘non-members’, e.g. visitors)
- Plan a strategy for resources that are not members of the UK federation (e.g. using ‘shibbolised’ EZProxy)
- Liaise with Service Providers to ensure that you are gaining access via the UK federation where appropriate
- Appoint a dedicated contact for user queries
- Decide if any end-user information needs to be changed
- Decide on testing procedures and timescales
- Plan for library staff or other ‘friendly’ users to test information and links prepared for end-users
- Plan staff awareness raising/training, if required

■ Step 3: Manage the change

- Decide in advance how the plan is going to be implemented, in liaison with the IT department that is implementing the federated access management solution
- Decide on timescales and resources
- Identify a project leader and key stakeholders
- Devise a project plan
- Keep stakeholders informed via a website, newsletter or/and wiki

■ Institutional login ‘branding’

- Users need to understand what information they are required to enter when asked for a username/password
- Consistency across the institution is important
 - JISC recommends that all institutions and Service Providers ask users to enter their ‘institutional log-in’ when asked for a username and password

■ Embedding e-resource links (i.e. to go WAYF or WAYFless?)

- Will the links be used by non-members, e.g. visitors? If, yes, is there an alternative access route for them?
- Can be laborious to construct, so best to ask the Service Provider first (some Service Providers make them publicly available, e.g. ScienceDirect)
- More information will soon be available on the UK federation website

■ Personalisation features

- Becoming increasingly available for ‘federated’ users
- Federated access management allows Service Providers to personalise their service without the need to identify the user, which helps you meet your responsibilities under the Data Protection Act
- Previous Athens users may need to re-register their preferences after they access a resource with their federated login for the first time

■ User statistics

- Federated access management is based on international standards, so offers greater potential for consistent and comparable usage statistics across more online resources
- Work in progress to use combined institutional and service provider logs provide facilities for gathering usage statistics
 - The [AAIEye Monitoring & Reporting Tool](#) being developed in Finland

- JISC federation support pages for library staff
 - www.jisc.ac.uk/whatwedo/themes/access_management/federation/federation_libraries.aspx
- JISC 'Federated Access Management: Guide for Academic Libraries' Briefing Paper
 - www.jisc.ac.uk/publications/publications/pub_accessmanagementbps/accessmanagementlibrarians.aspx
- JISC-shibboleth-libraries@jiscmail.ac.uk
- Instructions for constructing WAYFless URLs by Simon McLeish of LSE
 - <https://gabriel.lse.ac.uk/twiki/bin/view/Projects/WayfLess>
- List of live services available via the UK federation
 - www.ukfederation.org.uk/content/Documents/AvailableServices
- List of Service Providers JISC is currently negotiating with and their current federation status
 - <http://access.jiscinvolve.org/federated-access-and-publishers/>

Thank you for your attention