

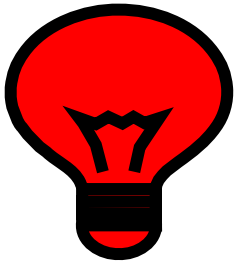
Masha Garibyan

**LSE Library Projects Team/
JISC Federated Access Management Outreach Team**

M.Garibyan@lse.ac.uk

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- Before you start
- Library implementation process
 - Planning for change
 - Managing the change
- Other things to consider
 - Institutional login
 - Embedded links
 - Personalisation
 - User statistics
- Further information



- 1) FAM developments should be part of your institution's strategic vision, backed up by senior management
 - Conducting an institutional audit may help
- 2) IT Services and Library Services have to work closely together to ensure a successful outcome
(A painful subject for some institutions, but think of the long-term benefits!)
- 3) Ensure that your institution has signed the UK federation membership agreement
(even if you plan to continue subscribing to the Athens service)

■ 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)
- Appoint a dedicated contact for user queries
- Decide if any end-user information needs to be changed
- Decide on testing procedures
- 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: Service provider liaison

- Liaise with ‘federated’ Service Providers to ensure that you are gaining access via the UK federation where appropriate
- Check licences of non-federated resources to make sure your planned alternative route is permitted (eg the use of Proxy server)
- Monitor Service Provider progress and make changes as appropriate
 - UK federation website
 - JISC Access Management blog
 - Announcements on mailing lists
- Contact ‘non-federated’ providers to ask what they are federation plans are
 - Refer to the JISC website for ideas of what to include

- 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
- Ask for help!
 - JISC Access Management Team
 - Mailing lists

■ 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)
- Consider using a portal

■ Personalisation features

- Becoming increasingly available for ‘federated’ users
- Often technology independent
- 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/accessmanagementlibrariansMar2008v1.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