



The
University
Of
Sheffield.

Preparations for Federated Access Management (FAM)

University of Sheffield

Tracey Clarke, eServices Technology Manager &
Rachel Mason, Senior Library Assistant, eServices Technologies



Contents

- UoS: background & Library eResources
- FAM: Starting position & decision making
- Implementation: The journey so far
- Now: Current position & plans
- Customer focus: Breaking down barriers



The
University
Of
Sheffield.

University of Sheffield: Background & Library eResources



University of Sheffield profile

- Number of students (2007/08): 23,914
- Number of staff (2007): 5,773
 - inc. 2000+ academic & research staff
- 70 academic departments



Library & eResources

- Multi-site Library
 - 1.4 million books & periodicals
- Wide range of eResources
 - ejournals: 11,000+
 - subject databases: 350+
 - ebooks: 7,000+
- 260,000+ eResource accesses per month during semester

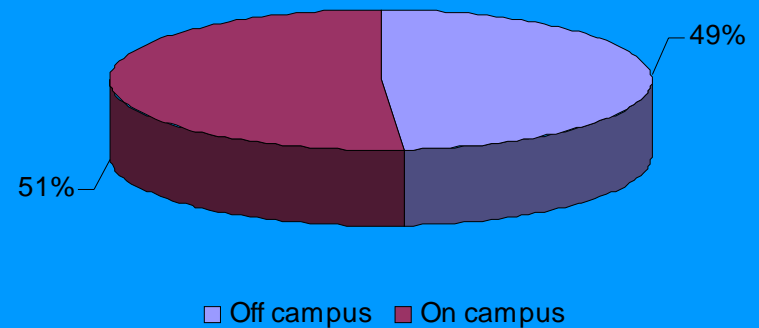




Library & eResources (2)

- Access via University portal (MUSE)
- 24/7 regardless of location
- High proportion of off campus access

eResource usage by location, Nov 2007





The
University
Of
Sheffield.

FAM: Starting position & decision making



Starting position

- Variety of different access methods:
 - AthensDA on/off campus
 - Classic Athens decommissioned at UoS in 2006
 - IP on campus/EZ Proxy off campus
 - IP on campus/AthensDA off campus
 - Username & password on/off campus



Starting position (2)

- eResource data held in Library's Oracle tables
- Dynamically generated A to Z web page listings
- Links to eResources prompt portal login
- Computing Services URL resolver service integrated into portal
 - Handles variety of resource access methods & authenticates users according to UCard status



Starting position (3)

- Resolver:
 - Uses IP address & restriction information in Library's Oracle tables to grant access
 - Gives AthensDA cookie as necessary
 - Gives access via EZ Proxy server as necessary



From AthensDA to FAM: Decision making

- Shibboleth project group set up, June 2007
- Partnership between Library & Computing Services within context of Identity Management at UoS
- Project group meets regularly & includes:
 - Library: eServices Technologies staff
 - Computing Services staff, including: Portal Developer, Senior Directories Programmer, Customer Services & Communications Manager, Assistant Director of Technical services etc.
 - Senior Project Manager



Decision making (2)

- Implement FAM technology, Shibboleth
- Replace AthensDA service by 31 July 2008
 - Approx. 80 resources affected
- Secure access to non-Shib/Athens resources
 - Switch to IP/proxied access
 - Avoid chargeable gateway
- Rationalize number of access methods
- Improve experience for customers
 - Go WAYFless



The
University
Of
Sheffield.

Implementation: The journey so far



Shibboleth implementation so far

- Developed project plan & strategy
- Institutional audit & directory structure assessment - ready to adopt FAM
- Joined UK Federation
- Liaison with JISC
- Written FAM into selection & acquisition procedures
- Installed Shibboleth IDP & integrated into resolver service
- Deployed on development server



Shibboleth implementation so far (2)

- Identified Shibboleth compliant eResources
- Contacted providers to enable UoS IDP testing
- Mapped existing Athens permission sets restrictions to Shibboleth attribute requirements
- Tested in development environment
- Worked to eliminate problems



Shibboleth implementation so far (3)

- Contacted all non-Shib eResource providers to establish
 - Plans for Shibboleth availability (preferred route)
 - IP access availability
- Moved most non-Shib eResources away from Athens to IP/proxied access
- Developed & implemented communications strategy for colleagues & customers



Shibboleth implementation so far (4)

- Shibboleth due to be deployed on production server & integrated into portal on 1 May 2008
- EZ Proxy due to be upgraded at same time
 - Upgrade tested in development environment
 - Necessary to enable resources e.g. NetLibrary to switch from Athens to IP/proxied access
- Technical problem: deployment & upgrade to be rescheduled



The
University
Of
Sheffield.

Now: Current position & plans



Current position & plans

- Shibboleth access not yet live
- Almost ready to launch
- WAYF quality assessment
 - Standard & non standard WAYFs
 - WAYFless important for seamless access
- Test WAYFless URLs
 - Platform, title & article level links



Current position & plans (2)

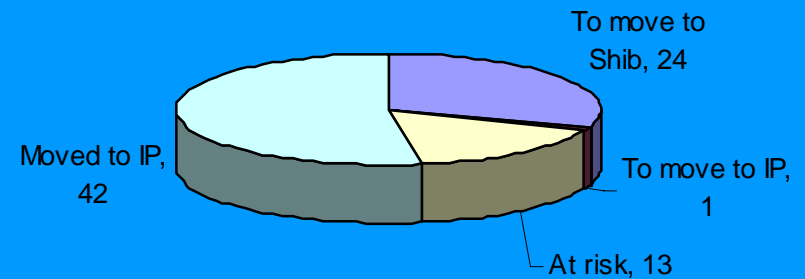
- Switch all remaining Athens resources to Shibboleth access where possible
- Switch all remaining non-Shib resources to IP/proxied access where possible
 - Move to Shib when available
- Review outstanding “at risk” resources
 - Athens only + not yet Shib + IP not offered
 - Most plan to be Shib compliant by 31 July 2008
 - Handful of resources affected e.g. British Library Archival Recordings Service, Census data, JORUM, PathCAL etc.



Current position & plans (3)

- 80 resources in total
(One resource may include thousands of titles e.g. JSTOR/ACLS HEB)
- 42 already moved to IP
- 1 ‘Athens & IP’ resource still to move to IP
- 24 still to move to Shibboleth
- 13 “at risk” e.g. Athens only + not yet Shib + IP not offered

Status of UoS Athens eResources May 2008





Current position & plans (4)

- Continue to keep colleagues & customers informed throughout transition
 - Careful use of terminology
- Raise awareness of
 - Potential loss of personalisation
 - Need to reregister for some resources e.g. Digimap
- 1 August 2008 onwards: continue to switch resources to Shibboleth access when available



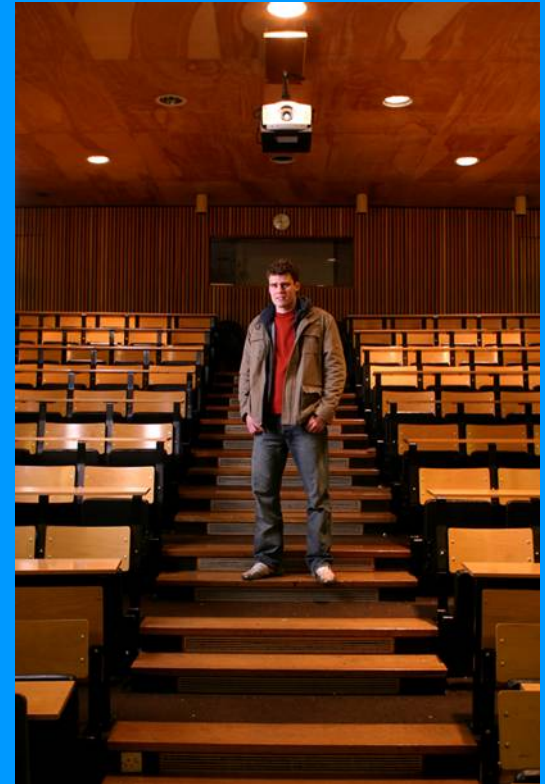
The
University
Of
Sheffield.

Customer focus: Breaking down the barriers



Customer focus

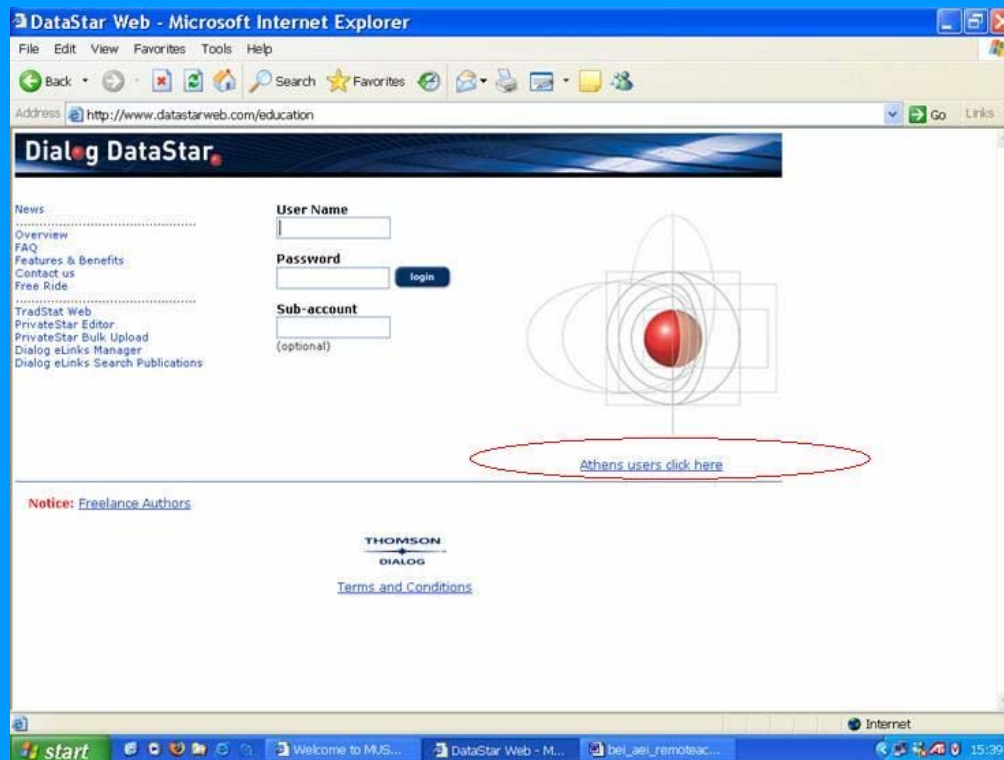
- Access via portal as usual
- Access simplified
 - WAYFless Shibboleth or IP/proxied access only
 - Confusing terminology reduced
- Previous barriers to access removed
 - More seamless & intuitive access experience for UoS customers
 - Likely to increase customer satisfaction & decrease “click through” access queries associated with AthensDA





Customer focus (2)

Example of “click through” access that UoS customers found confusing





The
University
Of
Sheffield.

Summary



And finally.... UoS Shibboleth preparations

Complex & resource intensive process, with challenging deadline

- Worth it!
- Avoids use of chargeable gateway
- Opportunity to assess & rationalise UoS eResources access management
- Likely to
 - reduce customer confusion & queries
 - improve service quality
 - increase customer satisfaction
- Provides granular access capability
- Has other potential uses at UoS (not just for eResource access)
....but that's another project!



The
University
Of
Sheffield.

Thank you – questions welcome at the end

t.clarke@sheffield.ac.uk (0114) 22 27280

r.mason@sheffield.ac.uk (0114) 22 27264