

JISC Access Management Transition Programme

Impacts and Opportunities for Libraries and Licenses

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- JISC has published its intention to centrally support federated access management from July 2008 as the preferred access management system within UK Higher and Further education.
- This will be enabled by the UK Access Management Federation, to be run by UKERNA:
www.ukfederation.org.uk.
- The federation is 'technology neutral' in terms of what systems an institution uses as long as it is SAML compliant: Shibboleth, Guanxi, AthensIM, Athens gateways (but potentially iChain and other commercial systems).
- JISC will fund Athens until July 2008, after which institutions will be required to pay a subscription for 'classic' Athens and AthensDA (and other new Athens resources such as 'Atacama').
- JISC is funding Eduserv to provide gateways between Athens and the UK Access Management Federation to allow Service Providers and Institutions to continue using Athens if they so chose.
- Authentication is devolved to the institution: the institution needs to be able to authenticate every user who is entitled to access institutional resources.
- Authorisation is handled by an exchange of information between an institution and service provider: the institution needs to know exactly what each and every user is entitled to access.
- So, what is in your license?

Why federated access management?

- Moves closer to the single sign-on ideal. Users need not remember so many passwords as they use their institutional username and password to access external, internal and collaborative resources
- Aligns with international convergence on Shibboleth/SAML
 - wider market for suppliers
- Avoids the need to maintain a central Athens-type database of registered users
 - by JISC/Eduserv *and* by participating libraries
- Open Source tools are available
 - so tools can be developed by participants and shared
- Commercial tools are available
 - for those who do not wish to use open source solutions
- Can be used for collaborative access to institutional resources
 - solves problem of how you allow access to your resources to other institutions WITHOUT having to register people as members of your institution.
- Free at the point of use for all members of the UK Access Management Federation.

- **BECOME A FULL MEMBER OF THE FEDERATION USING COMMUNITY SUPPORTED TOOLS**
 - COSTS: Institutional effort to implement software, join federation and enhance institutional directories
 - BENEFITS: Full institutional control, skilled staff and access management solution for internal, external and collaborative resources
- **BECOME A FULL MEMBER OF THE FEDERATION USING TOOLS WITH PAID-FOR SUPPORT**
 - COSTS: Cost of support from supplier and institutional effort in liaison with supplier and Federation
 - BENEFITS: Full support in implementation and access management solution for internal, external and collaborative resources
- **SUBSCRIBE TO AN 'OUTSOURCED IDENTITY PROVIDER' TO WORK THROUGH THE FEDERATION ON YOUR BEHALF (SUCH AS USE OF CLASSIC ATHENS WITH THE GATEWAYS)**
 - COSTS: Subscription costs to external supplier (from July 2008) and internal administration role
 - BENEFITS: Minimum institutional effort to achieve access to external resources only

Option 1 and 2: Roadmap for Institutions

Joining the UK Access Management Federation

INSTITUTIONAL JOIN-UP

The introduction of federated access management moves the responsibility for access management from the library to IS departments. These departments will need to work together to achieve this goal.

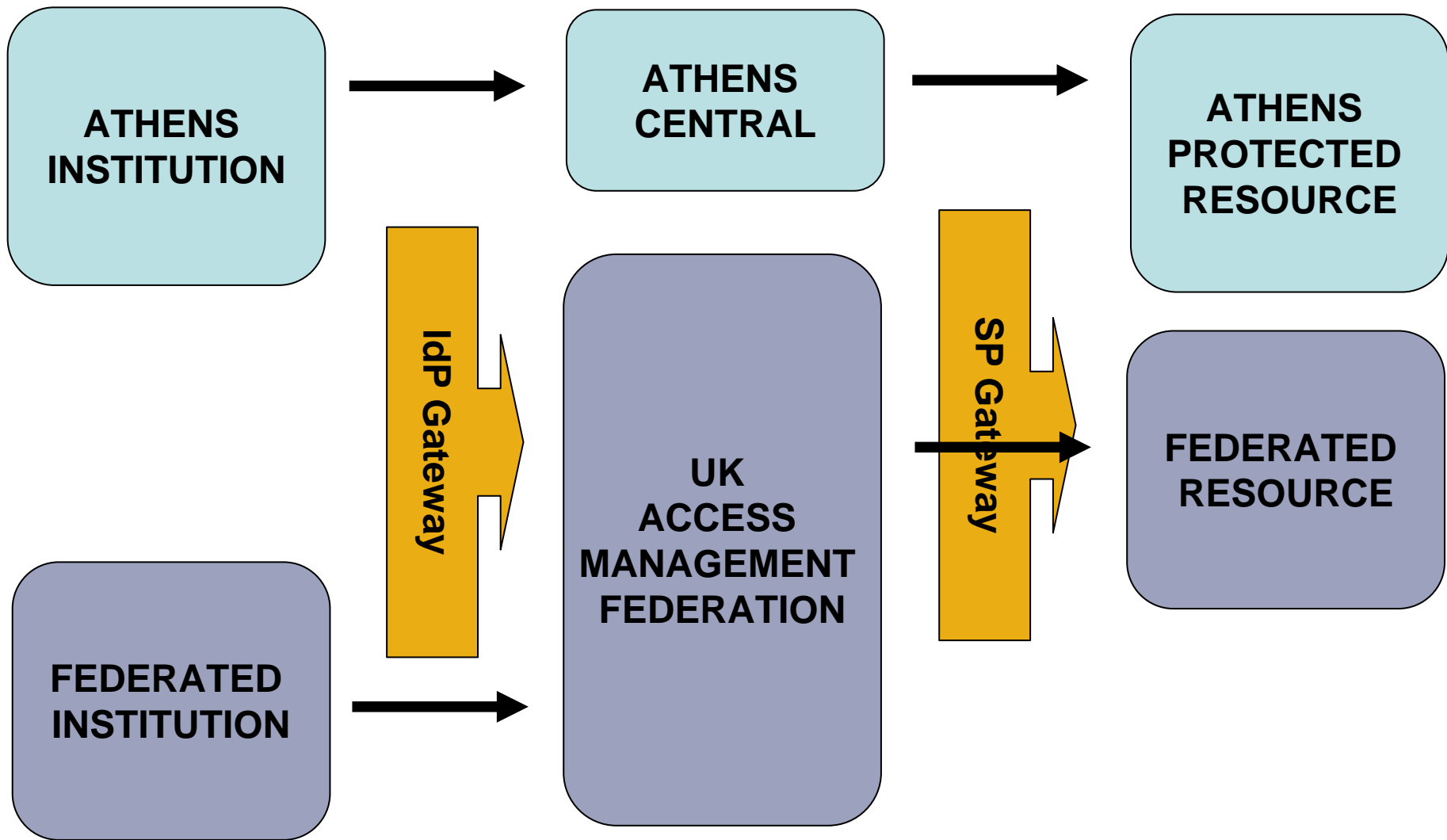
OPTIONS

Institutions will have choices and these choices should be supported by informed decisions. The potential models for adoption by institutions are given on page 11 and institutions should consider how well each of the models fits with their IT strategies.



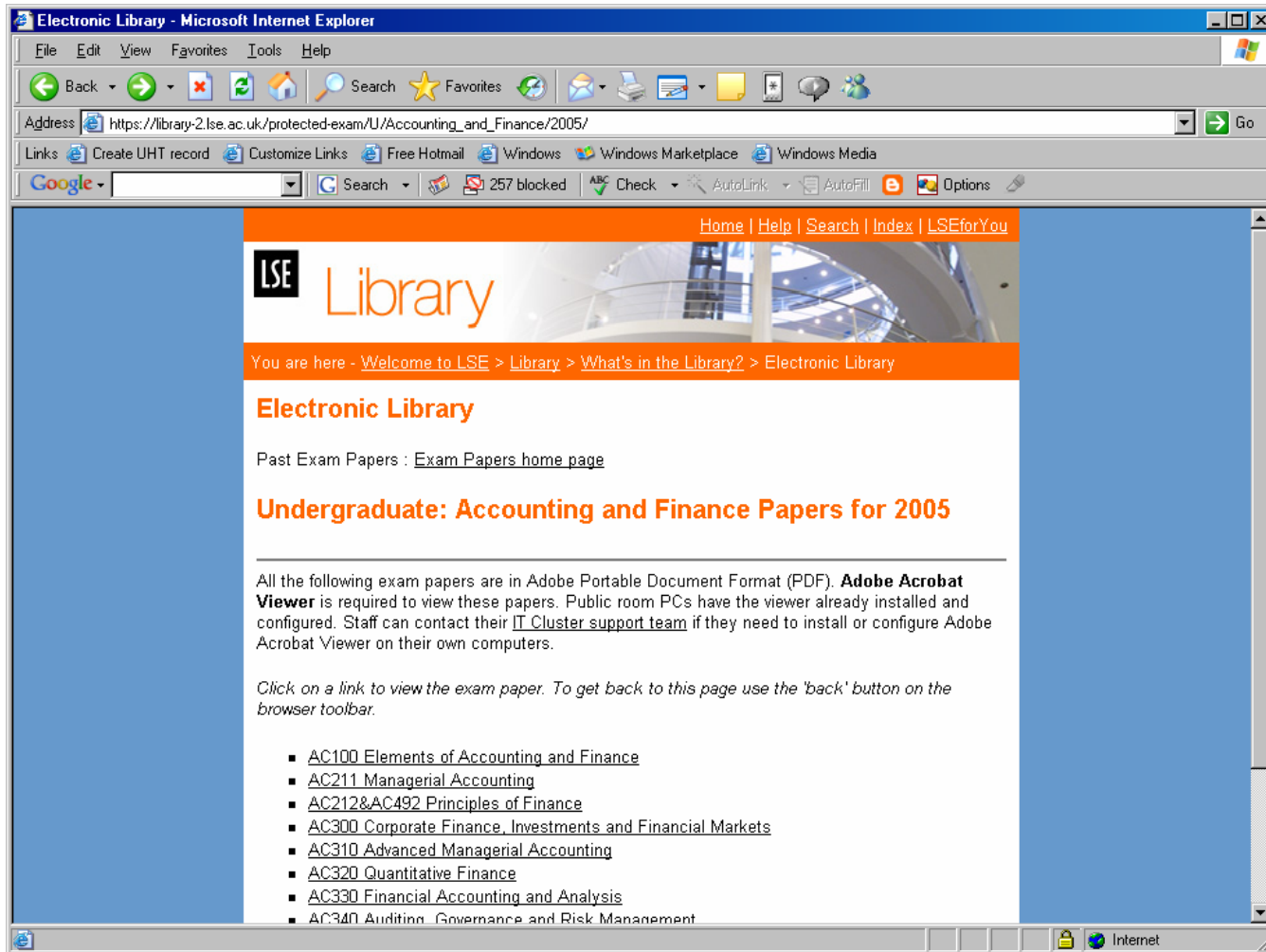
SUPPORT

JISC is providing support for all institutions who wish to join the Federation in the form of Middleware Assisted Take-up Service. MATU can help all organisations as they move through each stage in this process.



- Reduced overheads in password support
- No difference in on-campus and off-campus access
- More flexible access control – e.g. different categories of users to different levels of access (or none) to a resource
- Improved security for resources, so publishers happy
 - they also don't have to pay a licence fee (as they do for Athens), nor maintain campus IP address ranges
- Because the access is role-based rather than identity-based there is improved privacy for users

Some Examples of Usage



Shibboleth Access via a WAYF for external services

User knows [URL](#) of resource and that Shibboleth is used

[EDINA](#)  **Index to The Times** 1790 - 1980
 [Standard Search](#)
[Advanced Search](#)
[Results](#)
[Marked Records](#)
[Search History](#)
[Logout](#)
[Help](#)

Standard search

[clear all](#)

Search term:
 Index:
[browse..](#)

Search for
 in

limited by year to
[start search](#)

[Back to top](#)

And where they are from

Shibboleth behind a library portal for external services

- Alternatively, on or off campus, you could just go to the list of e-resources in the library's portal.
- In the LSE Library's case our 'Electronic Library' is run from Endeavor's Encompass system:
- ...but it could just be a list on a 'hand-crafted' web page

Library Catalogue | Electronic Library | Journals | Archives | Reading Lists | Other Libraries | Library Home

LSE Library

Login features (

Search

Electronic Library

Basic Search | Advanced Search | Search History

Search: within Free Text

Source: Click the icon to see specific databases in a given category

- Search Library Catalogue and Journal Titles
- 1. IBSS : International Bibliography of the Social Sciences
- 2. Subject Lists of Electronic Resources
- 3. Data
- 4. Reference
- 5. LSE Course Resources
- 6. A-Z List of Electronic Resources
- Collection for Shibboleth access testing

Search tips Search

Shibboleth behind the library portal

The expanded list shows a link direct to the Service Provider, in this case [Elsevier](#)

- + 5. LSE Course Resources [i](#)
- + 6. A-Z List of Electronic Resources [i](#)
- Collection for Shibboleth access testing [i](#)
 - [Academic Library: Electronic Books \(Gateway\)](#) [i](#)
 - [Adept Scientific - Adept4Education \(Gateway\)](#) [i](#)
 - [Blackwell Synergy Electronic Journals \(Gateway\)](#) [i](#)
 - [Education Media Online via Edina \(Shibboleth\)](#) [i](#)
 - [EIU Country Data \(Gateway\)](#) [i](#)
 - [EIU Marketindicators and Forecasts \(Gateway\)](#) [i](#)
 - [FAME \(Gateway\)](#) [i](#)
 - [Global Market Information Database \(Gateway\)](#) [i](#)
 - [Historical Abstracts from ABC-CLIO \(Gateway\)](#) [i](#)
 - [IBSS via WebSPIRS-SilverPlatter \(Gateway\)](#) [i](#)
 - [Index to The Times \(via Shibboleth, with WAYF - Edina\)](#) [i](#)
 - [International Who's Who \(classic Athens\)](#) [i](#)
 - [LexisNexis](#) [i](#)
 - [Ovid - IBSS, Philosopher's Index & PsycINFO etc. \(Gateway\)](#) [i](#)
 - [Oxford Scholarship Online \(Gateway - new Eduserv URL\)](#) [i](#)
 - [ScienceDirect \(Gateway\)](#) [i](#)
 - [ScienceDirect \(Shibboleth\)](#) [i](#)
 - [SwetsWise \(Gateway\)](#) [i](#)
 - [Taylor & Francis e-Books \(Gateway\)](#) [i](#)

Shibboleth behind the library portal

After clicking link in library portal:

The screenshot shows the ScienceDirect website interface. At the top left is the Elsevier logo and the ScienceDirect logo. In the top right corner, a red circle highlights the text "Logged in via LSE" with a "Logout" link below it. Below the logo is a navigation bar with buttons for Home, Search, Journals, Books, Abstract Databases, My Profile, Alerts, and Help. A search bar is located below the navigation bar, with a dropdown menu set to "All Full-text Sources" and a "Go" button. To the right of the search bar, it says "Full-text articles in ScienceDirect: 7,699,376".

On the left side, there is a "ScienceDirect Info" section with links for About ScienceDirect, Content Coverage, Librarian Services, Guest User Info, About Athens, Why Register?, and User Guides. Below this is a "ScienceDirect News" section with links for Contact Us and More Info... At the bottom left, there is a "TOP25 Hottest Articles" banner with a "SUBSCRIBE NOW!" button.

The main content area features the ScienceDirect logo and a banner for "Enhanced personalization". Below this is a welcome message: "Welcome to the world's largest electronic collection of science, technology and medical bibliographic information." There is a search box with the text "Search for a Title:" and a "go" button. Below the search box, it says "OR Browse A-Z".

On the right side, there is a "Subject Areas in Science" section with a list of subject areas: Agricultural and Biological, Arts and Humanities, Biochemistry, Genetics and Biophysics, Business, Management and Economics, Chemical Engineering, Chemistry, and Computer Science.

At the bottom, there is a "Top Publications in ScienceDirect" section with three featured publications: "Progress in Solid State Chemistry" and "Medical Science".

Authorisation and License Issues

- Now: Athens system
 - Conflates Authentication and Authorisation
 - Based on information maintained by institutions, managed by Athens Administrators
 - Suppliers must trust Athens and all licensed institutions
- Federated Access Management
 - Separates Authentication and Authorisation
 - Institutions knows who a user is and can verify this without revealing identity
 - Service Provider does not need to know (but can do)
 - Service Provider does know what group / roles can access resources
 - Institution and Service Provider must agree on this VIA ATTRIBUTE EXCHANGE

TECHNICAL ATTRIBUTE NAME	WHAT THIS REALLY MEANS
<p><i>eduPersonScopedAffiliation</i> <i>(member@jisc.ac.uk)</i> <i>UK specific controlled vocabulary</i></p>	<p>Establishes user's relationship with institution – e.g. staff, student, member. Terms as used in JISC Model license. Most authorisation can be done against this attribute.</p>
<p><i>eduPersonTargetedID</i> <i>(r001xf4rg2ss)</i> <i>opaque string defined by institution</i></p>	<p>'A persistent user pseudonym' to allow for service personalisation and usage monitoring across sessions. Not a real world identity.</p>
<p><i>eduPersonPrincipalName</i> <i>(harrisnv)</i> <i>defined by institution – login name</i></p>	<p>Used when a persistent user identifier is required across services. Typically used in for internal institutional services. Real identity can be established from attribute.</p>
<p><i>eduPersonEntitlement</i> <i>(expressed as an agreed URI)</i> <i>mutually agreed by institution and service</i></p>	<p>Used when a specific resource has a specific entitlement condition not covered elsewhere: must be over 21, must have completed foundation course module.</p>

- Attributes are managed within an 'attribute authority'. This can be managed via an existing directory service.
- May wish to consider specific toolkits for managing users:
- Signet
 - Institution-centred Privilege Assignment Manager
 - signet.internet2.edu
- Grouper
 - Institution-centred Group Manager
 - middleware.internet2.edu/dir/groups/grouper
- PERMIS
 - Complete Privilege management infrastructure
 - www.permis.org
- SHARPE

- In order to get a users attributes or resource entitlements right, it is essential that license terms are fully understood.
- For many licenses this is simple: member, staff, student etc.
- How many resources in your institution require fine-grained access control?
- Consider resources in the widest sense.
- Consider whether license management tools have a role to play.

A Role for ERM / License Management Systems?

- Problems with current management of licences
 - storage of information in disparate locations;
 - lack of procedures;
 - a large and growing collection of resources which needs managing;
 - danger of multiple interpretations of the licence;
 - finding information quickly and reliably
- Contravening a licence can result in legal action, financial penalties or termination of the agreement
- Danger of missed deadlines / failure to renew
- Need for better management reports
- Can help define user groups / attributes
- Need not be a commercial system

Example of Meridian (Endeavour) at LSE

The screenshot displays the Endeavor Meridian web application interface. At the top, there is a navigation bar with the Endeavor Meridian logo and a user profile for 'rumsey' who is logged in. The navigation menu includes 'Home', 'Alerts', 'Reports', and 'System Admin'. A search bar is located below the navigation menu, with 'All Records' selected and a 'Go' button. The main content area shows the search results for 'WestLaw UK' with a 'Product Details' link. The selected item is 'WestlawUK Subscriber Agreement 20-06-05 - License Details', which has a 'Delete' button. Below this, there are tabs for 'Properties', 'Terms of Use', 'Restrictions', 'Obligations', 'Archives', 'Products', and 'History'. The 'Restrictions' tab is active, displaying a table of license details. The table has two columns: 'Property' and 'Value'. The rows are: 'Authorized Users: Current members of LSE only "Faculty, administration and staff and students" (see Westlaw schedule)', 'Authorized Sites:', 'Remote Access Permitted: Yes', 'Notes Regarding Walk-In Users: Not permitted', 'Local Use Permissions:', 'Number of Concurrent Users:', 'Number of Pooled Concurrent Users:', 'Concurrent User Notes:', 'Other User Restrictions:', and 'Other Restrictions Notes:'. There are two 'Edit' buttons, one at the top right and one at the bottom right of the table, each with a dropdown menu labeled 'Select license or addendum to edit...'. At the bottom of the page, there is a footer with a copyright notice: 'Copyright © 2005 Endeavor Information Systems. All rights reserved.' and a navigation bar with links for 'Home', 'Alerts', 'Reports', 'System Admin', and 'Help'.

Endeavor
Meridian

rumsey is logged in. Logout

Home Alerts Reports System Admin Help

Search All Records for Go Search Tips

Meridian Search Results > WestLaw UK Product Details

WestlawUK Subscriber Agreement 20-06-05 - License Details Delete

Properties Terms of Use Restrictions Obligations Archives Products History

Select license or addendum to edit... Edit

Authorized Users:	Current members of LSE only "Faculty, administration and staff and students" (see Westlaw schedule)
Authorized Sites:	
Remote Access Permitted:	Yes
Notes Regarding Walk-In Users:	Not permitted
Local Use Permissions:	
Number of Concurrent Users:	
Number of Pooled Concurrent Users:	
Concurrent User Notes:	
Other User Restrictions:	
Other Restrictions Notes:	

Select license or addendum to edit... Edit

Home Alerts Reports System Admin Help

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Libraries

- Can your library manage several 'classes' of user?
 - Do you do this already?
- Why would you do this?
 - Will this save on your e-resources budget?
 - Help you to keep to the terms and conditions of licenses?
- What sort of attributes might you use to identify target users?
- Do you have the right information about your licenses available to hand?

Suppliers

- How would you sell licences to more-focussed groups (within a university)?
- Will this increase your revenue stream?
- Would you trust academic libraries to restrict access to limited licensed users?

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