OpenAthens Implementation: A Two-phased Move at Our Library

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Agenda

• Brief Overview of OpenAthens

• OpenAthens at UT Martin
  • Why OpenAthens?
  • Implementation Approach
  • What Worked & Lessons Learned

• Keys for a Successful OpenAthens Implementation
What is OpenAthens?

• Single sign-on service
• Identity and access management tool
• Username/password system for logging in to digital resources; can use institutional accounts or create accounts in OpenAthens
• Access management tool that allows librarians to say who can access what
• Supports secure access using SAML 2.0, which transmits user data securely
• Fully cloud-based service (no need for subscriber to host) with 24/7 customer support
Flexible Approaches to Implementation

- OpenAthens
  - All at Once
  - In Phases
    - Step 1: As SSO for LSP
    - Step 2: Add other resources over time

- In conjunction with other products, e.g.,
  - FOLIO
  - EBSCO Discovery Service (EDS)
University of Tennessee at Martin

- Public institution located in northwest Tennessee with five regional centers; part of the University of Tennessee system
- FTE: 6,700 (as of Spring 2021)
- Paul Meek Library
  - Sierra ILS → FOLIO LSP
  - EBSCO Discovery Service (EDS)
  - EZproxy authentication for off-campus access prior to OpenAthens
  - 510,000+ electronic resources
Why OpenAthens?

- Part of FOLIO implementation package
  - Integrations with EDS and OpenAthens
- Project for post-migration of FOLIO
- Intend to provide new user experience with library services
Implementation Timeline and Phases

*Phase One: June 2021
  • Configuration and refinement of the OpenAthens connector

*Phase Two: August 2021 – December 2021
  • Preparations
    • OpenAthens setup questionnaire
    • A list of content providers, vendors, and publishers
    • Verification of the OpenAthens info
    • Final athenized URLs
  • Intensive testing
    • Regular communication with EBSCO, vendors, and publishers
    • Testing on and off-campus by library staff
    • Updated A-Z Database List & updated proxy setting in LibGuides
  • Go-live with OpenAthens
    • Promoting the transition on campus
    • Creating a LibGuide for OpenAthens
    • Training and feedback from library staff
Lessons Learned

• Prepare for a comprehensive list of resources/vendors if possible
• Ensure vendors have IP addresses added
• Understand proxied vs. federated resources
• Construct unique URL links
• Have EZproxy back-up
• Create guest account
• Document the transition progress!
Move Forward

- Centrally managed resources
  - EBSCO support and collaboration
- Workflows with OpenAthens
  - New processes for database setups and trials
  - Configuration in OpenAthens admin
  - Troubleshooting: redirector link generator
- OpenAthens prefix update for MARC records in FOLIO
  - New load profiles for e-resources
- Reporting for granular statistics
  - Usage statistics for patron groups and platforms
Effective implementation strategies

Pre-Planning
• List out your resources and their URL’s
• Assess where your links may be embedded, e.g., Libguides, Course Pages, etc.

Phased Approach
• Works well for larger collections
• Gradually switch over by running OpenAthens simultaneously with another authentication, e.g., EZProxy

Measured Approach
• Start simple, familiarize yourself with core functionality
• Ensure your Identity Provider (IdP) is configured to deliver the required functionality
• For meaningful Usage Statistics confirm the information in IdP user accounts is sufficiently detailed
• Define useful permission sets

Vendor Outreach and Testing are shared responsibilities
• EBSCO will reach out to many of the content providers for you
• Follow up with content providers to ensure authentication is configured for OA as early in the project as possible
• Don’t assume the publisher will configure your account for OA authentication correctly the first time
• Test and test again. Document test results and share continuously with EBSCO
• Keep asking questions
Questions?