

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



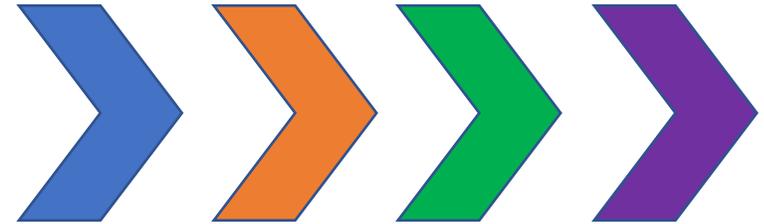
What is OpenAthens?

- 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

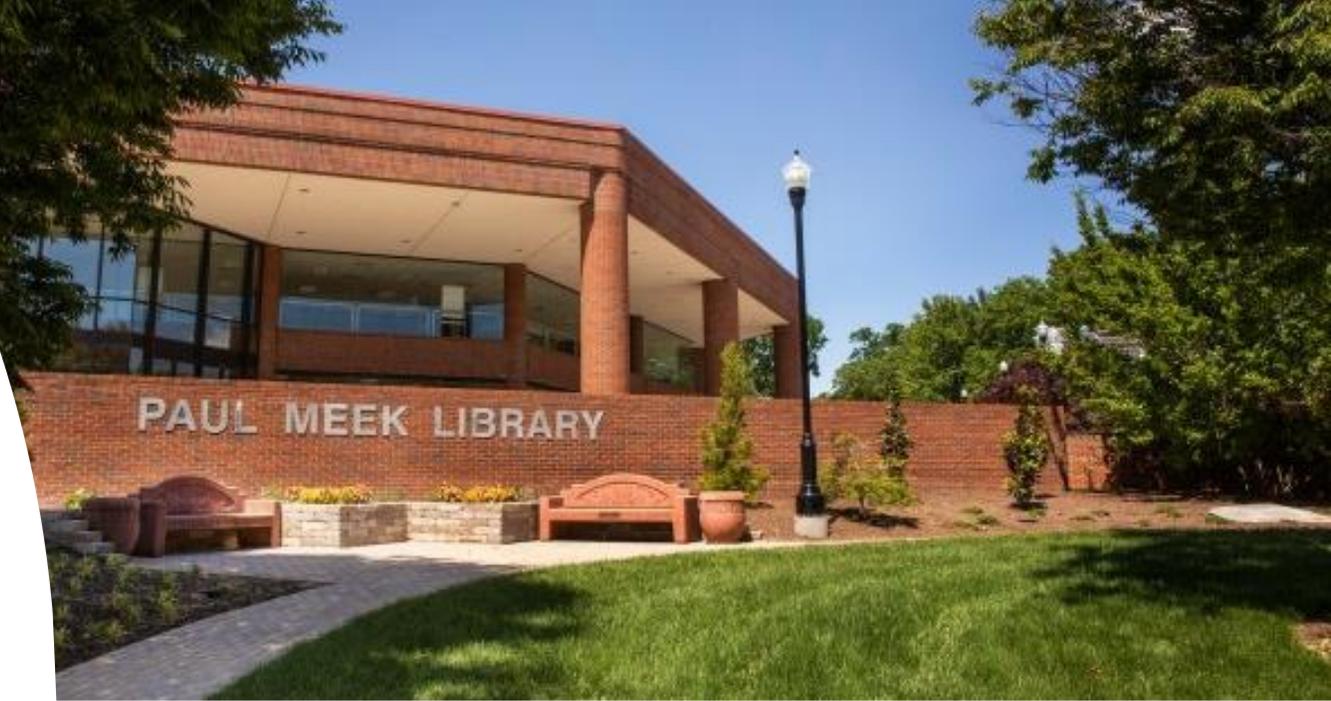


- In conjunction with other products, e.g.,

- 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?