

# OpenAthens Implementation: A Two-phased Move at Our Library

Hong Li, Electronic Resources & Discovery Librarian, UT Martin [hli108@utm.edu](mailto:hli108@utm.edu)

Timothy Goodrich, SaaS Implementation Project Mgr, EBSCO [twgoodrich@ebSCO.com](mailto:twgoodrich@ebSCO.com)

Christopher Holly, Director of SaaS Innovation, EBSCO [cholly@ebSCO.com](mailto:cholly@ebSCO.com)



# Agenda

- Brief Overview of OpenAthens
- OpenAthens at UT Martin
  - Why OpenAthens?
  - Implementation Approach
  - What Worked & Lessons Learned
- Keys for a Successful OpenAthens Implementation



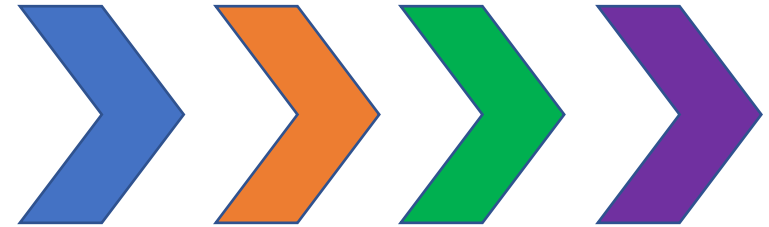
# What is OpenAthens?

- 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?