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RA21: Seamless Access is Easy, Secure and Highly Reportable

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Seamless Access
in the 21st century can be
easy, secure, and highly reportable

Thoughts driving an **OpenAthens** deployment

By **Scott R. Anderson**

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Online Northwest, Portland State University, March 30, 2018

Got Questions ?

Get my attention ….
and please ask.

(Just don't throw anything at me.)

About Millersville University (MVS)

- An institution far far away …. 80 miles due west of Philadelphia
- Mid-Sized Comprehensive institution (6405 FTE)
  - 6800 (from 7000) undergrad, 970 (from 875) graduate
  - 320 FT faculty, 200 PPT &/or TPT = 520 faculty
- 120+ programs for undergrads
- 24 programs for graduate, 3 Doc programs
- Top 10 declared majors: (1 to 10)
  - Biology, Business, English, Psychology, Math, History, Early Childhood Ed, CS, Meteorology, Early/Special Ed
- Several "dual institution programs" - EdD, MSW, DSW, MALC

About MVS Library

- Nearly 100% electronic
  - In 2015/16 - 5 physical journals; purchased 116 physicals
  - In 2016/17 - 4 physical journals; purchased 89 physicals
- 280k physicals *and declining* (general collections)
  - Maxed out just shy of 450k several years ago
  - 21k special collections; 22k juv/curr collections
- 271k e-books and 170k e-journals/conference
  - JSTOR, EBSCO Completes, Muse, Sage, Elsevier, ACM, ACS, IEEE, IOP, Alex St Pr
- 20k e-books exposed via DDA
- 34k e-videos exposed via DDA
- Very robust Special Collections / Archives
  - Avg Sem: 250 students; 85 fac; 85 comm; 6k e downloads

About Scott R. Anderson (SRA)

- 2018 is 24th year in the library profession
- Instruction / Research assistance
  - Art & Dsgn, Business, Computer Science, Economics, Mathematics
- Represent entire library systems effort
  - ILS, ILL, IR, SC&A, content platforms, Discovery, Linking, KB, … and user access
    - Alma, Illiad, TIND IR, Aeon & ASpace, EDS, FTF … AD to Shib to Proxy/Shib/OA
- Collections use and analysis
  - Local and consortium collections/resources
  - Analysis of use - subscribe vs. buy vs. borrow vs. cost per use
  - Value propositions - renew, not-renew, expand/shrink versioned resources, switch
  - Ways to meet curricular changes

Access : users, services, content

- On Campus: IP Access
  - Easy, walk up and go …. almost
  - Someone used a resource - not as helpful for analysis – no user attributes
  - Not the same experience as "off campus"
- Off Campus: Proxy
  - Consortium run authentication / proxy / Shibboleth-ish / **customized**
    - Carrying the costs of customization in staff time and maintenance
  - Y/N authentication – not as helpful for analysis – no user attributes
  - Reporting never a high priority
- No ILS "back door" access mechanism for years
  - Avoid "patron file" – use real time University IdP when possible

Access : **users**, services, content

- University is official identity provider
  - Typically made actionable to the library via some IT service
  - Official source of basic student/faculty/staff "user" and "group" types of data
  - Making attributes actionable in 3 steps ….

    (1) Student Information System (SIS), then to
    (2) Active Directory (AD), then to
    (3) Shibboleth (SSO) so we can use it ….
    … Is automated … or it seems to be to us anyway ….

  - Getting SPECIFIC attribute data flowing has proven daunting

Access : users, services, content

- IT provides the basic attributes very well
  - Provides in an actionable way the basic attributes
    - Username / email / group affiliation / current status
      - memberOf "faculty / staff / student" … and "currently a student / employed"
- IT provides the more specific attributes …. not so well
  - You want what? … go ask the Registrar
  - It will be "awhile" before we gets specific attributes automated
    - Think "course" or "major" or "minor" or "dept" or "research assistant"
    - Attributes that would assist with scoping access to specific resources / services
- Need means to manage specifics to …
  - scope access / get more informative reports

Access : users, **services**, content

- InterLibrary Loan
  - Illiad – user provides one time demographics, doesn't update
- Course reserve
  - Ares – one time course affiliation per semester
- "E-Zborrow" for unmediated monographic requesting
  - Uses that icky patron file from the ILS
  - What's my Library ID number?
- Repository
  - Submission permissions (if attribute "submit", you get permission)
- Discovery
  - Real time ACCOUNTS being created in Discovery via Shib SSO now … will move to AO SSO
  - Accounts are UNIQUE into "perpetuity" so are perfect User ID for Millersville
  - Building out personalization around this UI – pull "personalization" from other services

Access : users, services, content

- Very "e content centric"
  - Seamless access is a big issue – because it's basically all our content
  - We buy physicals as a last resort

- Flat budgets
  - Analysis of content "costs" and "value" increasingly important
    - Value proposition "varies" by user group
  - To add/alter content mix, we need to curtail, trim, cut, or slash
  - Clearly demonstrate ability to meet niche need to pry out non-library $$$
    - We think "scoping access" to resources will help

Midway Brief Recap

- 100% electronic as a practical matter
- Moving away from IP / Proxy to secure and "known" SSO process
  - Avoid: Lack of security, no reporting, no scoping, IT managing 125+ connections
  - Gain: Security w/SAML, actionable reporting, scoped access, ONE connection
- Library gains a singular mechanism to manage users to content
  - Leverages what the University IdP provides
  - Provides Library w/options to access when lacking university provided attributes
- IT manages a single connection to OpenAthens
  - Ie, the Library doesn't need to bother them about connections!

- Users gain a singular known process to login regardless of location

What is OpenAthens ? How does it work ?

- A "gateway authentication" service
    - Most libraries have a "general scholarly database of journals"
    - Metaphorically similar, but for authentication with content providers
    - OA and content providers "talk" via a set of commonly understood attributes
- Connect your institution to OpenAthens
    - IT makes this connection one time (via some SAML service)
    - Determine the universe of user attributes that you want to release to OA
    - Connect your OA profile to your content providers and services
        - Release attributes to each content provider or service as appropriate
    - Leverage existing channels and "WAYF" if user on open web

Advantage of OA for the Library ?

- Dashboard
  - The library can handle connections – add, drop, etc
  - Single point to manage/configure connectivity
- Additive functionality
  - Access control logic independent of what IT has implemented
    - IT can't tell us that, but the Registrar can
- Actionable Reporting
  - Even if local IT wanted to make all the connections
  - They probably can't do reporting
    - We could do just InCommon if we had the time;
    - But we can't readily tell you about the activity.

Reporting & Analysis with OA

- Examples are not Millersville data
  - We're only incidentally generating data into OpenAthens currently
  - Some MVS users are finding the WAYF OpenAthens login
    - We haven't said a word to our community …. Yet.

- Easy to generate reports
  - Basic to super-fancy
  - Richness based on what attributes you have mapped
  - More attributes or attribute values, more reporting options

- Drop into Excel / Reporting tool of choice
  - Commence numerical wizardry

Group name	Total accesses	AccessMedicine - Silverchair (usage)	American College of Physicians (transfer)	American Journal of Roentgenology. (usage)	American Medical Association (transfer)	American Psychological Association (transfer)	American Society of Clinical Pathology. (usage)
Administrator	17	0	0	0	1	0	0
Allied Health Profes	8	0	0	0	0	0	0
Dentist	4	0	0	0	0	0	0
Fellow	25	0	0	0	2	0	0
GMO/Fligh Surg	3	0	0	0	0	0	0
Hospital Corpsman	42	2	0	0	0	0	0
Ind Duty Corpsman	274	40	0	0	0	0	0
Intern	238	9	1	0	2	0	0
Librarian	9	0	0	2	0	0	0
-No group-	80	4	0	0	0	0	0
Nurse	102	0	0	0	0	0	0
Nurse Practitioner	32	0	0	0	0	0	0
Other	4	0	0	0	0	0	0
Physician	234	18	0	0	4	0	1
Physician Assistant	66	7	0	0	0	0	0
Physician, Emerg Med	202	0	1	0	5	0	0
Physician, Fam Med	6	0	0	0	0	0	0
Physician, Int Med	133	0	0	0	1	1	0
Physician, Obs/Gyn	10	2	0	0	0	0	0
Physician, Other	55	0	0	0	0	0	0
Physician, Pediatric	92	0	0	0	8	0	0
Physician, Psych	3	0	0	0	0	0	0
Resident	379	6	0	0	11	0	0
Surgeon	22	1	0	0	0	0	0
Total	2040	89	2	2	34	1	1

OpenAthens statistics by user group broken down by resources
Report period : 01 January 2018 - 26 February 2018
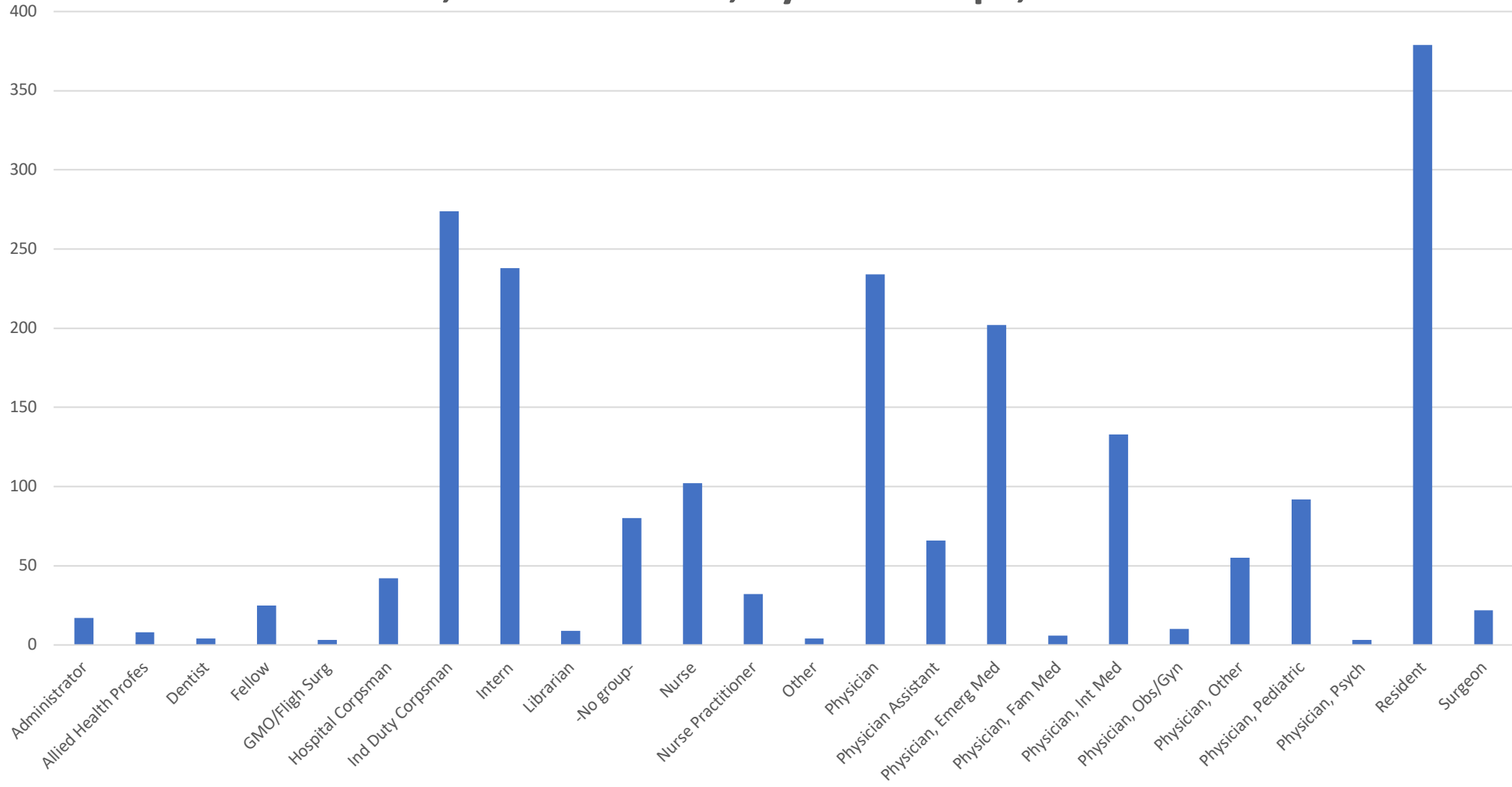
Typical Spreadsheet Like Report

Not overly exciting to look at, BUT … all the raw data is there.

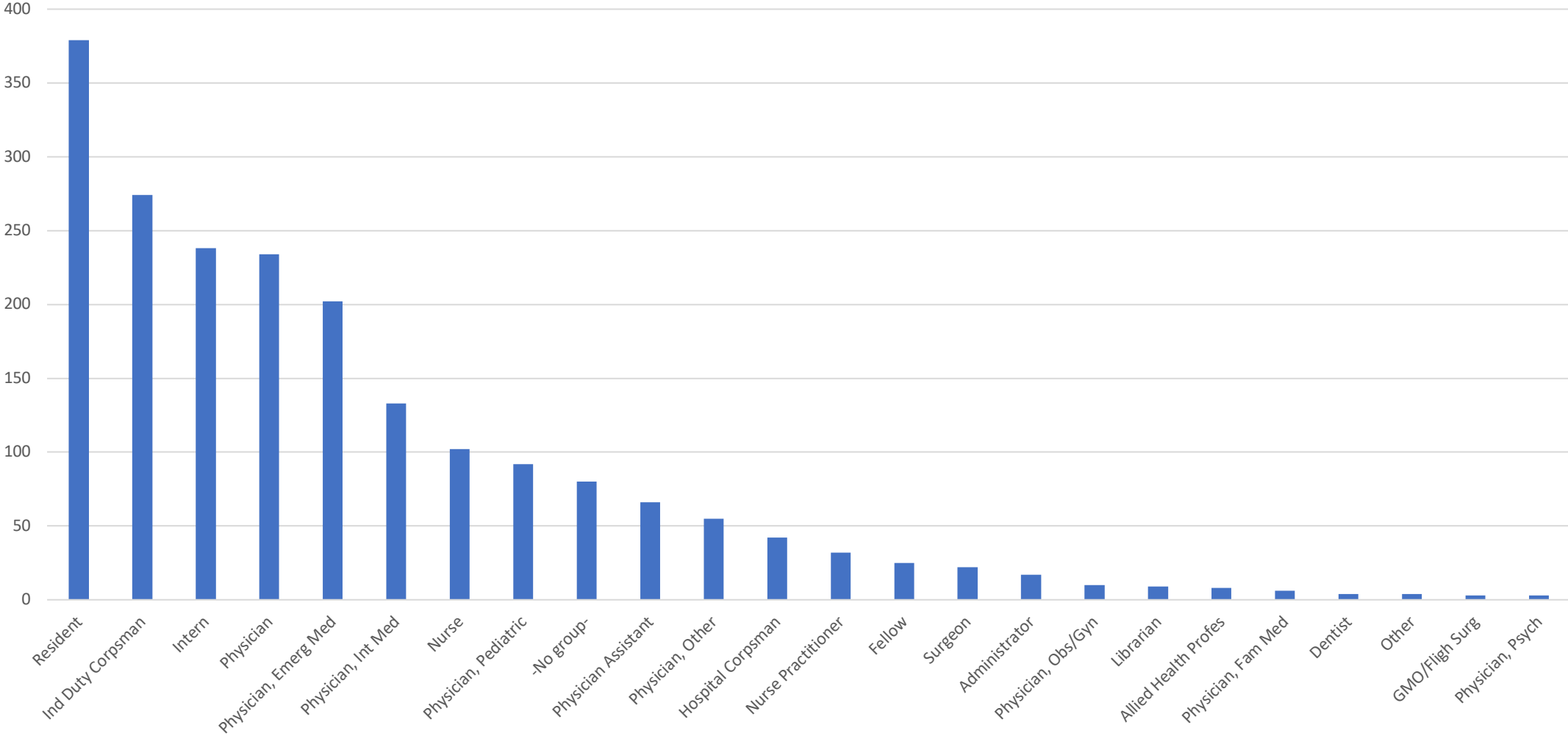Access all your OA data from "day 1" of your implementation, or specify time periods, etc.

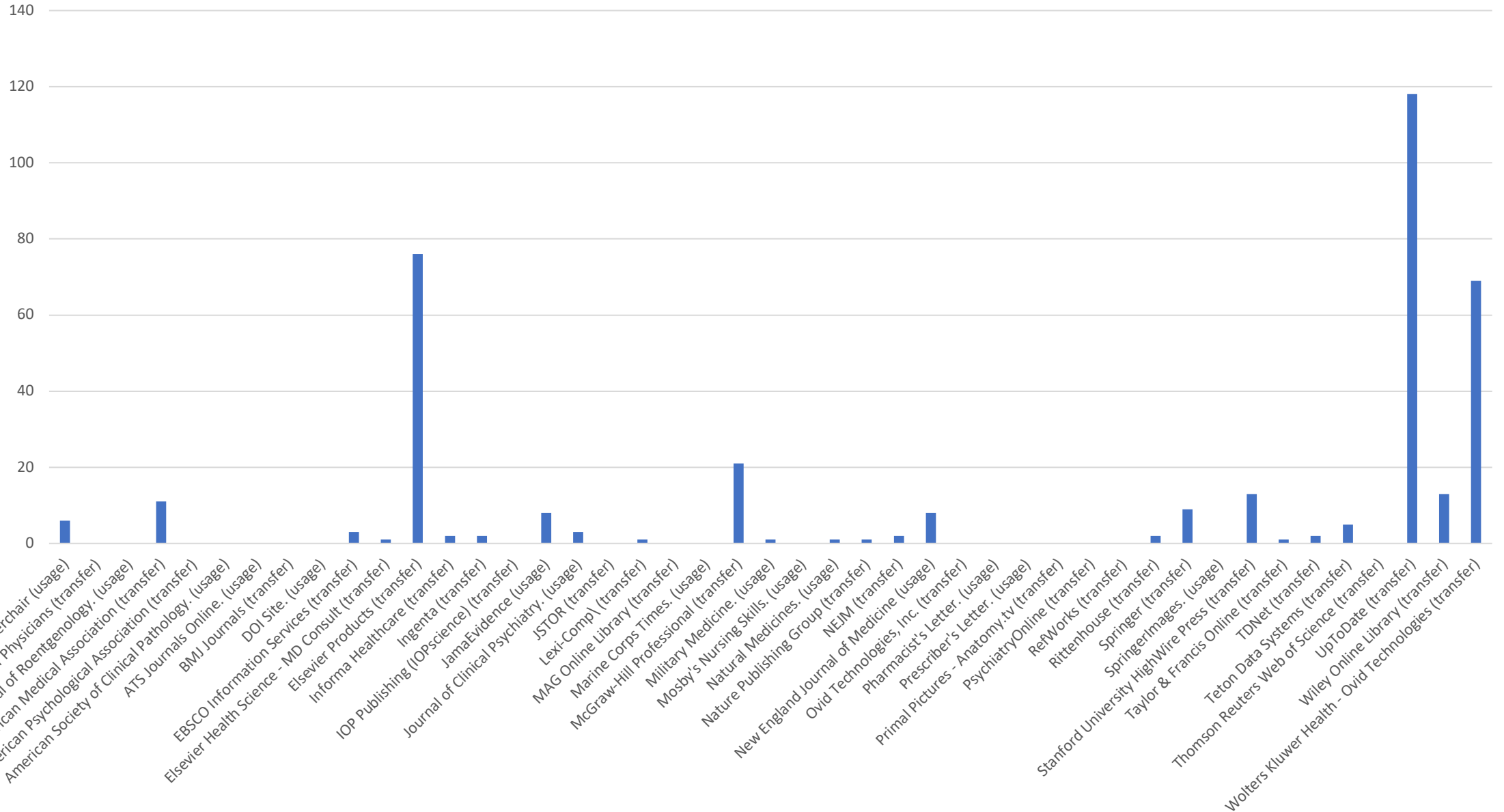What I find much more useful is the ability to start telling a story …

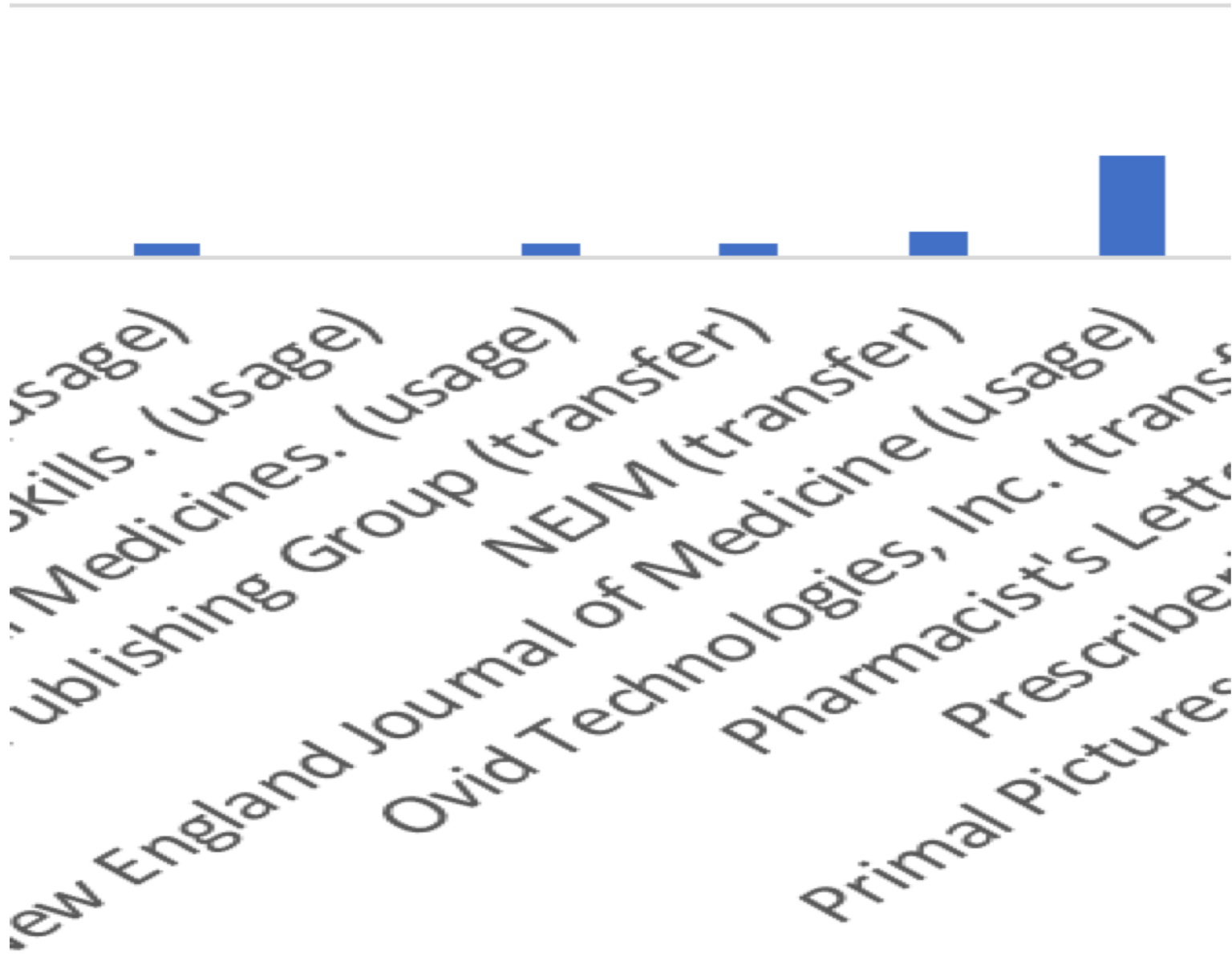Total Accesses, All Resources, by All Groups, Jan & Feb 2018

Total Accesses, All Resources, by All Groups, Jan & Feb 2018

RESIDENT use by Resource, Jan & Feb 2018

Interesting Visualization

Setting aside absolute level of use.

RESIDENTS use the NEJM content "natively" about 4x more than they get transferred to the NEJM.

So RESIDENTS for whatever reason seem to start looking at or for NEJM content right at NEJM itself.

Perhaps, it's the table of contents notification? ... as the NEJM admin, I'd be interested in how many residents have accounts on NEJM.

Do we have RESIDENTS requesting NEJM via ILL ... ? ... cause they probably shouldn't be ….

Resident use by Resource, Jan & Feb 2018
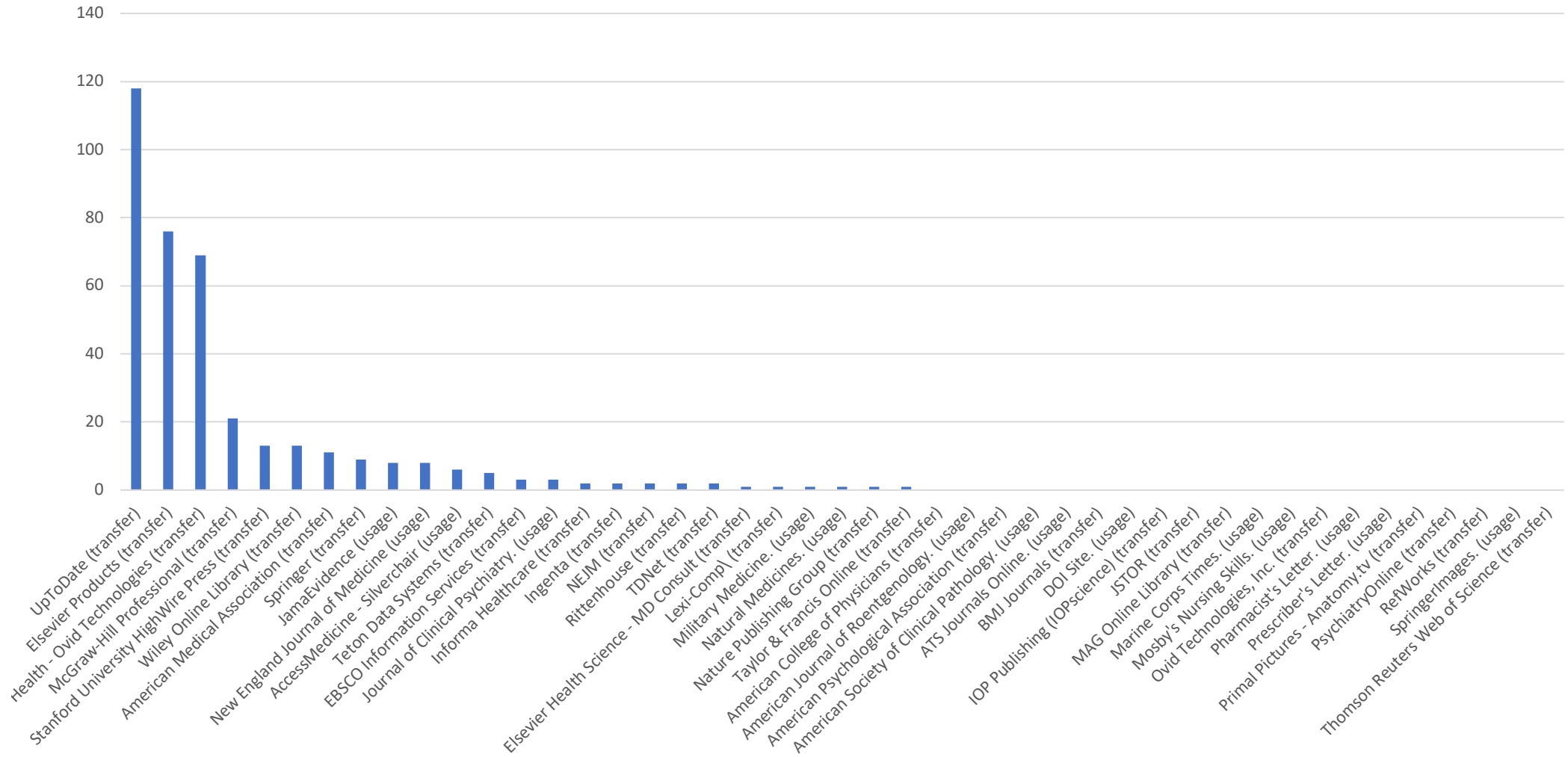
Typical Spreadsheet Like Report

If you ELECT to track by user.

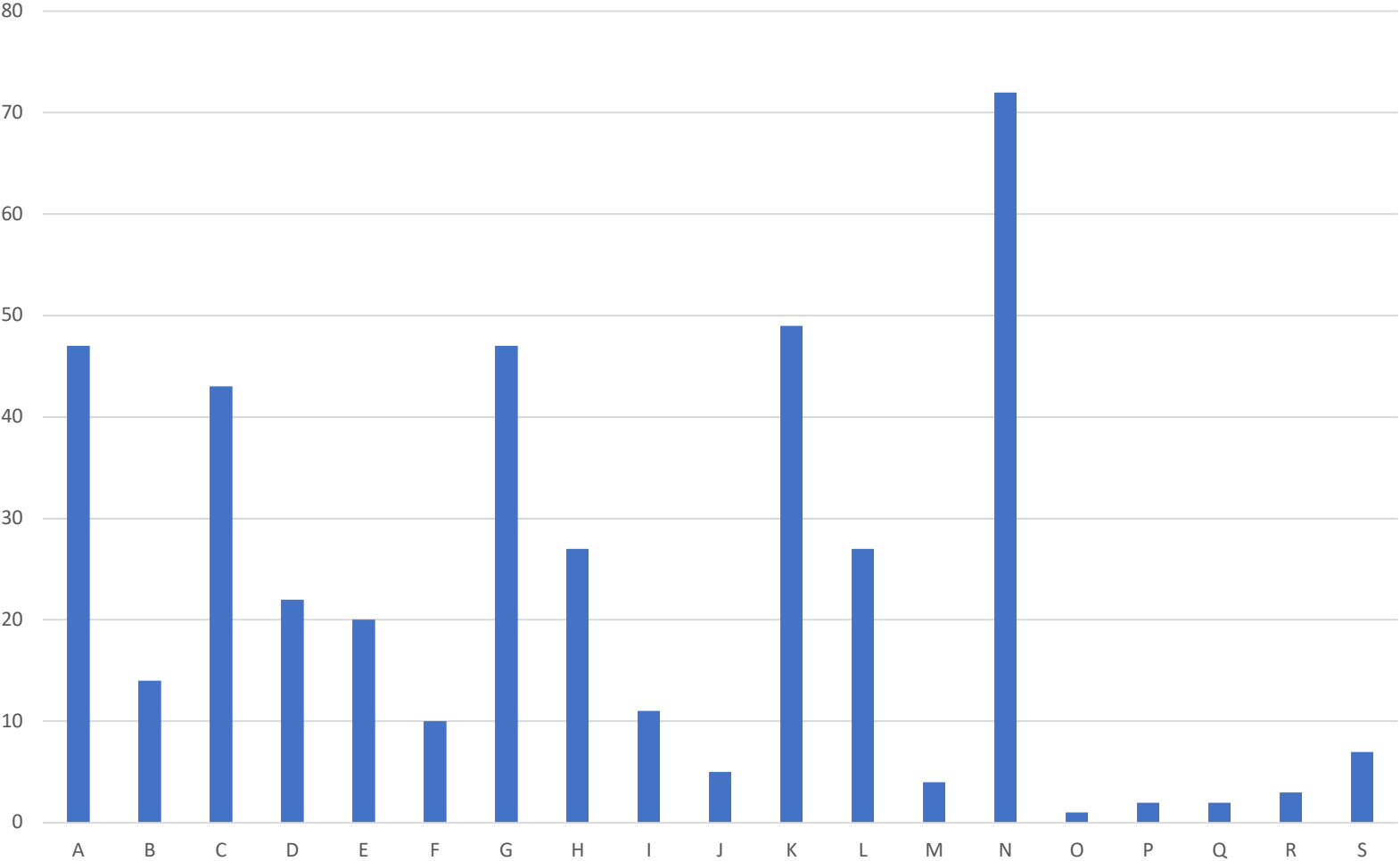Optional – part of configuration.

Options for:

ID "super users" regardless of group.

Conducting student assessment.
Use the library = do better ?

OpenAthens statistics by username/UID broken down by resources

Administrator : XXXXX

Report period : 01 January 2018 - 26 February 2018

Date run : 26 February 2018 02:22:12 GMT

Username/UID	Total accesses	AAAS. (usage)	AACR. (usage)	AHA Journals. (usage)	AlphaMed Press. (usage)	American Academy of Pediatrics Journals. (usage)	American Chemical Society (ACS). (usage)
Total	10302	163	42	27	1	2	293
1	47	0	0	0	0	0	1
2	14	0	0	0	0	0	0
3	43	0	0	0	0	0	0
4	22	0	0	0	0	0	0
5	20	0	0	0	0	0	0
6	10	0	0	1	0	0	0
7	47	0	0	0	0	0	0
8	27	0	1	0	0	0	1
9	11	0	0	0	0	0	0
10	5	0	0	0	0	0	0
11	49	0	0	5	0	0	0
12	27	0	0	0	0	0	5
13	4	0	0	0	0	0	0
14	72	0	0	0	0	0	14
15	1	0	0	0	0	0	0
16	2	0	0	0	0	0	0
17	2	0	0	0	0	0	0
18	3	0	0	0	0	0	0
19	7	0	0	0	0	0	0

Total Access by "Username", Jan & Feb 2018

Possibilities:

Assessment

Surveys

Focus Groups

"User Persona"

Key Opportunities for MVS

- 'Known SSO" login process regardless of location
  - On or off campus; across devices; users experience the same process
  - Portability between resources / services, "single sign on"
- Lower IT hurdle
  - IT admits it's can't realistically manage 125+ connections
  - They can manage one … OpenAthens
  - Focus on making user attributes more readily available
  - Might even use OA as the University SAML service vs. Shibboleth
- Reporting
  - What groups are using what resources and to what extent
    - Is use reasonable? Is there sufficient value ?

Key Opportunities for MVS

- Collections Analysis / Scoping
  - Program proclaims we must have; but your students are not using ….
    - The Library can help with that …
  - "Right size" access to content with users of that content
    - By program, course, engagement

- Personalization
  - Platform accounts without "making another account"
  - Working on pulling that all together in our "library UI"

- Security
  - Best practice

Thank you

Got Questions ?

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Title of Presentation	RA21: Seamless Access is Easy, Secure and Highly Reportable
Presenter (Email, First, Last, Suffix, Institution)	Scott.Anderson@millersville.edu,Scott Anderson, MLS, MBA, Millersville University
Presentation Type	Presentation
Description (Please describe in no more that 75-100 jargon-free words)	Proxy services originating 20+ years ago, do not meet the needs of modern libraries. Today's authentication systems are more secure, offer robust analytics, and provide modern UX for managing collections by groups of libraries or users (alumni, faculty, health sciences, law libraries, etc.). Libraries need to support research in ways that are more personalized and need to support research when users are not connected to their institution's network. This session will discuss how libraries can move beyond IP authentication to one that is more secure, personalized and is easy to setup and manage.
Learning Outcomes (What "take-aways" or outcomes should attendees anticipate after attending your presentation? A short list, please.)	Academic Institutions are making data driven decisions now more than ever, but beyond circulation and COUNTER metrics, what stats are you getting? Learn how to get authentication analytics from your collections by user groups and individual users.