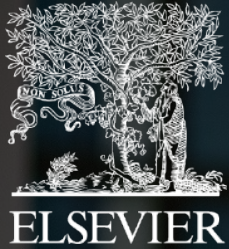


CNI 2021 Spring Membership Meeting



Elsevier Federated Access-Only Project Briefing

Kelechi Okere, Global Dir., Seamless Access Initiative – Elsevier
Emily McElroy, Dean, Leon S. McGoogan HS Lib, Univ. Nebraska
Medical Center
Russell Palmer, Assistant Director for GALILEO Support Services

19 March 2021


- **Summary**

- Panel discussion

- Contact us

Federated Access: a primer

What it is

- 
- Identity based, Single Sign-on (SSO) access authentication method built on SAML (Security Assertion Markup Language). Facilitated by Shibboleth, OpenAthens, and other SAML 2.0 based software. Credentials persist across campus services (e.g. email, LMS, library catalog, etc)
 - Authorization & privacy settings are handled/controlled by institution's identity provider (IdP)
 - Allows access to a resource on any device no matter where the user is – negates need to go first to library homepage to access resource. User authenticates directly in resource.
 - Opens up possibilities for granular usage reporting, greater personalization

What it's not...

- 
- A method of tracking user behavior

Arguments to evolve from IP as primary access method to e-resources



ADVERTISEMENT



Rethinking Authentication, Revamping the Business

By ROGER C. SCHENFELD | JUN 10, 2016 | 18 COMMENTS



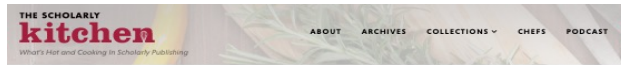
- Publishers: piracy concerns, seamless access for researchers, value in greater personalization
- Academic Librarians: poor user experience, esp. w/off-site access
- Corporate librarians: administrative headaches & workflow deficiencies

One [alternative] direction that seems most likely to gain traction is the further rollout of SAML-based solutions.



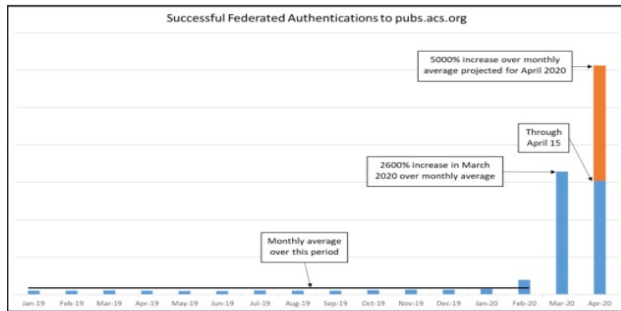
- Industry wide effort to fine tune federated access to library e-resources with standards
- Creation of entity categories to better support access to library e-resources
 - Anonymous
 - Pseudonymous
- WIP: Contracts language toolkit for federated access

Is the pandemic helping to accelerate move to Federated Access?



Guest Post – Seamless Remote Access During a Global Pandemic: An Indispensable Necessity

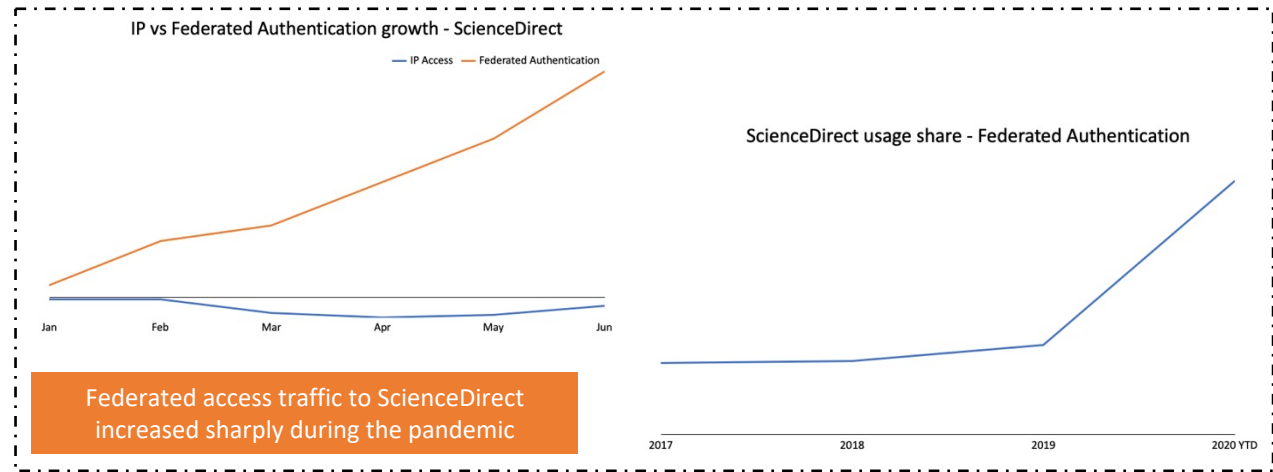
By RALPH YOUNGREN | APR 21, 2020 | 11 COMMENTS



Guest Post – Why Federated Access Matters: One Library's Pandemic Story

Emily Singley discusses how Boston College adapted to federated access technologies to better support campus users during the pandemic, and why this matters going forward.

By EMILY SINGLEY | SEP 29, 2020 | 8 COMMENTS



ER&L 2020

- 2 presentations on Federated Access



ER&L 2021

- 6 presentations on Federated Access

Sources

- <https://scholarlykitchen.sspnet.org/2020/09/29/guest-post-why-federated-access-matters-one-libraris-pandemic-story/>
- <https://scholarlykitchen.sspnet.org/2020/04/21/guest-post-seamless-remote-access-during-a-global-pandemic-an-indispensable-necessity/>
- https://pheedloop.com/erl2021/virtual/?mc_cid=b3fc53906a&mc_eid=a3dff2f4fc&page=sessions§ion=SESUZF6BXIG81QKY3
- <https://erl2020.mediasiteservices.com/browse>

Federated access-only – can we get there?

Vision for future access management



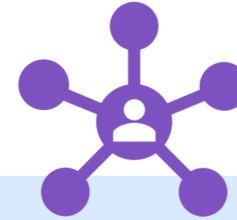
Learn what's involved in moving from IP based access to federated authentication-only (FAO) for all products



Partner with libraries & IT around the world to validate hypothesis in 2020



Validate benefits to consider broader use of federated access to resources



Formulate responsible strategy, including improvement of services & user experience to achieve FAO end state



Publish findings/present at conferences

Focus areas for our investigation with customers



User experience



Federated authentication configuration optimization



Customer support



Department level access usage reporting



Security



Privacy

What we learned in 2020

LEARNING

- Surveyed 27 libraries & nearly 300 researchers
- Interviewed 25 librarians
- Analyzed internal systems, policies, customer journey map

- Non-trivial decision to switch to FAO
- Not all vendors offer FA, concern over walk-in user access
- Elsevier to firm up systems/policies

PARTNER TO SOLVE

- Recruited 15+ libraries from U.S., AUS, & NL to validate FAO value proposition
- Sought feedback on privacy principles for Federated access

- Understood customers' internal drivers for FAO
- Pros & cons
- Incentives

VALIDATE BENEFITS/ INCENTIVES

- Customers foresee streamlined user experience, security, user privacy
- Ubiquitous seamless access - on all devices
- Optimal remote access
- Easier to manage than IP

- Granular usage reporting; e.g. by department, demographics, lab, etc
- Potential to license for narrower groups

DEVELOP

- Elsevier access management UX improvements
- Granular usage reporting

- Professional customer service group to guide customer journey

- **Summary**

- Panel discussion

- Contact us

Questions? Write to us

Presenters:

- Kelechi Okere (k.okere@elsevier.com), Global Dir., Seamless Access Initiative, Elsevier
- Emily McElroy (emily.mcelroy@unmc.edu), Dean, Leon S. McGoogan HS Lib, Univ. Nebraska Medical Center
- Russell Palmer (russell.palmer@usg.edu), Assistant Director for GALILEO Support Services