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

- 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.

Source: https://scholarlykitchen.sspnet.org/2016/06/22/rethinking-authentication/
• 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?

Federated access traffic to ScienceDirect increased sharply during the pandemic.

Sources
https://erl2020.mediasiteservices.com/browse

ER&L 2020
- 2 presentations on Federated Access

ER&L 2021
- 6 presentations on Federated Access
Federated access-only – can we get there?

Vision for future access management

1. Learn what’s involved in moving from IP based access to federated authentication-only (FAO) for all products
2. Partner with libraries & IT around the world to validate hypothesis in 2020
3. Validate benefits to consider broader use of federated access to resources
4. Formulate responsible strategy, including improvement of services & user experience to achieve FAO end state
5. 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