

InCommon Library Services Collaboration

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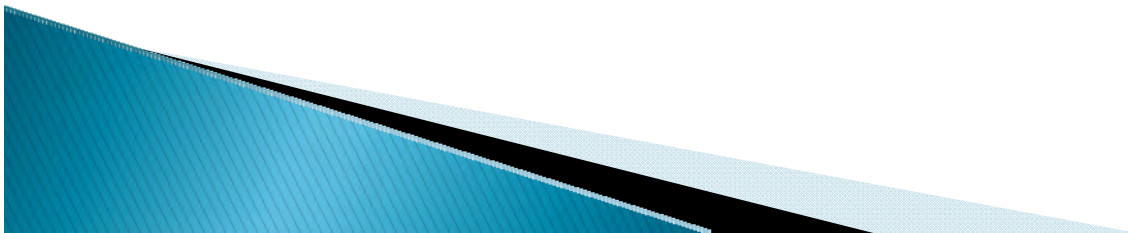
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January 15, 2010

back story: e-resources and access management

- ▶ CD-ROMs
- ▶ resources to the web
- ▶ usernames and passwords to patrons
- ▶ embed user/pass in links
- ▶ referring URLs
- ▶ IP address and proxying

- ▶ Shibboleth

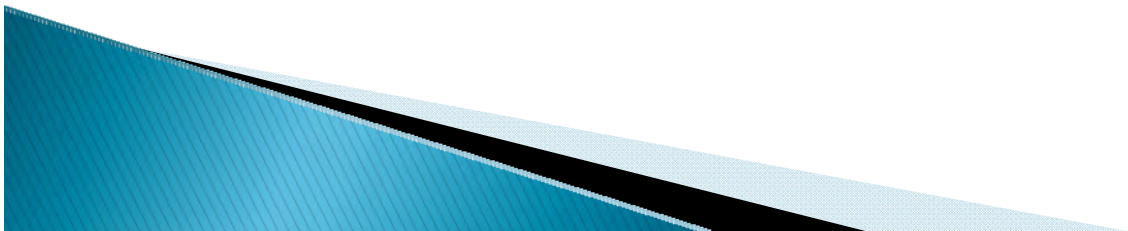


Shibboleth: the promise

- ▶ patron privacy
- ▶ SSO (single sign on)
- ▶ fine-grained access control
- ▶ fits in existing architecture

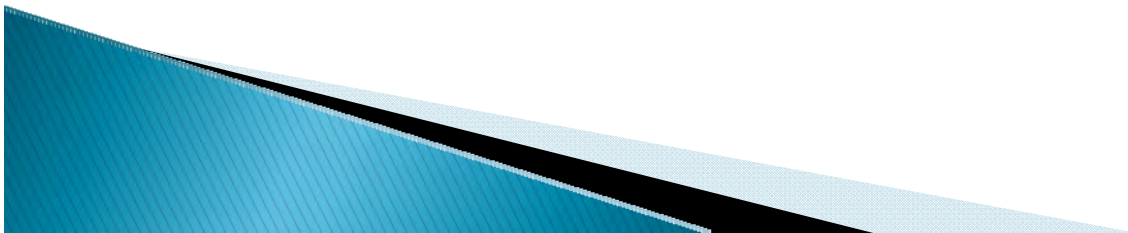
For libraries:

- ▶ get out of IP address mgmt business
- ▶ accurate enforcement of license agreements



Shibboleth: the reality in the US

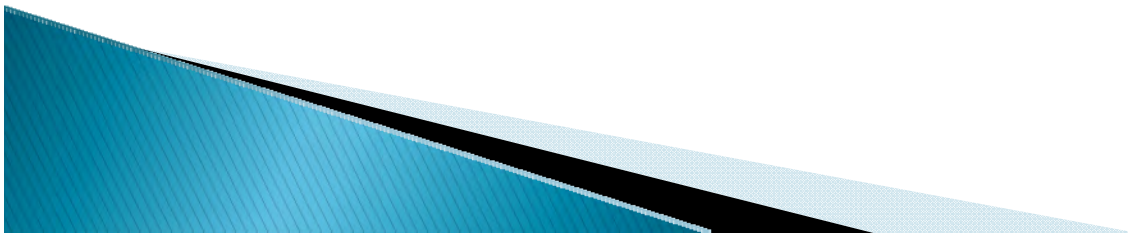
- ▶ very little library involvement
- ▶ vendors not joining InCommon



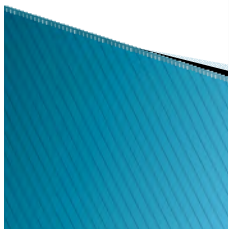
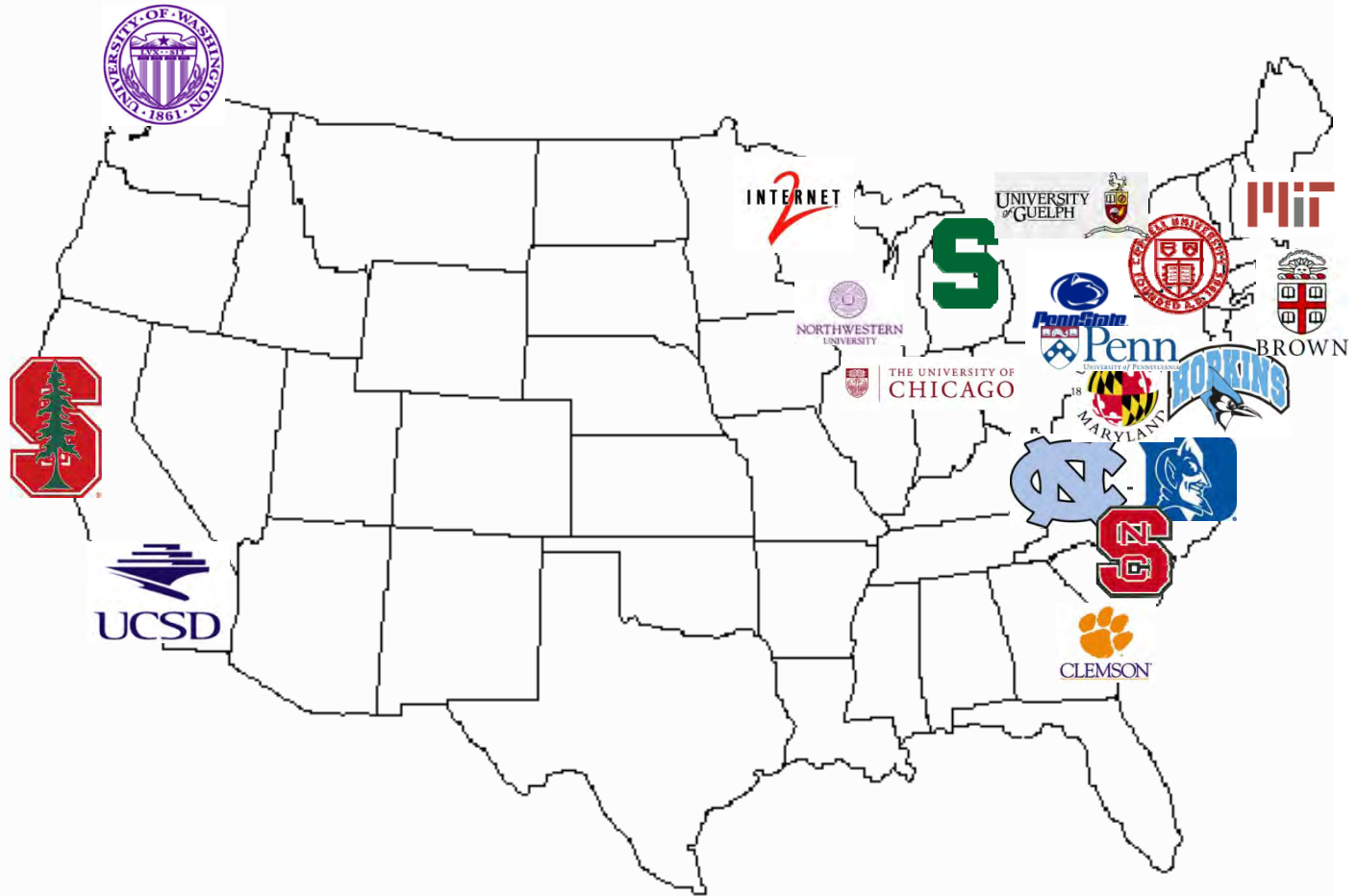
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Purpose

- ▶ investigate why the slow uptake
- ▶ technology solutions to overcome hurdles

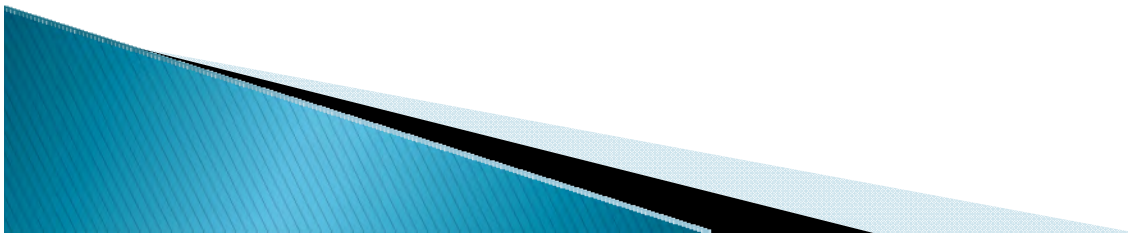


InCommon Library Services – Participating Universities



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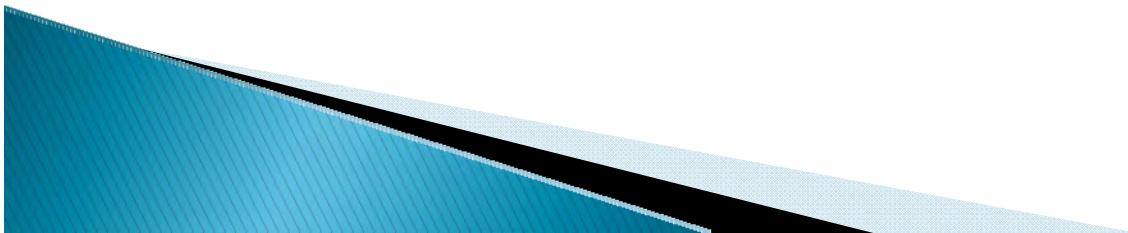
- ▶ Phase I (Feb 2007 – Dec 2008)
 - Identify challenges (technical and organizational)
 - Propose technical solutions
 - Identify organizational needs
- ▶ Phase II (March 2009 –)
 - Pilot technology solutions
 - Satisfy organizational needs
 - Increase participation, build community



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Phase I: Challenges

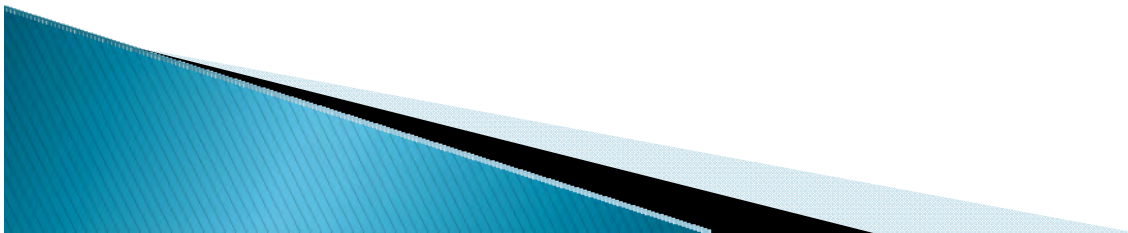
- ▶ **Technical**
 - Overhead – Shib is complex
 - WAYF
- ▶ **Organization**
 - No list of shib-enabled resources
 - Benefits vs costs
 - Decentralized federation – no policies or roadmaps



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Phase I: Technology Solution => EZproxy

- ▶ WAYFless access to licensed resources
- ▶ Transition from IP to Shibboleth
- ▶ Integrates with library and campus software



Workflow w/o EZproxy

<http://listor.org/stable/1255052>



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The Shibboleth Incident (Judges 12:6)

E. A. Speiser

Bulletin of the American Schools of Oriental Research, No. 85 (Feb., 1942), pp. 10-13

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Workflow w/ EZproxy

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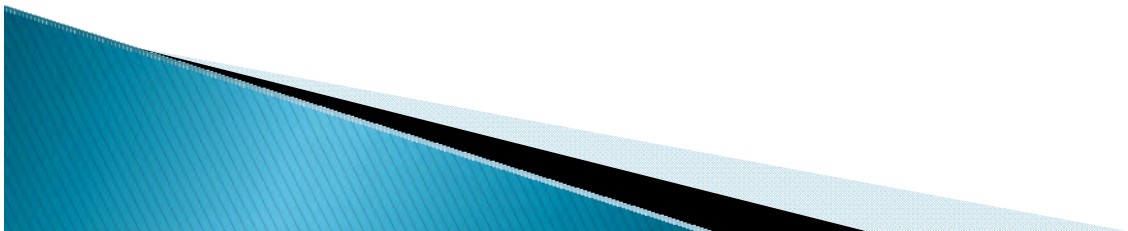
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Phase II

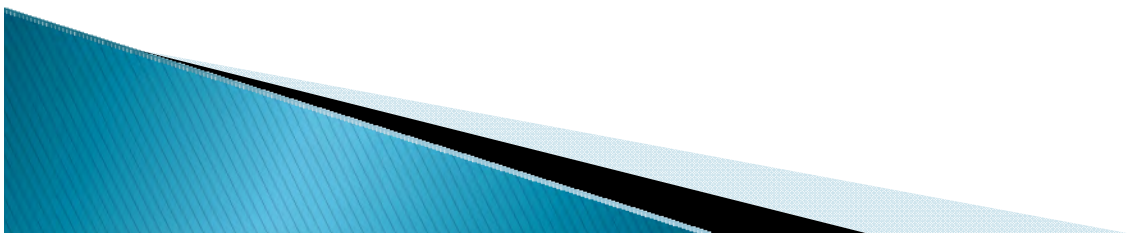
- ▶ Vendor subgroup
 - Pilot EZproxy/Shib
 - Best practices – resource providers
 - Registry of resource providers
 - Community efforts – recruitment
- ▶ Use Case subgroup
 - Document use cases
 - Develop how-tos / cookbooks



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Phase II: Best Practices

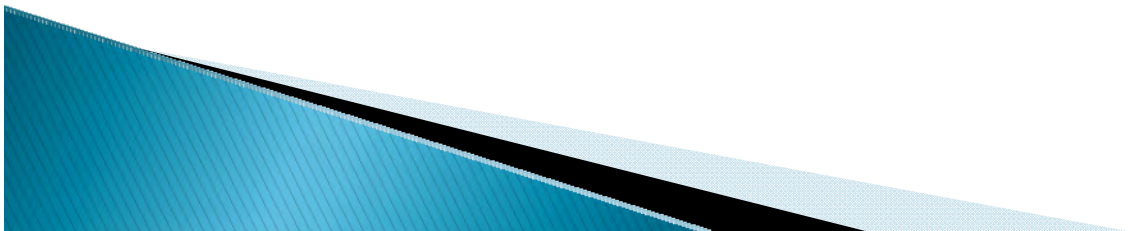
1. eduPerson attributes
(eduPersonEntitlement = common-lib-terms)
2. WAYFless URLs
3. WAYFless URLs directly to resources (not just search page)
4. Shib/EZproxy hybrid compliance



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Phase II: Registry of Resources

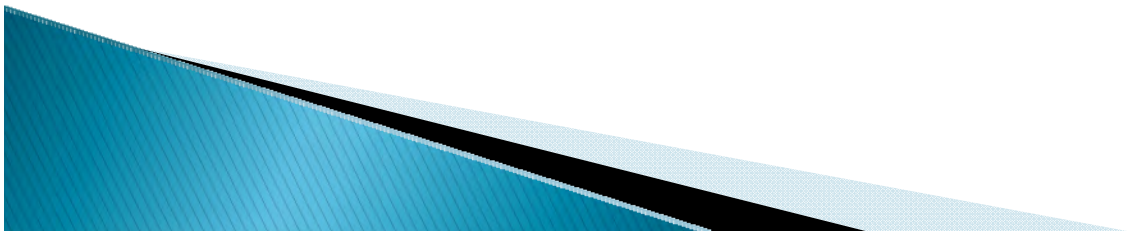
- ▶ Implementation specifics
 - Best practices criteria
 - How WAYFless urls are implemented
 - User attributes
 - EZproxy integration
- ▶ Where to get help
 - Support contact information
 - Vendor or customer supplied how to documentation



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Phase II: Ezproxy/Shibboleth how-to

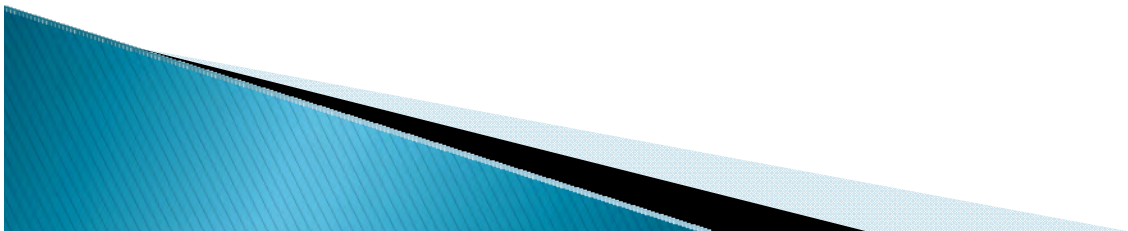
1. Shibboleth IdP release eduPersonEntitlement
2. Shib-enable EZproxy
3. EZproxy - authz via user attributes
4. EZproxy - enable Shib access to resources



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Phase II: Community

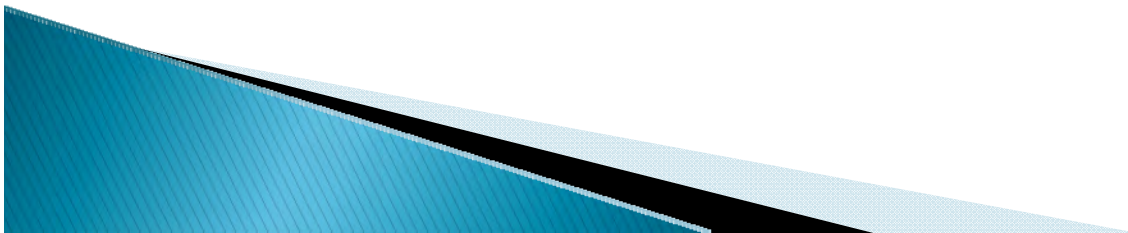
- ▶ vendor communications
 - worked with over a dozen vendors
- ▶ UK Access Management Federation and reFeds
- ▶ vendor recruitment
 - recruiting 15–20 vendors
 - over 20 universities participating



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Vendor recruitment

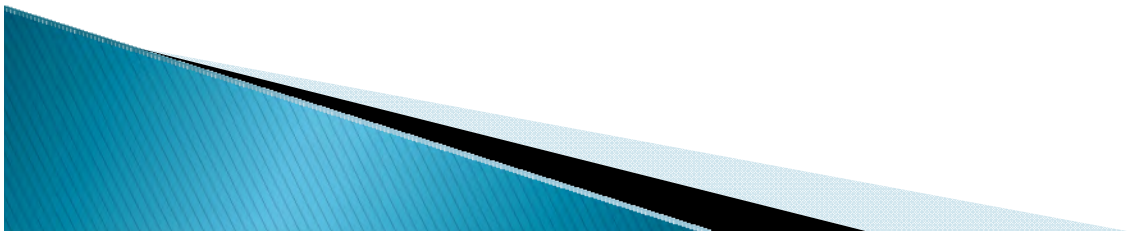
- ▶ Invitation to join
- ▶ InCommon sponsorship
- ▶ Implementation testers
- ▶ Best practices



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Progress

- ▶ Technology solution
 - EZproxy/Shibboleth hybrid
- ▶ Resources
 - Best Practices
 - Registry of Shib resources
 - EZproxy/Shibboleth HOW TO
 - Case studies
- ▶ Community
 - Vendor communications
 - University involvement



Questions?

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