

PERSEUS:
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Portal-enabled Resources via
Shibboleth End-user Security



Access to library resources: Case study

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PERSEUS Project, LSE Library

Overview

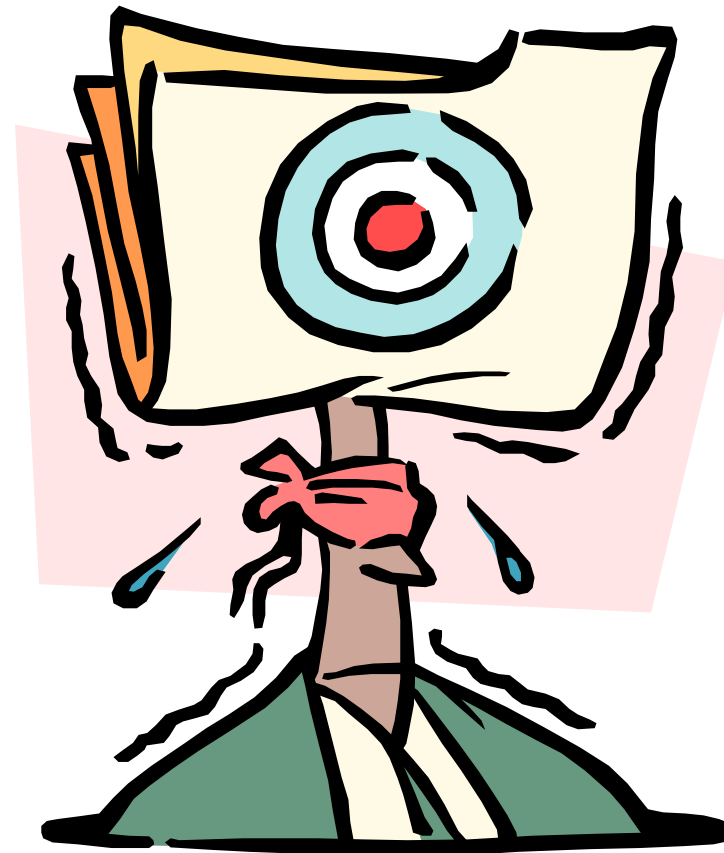
- Rationale for presentation
- Introduction to the LSE Library
- PERSEUS Project
- Current LSE Library e-resources access conditions and management
- Some problems
- Some solutions
- What is next?

Rationale

Students and staff in HE currently struggle with:

- information overload
- varying access and licensing conditions for electronic resources
- lack of Internet security

Is Shibboleth a perfect solution?



LSE Library [pic]



17 March 2005

IAMSECT Dissemination Event,
Newcastle

LSE Library: some facts

- Also known as the British Library of Political and Economic Science
- The largest library in the world devoted exclusively to the social sciences
- Around 3000 e-journal subscriptions
- A national resource – around 11,000 registered external users
- Actively involved in library devpt projects
- The first institution in the UK to pilot the Shibboleth technology

PERSEUS Project [1]

- *Portal-enabled Resources via Shibbolized End-user Security (PERSEUS) Project*
- PERSEUS aims to:
 - provide Shibboleth-based access management to all LSE information resources via an institutional portal
 - Library, student database, financial records, VLE etc)
 - provide authority management for “short-term virtual organisations”
 - LSE Alumni Special Interest Groups

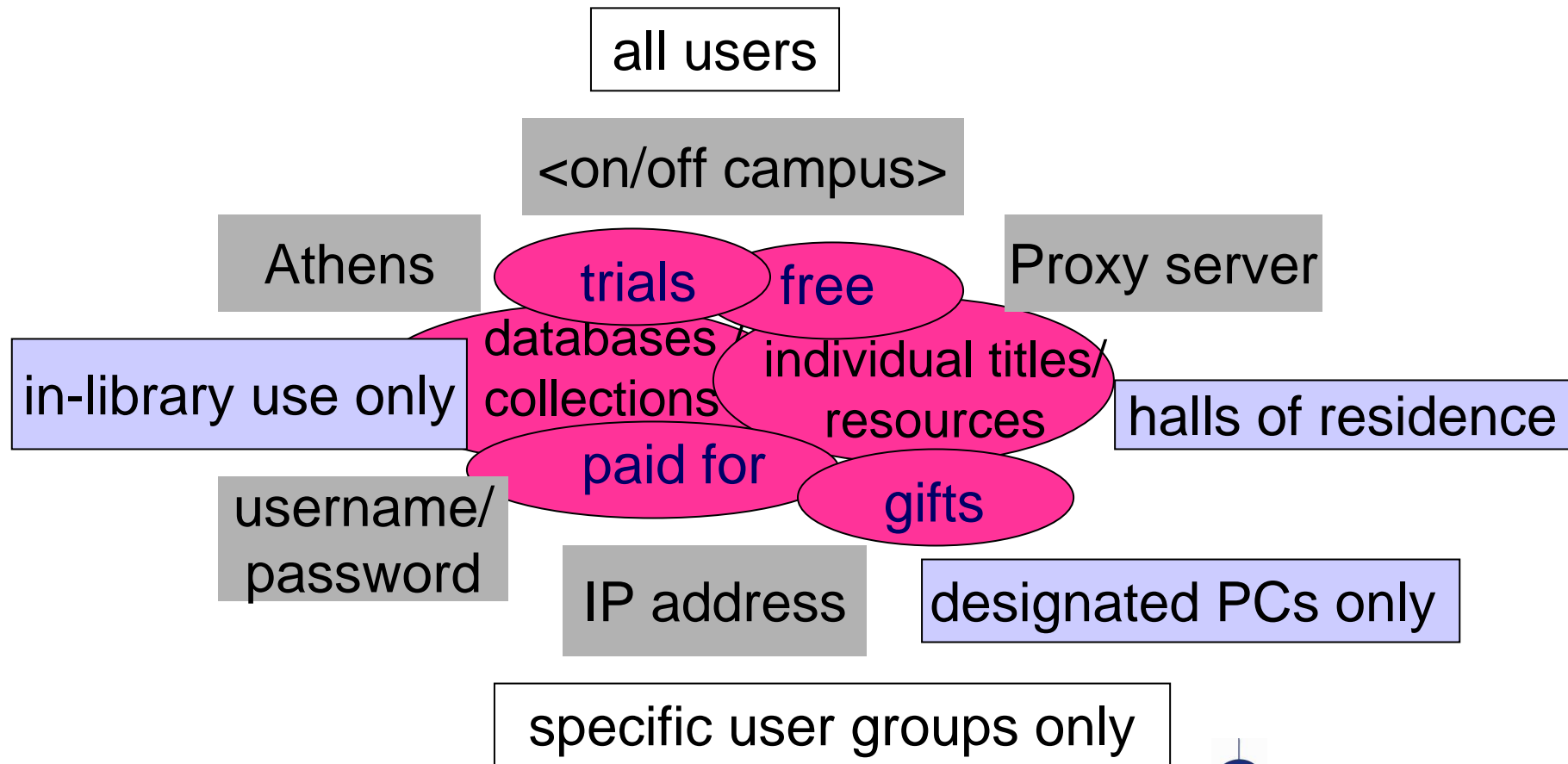
PERSEUS Project [2]

- Follows-on from the JISC SECURe Project at LSE
- July 2004 to June 2006
- Part of the JISC Core Middleware: Technology Development Programme
 - ...supporting JISC investment in Shibboleth
 - ...and the Internet2 Middleware Initiative
- Using LSE as a test bed for Shibboleth
 - multiple user identities and attributes
 - complex portal infrastructure

LSE Library e-resources

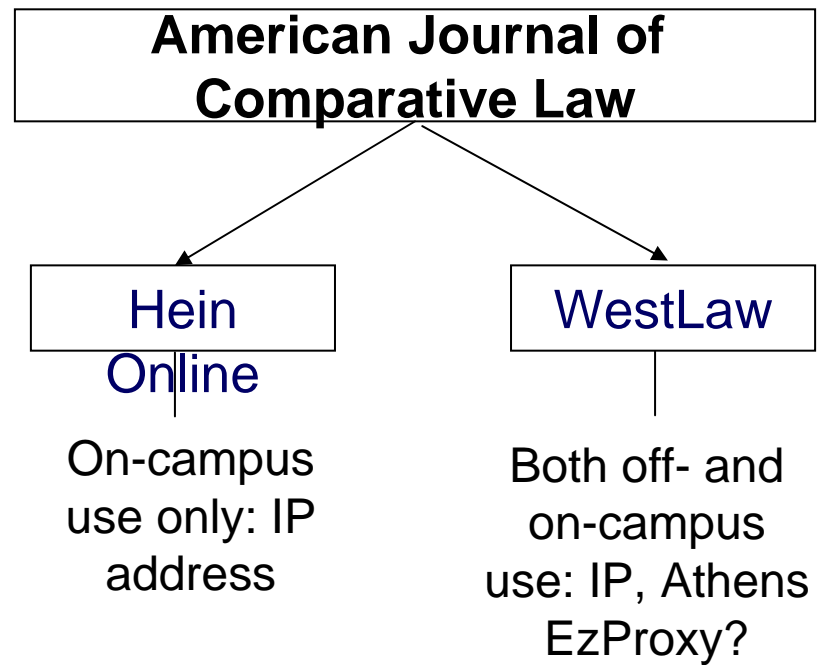
- **Electronic Library** (indexing and abstracting services, statistical data, government information, organisational websites, online working papers etc)
 - Provided by ENCompass from Endeavor
- **Electronic journals ‘portal’** (full text e-journals only)
 - Provided by Serials Solutions
- LSE exam papers (past exam papers in online form)
- Open Source digital repository (under development)
- Electronic reading list system (under development)

E-resources access conditions



E-resources access conditions

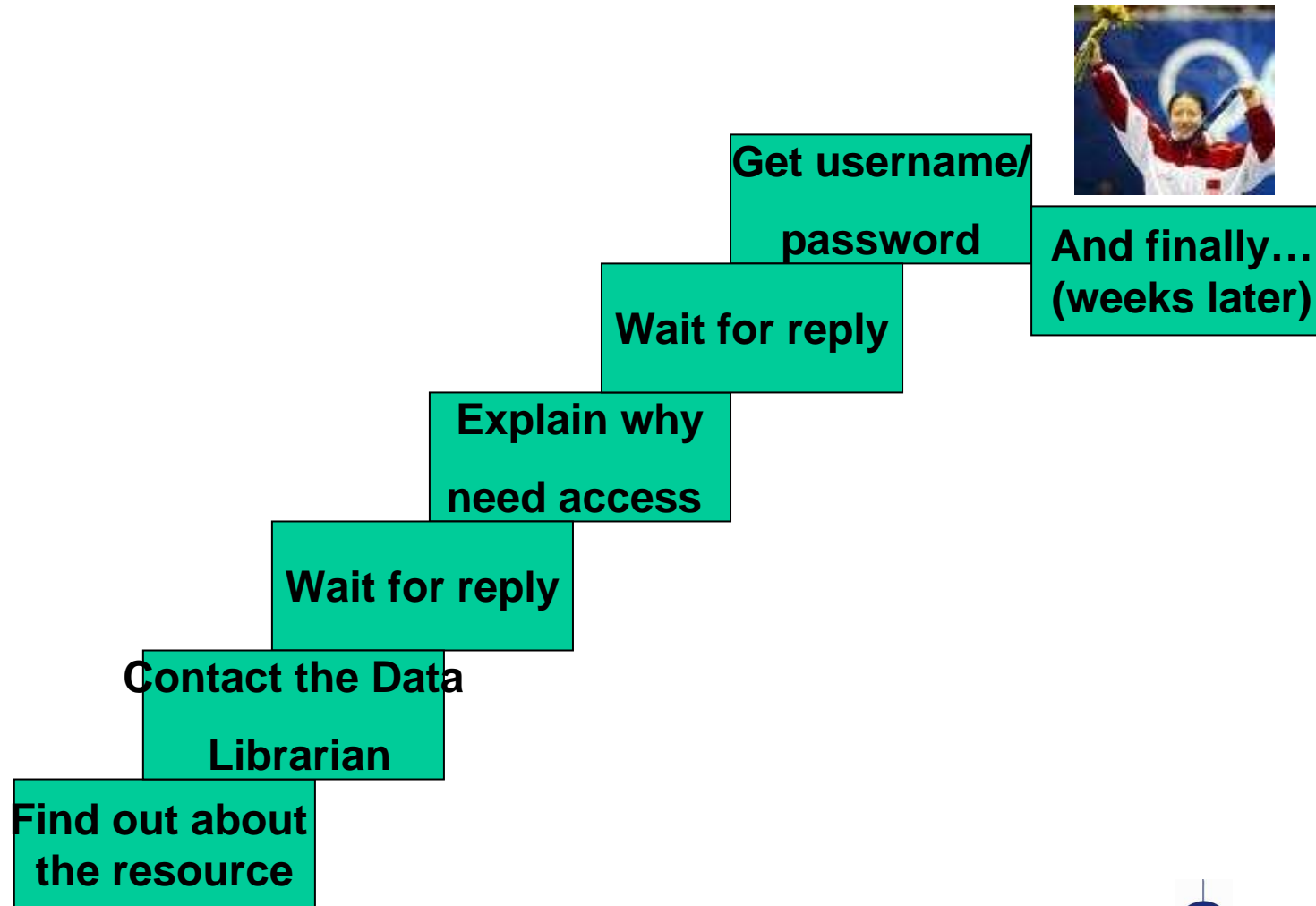
- And ... the same resource is sometimes available from several suppliers, each imposing different access methods...



A different scenario

- *'European Community Household Panel Study'* from EUROSTAT
 - licensed for use by LSE staff members only
 - available via usernames/passwords

‘European Community Household Panel Study’



Some more examples

- Sometimes licences don't make it very clear who is considered an 'authorised user'
 - E.g. no specific reference to Alumni
- Or what access methods are allowed
 - E.g. access via EzProxy is not specified

'Authorised user' shall mean an individual who is authorised by the Licensee to access the Licensee's information services available through the Licensee's Secure Network and who is (i) affiliated with the Licensee as a current student, faculty, library patron, employee, or in some other capacity whereby they are permitted to access such services in the Licensee's ordinary course of business, whether from a computer or terminal on the Licensee's Secure Network, or offsite via a modern link to valid IP address on the Licensee's Secure Network; or (ii) physically present on the Licensee's premises.

Visitors are allowed but what about alumni ?

Oxford Online Journals

http://journals.oup.co.uk/jnls/help/librarians/institutional_faq.html

Q. Who is entitled to access the journals online from my institution?

A. All members (employees, faculty, staff and students) of the subscribing institution site are entitled to online access. This includes **visitors** or **members of the public** accessing via terminals located on the site and under the control of the subscribing institution. It also includes members using their home computers, provided such use can be authenticated by the institution via password controlled access to an institutional proxy server, or via [Athens <http://www.athensams.net/>](http://www.athensams.net/).

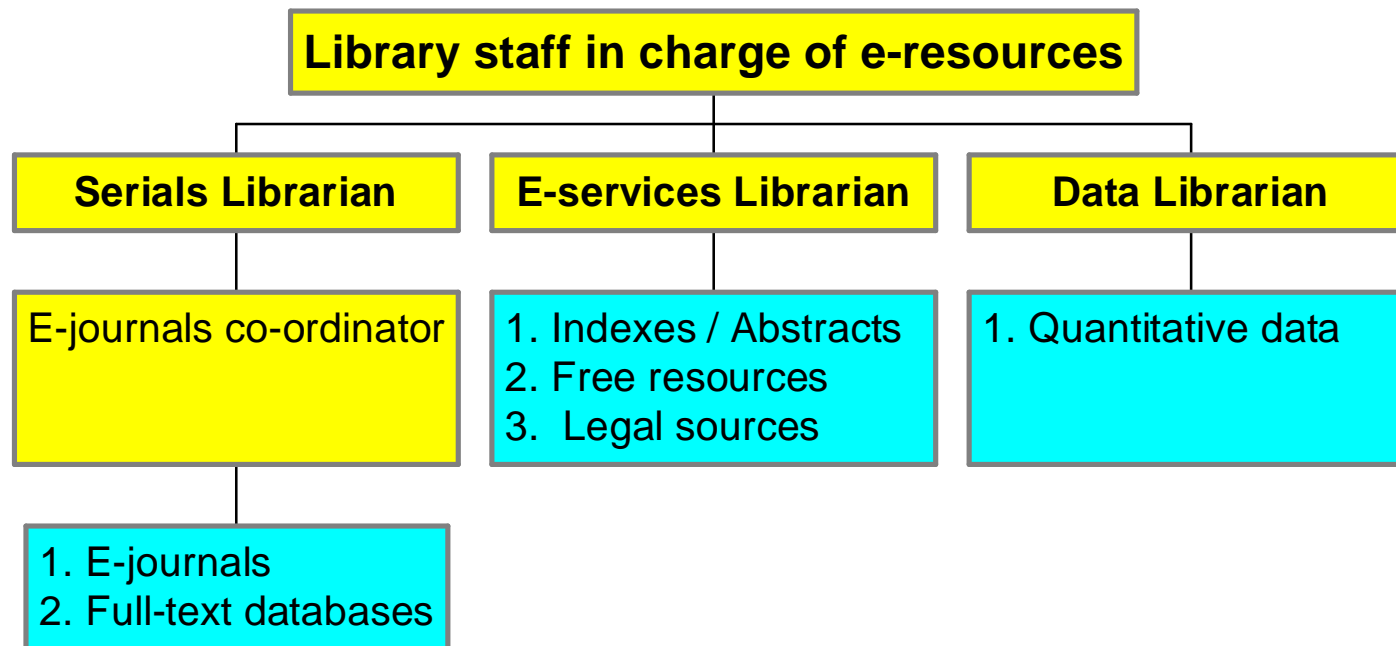
Q. Does OUP include alumni of an institution under the definition of Authorised Users?

A. No

And there are also regional differences and restrictions...

- E.g. JSTOR and others have different version licences for different countries

LSE e-resources management structure



What are the problems?

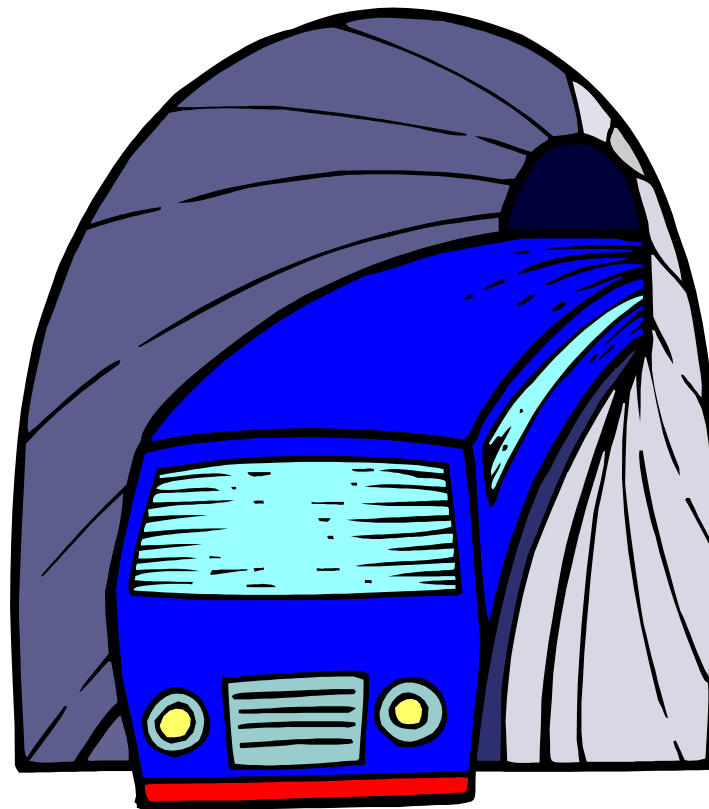
- Licensing information can be confusing or unclear
- 3,000 e-journal subscriptions = a lot of staff time
- At the moment, licensing/access info at LSE is dispersed, so difficult to monitor 'who can access what'
- Users have to remember a wide range of access details and aren't always sure what they can/can't do
 - 'Password information' page only provides general access info for LSE staff and students
- But at least there's only one campus and (at the moment) there are no course-specific restrictions!

What are the solutions?

- A LSE-wide portal with an intelligent access control mechanism that can match user attributes to access conditions (PERSEUS)

AND

- An e-resources management system to store all licensing/ access info in one place



Meridian

- Meridian is a commercial electronic resource management system under development from Endeavor (available from 1 June 2005)
- It will (hopefully) enable efficient management of all LSE electronic resources throughout their lifecycle
- It will have a dedicated section for licensing/access conditions information
- LSE Library is the lead site for testing the licensing section (March 05)

PERSEUS/Meridian connection

- PERSEUS is working with Endeavor to make ENCompass and, possibly, Meridian 'shibbolised'
- PERSEUS is taking part in testing Meridian
- Meridian *might* provide a 'hub' for role attributes needed to establish secure Shibbolised access to LSE information resources
- Meridian WG and PERSEUS have come up with an interim 'solution'

Interim 'solution'

- A joint Excel spreadsheet detailing various access conditions outlined earlier
 - Designed in close collaboration with with Library Projects Team (working on PERSEUS)
 - Designed with Shib role attributes in mind
 - Better than nothing but still very time consuming

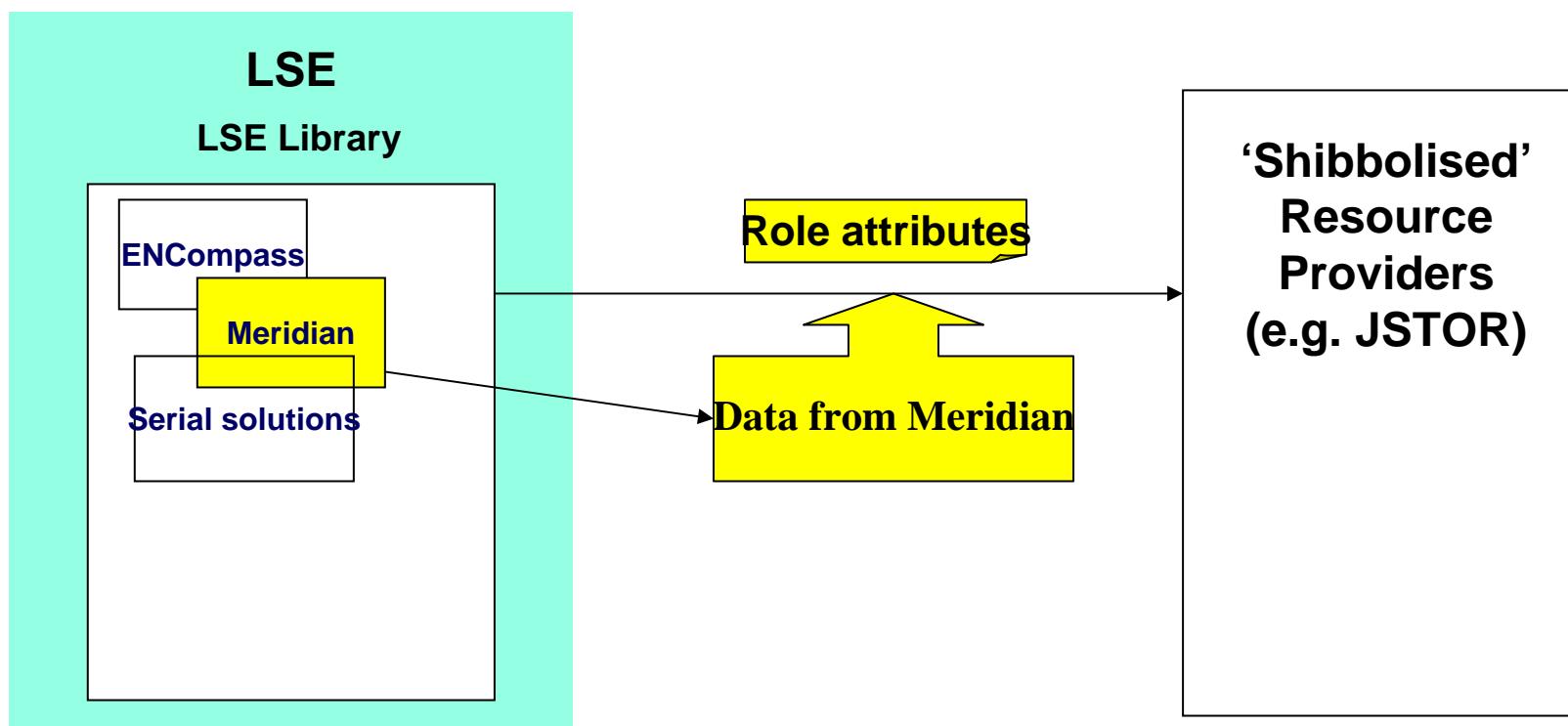
Attributes

- Off campus access?
- Authentication required?
- Authenticate by IP?
- Authenticate by Athens?
- Authenticated by username/password
- Licensed for on-site use only?
- Licensed for use in-library use only?
- Halls of residence?
- Access via EzProxy specifically allowed?
- Off-site access spec. allowed?
- Access for specific user groups only?
- Access from specified machines only?

Some questions

- Will Meridian provide an easier way of inputting access/licensing information?
- How would that info feed into Shibboleth-enabled access provided by PERSEUS?
 - Will it provide machine-readable attributes?

Ideally, it will work like this...



Some concluding thoughts

- There seems to be no easy solution
- A need for a central (UK) database of standard licences for major suppliers that reflects Shib (eduPerson) attributes?
- It is important to establish a dialogue between techies and librarians
 - Digital Library Federation
- Role-based access mgmt developments have to take into account non-technical matters (remember the EuroStats example!)

References

- www.lse.ac.uk/library
- <http://www.angel.ac.uk/PERSEUS/>
- <http://www.diglib.org/standards/df-erm02.htm>

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Any questions?