



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



# Access to library resources: Case study

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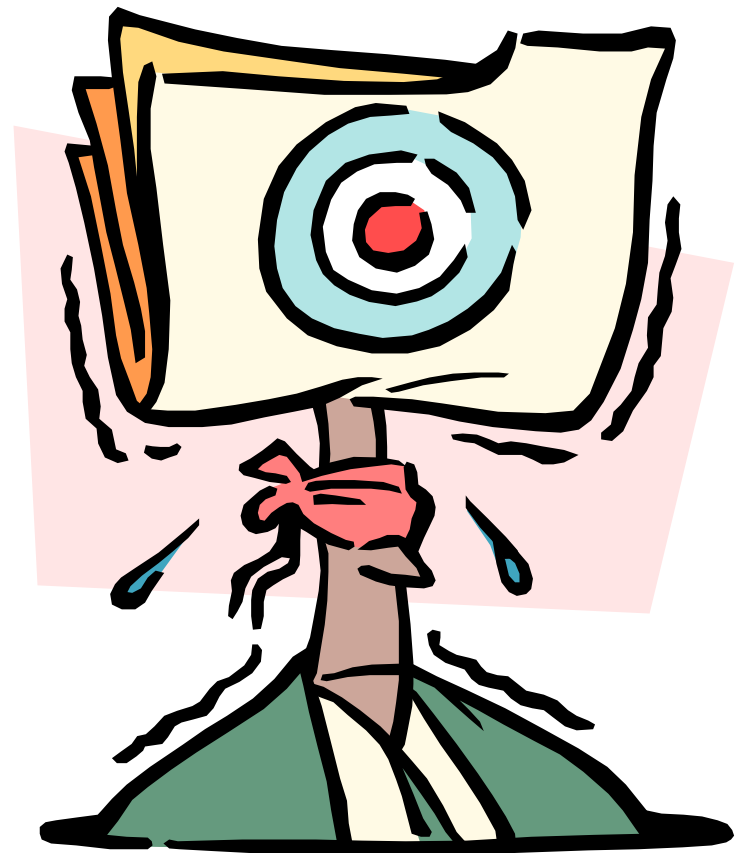
# Overview

- Rationale for presentation
- Introduction to the LSE and its Library
- Current LSE 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



# London School of Economics and Political Science (LSE)

- A world class centre for teaching and research in the social, political and economic sciences around the globe

# LSE Library [pic]



3 March 2005

EuroCAMP, Turin, Italy

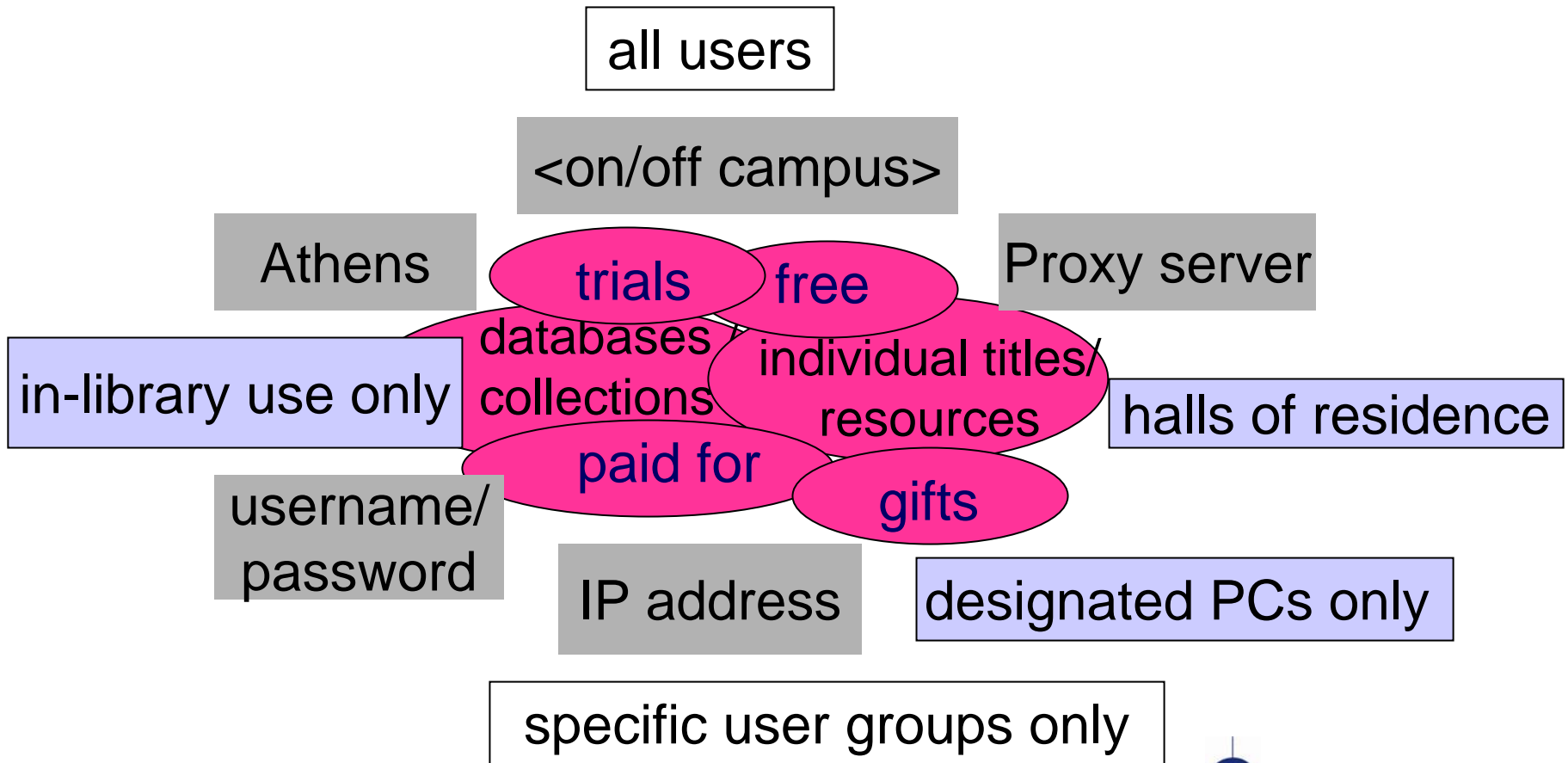
# LSE Library: some facts

- Also known as the British Library of Political and Economic Science
- The largest library in the world devoted exclusively to the social sciences
- 50 km of shelving
- Around 3000 e-journal subscriptions
- 490 networked PCs and 226 laptop drop-in points
- A national resource – around 11,000 registered external users

# 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...

**American Journal of  
Comparative Law**

**Hein  
Online**

On-campus  
use only: IP  
address or  
username/  
password

Visitors – no  
Halls of residence - no

**WestLaw**

Both off- and  
on-campus  
use: IP, Athens  
EzProxy?

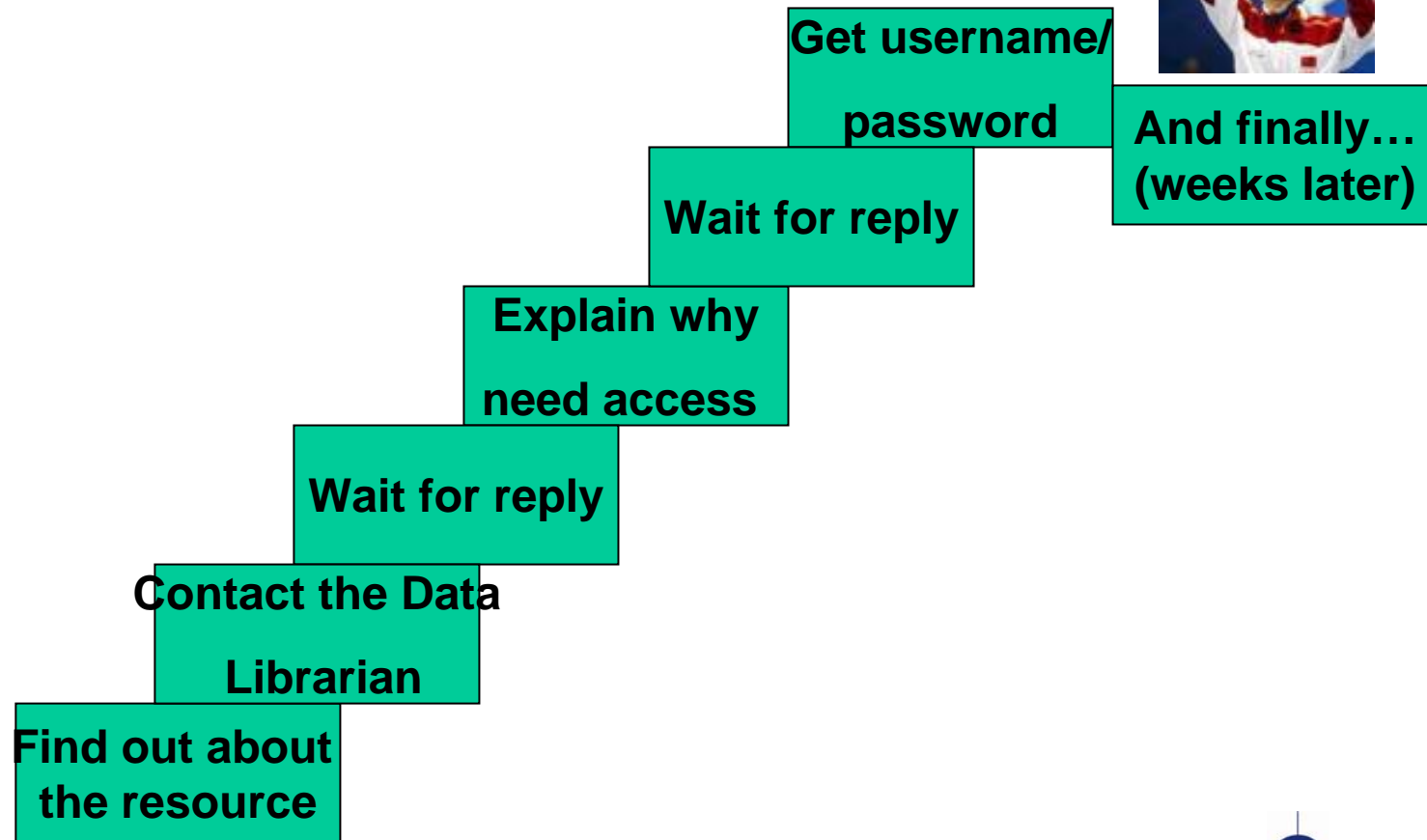
Visitors – no  
Halls of residence - yes

# A different scenario

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

Fairly straightforward?

# *'European Community Household Panel Study'*



# Some more examples

- That is if you understand what licences actually say...(bearing in mind that librarians are NOT lawyers!)
- 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

**'Only individuals authorized by the subscribing organization may access and use the Online Services'**

LexisNexis

Includes visitors?

Visitors are allowed access but only on-campus

**“Authorized Users” means persons who are authorized to use Licensee’s library facilities who (a) are affiliated with Licensee as students, faculty or employees, or (b) are physically present in the Library (as hereafter defined).**

JSTOR, US

**'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 alumni are not? What about 'physically present' alumni?**

**Oxford Online Journals** [http://journals.oup.co.uk/jnls/help/librarians/institutional\\_faq.html](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/).

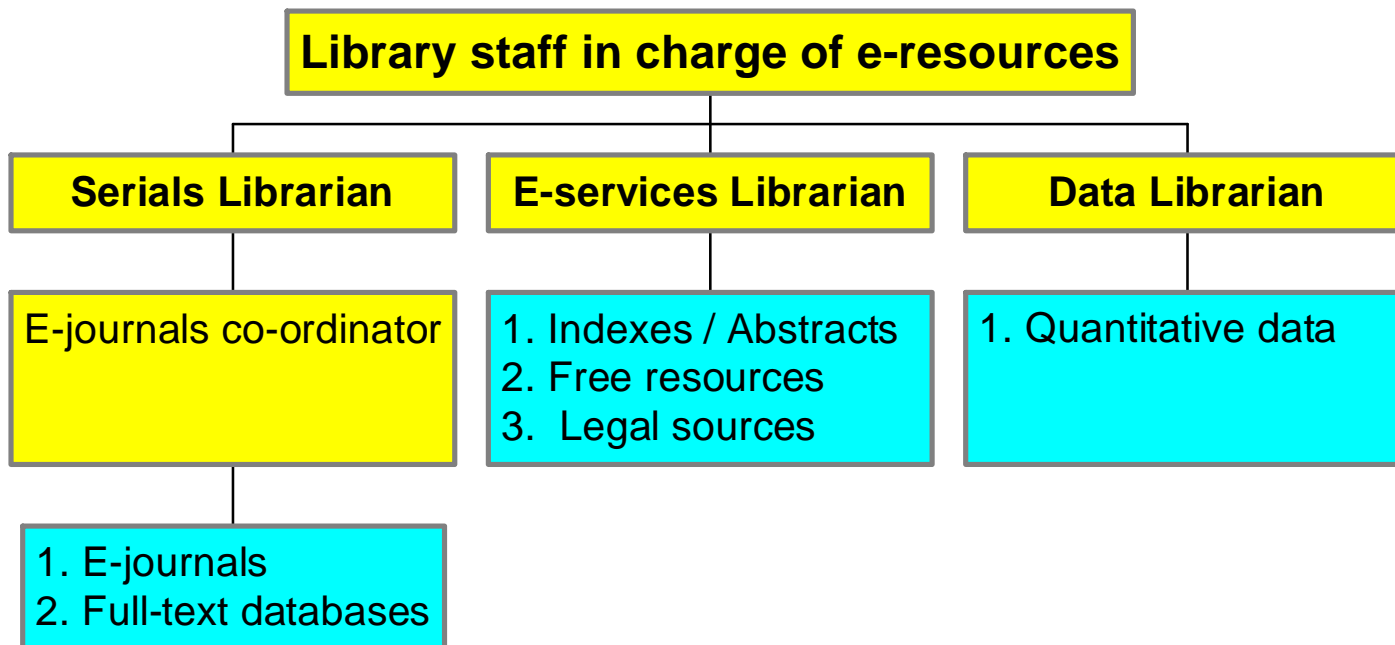
**Q. Does OUP include alumni of an institution under the definition of Authorised Users?**

A. No

# And there are also regional differences and restrictions...

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

# LSE e-resources management structure

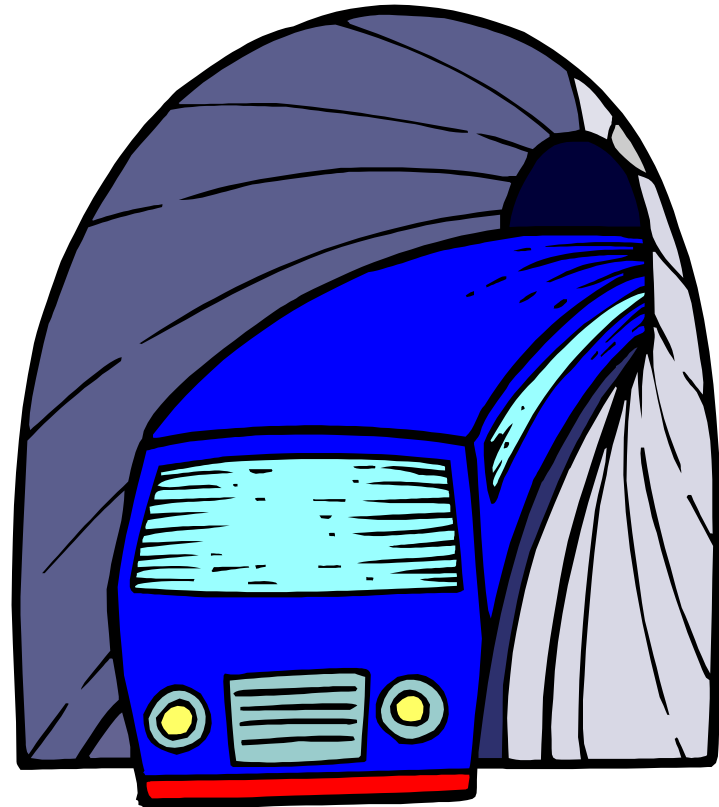


# What are the problems?

- 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'
- Also, users have to remember a wide range of access details
- So, some users aren't 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?

- An e-resources management system that will keep all licensing info in one place **PLUS**
- A School-wide portal with an intelligent access control mechanism that can match user attributes to access conditions



# 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 testing licensing info (March 05)

# In the meantime...

- *Portal-enabled Resources via Shibbolized End-user Security (PERSEUS) Project*
- PERSEUS aims to:
  - provide Shibboleth-based access management to information resources via an institutional portal, using uPortal toolkit
  - create a generalised campus architecture for use by other institutions
  - provide authority management for “short-term virtual organisations”
    - LSE Alumni Special Interest Groups

# PERSEUS Project

- 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 vision for the future
  - ...and the Internet2 Middleware Initiative
- Using LSE as a test bed for Shibboleth
  - multiple user identities and attributes
  - complex portal infrastructure
  - differing e-resource licensing conditions

# What is the 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 implementing Shib at LSE)
  - Designed with Shib role attributes in mind
  - Better than nothing but still very time consuming

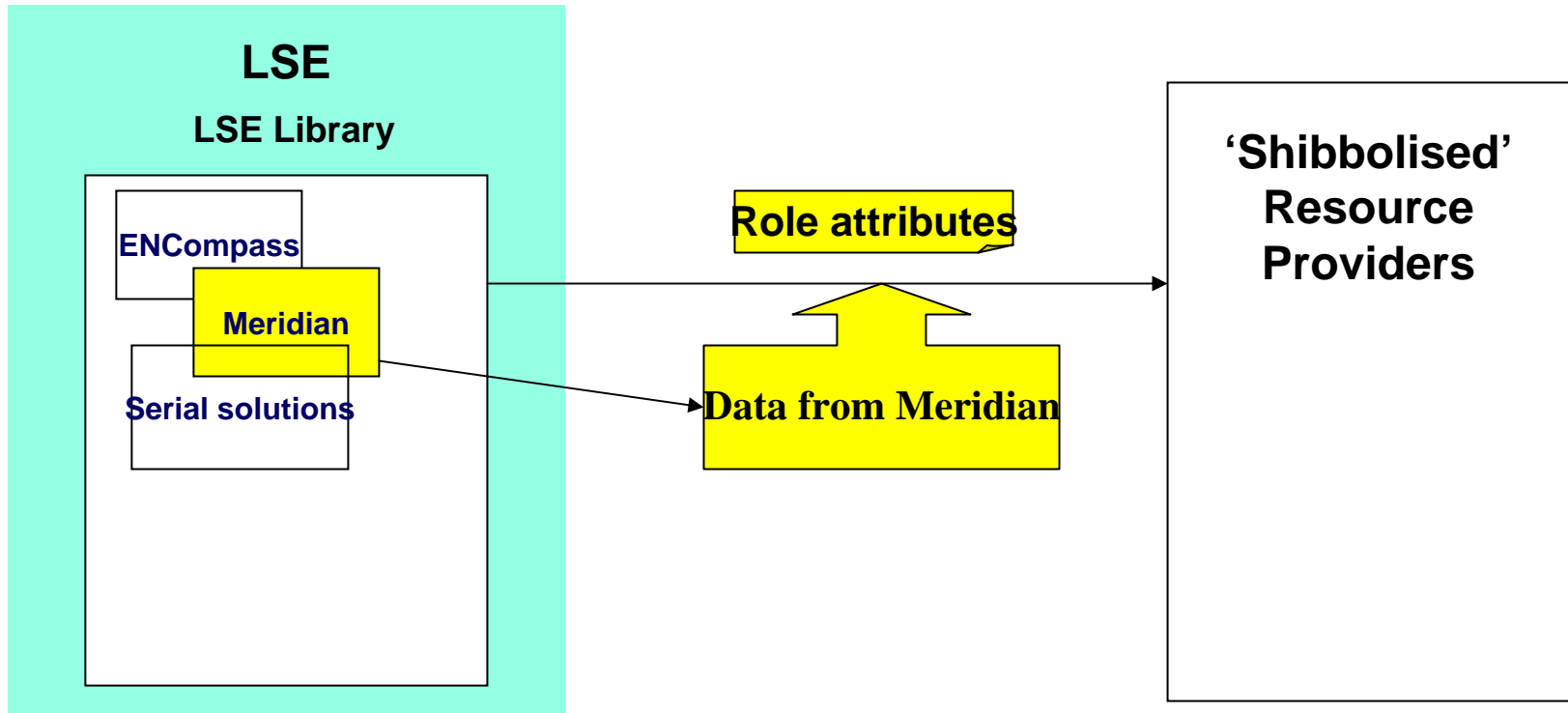
# Attributes

- 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 licensing info in Meridian feed into Shib-enabled access?

# It might 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 eduPerson attributes?
- It is important to establish a dialogue between techies and librarians
- 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.lse.ac.uk/library)
- <http://www.angel.ac.uk/PERSEUS/>
- <http://www.diglib.org/standards/df-erm02.htm>

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Any questions?