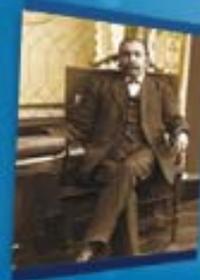


Ex Libris



Ex Libris and Shibboleth

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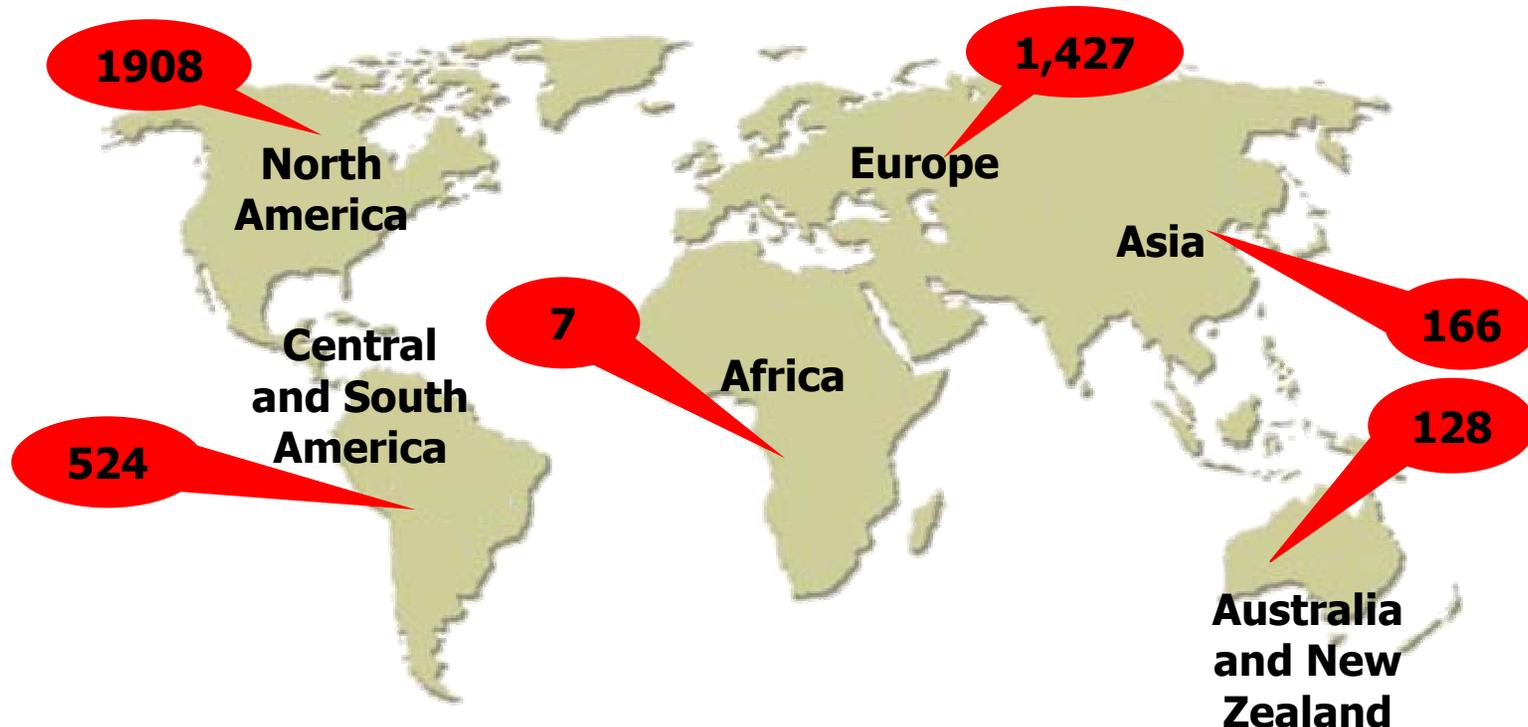
Agenda

- Ex Libris at a Glance
- Ex Libris and Shibboleth
 - Initial work – SFX/Shibboleth
 - Ongoing work – MetaLib/Shibboleth
- Patron Directory Services (PDS) Module
 - 'Shibbolizing' PDS
- MetaLib/Shibboleth Pilot Integration Projects
 - 'Lessons Learned'
- Ex Libris and Shibboleth – Current Status
- Future Challenges

Ex Libris at a Glance – Customers

Business Library automation and e-content management

Customers Over 4,000 libraries and corporations worldwide



Ex Libris at a Glance – Products

Ex Libris



Shibboleth and Ex Libris – Initial Work



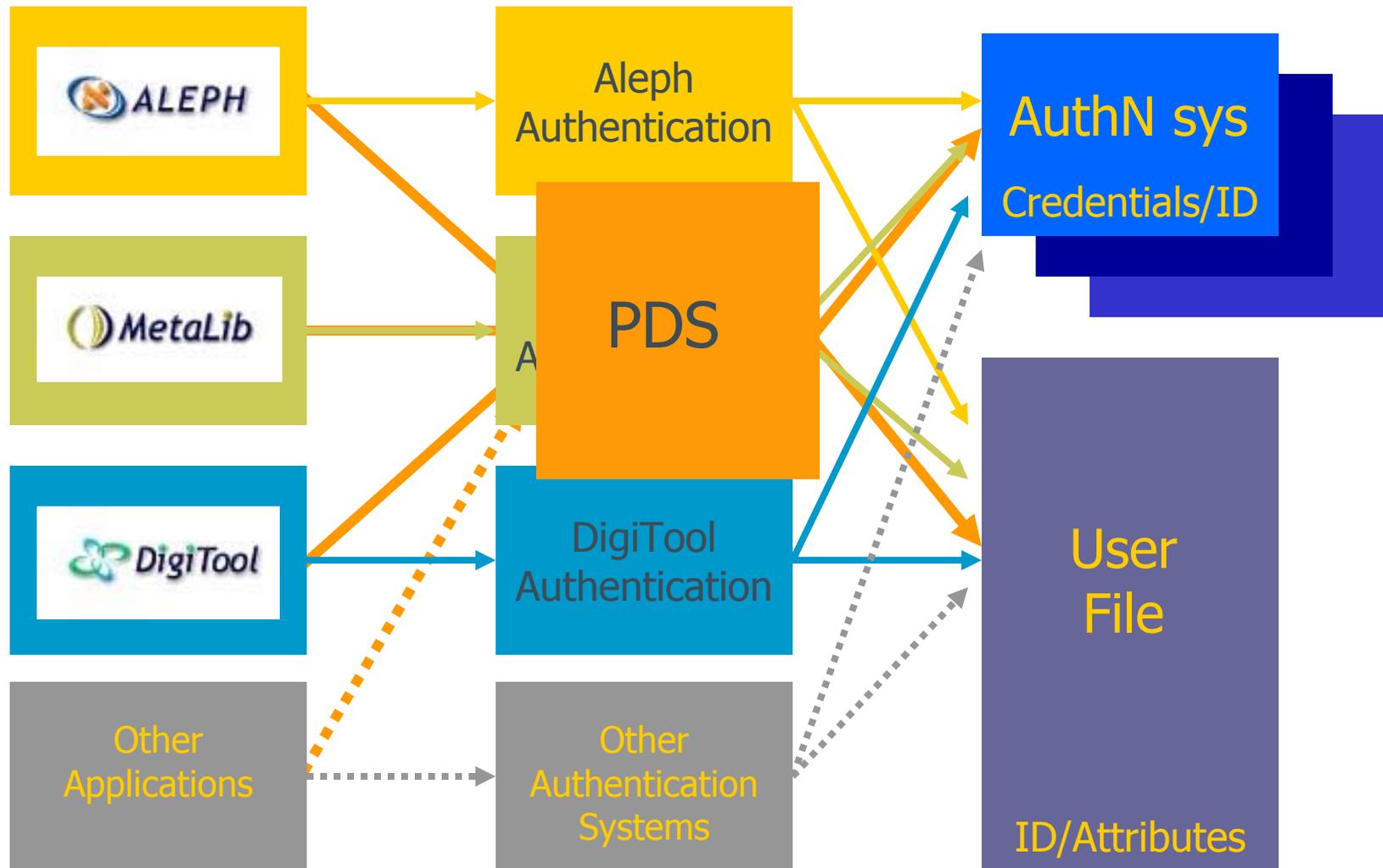
- Project Goals
 - Establish SFX as a Shibboleth target (Service Provider)
 - Main motivation – enable role-based features
- Summer 2001 – started discussions with Internet 2 / Shibboleth group
 - In 2002 – Pilot/Alpha Testing – integrated SFX as a Shibboleth Target (0.9...)
 - Rolled out test system to 2 Pilot sites
- Conclusion - too early to assess the value of integration
 - Early stage of Shibboleth development
 - No real Shibboleth adoption in libraries
 - Not enough of a business case: role-based entitlements in SFX weren't a priority (yet)

Shibboleth and Ex Libris – Ongoing Work



- Project Goals
 - Focus on local library system's integration with Shibboleth
 - Specific interest in consortia, including hybrid Shibboleth/non-Shibboleth
- Project Method
 - 'Shibbolize' the Patron Directory Services (PDS) module

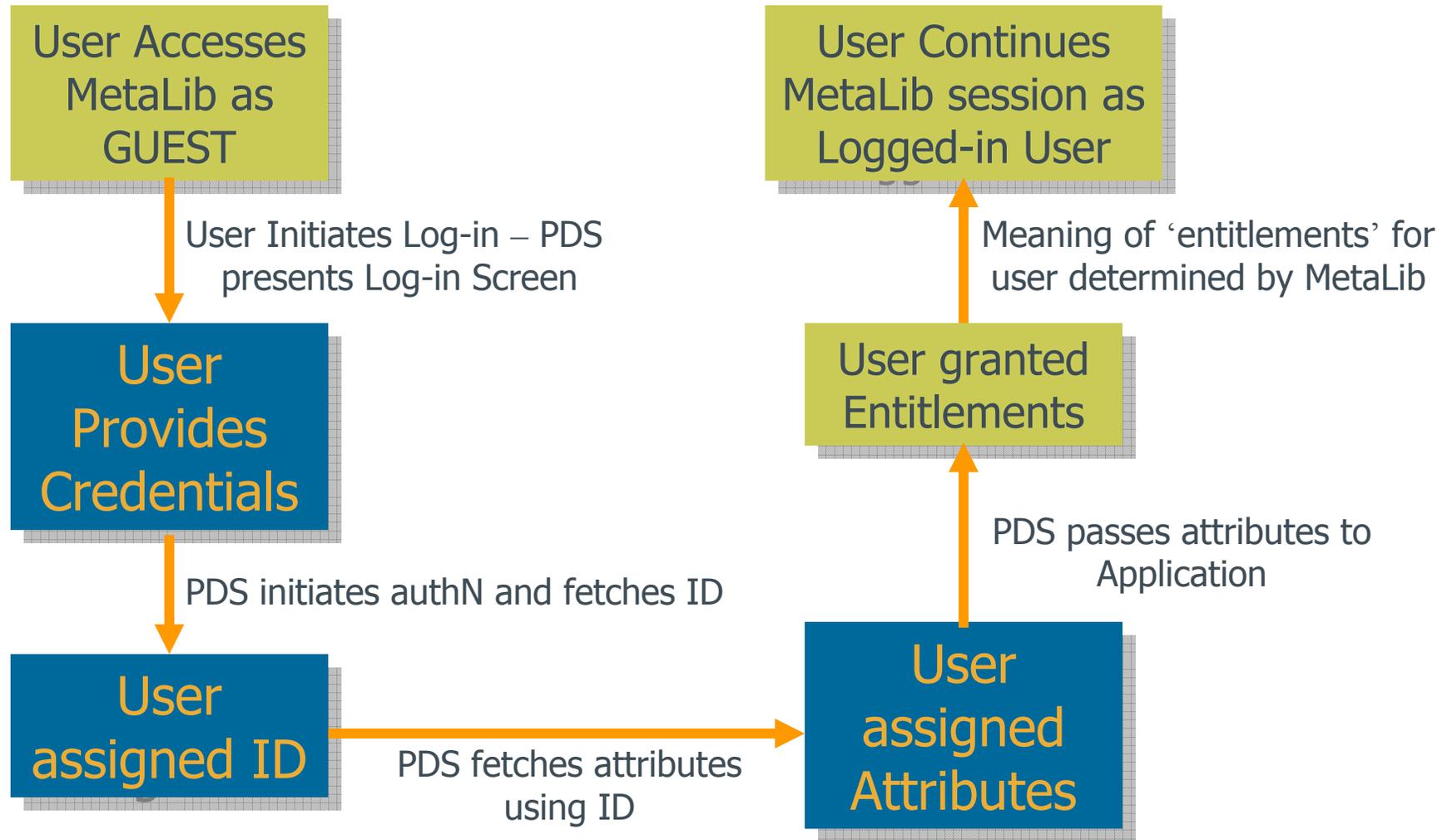
Patron Directory Services (PDS) Module



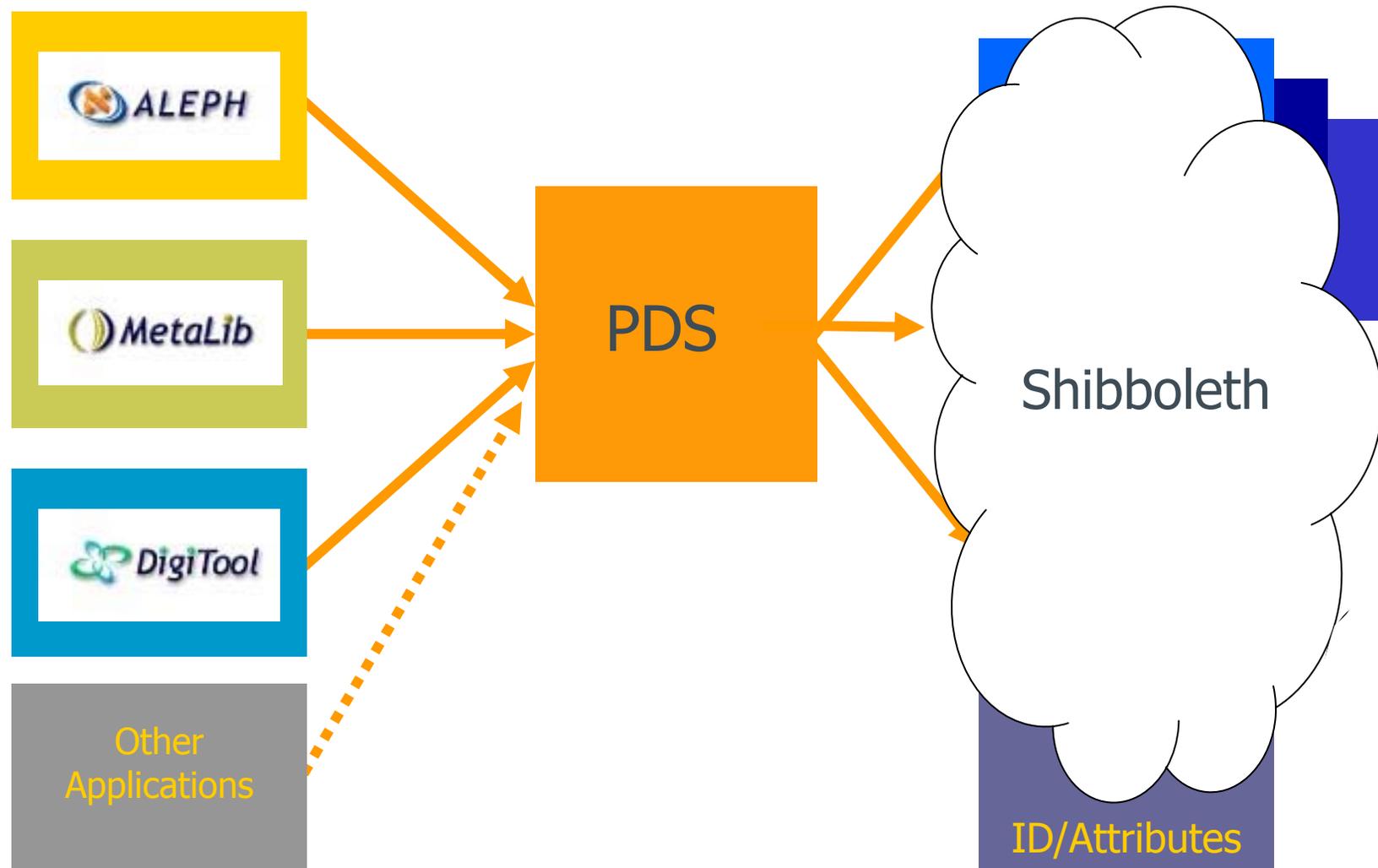
PDS – Benefits

- Facilitates a single point of integration with authentication systems for Ex Libris products
- Simplifies maintenance
- Provides infrastructure for single sign-on (SSO) across Ex Libris products
- Accommodates consortia when different institutions each have their own authentication and attribute databases
- Enables easier integration with institutional frameworks: Shibboleth

PDS Workflow – MetaLib Example



PDS – Authentication hub to Shibboleth



Shibboleth and Ex Libris – Ongoing Work



- Summer 2005 – began working with pilot MetaLib customers
 - PDS serves dual roles as the Shibboleth Service Provider and, in consortia, as the Shibboleth WAYF
 - SSO fully or partially implemented to suit institutional MetaLib workflow
- Results – successful pilot implementations at three MetaLib sites
 - Some good input on future direction...
 - Help identify prerequisites

'Shibbolizing' PDS – a typical example

- PDS/Apache is configured as a Shibboleth Service Provider and WAYF
 1. User attempts to access a PDS application or to log into PDS directly
 - If the user's institution is part of a consortia –
 2. User presented with a list of PDS institutions (PDS acting as a WAYF)
 3. User selects a Shibboleth institution from the list of available institutions
 - Users from a single site don't have to select their institution –
 - Users from institutions that aren't 'shibbolized' complete process using standard PDS/MetaLib configuration for their institution –
 4. User redirected to a Shibboleth Service Provider application that links directly to one Shibboleth Identity Provider for authentication
 5. Service Provider, in conjunction with the Identity Provider, presents the user with a log in screen
 6. Service Provider gathers user attributes and creates a PDS session
- MetaLib, or Ex Libris application, determines user's entitlements based on attributes passed from PDS

Pilot Integration Projects



- National Library of Finland (FinELib) upgraded existing MetaLib/Shibboleth integration
 - February 2006 – ‘live’ at 6 FinELib institutions
- University System of Maryland, USA successfully implemented MetaLib/Shibboleth integration in a test environment
- University of Newcastle upon Tyne, UK completed beta testing MetaLib/Shibboleth integration
 - Differs from FinELib and Maryland integrations
 - At Newcastle, a user with a Shibboleth session is automatically logged in to MetaLib – SSO is fully configured – while users who do not have a Shibboleth session access MetaLib as guests.
 - At FinELib and USMAI, users access MetaLib as guests with Shibboleth authentication invoked only after a subsequent login request by the user.

'Lessons Learned'

- PDS/MetaLib implementations vary – flexibility to accommodate customer's unique requirements
 - Shibboleth/PDS/MetaLib integration approaches also vary to accommodate the authentication/authorization workflow of each customer's unique environment...
- Customers must have a good technical understanding of Shibboleth, PDS/MetaLib
- Pilot projects enabled Ex Libris to identify customer prerequisites for successful PDS/Shibboleth integration with MetaLib
 - Document guidelines and best practices for successful Shibboleth/PDS/Ex Libris product integration

Ex Libris and Shibboleth – Current Status

- National Library of Finland (FinELib)
 - December 2006 – ‘live’ at 11/37 universities/polytechnics
 - Voyager at 2+ universities
- University System of Maryland, USA
 - May 2006 – ‘live’ with MetaLib, EZProxy/SFX
 - Aleph – next project
- University of Newcastle upon Tyne, UK
- Bristol University, UK
- University of Leuven, Belgium

- ETH-Bibliothek Zurich, Switzerland



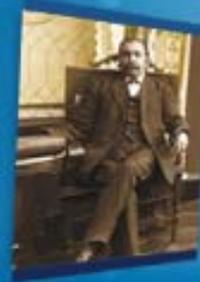
Future Challenges – Policies/Guidelines

- Is there a need for better support or consultancy mechanisms to support large-scale implementation?
- Federations – Coverage is growing, but not worldwide yet
 - In production
 - HAKA (Finland)
 - CRU (France)
 - SWITCHHaii (Switzerland)
 - UK Access Management Federation
 - InCommon (USA)
 - In pilot/preparation phase
 - MAMS (Australia)
 - Associatie K.U.Leuven (Belgium)
 - Czech Republic
 - DK-AAI (Denmark)
 - DFN-AAI (Germany)
 - Slovenia
 - SWAMID (Sweden)

Future Challenges – Functionality

- SAML 2.0/Shibboleth 2.0 – late Spring 2007?
 - Single logout
 - Attribute 'push'/multiple user roles
- Possible Future Developments
 - Shibboleth & Metasearch - API/Web services
 - Release OpenURL's baseURL attribute

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Thank You