

The slide features a dark purple background with a large, faint circular graphic on the right side. The word "OpenAthens" is written in white, sans-serif font on the left. Below this, a white rectangular box contains the text "Administrator Training" in a smaller, black, sans-serif font.

OpenAthens

Administrator Training

Welcome to this OpenAthens Administrator training. I'm going to attempt to take you through everything you will need to know to assist your end users with using OpenAthens, as well as being able to use it yourselves, to manage user accounts, look at usage data and add resources.

Feel free to raise a Teams hand at any point if you have any questions, if you'd like me to explain something, or if you'd like me to go in to more detail.

Before we get in to the Admin training in full, we're going to take a quick look at what an end user might see on their journey. After that, we'll make our way through the features of the Admin dashboard; Managing user accounts, your resources on OpenAthens, look at usage data and admin account settings.

The User Journey

The end user route to access using OpenAthens

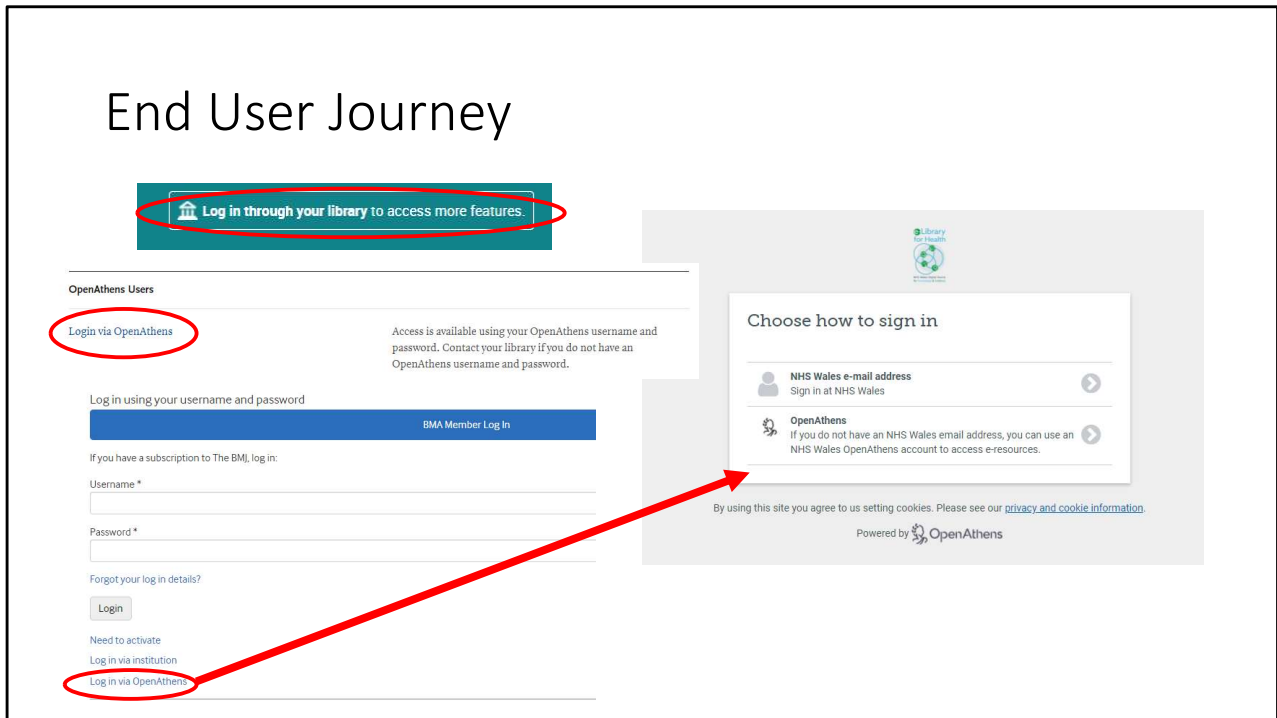
To start at the beginning, Library users have access to thousands of resources that we procure either nationally, as in our case, or within their relevant Health Boards. Once a new resource is purchased, we register the IP addresses of the sites that they have been procured for so that any computer being used in a library, hospital, or other identified site, the resource acknowledges the incoming IP address and allows the procured access.

This makes for a seamless user experience, everything happens behind the scenes, and users can just access the resources they need to carry out their jobs.

The obvious limitation, is when someone is using a laptop or mobile device, working from home or in an undesignated location, but still need to be able to access the resources to carry out their day job. This is where OpenAthens comes in.

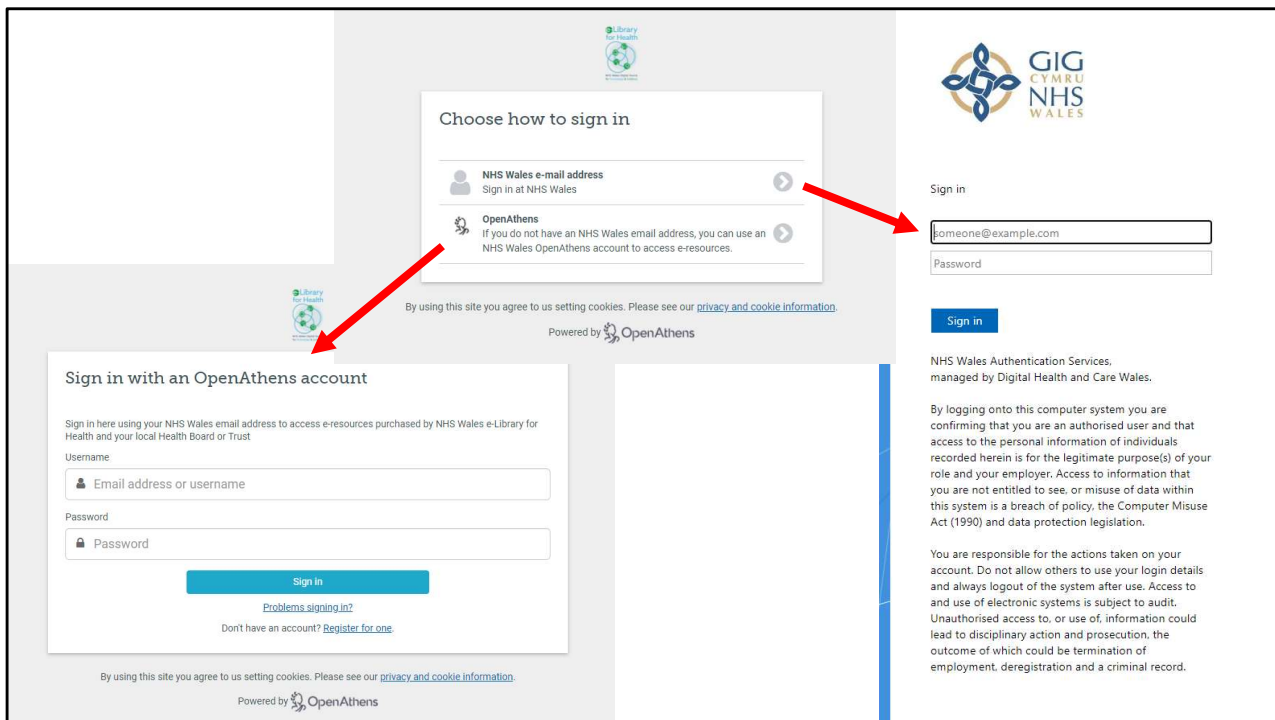
When a user attempts to use a library resource from an IP address that isn't recognised, OpenAthens steps in and gives users the opportunity to log in to OpenAthens to gain access.

End User Journey



The second way is necessary if the user is *not* on a recognised IP address. Either they are working from home, or simply at a location away from their work base and off the NHS Wales network, and this is where OpenAthens comes in.

The user journey with OpenAthens can vary depending on how the user is accessing a resource. If a user is having trouble accessing a resource with OpenAthens a good first step is to identify which route they have taken. If a user goes to the website of the supplier, such as BMJ or NEJM, they will have the option to log in through their library, institution, or plainly OpenAthens. Selecting this will direct the user to “choose how to sign in”. If a user was instead accessing a resource while off-site on the e-Library website, they would be taken straight to this selection screen.



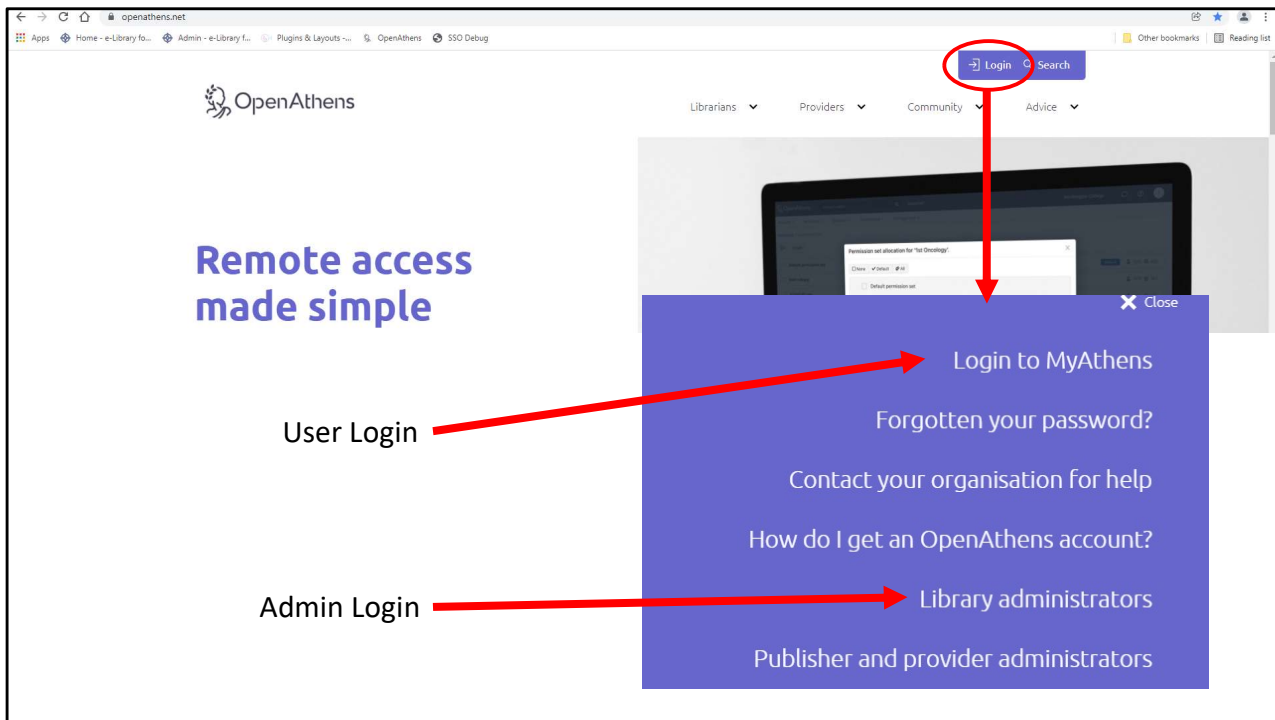
From the selection screen, the two options are as follows.

The first option is the newer Single Sign On route. If a user has an NHS Wales email address, they can use that address and password to log in as they would for work, and OpenAthens would automatically generate them an account and allow them access. This is our preferred option, as encouraging users to log in this way will mean their accounts don't expire as long as they are listed in the NHS Wales directory, and their passwords and details will update as they update them for work, reducing the need for active OpenAthens administrator action to only if they encounter some problem.

The second option is primarily for users who do not have an NHS Wales email address. In the past this was the only type of account, and so long-time Athens users may still authenticate this way. The second option allows the users to enter some details to register for an OpenAthens account with an email address of their choice, and set a password of their choice.

We are now recommending that when this older style of account come up for its 18 month renewal, that you check if the user has an NHS Wales email address they could

log in with instead. This year the minimum password complexity increased to a 10 character password. Again, using the SSO route, users just need to use their work password, which is one less password to remember, and should present an easier access option for the user, while also reducing the workload on Athens admins maintaining user account details.

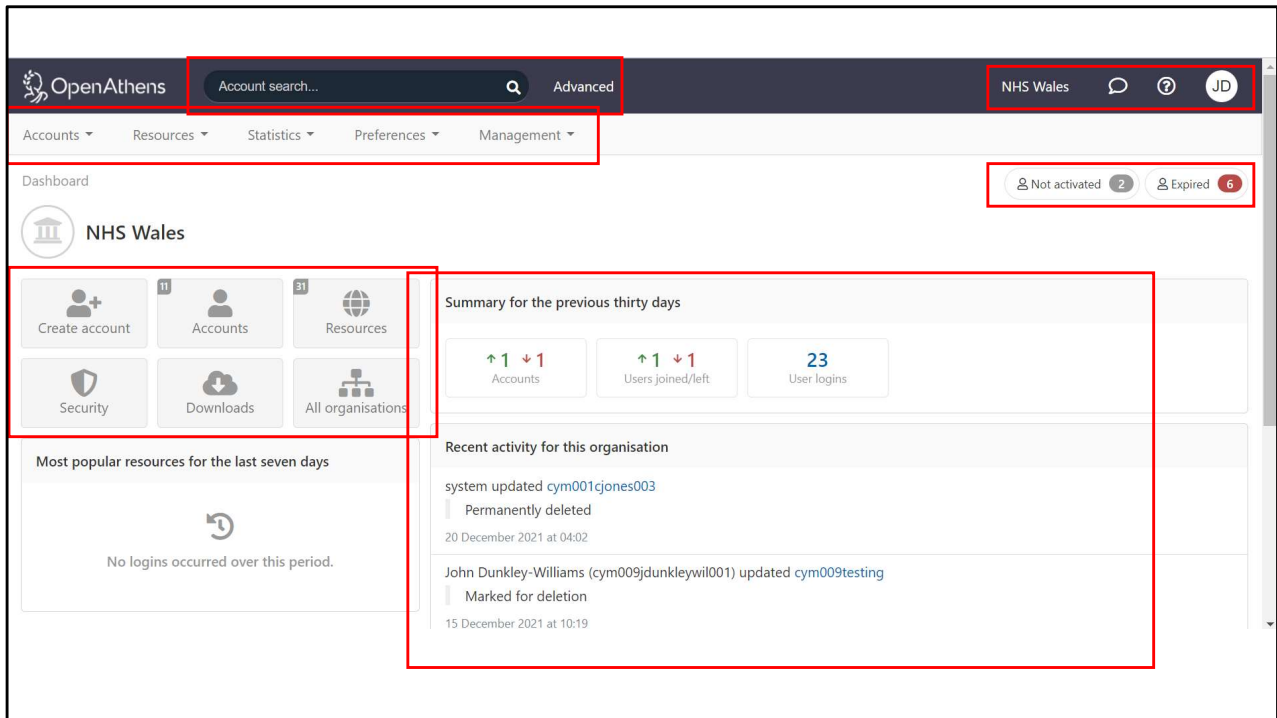


The third access route, is via the OpenAthens website, www.openathens.net – this will take users to a user homepage we created and from which they can either proceed to the e-Library website, or access some of the local Health Board resources listed on the page.

This will be the place you come to log in as administrators.

Admin Dashboard

A tour of the OpenAthens administrator platform



Once you have logged in, you'll arrive at a dashboard that looks something like this.

From the top, here you can search for user accounts.

From the ribbon then, you can access all of the available features to you as an administrator.

These six icons are the most popular tools, and are also available in the drop down menus.

The summary displays activity on the account.

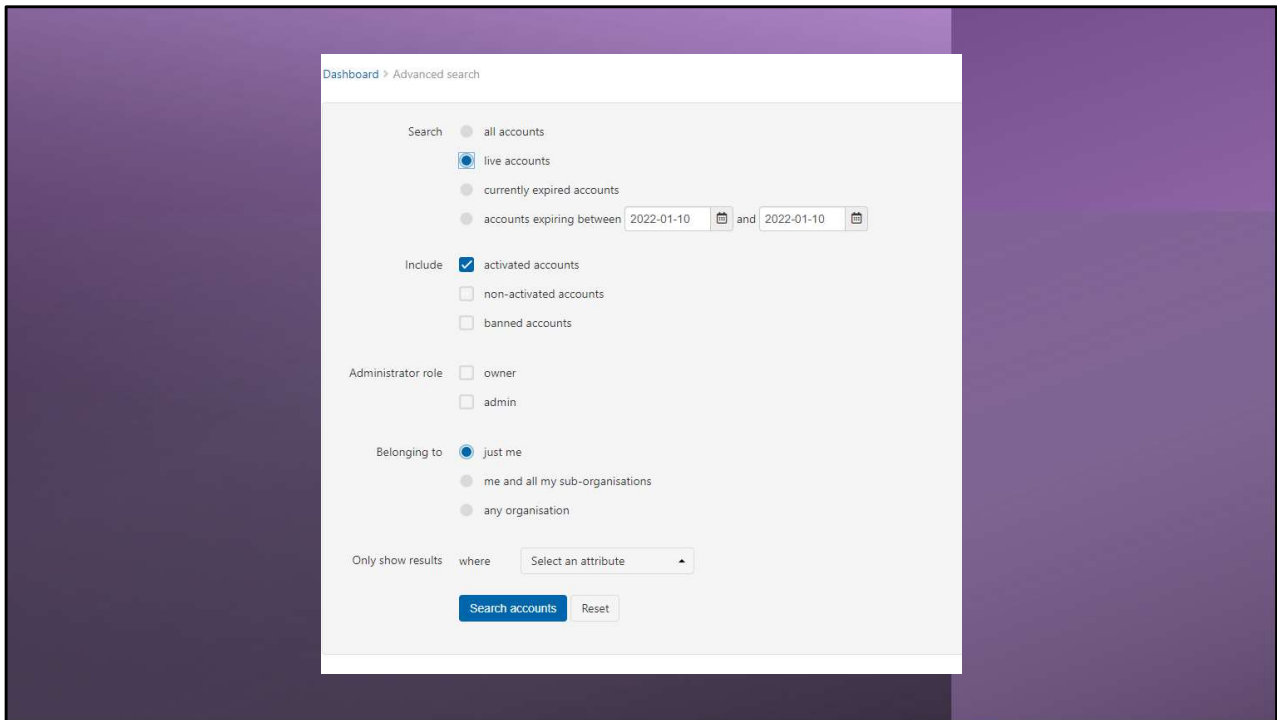
At the top right shows how many accounts are waiting to be activated, and those that have expired at a glance.

Lastly, in the very top right corner you can see the live chat, under the speech bubble, and the help icon which has a wealth of really useful information if you ever get stuck, complete with picture examples and really quite good explanations of everything. I was able to navigate much of the SSO integration using the help topics in

here.

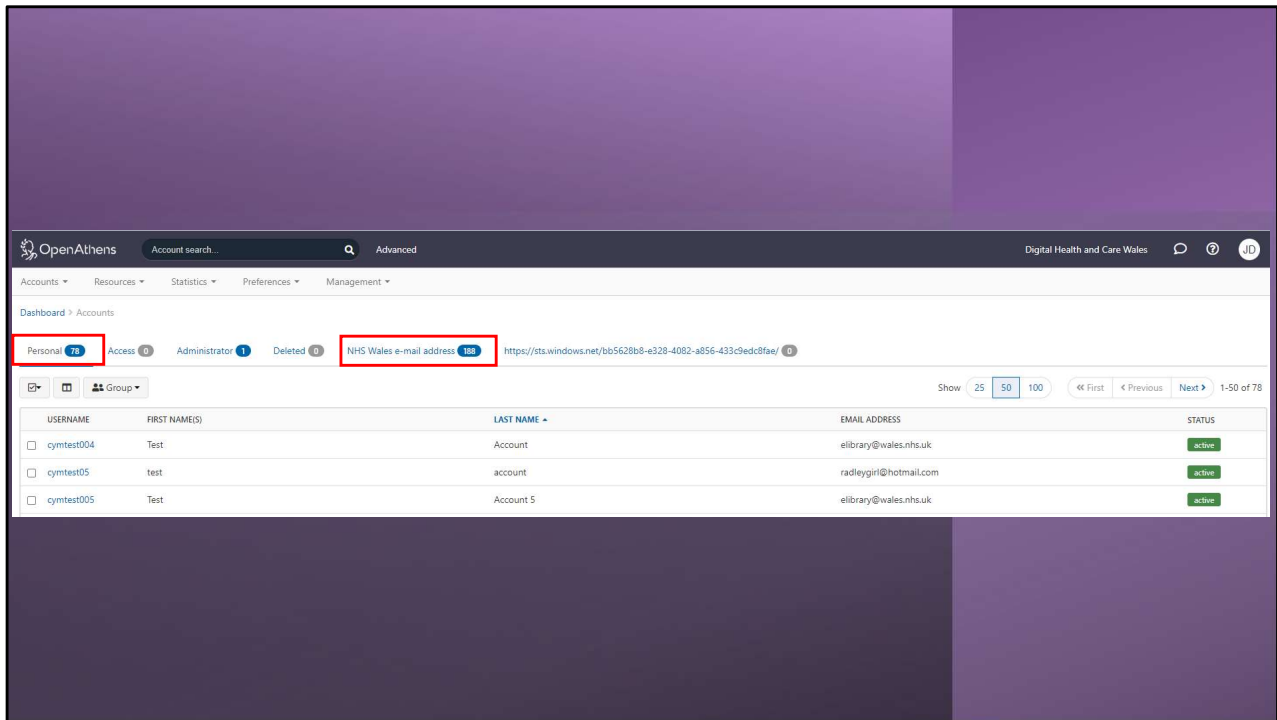
User Accounts

Searching, editing, authorising end user accounts

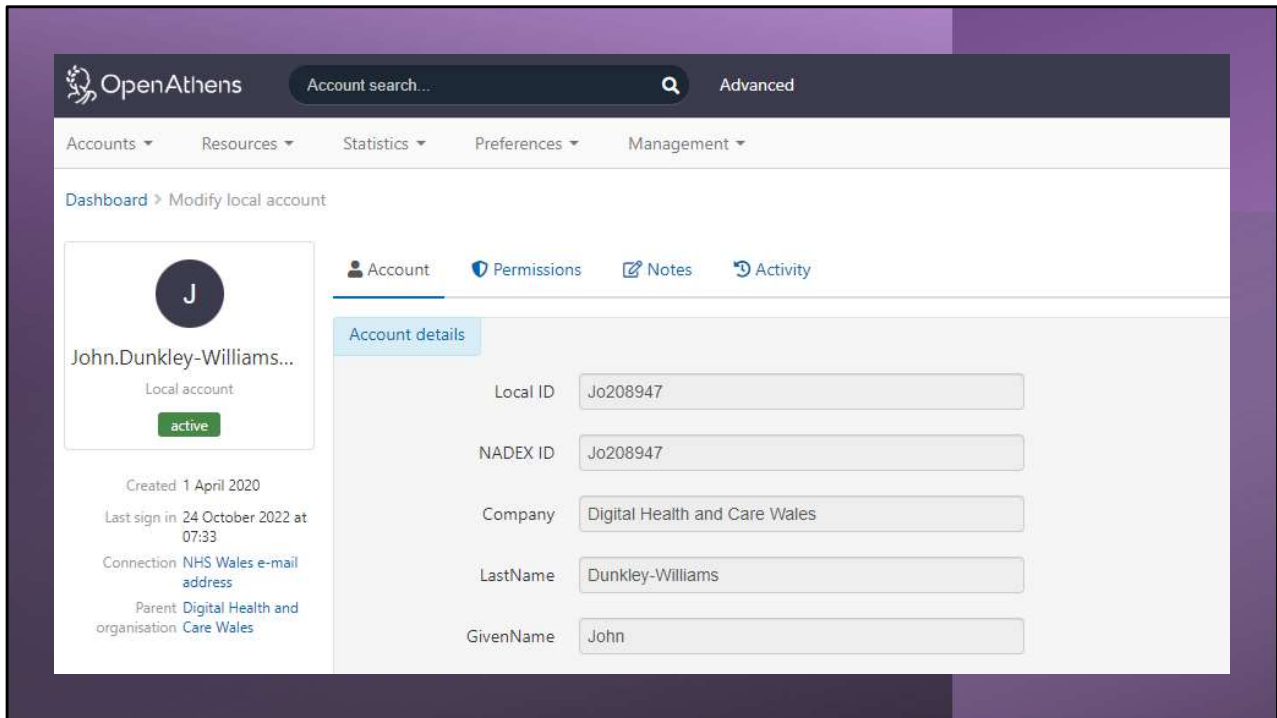


Starting with the account search, I usually jump straight to the advanced search, since by default you won't see inactive accounts in your search. By using the advanced search you can make sure to include all accounts in the search criteria, and combine search attributes if you don't have a username, such as first name and last name.

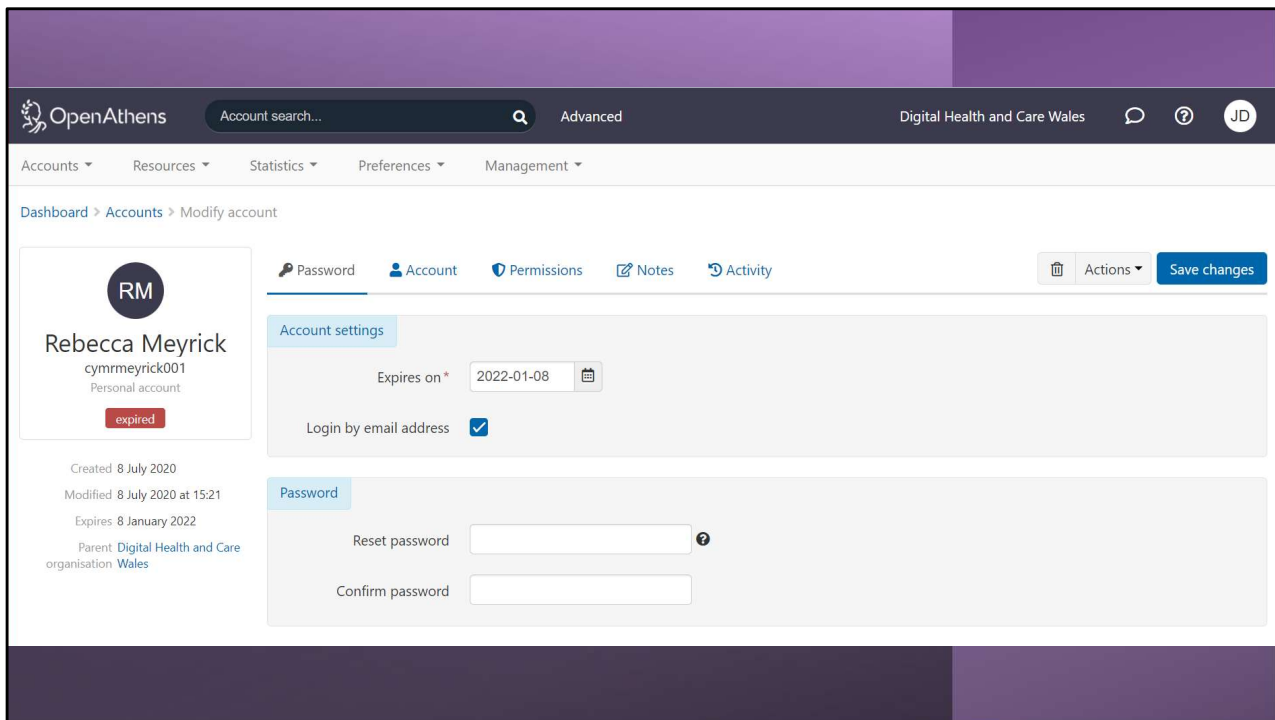
As local administrators your searches will be limited to your own organisations, so it might also be that a user belongs to another Health Board if they don't appear. If you have any trouble of course you can get in touch with the e-Library at any time.



Your search results will appear like this, similar to as if you had navigated to All Accounts. The first page displayed is the “Personal” tab. These are the older-style OpenAthens accounts. SSO accounts are listed on the separate tab, NHS Wales email address.



If you select an SSO account they look like this – This is the information extracted from the NHS Wales directory. You can manually adjust permissions here, but generally the details are not editable, because even if you did change them, as soon as the user logged back in, it would be overwritten with whatever is in these information fields in the NHS Wales directory. If there was missing data here, for example the company field was blank, that would need to be fixed and input at the NHS Wales directory. Athens admins shouldn't really need to manage SSO accounts because NHS Wales IT should effectively be managing them when they ensure staff details are kept up to date.

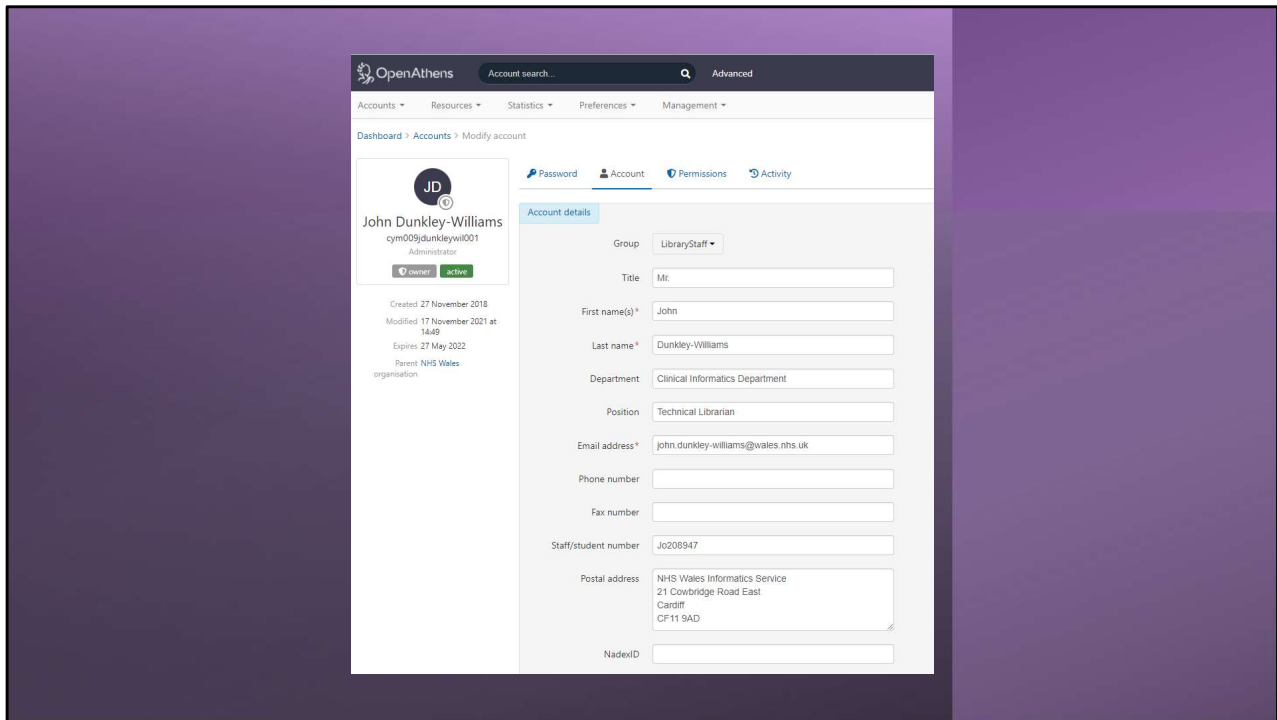


This is what an old-style user account looks like, these require more hands on management.

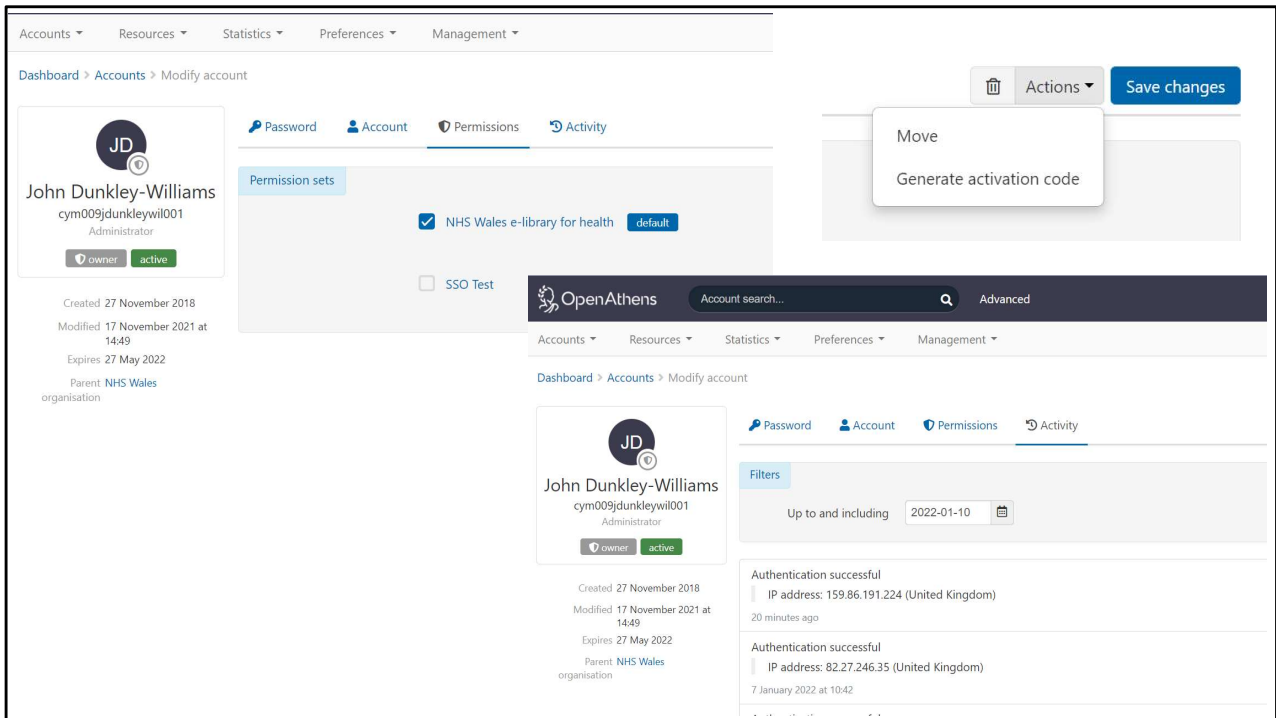
You can see a green button on the left indicating the account is active, or as in this case, a red one that indicates the account is expired, and the first tab also offers you the option to reset the user's password. When it comes to expiration with old style accounts, most Health Boards have a default setting of 18 months.

When it comes to renewing accounts for users, again, we first like to recommend an SSO account. If a user insists on staying with the classic account and their extra set of login details, or else they don't have an NHS Wales email address, these will need to be manually updated and managed. Remember you must not renew accounts without a users permission. In signing up to use OpenAthens, users agree a set of terms and conditions. In renewing the accounts of your users without them expressly asking, you are accepting those terms and conditions on their behalf.

If you make any changes to the account, you must be sure to press the blue "Save changes" button in the top right for them to take effect.



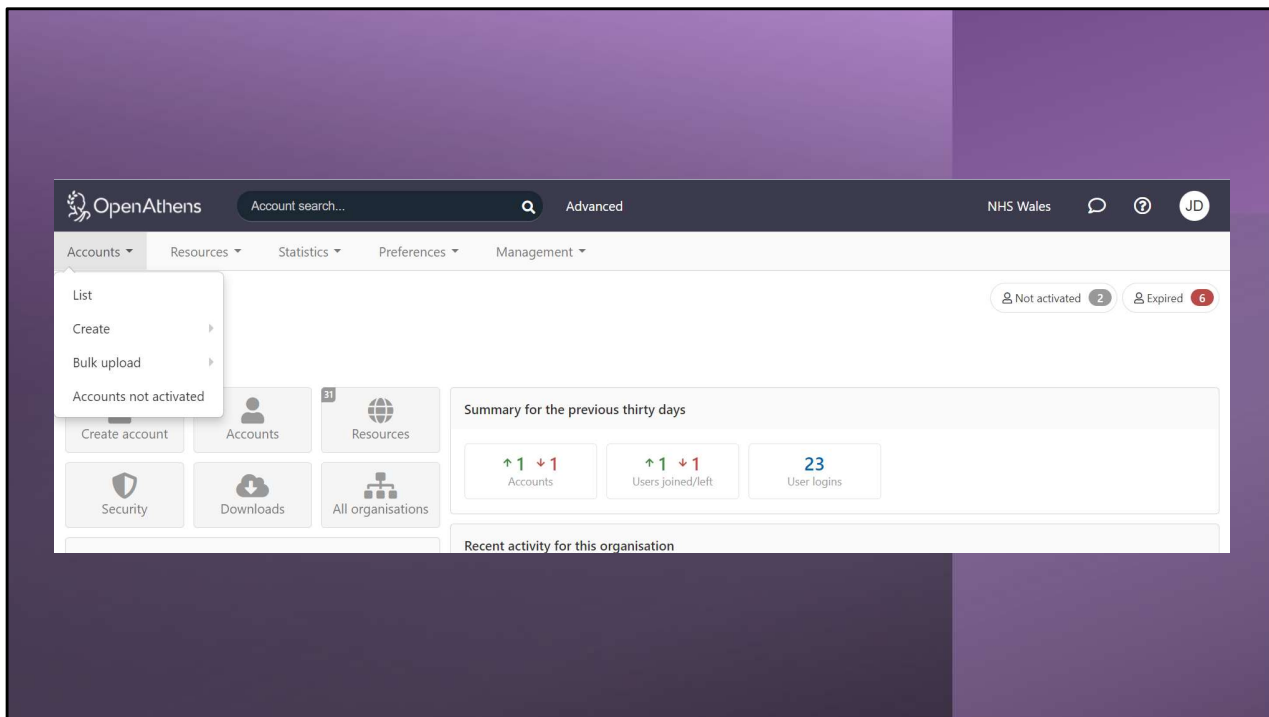
The next tab is for account details. Here you can of course update the users details as necessary.



In the permissions tab you should see at most, the e-Library and probably a set of local permission too for the resources only available in your Health Board. Those should be checked for the user to have access.

The activity tab shows the recent activity on the user account.

Lastly the “Actions” button in the top right is where you would go to activate an account, and also to “move” or migrate an account to a different Health Board, if a persons place of work has changed. You can also see the small bin icon to delete an account entirely.



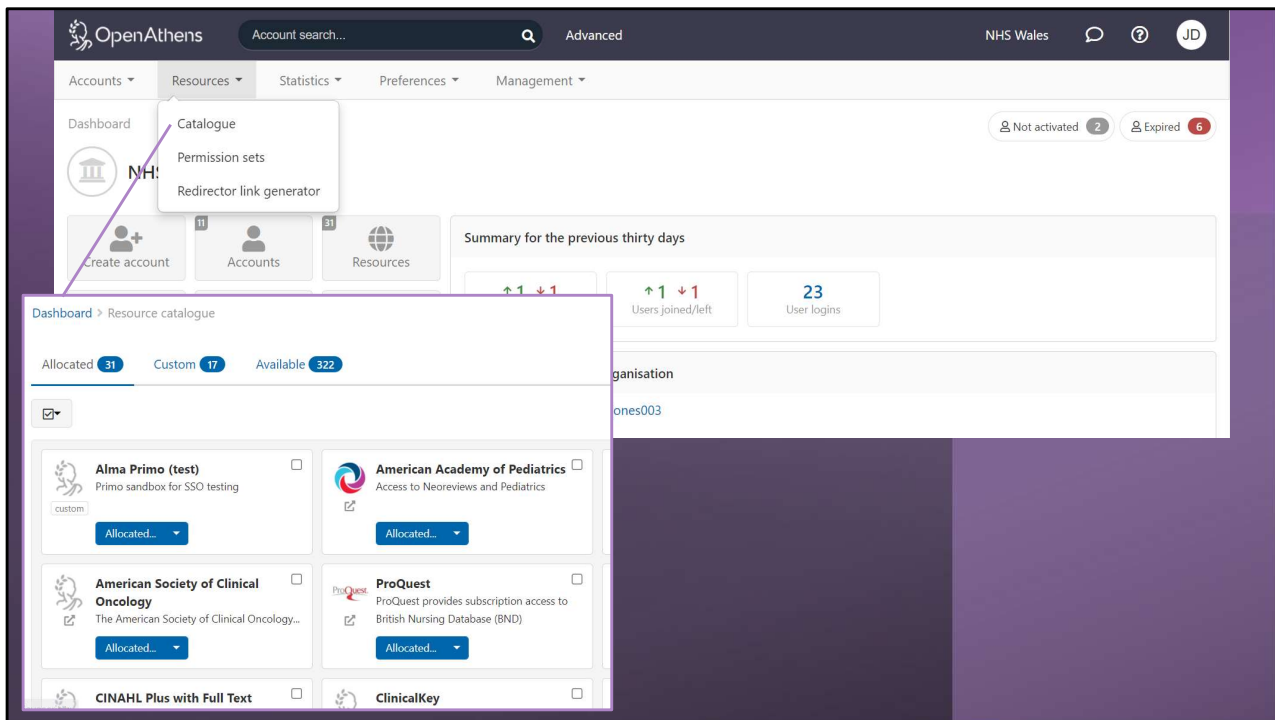
Coming back to the dashboard, we'll now take a look through the drop down menu options.

The first dropdown is for Accounts. The first option will simply list all of the account in your organisation. Create, as you might guess, is to create a new user account. Most users should now be coming from the SSO system, or else will create their own accounts from the registration forms, but you may be creating test accounts to use. The Create and List functions are two of the six quick access buttons placed below the menu – they do they same thing.

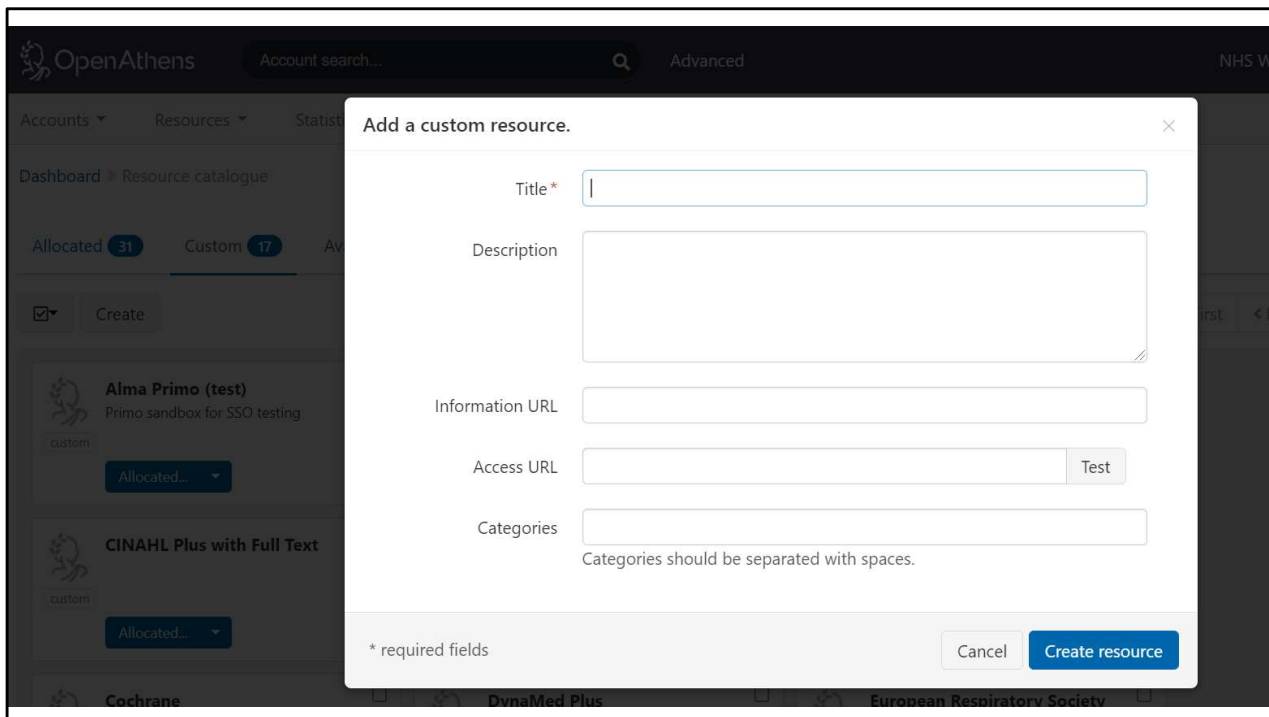
You shouldn't need to Bulk upload, and so the final option will show you accounts that haven't been activated yet, much like the quick access button in the top right.

Resource Management

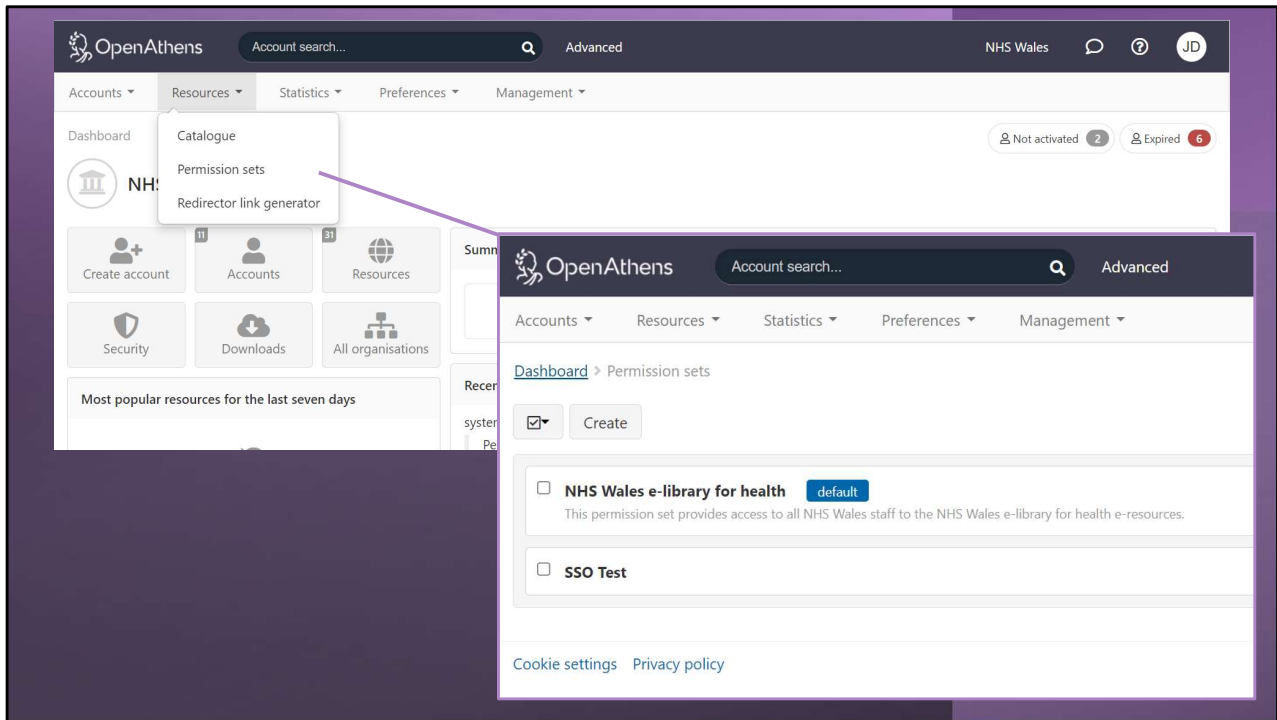
Adding and editing resources for OpenAthens authentication



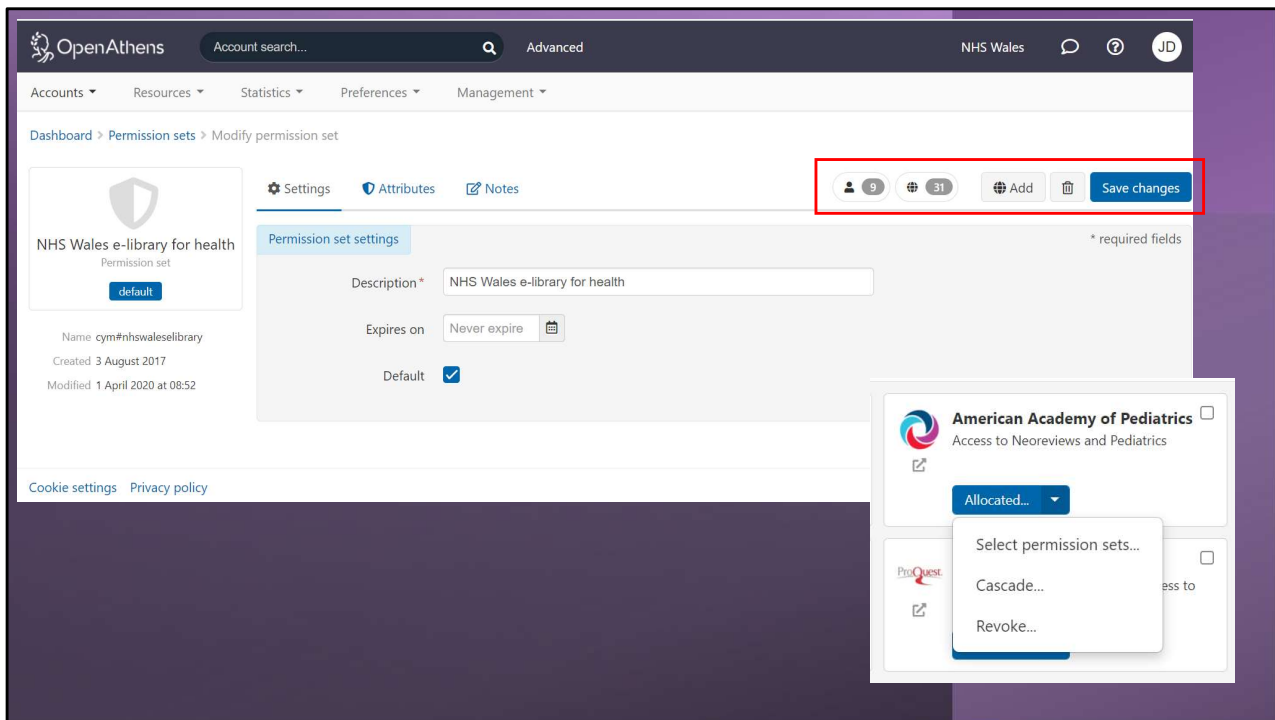
The next dropdown is Resources. The first option; Catalogue, shows you the list of resources already set up for access, as well as the custom ones you've created. The resources button on the grid below will also take you here.



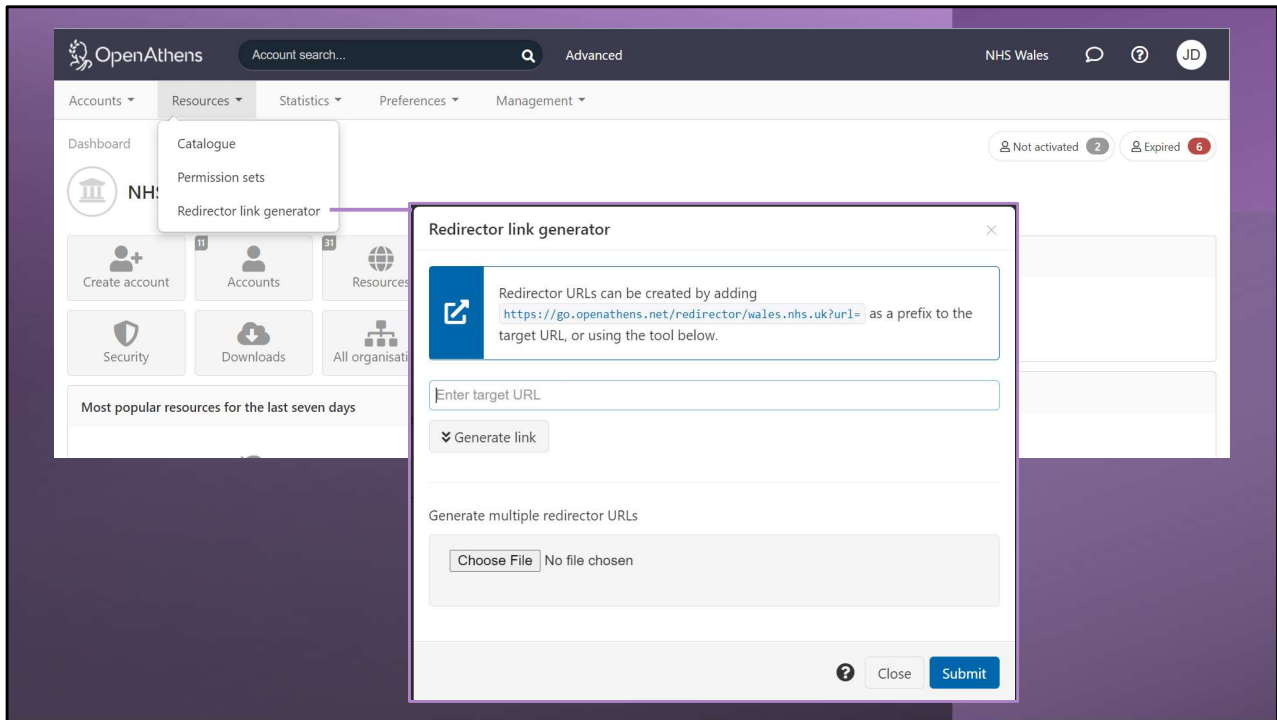
If you take up a new resource locally, specifically for your Health Board, you may need to create a custom resource to allow users to log in to it using OpenAthens. You can do this using the Create button on the custom tab of the catalogue, and enter some basic information about the resource. The main thing you need will be the access URL. If you're unsure, you can usually get this from the supplier, but as always, if you have any trouble, get in touch with the e-Library for support.



Next in the resources dropdown is Permission sets. Here you should see, similar to on your user profiles, the NHS Wales e-Library, and a local permission set of resources also. Also note the create button at the top should any new permission sets be required.



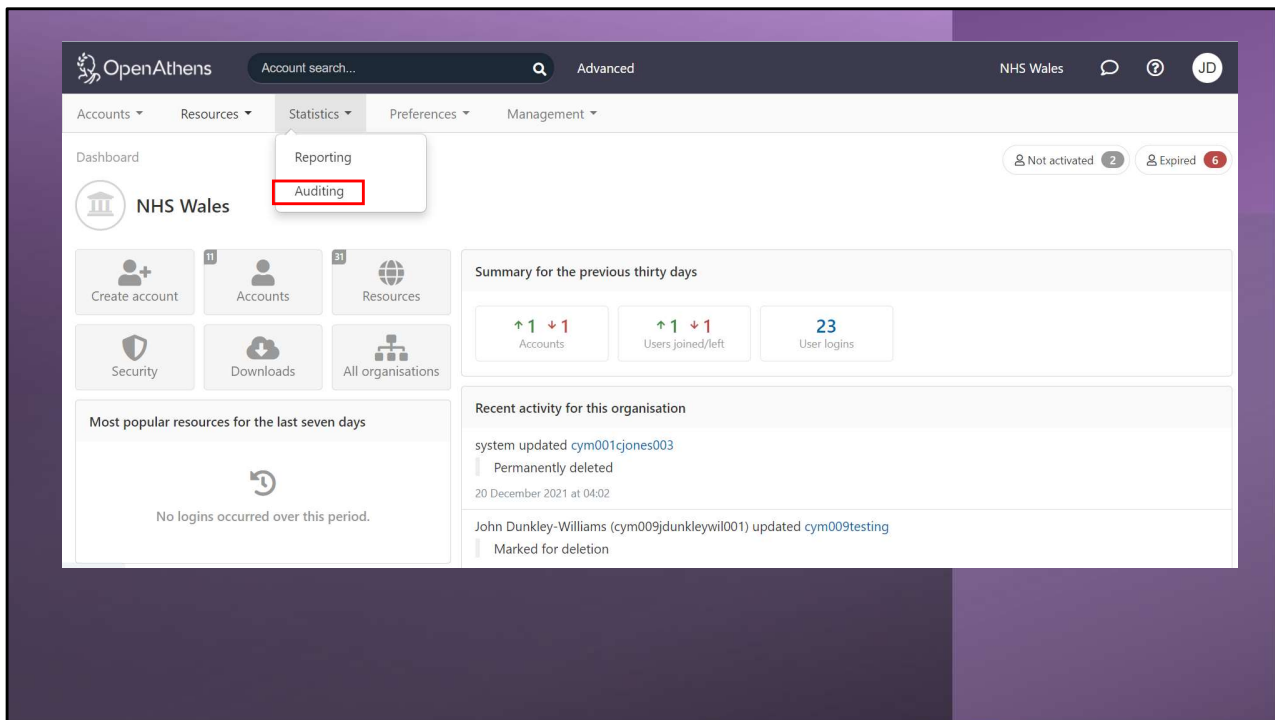
The most likely scenario is that you will edit your local permission set to add or remove resources. At the top right, the person icon indicates how many people have access to this permission set. You can select it for a full list. The second, and perhaps most important icon, takes you through to the catalogue page we looked at recently. From there, you can use the blue button where it says “Allocated..” to assign resources to specific permission sets. On a basic level you will use this to build your local permission set for your Health Board users, but you could also create permission sets specifically for a particular user group, such as GPs, and then manually assign that permission set to the relevant OpenAthens accounts. As always, Save Changes when you are finished.



The last tool under the resources dropdown is the redirector link generator. This handy tool lets us enter the URL for a resource, and create a link that, if it doesn't detect a valid IP address to authenticate with, directs the user straight to the OpenAthens login screen – the behaviour you'd be familiar with from the e-Library website.

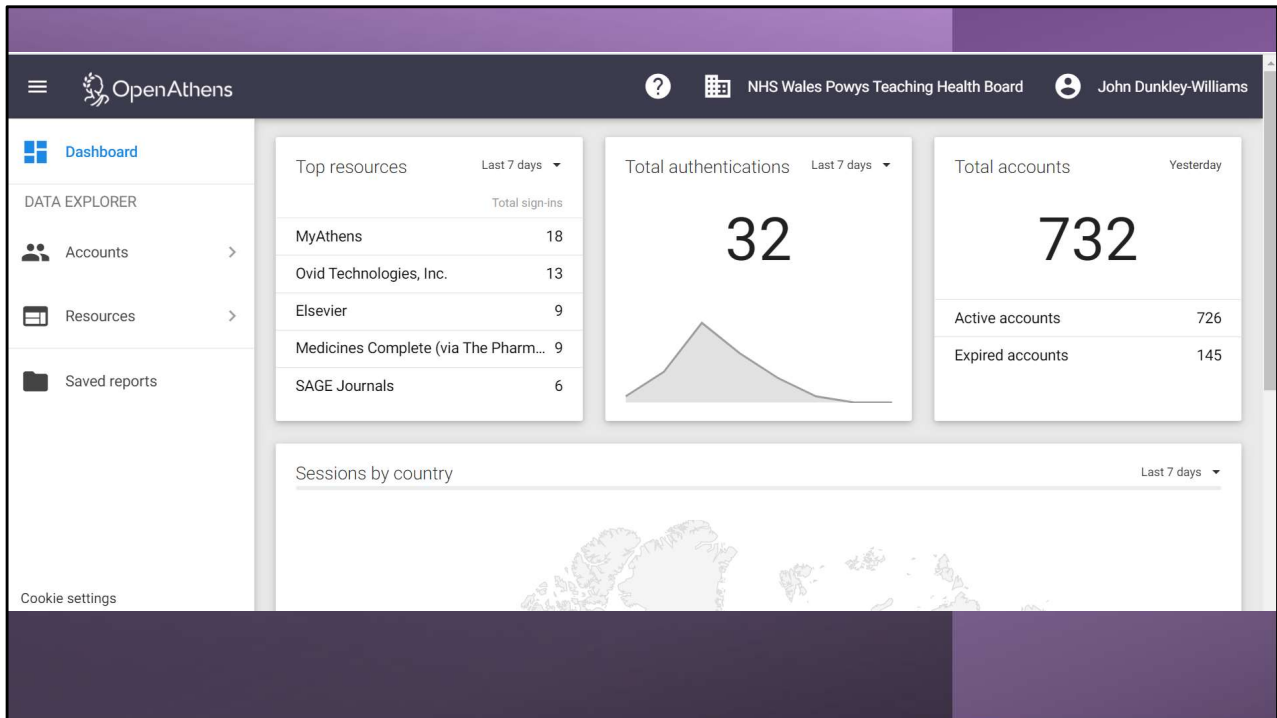
Statistics

A look at the data available on the OpenAthens platform



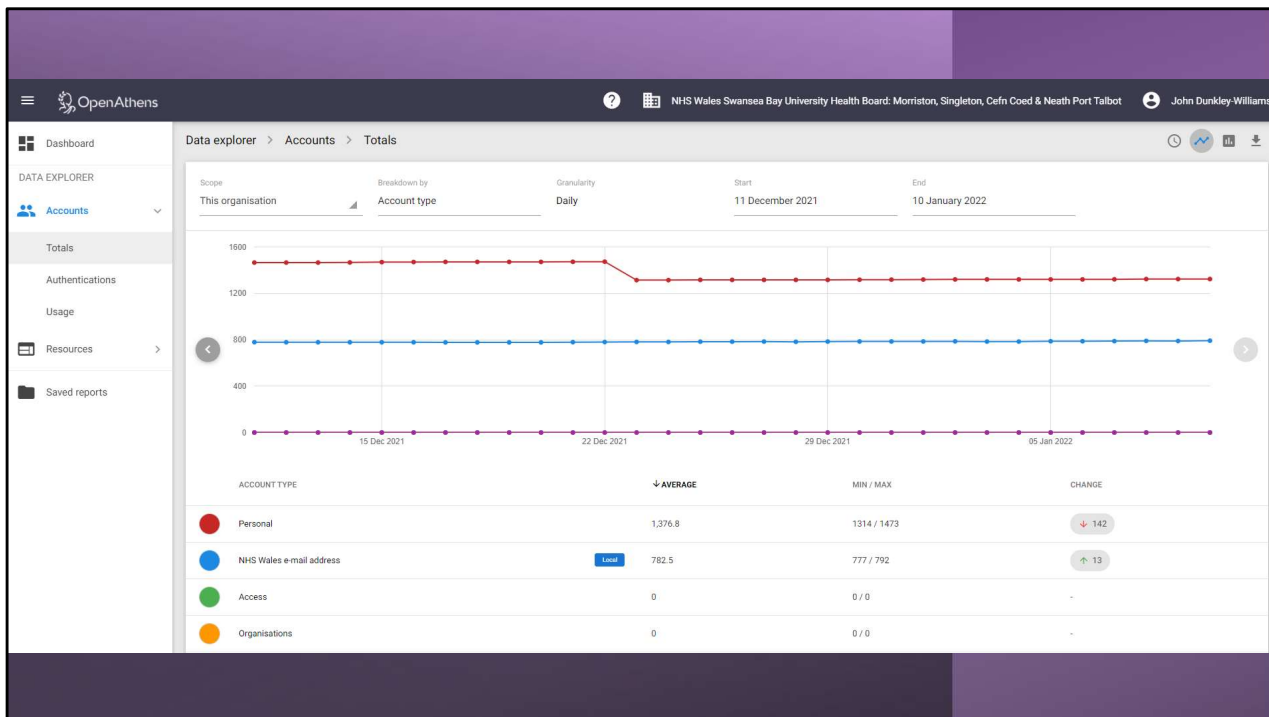
The next dropdown across is the Statistics menu.

Speaking first about Auditing, this allows you to set a date range to examine activity. Similar to the recent activity on the main dashboard, this lets you look at a specific time range for the same kind of report.



The other option on the statistics dropdown brings you to the data explorer dashboard.

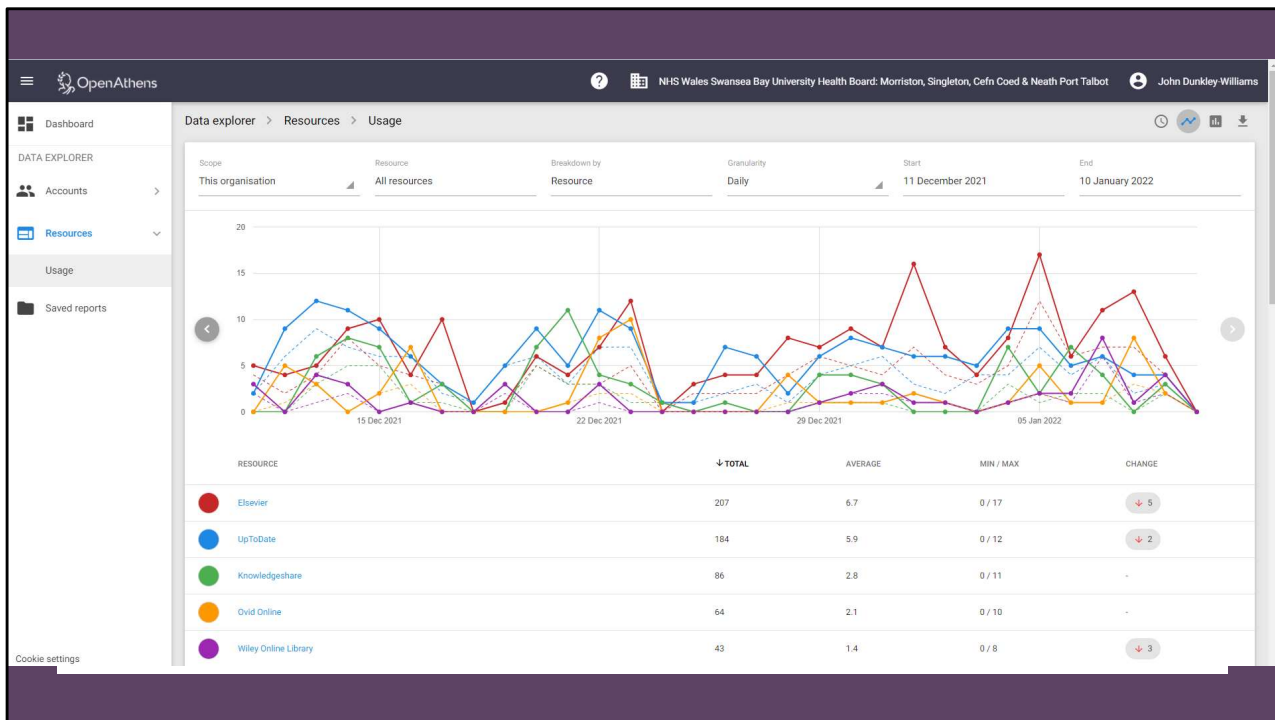
The main dashboard offers a quick look at the most used resources (specifically Athens usage – this will not be as useful as the regular usage reports from the suppliers and their platforms which will also take IP authentication in to account,) as well as the total number of Athens logins in a date range of your choosing, and the total number of accounts in your organisation. From here you can of course go on to produce more detailed reports.



The Accounts menu offers you a look at total accounts and the account types, as indicated below. We use this regularly to compare the number of Personal accounts, the old style of OpenAthens account, to the NHS Wales e-mail address accounts – the new SSO style of account. As you can see along the top you can alter the scope to suit your needs, if you wanted to look at one particular account type, or look at the data for a specific date range.

The options below offer a similar look at the number of Athens authentications for a given date range, as well as general usage of resources through Athens following the same line graph format.

In the top right you also have some download and export options if you would like to do more with the data.

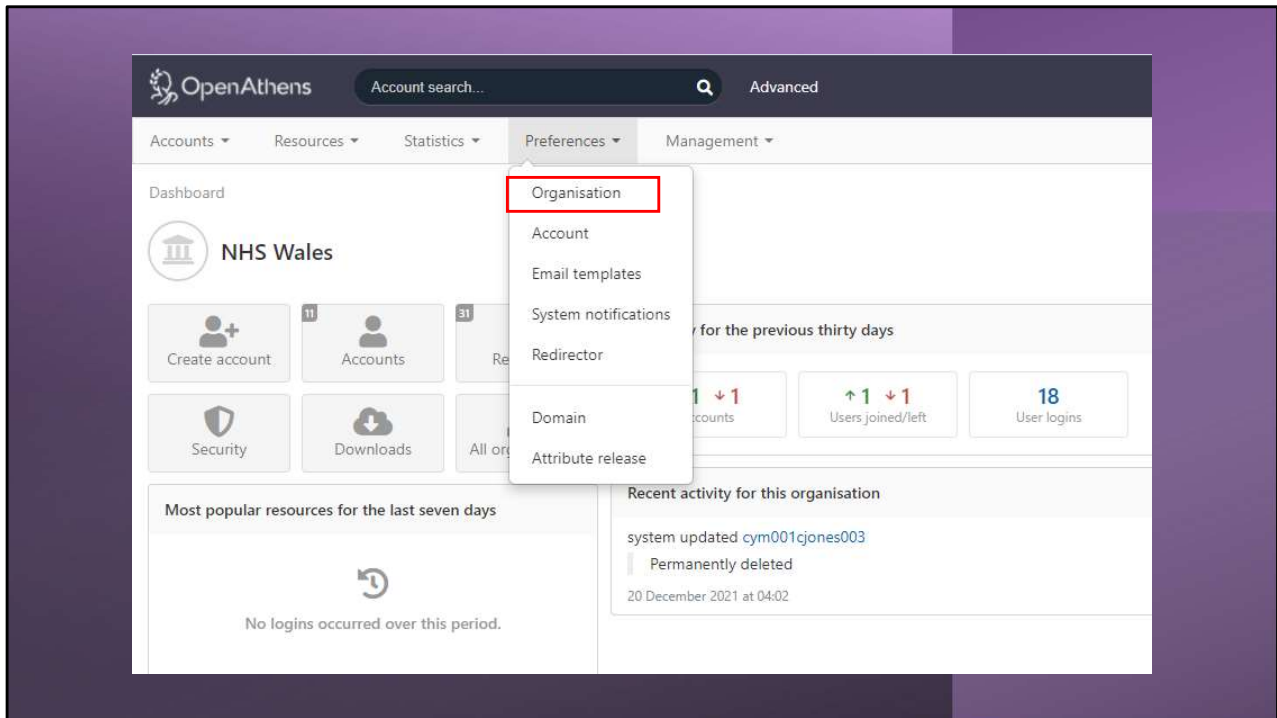


Below accounts, Resources, as you might guess, gives you data based on the resources in your Athens catalogue. We use this less, since again, it is limited to Athens authentications and resources, and you will get a much better view of the data from the supplier platforms, but these features are here if you need them.

As the last option indicates, you can save these reports to your account to view again later.

Admin Account Settings

A look at how to customise the settings of your administrators accounts



We return now to the main dashboard, and the next drop-down menu; Preferences. Your list as local administrators may be shorter but I'll run through the main features should you need them, starting with Organisation.

The screenshot shows the OpenAthens 'Organisation preferences' page for NHS Wales. The page is divided into two main sections: 'Organisation details' and 'Public contact details'.

Organisation details:

- Name: NHS Wales
- Department: NHS Wales
- Discovery domain hints: (empty)
- Geo location: 51.4812485,-3.1879878
- Postal address: 21 Cowbridge Rd E, Cardiff CF11 9AD

Public contact details:

- Name: NHS Wales e-Library Support
- Phone number: 02920 502020
- Email address: elibrary@wales.nhs.uk
- Website URL: http://www.wales.nhs.uk/elibrary

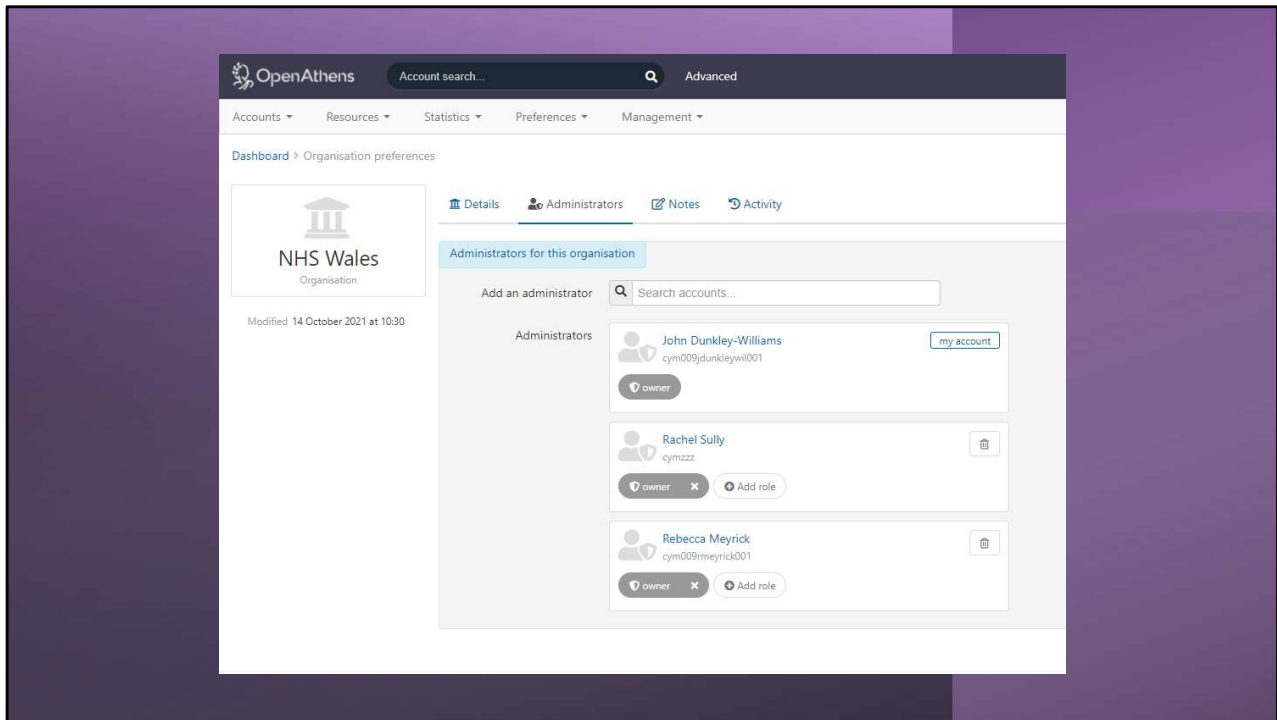
ipAddressWhiteList:

- 159.86.183.*
- 159.86.191.*
- 46.254.201.60

emailDomainWhiteList:

- wales.nhs.uk

Organisation opens a page much like the user account page, but for the OpenAthens account itself. You can see here the details for the NHS Wales parent account. Much of what you see on this first page is set at a global level, but you may wish to edit the IP addresses further down the page if a new one is added to your Health Board, or more importantly edit the main contact number, email address and website for your Health Board or Trust.

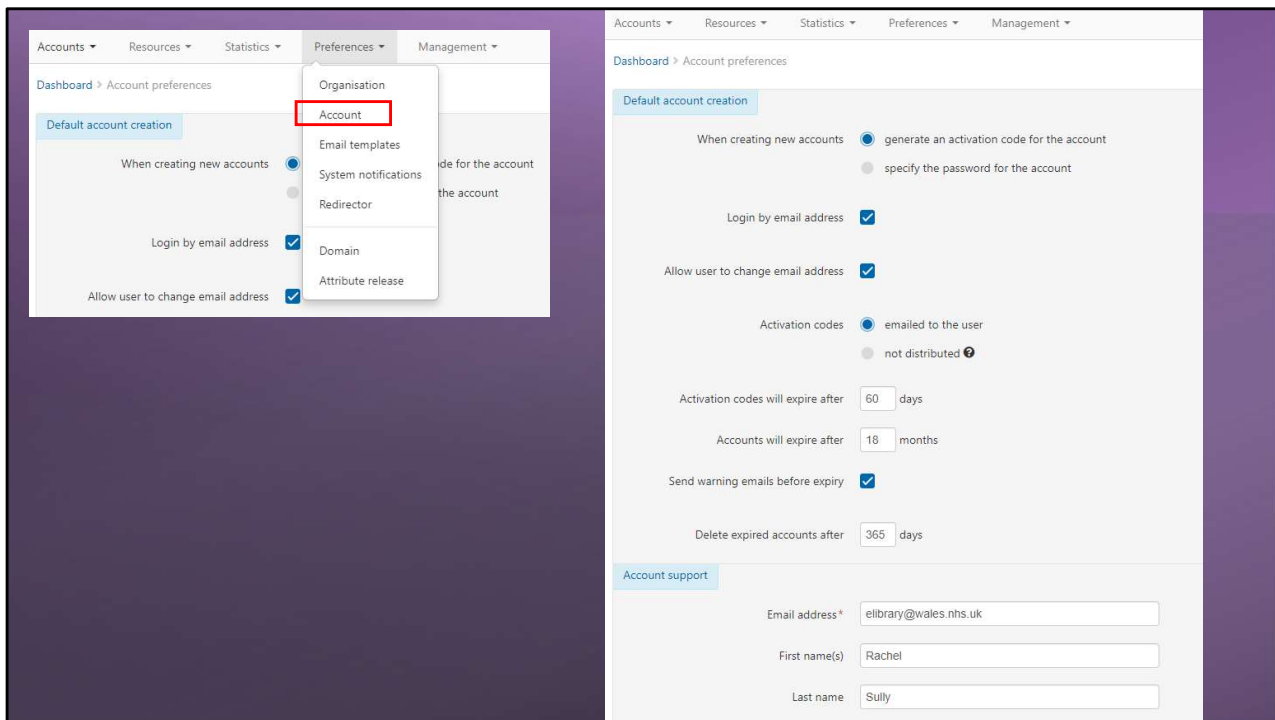


The second tab is one that I have recently delivered a short training session on as you might remember following the changes last year – the Administrators tab. This is where you come to add personal accounts as administrators. This has numerous advantages, including that when you require an email code to authenticate, it comes through to your own email address and much faster. It means you aren't using a shared account, which is not only much more secure, but will allow you to accurately track who makes changes, or adds and removes users, so you can communicate as a team much more easily when you need support, or you're working on an account that another member of staff has recently had activity with.

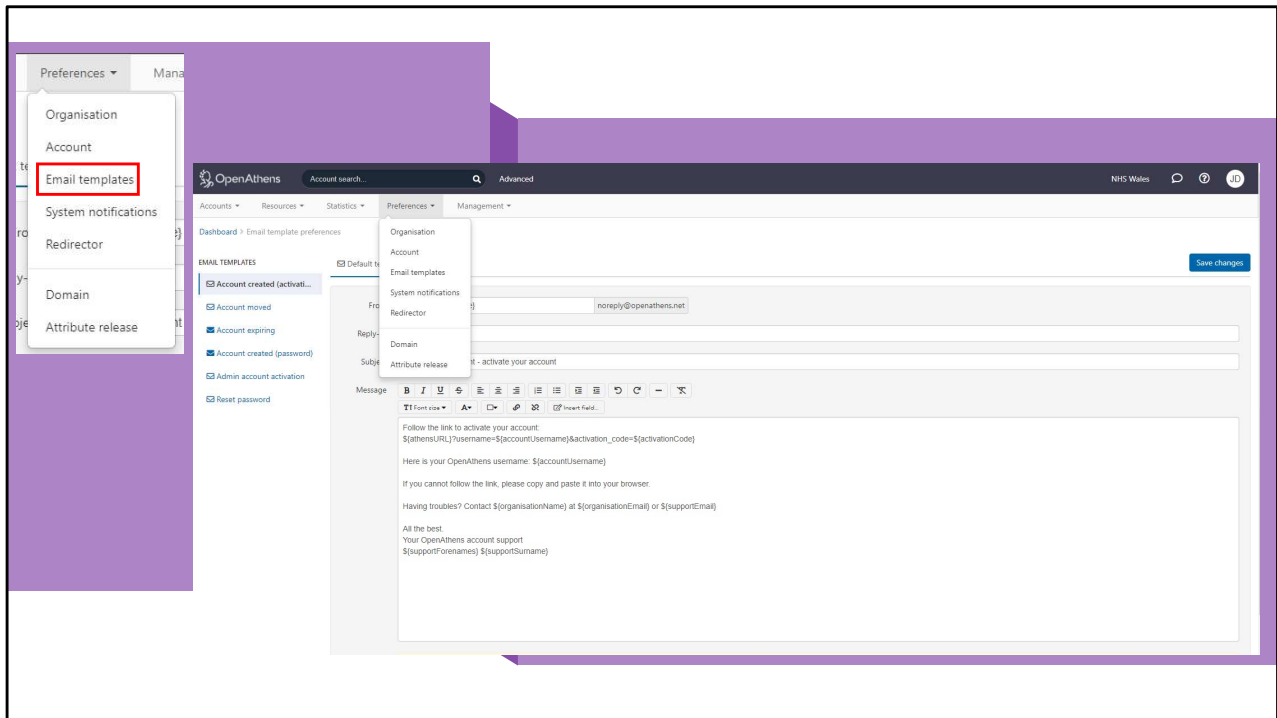
The only draw back is that currently if you are assigned as an administrator account, you can't log in as a regular user with the same details. I personally get around this by having two accounts – my Admin account, which is the old one I manually signed up for OpenAthens with before we introduced SSO, and secondly my SSO account which I log in to using my work credentials. This way actually enables me to use the same email address to log in either way, you can have both types of account with the same email address.

Lastly here, much like on user accounts, there is room to add notes and review

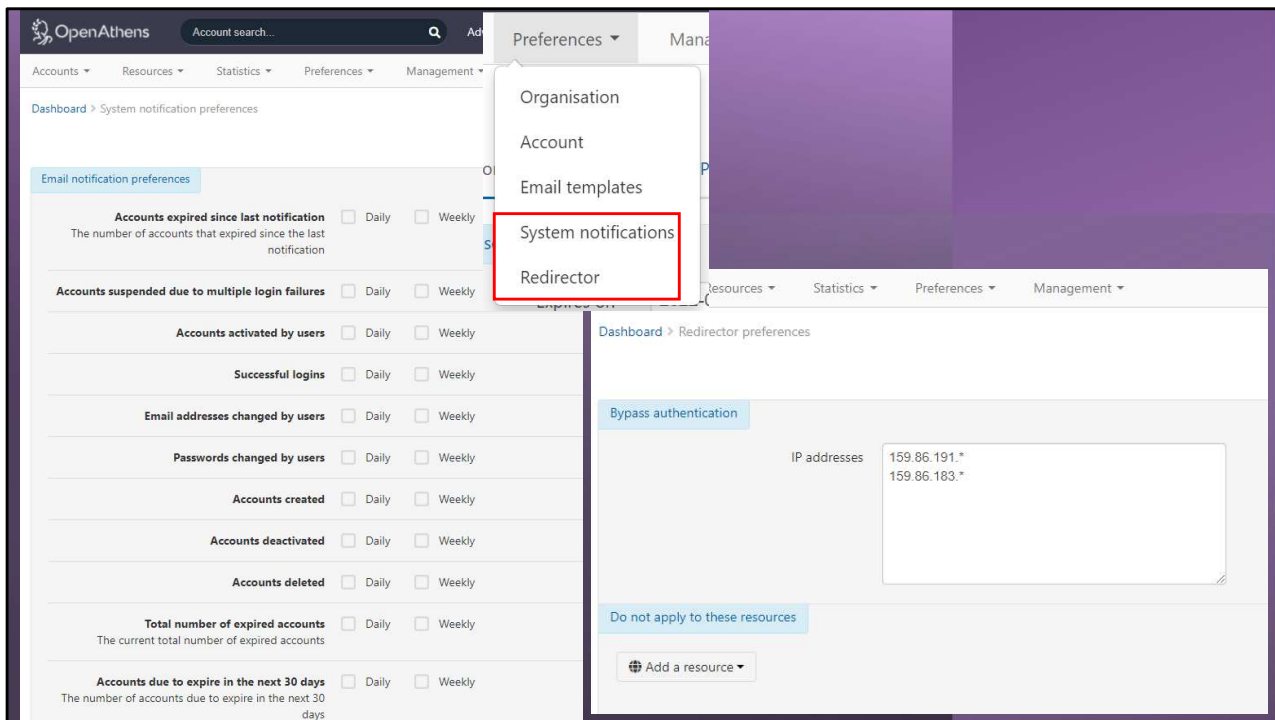
activity.



Next on the preferences drop-down is Account. This allows you to customise some default settings for your Admin account, such as the default length for account expiry, or whether you want to allow the user to log in using their email address or just their username (pertaining the self-registered accounts). It's worth coming and taking a look here to see what options are available, for example, by default we recommend user accounts expire after 18 months to ensure we check in with them and make sure their details are up to date. Some Health Boards however have this set to a longer 2 years so they don't have to review accounts so often, and others have it set to 12 months where there is generally a higher staff turnover for example. This again relates mainly to self-registered accounts, since the new SSO style accounts will automatically update with the details stored for a user in the NHS Wales directory.

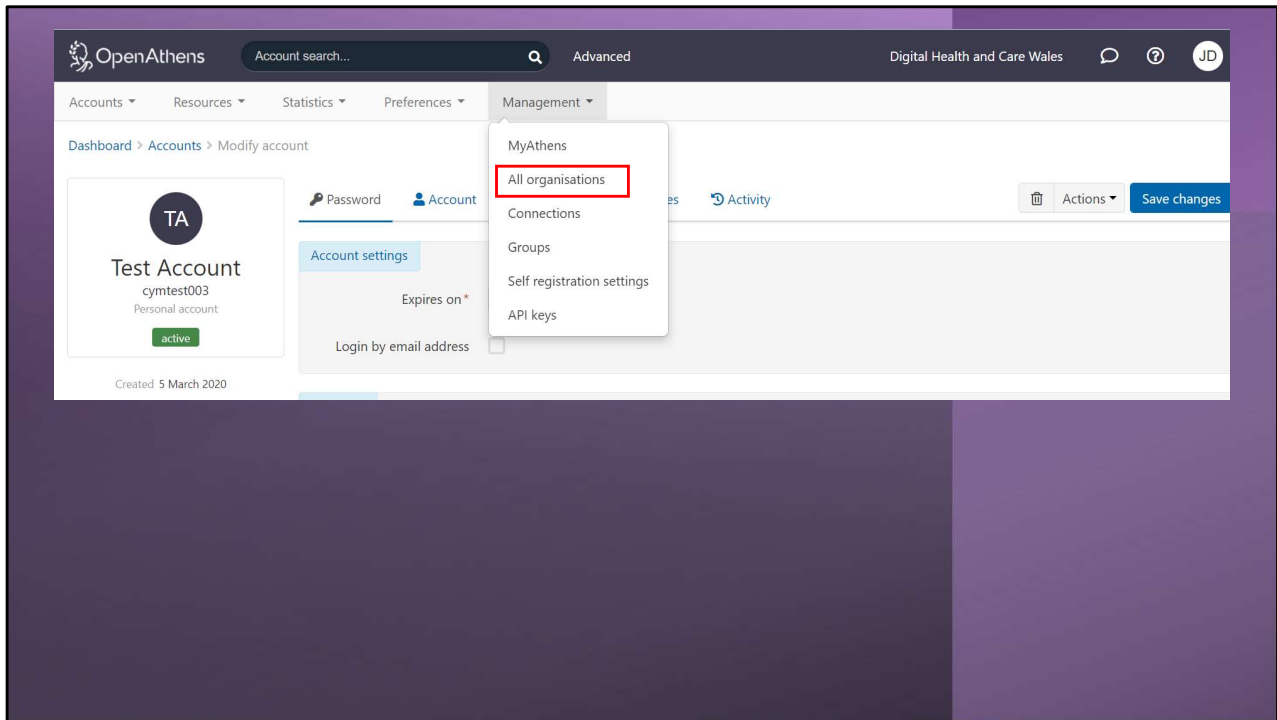


Next, Email templates. This allows you to customise the emails sent out to your users automatically, such as when accounts are created or due to expire. Again, these are worth reviewing occasionally to keep any details up to date.

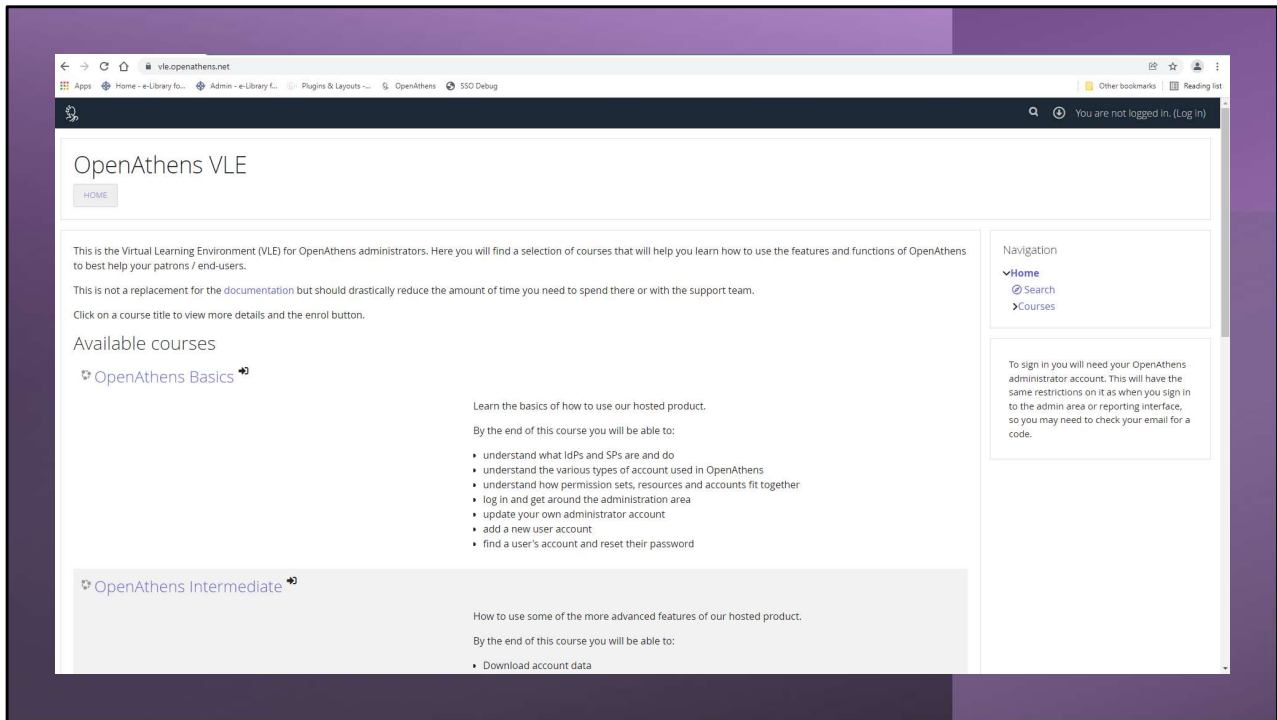


System notifications lets you set what, and how often you wish to receive notifications about, such as user accounts expiring or details being updated. This is largely going to be personal preference, depending on how busy your inbox is and how much time you have to give to OpenAthens each week, so set up what works best for you. Again, with personal administrator accounts you can use these features more to your needs than if all of the notifications were being sent in to the general library email inbox.

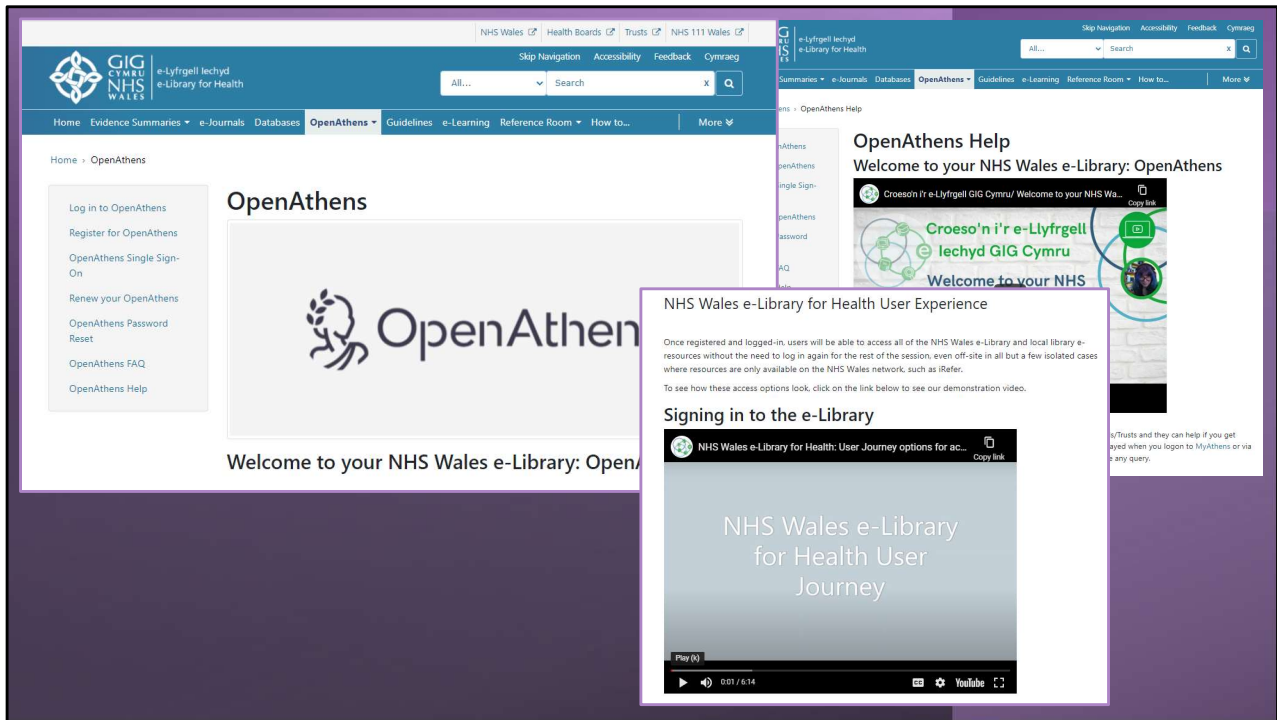
Lastly, any time you have a new IP range added to the local network, it should also be added in the redirector so that any user coming from the IP address designated by your Health Board is automatically identified.



The last drop down menu you will have seen on my screenshots is Management. This one might appear for you at all as local admins, but perhaps BCU might have an All Organisations option, since they are set up a little differently, with sub accounts for each library. If you do have any of the options available here, they won't be used in the day to day running of OpenAthens as local admins.



If you're looking for more organised OpenAthens training following this presentation, and the responsive OpenAthens Help available isn't what you're looking for, you can use vle.openathens.net to take some online courses. There are currently 6 available, from the basics to more advanced and specific features.



Alternatively, we have content that we've produced on the e-Library website to assist with the basic Athens functionality, including some short videos to help walk a user through signing up and logging in.

Thank you

Are there any
questions?

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