The Problem

- Current Discovery tool technology users are presented with:
  - Inconsistent login links on Provider, library and article pages
  - Inconsistent terminology for login options
    - Do patrons understand what “Athens” and “Shibboleth” mean?
    - Do patrons know if their library supports these technologies?
    - Do patrons understand terminology into instruction and local library websites
    - Authentication requires vendor/library/federation collaboration, are they speaking the same language?
  - Questions from the Service Provider as to which federation / country they are from and which organization affiliation they have

End Result

- Small, smart conventions for moving the user within a session seamlessly from licensed site to licensed site and authenticated portal to licensed site

Out of Scope

- The creation of new SSO technologies
- The standardization of current SSO technologies
The Team

<table>
<thead>
<tr>
<th>Last, First</th>
<th>Company</th>
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</thead>
<tbody>
<tr>
<td>Carmody, Steven</td>
<td>Brown University</td>
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<td>Cervone, Frank</td>
<td>Purdue University Calumet</td>
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<td>Chandler, Adam</td>
<td>Cornell University Library</td>
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<td>Confetti, Pete</td>
<td>CredoReference</td>
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<td>Dale, Andy</td>
<td>OCLC Online Computer Library Center</td>
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<td>Ferry, Kristine</td>
<td>University of California, Irvine</td>
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<tr>
<td>Ingham, Andy</td>
<td>University of North Carolina Chapel Hill Libraries</td>
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<td>Kaplanian, Harry</td>
<td>Serials Solutions, Inc.</td>
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<td>Kennedy, David</td>
<td>Duke University</td>
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<td>Koppel, Ted</td>
<td>Auto-Graphics, Inc.</td>
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<td>Lengwenat, Ms. Ulrike</td>
<td>Springer</td>
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<td>Noerr, Peter</td>
<td>Muse Global, Inc.</td>
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<td>Norris, Lyn</td>
<td>Eduserv</td>
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<td>Patel, Kishor</td>
<td>ProQuest</td>
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<td>Pesch, Oliver</td>
<td>EBSCO Information Services</td>
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<td>Staines, Heather</td>
<td>Springer</td>
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<td>van Lierop, Pieter</td>
<td>Inform Library and Information Solutions</td>
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<td>Walsh, Robert</td>
<td>EnvisionWare, Inc.</td>
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<td>Zhang, Foster</td>
<td>Johns Hopkins University/Sheridan Libraries</td>
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What have we accomplished?

- **Reworked charge for:**
  - Clarification and understanding
  - Easier to divide and conquer
  - Completed in February

Accomplishments

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Lead and Team</th>
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<tbody>
<tr>
<td>Standardizing terminology</td>
<td>Ted Koppel, Kristine Ferry, Steven Carmody, Kishor Patel, Heather Staines, Robert Walsh, Andy Dale</td>
</tr>
<tr>
<td>Standardizing user interface presentation</td>
<td>Andy Ingham and Steven Carmody, Pete Ciu, Steven Carmody, Frank Cervone, David Kennedy</td>
</tr>
<tr>
<td>Identify approaches that allow search technologies to leverage existing Web SSO authentication user sessions when contacting backend Provider sites</td>
<td>Harry Kaplanian, Peter Ciu, Steven Carmody, Andy Dale, Ted Koppel</td>
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<tr>
<td>Provide plans for the promotion and adoption of these Recommended Practices</td>
<td>Heather Staines, Foster Zhang, Harry Kaplanian</td>
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</tbody>
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Accomplishments

- Agreement to include research and recommendations from other working groups such as:
  - REFEDS
  - Kantara
  - JISC
  - The Shibboleth Group
  - InCommon
  - SWITCH
  - UK Federation

Accomplishments

- Include input from publishers and providers (Contacted)
  - Springer (MetaPress)
  - Elsevier
  - Nature Publishing Group
  - Wiley
  - Oxford University Press
  - Cambridge University Press
  - IEEE
  - AIP
  - Ithaka/JSTOR
  - EBSCO
  - H.W. Wilson

Accomplishments

- Include input from publishers and providers (to be contacted)
  - Semantico
  - High Wire
  - Atypon
  - ProQuest
  - Wolters Kluwer
  - ACS
  - IOP
## Current Goals

- Drafts by end of April
- Continue gathering input from publishers and providers
- Continue communication with other working groups and report back to the SSO working group

## Deliverable 1

- **Standardizing terminology**
  - Use cases describing the ways in which a browser would arrive at a Service Provider, traverse a Discovery process, and arrive at a specific login.
  - Develop a standard vocabulary of technical, business and policy-related terms used by Web SSO and Federated Authentication products.
  - Develop a set of “best practice” recommendations for the relationships between customers, licensing bodies, federations, and service providers.

## Deliverable 2

- **Standardizing user interface presentation for user authentication**
  - Identify a preferred location for login
  - Recommend to Service Providers a standard approach for guiding the user to the desired authentication method
  - Develop standardized approaches for handling automatic login when the url presented at the SP identifies the user’s preferred authentication method and/or authentication provider.
  - Develop a consistent approach/link syntax for campus–based software to present a deep link to a Service Provider which will trigger an automatic login process that bypasses the Discovery process.

## Deliverable 3

- **Identify approaches that allow Federated Search technologies and portals to leverage existing Web SSO authentication sessions of a user when contacting backend Service Provider sites.**
  - Work with those package mechanisms that currently support “delegated authentication.”
  - Ensure that Service Providers have access to the documentation they need to support this feature.

## Deliverable 4

- **Provide plans for the promotion and adoption of these Recommended Practices to make the access improvements a reality**
  1. Marketing plan
  2. Business case/justification will be developed as part of the marketing plan.

## Challenges?

- Communication between sub teams
  - Deliverables are still not very self contained
  - Sub teams need to work with each other
- Standard vocabulary isn’t so easy
  - How do you define “logout”?
- Varying levels of technical and business knowledge and experience
  - What is Shibboleth and how does it work? Why is it different?
- Marketing plan
  - None of us have written one
  - Formalized plan has never been written for a NISO working group
Questions and More Information

- SSO website: [www.niso.org/workrooms/sso](http://www.niso.org/workrooms/sso)
- SSO Interest Group list: [www.niso.org/lists/ssoinfo](http://www.niso.org/lists/ssoinfo)
- SSO Charge: [www.niso.org/workrooms/sso/charge](http://www.niso.org/workrooms/sso/charge)
- Harry.kaplanian@serialssolutions.com