

Shibboleth/OpenAthens/SSO and RefWorks

Question

How does a subscribing institution get started with Single Sign On (SSO) (SAML 2.0) Shibboleth or OpenAthens in RefWorks?

Answer

Review this article with your IT department. Then, submit a case to [RefWorks Support](#) and provide the following details in the request:

1. Subscriber name:
What is your Subscriber name? This is how your Institution's name will be displayed in the WAYF (list of Institutions).... e.g. "University of Washington" or "Central Coast Pharmaceuticals"
2. Does your institution belong to a Federation? If so, which one (InCommon, OpenAthens, etc.)? Please provide your metadata if:
 - a. Your institution does not belong to a federation
 - b. Your institution belongs to a federation to which RefWorks does not belong
[RefWorks Federation Details](#)
3. If your organization does not belong to InCommon Federation or OpenAthens (see #2 above), you must download RefWorks SAML metadata and configure as a service provider.
4. What is your IDP (Identity Provider) entityID?
This is the entityID value in your institution's SAML metadata. Usually this is in a form of a URL; Example RefWorks' shibboleth: entityID=<https://shibboleth.refworks.proquest.com/shibboleth/sp>
5. Do you use [ePPN](#) or [ePTID](#) (Person Principal Name or Person Principal ID) to identify users?
You must have at least one ID to configure SSO connection with RefWorks.
6. Who will be the point of contact at your institution for the implementation?
Please include email address for contact
7. Test credentials that we can use to debug our configuration if it's not working properly.
Test credentials are required before we can start implementation.

Note

Note: You may use the RefWorks SSO feature (based on your SAML metadata) using your

existing services, such as OKTA or Entra ID (formerly Azure).

If you do not yet have a metadata file, you must create the SAML file to send the data to RefWorks.

After form submission, our production Service Provider (SP) will be configured to allow your Identity Provider (IdP) access to RefWorks. The institution will not be added to the RefWorks login page until testing and other preparations are complete.