

IFoA LIBRARY SERVICES

USING THE IFoA ACTUARIAL KNOWLEDGE HUB

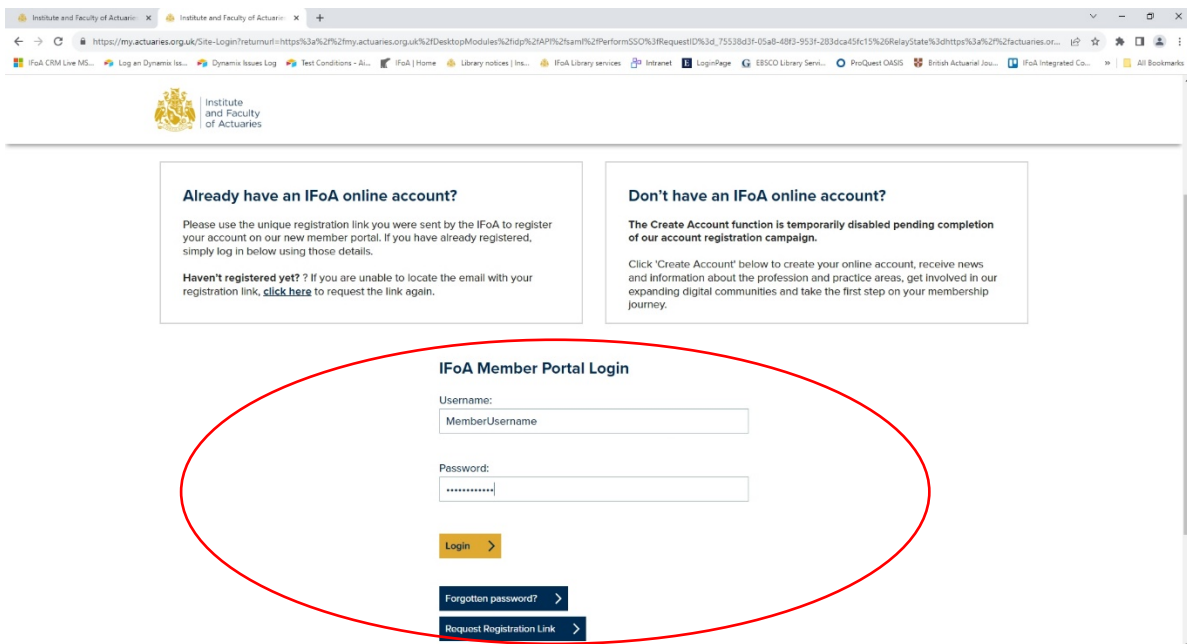
Login to the IFoA Actuarial Knowledge Hub and IFoA eLibrary resources


There is one member login route for IFoA members to access, search and view full ebooks and online resources that the IFoA Library subscribes to for IFoA members.

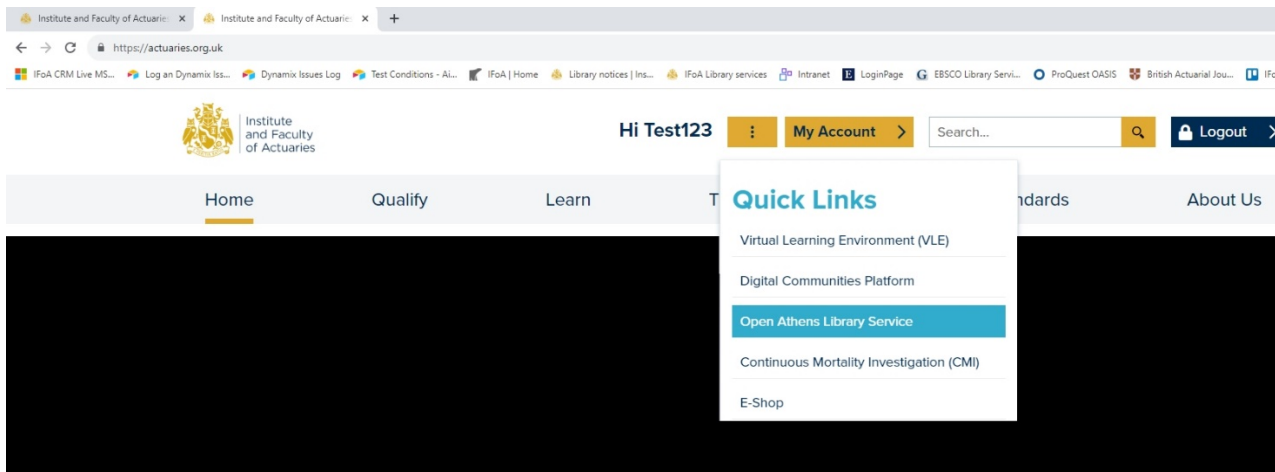
From the IFoA website at <https://actuaries.org.uk> click to login as an IFoA member:



Enter your IFoA member login credentials at the member portal:
(prior registration for new members will be required before login)



On reaching either the IFoA website home page again showing your username, or your member 'My Account' page after login, click on  pull-down menu of options next to 'My Account' - Click 'Open Athens Library Service'

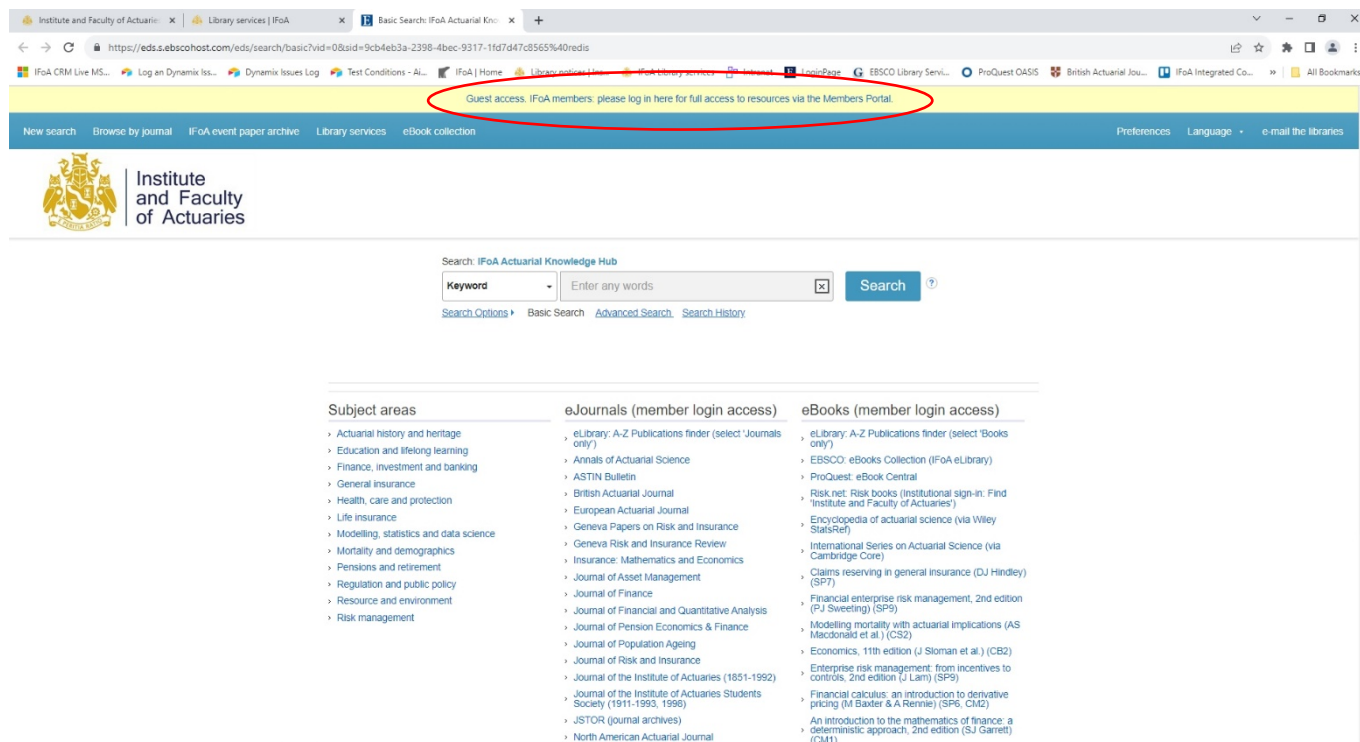


Following this option, you pass directly to the IFoA Actuarial Knowledge Hub, and by your member login, you will be 'authenticated' (by OpenAthens) to access full text of eLibrary resources that you find by using the Hub's search.

Note! If you have *already logged in* to the IFoA website to view your 'My Account' for other purposes, then links from other Library pages advising 'member login' to access eLibrary resources should take you directly to the Actuarial Knowledge Hub page where you can begin your search or navigate to digital eBook titles.

The Actuarial Knowledge Hub is available for public 'guest' users to search at <http://discovery.actuaries.org.uk> (or by following links to the Hub from the IFoA website's 'Library Services' page. In this mode the Hub discovery tool will report search results, but access to full text eBooks and online journals by members will require login.

Login following '*IFoA Members: Please login here for full access to resources via the Members Portal*' link at the top of the Actuarial Knowledge Hub page will lead the member to the IFoA member portal login as described above.



After login through the member portal outlined above, you will return to the Actuarial Knowledge Hub with member access to all IFoA subscribed eLibrary resources.

Note! After login, EBSCO may present a page to 'Select Resource': '**EBSCO Discovery Service**' (for the Actuarial Knowledge Hub search' OR '**New Publication Finder UI**' (an A-Z route to titles of journal and ebook resources). A link to the Publication Finder also features on the Hub's home search below 'eJournals' and 'eBooks' columns.

The IFoA Actuarial Knowledge Hub: orientation

The Hub search is free for all to use in a 'Guest' access mode; then IFoA members can login via the top link.

The Hub's first page presents a **basic search** box, '**Subject areas**' listing links that run prepared searches for library catalogue and online resources on broad actuarial subjects, and '**eJournals**' and '**eBooks**' of the main actuarial, insurance, pensions and risk journal titles that the IFoA Library subscribes to for members. Also among these are some eBook titles that form part of core reading for some IFoA exam subjects.

From the top bar, there are links to:

'**New search**': Clear existing any existing search entered, to enter new search terms.

'**Browse by Journal**': See links to the actuarial journals shown along with routes to find other journals on other subjects included in the IFoA eLibrary's subscription packages. Member login is needed to view full text of articles.

'**IFoA event paper archive**': Move to the IFoA website page listing conference papers by year then event title, although the Hub search can also find many individual conference papers on the Library catalogue.

'eBook collection': Browse the collection of eBook titles provided by Ebsco, the supplier that hosts the Hub. The IFOA eLibrary also offers **'eBook Central'** from ProQuest and more ebooks from Cambridge Core. Search of the Hub finds eBook titles and results will link for members to view the eBook online or download it for time-limited use on your device. eBooks operate on licences allowing one or sometimes unlimited member users at one time.

'Preferences': Set the style how you prefer to see search results first presented, as well as the language and report formats, and your email contact address if you wish to share selected references to search results.

'Email the libraries': Complete an enquiry form to send to libraries@actuaries.org.uk and the IFOA Library Service will receive this and respond.

Search the IFOA Actuarial Knowledge Hub

The Hub's first page presents a **Basic Search** box in which to enter search terms, initially set to search for any 'Keyword' (author name, title or subject keyword). Enter word(s) and click 'Search'. The search will find and display results as *titles* of books, articles and other online resources that best fulfil the combination of all or most of the search terms entered. Enter a "word phrase" in quotation marks, or first results listed will be those that most match the words in the order. You can then apply the Hub tools to refine results to be more precise to your needs.

At Basic Search level you can adjust the search for 'Author' name or 'Title' only instead of the default 'Keyword' for more precision. A search for Title words will more likely find fewer references of greater relevance as the resulting titles are those that describe the main focus of an article or book resource.

Below the search box, click to pull down 'Search options' to add further specifications to results you seek:

Search: IFOA Actuarial Knowledge Hub

Keyword - Enter any words Search

Search Options - Basic Search Advanced Search Search History

Search Options

Search Modes and Expanders

Search modes

Boolean/Phrase

Find all my search terms

Find any of my search terms

SmartText Searching [List](#)

Apply related words

Also search within the full text of the articles

Apply equivalent subjects

Limit your results

Catalogue Only

Full Text

Publication

Publication Date

Month Year - Month Year

Available in Library Collection

Scholarly (Peer Reviewed) Journals

Author

Title

Language

English

Chinese

Dutch/Flemish

Reset

Search

These are some 'filters' that can help you refine your search in combination with keywords:

Search Modes and Expanders: Here you can click buttons to your preference for finding a phrase ('Boolean/Phrase'), and all search words you entered. Again search phrase words in the 'Title' field for results more closely matched on a subject. 'Find any of my search terms' is useful for finding words that have variant spellings. Click on [?](#) for help that explains how these search modes improve or broaden search results.

Limit your results: Click boxes shown to find references from the IFOA Library 'Catalogue only', 'Full text' (limits to where IFOA member can access full articles and ebooks after member login) and/or enter a 'Publication Date' range

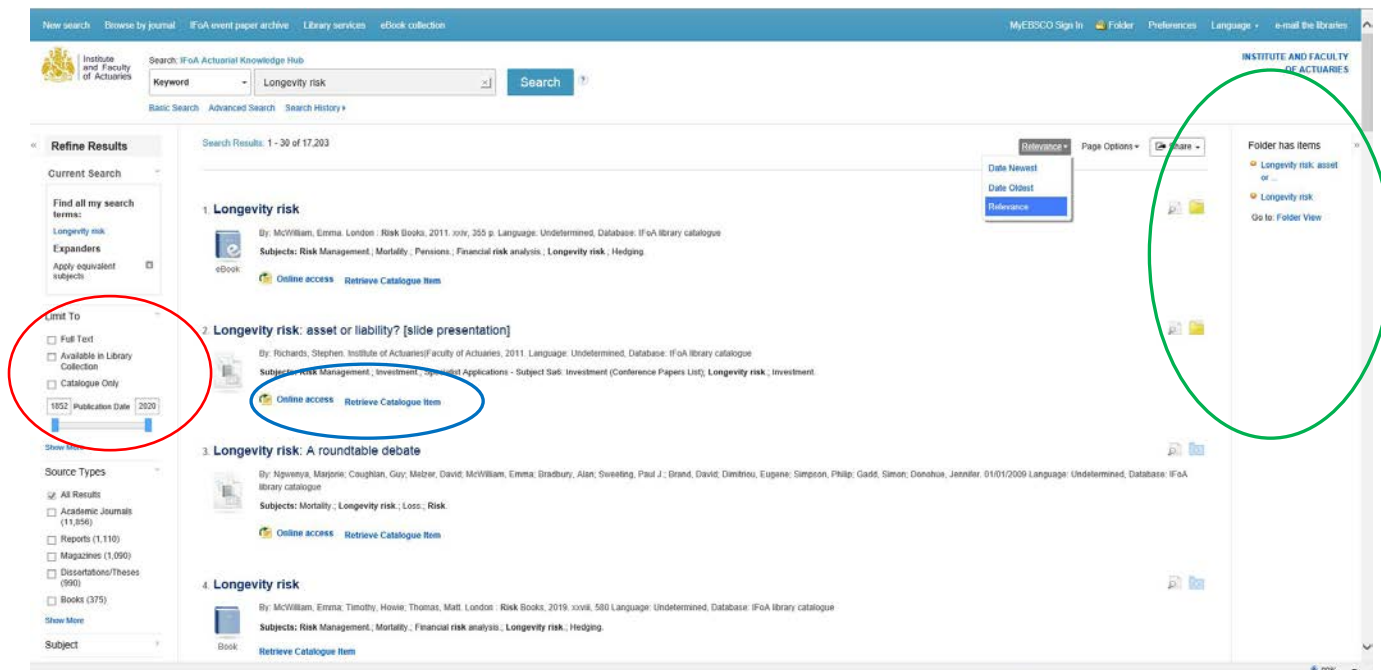
from January selected of one year to December of a later more recent year. You can limit results by **Language** from a pull-down menu of languages, using <Ctrl> key with your mouse click to select more than one. Search limiting to **'Scholarly (Peer Reviewed) Journals'** will find articles from academic sources, omitting pre-journal research papers.

'Apply search within full text of the article' will find results in which the search term or phrase appears with the abstract of indexed subject keywords – useful to try if a first search on Title does not yield many initial results.

Click boxes to refine your search then click on **Search**. There will be further opportunities to filter your results...

Understanding and improving Hub search results

A search may retrieve a large number of results listed in order of 'relevance'.



Check boxes to apply one or more of the filters from the left side menu (circled in red above) to refine search results:

<input checked="" type="checkbox"/>	Full text	Amends results to those that IFoA members can view full text of articles and ebooks of journals that the IFoA Library subscribes to.
<input checked="" type="checkbox"/>	Available in Library collection	Includes results to those printed publications and resources indexed on the IFoA Library catalogue, and where you can request to the Library Service to borrow items. 'Catalogue only' limits only to Library catalogue items you can request to borrow.
<input type="text" value=" "/>	Publication date	Enter start and end year of a publication date range or use scroll bar to narrow results to a more recently published set of references.

From the results, the title shown links to a full Hub reference to the item. Below the reference (circled in blue above) you may see **'Online access'** which will link to the online resource. You may also see **'PDF Full Text'** or **'Full Download'** for some eBooks available in the Ebsco eBook collection or 'JSTOR Full Text' for articles in journals to which the IFoA Library has subscription to a collection. Access will be subject to IFoA member login outlined above.

'Retrieve catalogue item' will transfer to the record in the IFoA Library catalogue (<http://library.actuaries.org.uk>). It is from the IFoA Library catalogue that you can request the book from the IFoA Library Service.

Selecting and exporting Hub search results

Members who are logged will see and can click on the folder '+' icon next to each reference (circled in green above) to add items of interest into your personal folder of references from this search session.

Once you have clicked search result references, a 'Folder view' panel appears, listing items selected. Click on 'Go to: **Folder view**' for a new page allowing confirmation of your selections to **Print**, **Email** (to an email contact you specify), **Save** (as a file) or **Export** a file in a chosen format. There are options to write the details of selected items in a specified reference style (not illustrated above).

Advanced Search

There is a link to 'Advanced Search' below the Basic Search box on the Actuarial Knowledge Hub's home page:

The screenshot shows the Advanced Search page with the following details:

- Search query: mortality OR longevity
- Field selected: TI Title
- SO Journal Title: Actuar* OR ASTIN OR "Insurance: Mathem
- Search Options: Find all my search terms, Apply equivalent subjects
- Limiters: Publication Date (2020 to 2023)

Advanced Search allows you to build a more targeted search of indexes related to resources in the fields of actuarial science, finance and insurance that the IFoA Library subscribes to for members.

Three search boxes initially show in which to enter terms, or click '+' to add more search boxes. In each box, click on 'Select a field' to specify TX (All Text), AU (Author), TI (Title), SU (Subject Terms), SO (Journal Title/Source), AB (Abstract), IS (ISSN – serial title number if known), or IB (ISBN – book number, if known) fields to search.

The example search shown looks for 'mortality' or 'longevity' specifically appearing in a journal or book Title (for more precise relevance of the subject of the resources the search will report in results). Adding search for 'Actuar*' (appended asterisk will find 'actuary', 'actuarial' or 'actuaries') OR other specified journal titles in quotation marks, will confine results to articles of the specified journals. Click on [Search](#) to run Search.

The screenshot shows the search results page with the following details:

- Search query: mortality OR longevity
- Field selected: TI Title
- SO Journal Title: Actuar* OR ASTIN OR "Insurance: Mathem
- Search Results: 1 - 30 of 493
- Refine Results: Full Text, Catalogue Only, Scholarly (Peer Reviewed) Journals
- Publication Date: From 2020 To 2023

Search Results:

- Hedging longevity risk under non-Gaussian state-space stochastic mortality models: A mean-variance-skewness-kurtosis approach**
By Li, Johnny Siu-Hang, Liu, Yanxin, Chan, Wai-Sum. In *Insurance Mathematics and Economics*. November 2023. 113-96-121. Language: English. DOI: 10.1016/j.insmatheco.2023.08.001. Database: ScienceDirect. [Full Text Finder](#)
- Socioeconomic differentials in mortality: implications on index-based longevity hedges.**
By Lyu, Pintao, Li, Johnny Siu-Hang, Zhou, Kenneth G. *Scandinavian Actuarial Journal*. May 2023. Vol. 2023 Issue 4, p359-387. 29p. DOI: 10.1080/G3461238.2022.2104131. Database: Finance Source. In this paper, we address the mortality modeling needs for pension plan sponsors who wish to use index-based solutions to mitigate their longevity risk exposures. Specifically, we propose the th...
Subjects: Trusted pension funds; Longevity; Pensions; Hedging (Finance); Mortality; Death rate. [Full Text Finder](#)
- Hedging Mortality/Longevity Risks for Multiple Years.**
By Lin, Tzuling, Tsai, Cary Chi-Liang. *North American Actuarial Journal*. 2020. Vol. 24 Issue 1, p118-140. 23p. Publisher: Taylor & Francis Ltd. Database: Complementary Index. [Full Text Finder](#)

On viewing results, you can apply filters to 'Refine Results'. In the example results shown above, you can narrow the date range to more recent articles e.g. from 2020 to 2023. After using a filter, the Hub will adjust the results.

As outlined above, you can click to add a reference to a personal folder of resources of interest for review or export.

Capturing a Search to share or advise to others

In the example from a Search (advanced or basic) shown above, top right of the results is a 'Share' option to click. This 'Share' feature is only available to member users logged in to use the Hub.

'Use Permalink' allows you to copy the search you have built and paste it for another to run the search and view the results again. The results of the search may automatically update with the addition of newer resources published that the Hub search can find.

The permalink for the example search used here as copied from the Hub is:

[https://search.ebscohost.com/login.aspx?direct=true&AuthType=shib,ip&bquery=TI\(+mortality+OR+longevity+AND+SO\(+Actuar*+OR+ASTIN+OR+%26quot%3bInsurance%3a+Mathematics+and+Economics%26quot%3b+\)&cli0=DT1&clv0=202001-202312&type=1&searchMode=And&site=eds-live&custid=ns023773](https://search.ebscohost.com/login.aspx?direct=true&AuthType=shib,ip&bquery=TI(+mortality+OR+longevity+AND+SO(+Actuar*+OR+ASTIN+OR+%26quot%3bInsurance%3a+Mathematics+and+Economics%26quot%3b+)&cli0=DT1&clv0=202001-202312&type=1&searchMode=And&site=eds-live&custid=ns023773)

To share a search for public user interest, an edit of the link is needed as highlighted below:

[https://search.ebscohost.com/login.aspx?direct=true&AuthType=guest,ip&bquery=TI\(+mortality+OR+longevity+AND+SO\(+Actuar*+OR+ASTIN+OR+%26quot%3bInsurance%3a+Mathematics+and+Economics%26quot%3b+\)&cli0=DT1&clv0=202001-202312&type=1&searchMode=And&site=eds-live&custid=ns023773&groupID=main](https://search.ebscohost.com/login.aspx?direct=true&AuthType=guest,ip&bquery=TI(+mortality+OR+longevity+AND+SO(+Actuar*+OR+ASTIN+OR+%26quot%3bInsurance%3a+Mathematics+and+Economics%26quot%3b+)&cli0=DT1&clv0=202001-202312&type=1&searchMode=And&site=eds-live&custid=ns023773&groupID=main)

Editing in 'guest' and appending '&groupID-main' allows another user to view the search results without having to login as a member.

EBSCO: 'New Publication Finder UI' for IFoA resources

A link to the 'Publication Finder' also features on the Hub's home page below 'eJournals' and 'eBooks' columns. This offers another route to resources available as part of IFoA Library subscriptions. Access to full text of resources will only follow member login to the IFoA website member portal.

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The image shows a screenshot of the EBSCO Publication Finder interface. On the left, there is a sidebar with the text 'EBSCO' at the top, followed by 'Select Resource'. Below this, there are two options: 'EBSCO Discovery Service' and 'New Publication Finder UI'. A blue arrow points from the 'New Publication Finder UI' option to the main search interface. The main interface has a dark blue header with the text 'Searching: Publication Finder for INSTITUTE AND FACULTY OF ACTUARIES' and 'powered by EBSCO'. Below the header, there are three tabs: 'Publications', 'Browse Databases', and 'Browse Subjects'. The 'Publications' tab is selected. There is a search bar with the placeholder text 'Search Title' and a magnifying glass icon. Below the search bar, there are three radio buttons: 'All', 'Journals Only', and 'Books Only'. Below the radio buttons, there are two rows of letters: the first row contains letters A through Z, and the second row contains two-letter combinations from AA to AZ. Below the letters, there is a 'Get Started' section with a laptop icon and the text 'Find resources available from the library's collection.' At the bottom of the page, there is a footer with links for 'Help', 'Disclaimer', 'Privacy Policy', and 'Terms of Use', and a copyright notice: '© 2021 EBSCO Industries, Inc. All rights reserved.'

Here you can select the filter buttons for 'All', 'Journals only' or 'Books only' and then click on A to Z letters to retrieve titles of resources whose titles begin with this letter (or first two letters below the A-Z), or you can search for key words appearing in the titles of resources. Click on the magnifying search symbol to run the search. Results report resource titles, with links to the home record for journals.

Set to retrieve 'Publications', the publication finder gives an idea of the range of journals and ebooks from which the Actuarial Knowledge Hub retrieves results of your search terms entered. You may also select 'Browse Databases' to use external intelligence search tools, offered by EBSCO that hosts the Hub, although not all search result references will be accessible.

Please note that there may only be access to the back issues of some journals for *some years before the current year* through the JSTOR archive resource, as the IFoA Library may not subscribe to the journal's new issues.

Troubleshooting

The Actuarial Knowledge Hub is a 'discovery' tool that finds research and publication resources in the Institute and Faculty of Actuaries Library catalogue, and more articles from online journals in the IFoA Library subscriptions. It can also find references from relevant database sources *beyond* Library holdings.

The following may address queries that can arise in use of the Actuarial Knowledge Hub:

I cannot access the full text of an item listed in my search results

Please check you have logged in to use the Hub as an IFoA member. If the Hub page invites '*Please login here for full access to resources via the Members Portal*' at the top, please follow this login link via the IFoA website's OpenAthens page.

Sometimes, the publisher's site hosting a journal that the IFoA Library subscribes to may not have recognised the user as having logged in to enjoy access to full text of an article you find. If it is an article from one of the journals listed on the Hub's first page, please note details and follow the link to that journal and navigate to the journal volume part and access to the article may be more successful.

The search result may be a pre-print version of a research paper and the result is reported as a reference from a database gateway to research. Please try to follow source URL or DOI links for the reference, and there may be a route to the full text.

It may be the search result is an article from a journal that the IFoA Library does not subscribe to. Please contact libraries@actuaries.org.uk or follow the 'Email the libraries' link to report the reference you wish to read. The IFoA Library may be able to obtain it from the British Library On Demand document supply, subject to reasonable limit.

I cannot access an eBook found by the search

Again access to all ebooks only follows member login to use Actuarial Knowledge Hub resources.

The IFoA Library acquires access to eBooks for members through a number of providers. EBSCO hosts the IFoA's Actuarial Knowledge Hub and offers a number of titles in its '**eBook collection**'. In search results, these show with a 'PDF Full Text' or '**Full Text Download**' link to follow. There may be limits to the amount of an ebook that can be downloaded, owing to copyright and publisher restrictions, but there can still be online viewing only of the whole ebook without download options.

eBooks from other providers, such as ProQuest ('**eBook Central**') and Cambridge Core, will feature in search results as 'ebook' – please follow the 'Online access' link to open the provider's landing page for the ebook and contents.

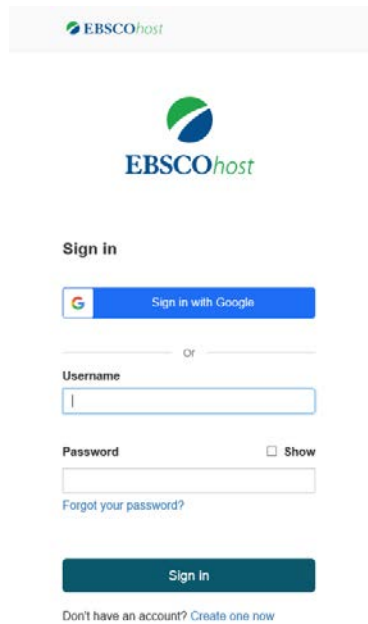
'**Retrieve catalogue item**' also transfers to the IFoA Library catalogue where there also be a link to 'Read me' (Click to online ebook). IFoA Library printed books can only be requested through the IFoA Library catalogue.

The IFoA Library buys a licence for one or a number of concurrent users to view ebooks. For popular titles, several users can access an ebook online, but in times of high demand, access may be denied until a current reader exits from the ebook. Please try to access the ebook at regular intervals.

Occasionally, the publisher of an ebook may not have recognised the member's Open Athens login to access the ebook. In this case, follow link for 'Get Access' and look for institutional login as 'OpenAthens federation' and then selecting 'Institute and Faculty of Actuaries'.

For any queries, please contact libraries@actuaries.org.uk and the IFoA Library Service will be pleased to advise.

I see these EBSCO invitations to login but do not gain access using my IFoA member credentials



A System Problem has Occurred
To begin a new session, please [login again](#).



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These messages can occur because your Hub user search session may have ‘timed out’ or become disconnected from your search history, possibly when clicking <Back> after a period of search inactivity. With apologies, you will need to login again following routes 1, 2 or 3 outlined in this guide, not through the Ebsco sign-in shown.

I see this OpenAthens invitation to login but do not gain access using my IFoA member credentials

Sign in with an OpenAthens account

Username

Password

[Problems signing in?](#)

Find your institution

Search

Outside the IFoA website, this is a separate login page especially for **non-members** such as students registered to sit the next IFoA CM1, CS1 and SP9 examination sessions and associated examiners and markers to access examined textbooks as ebooks. The IFoA Library creates ‘OpenAthens accounts’ for these users and their access to *selected* resources will be through a different interface login with a pre-set username. Any non-member can still use the Actuarial Knowledge Hub search in guest mode, but access to full text resources only becomes available for IFoA members after login.

Following the routes 1, 2 or 3 outlined in this guide, IFoA members can benefit from ‘single sign-on’ to the full range of IFoA eLibrary resources.

For any queries, please contact libraries@actuaries.org.uk and the IFoA Library Service will be pleased to advise.

All links in this guide here may change as IFoA Library Services adapts the Hub page to member user demand.