



Authentication and Authorisation for Research and Collaboration

NA2: Training and Outreach

Laura Durnford
GÉANT

AARC All Hands meeting
21 March, 2017
Athens, Greece



Agenda

- T1 - Learning needs analysis - Objectives & achievements
- T3 - Training for resource and service providers - Objectives & achievements
- T4 - Training for identity providers - Objectives & achievements
- T2 – Outreach and dissemination – Objectives & achievements
 - Communications going into Y2
 - **FEEDBACK OPPORTUNITY 1** - AARC video
 - Blogs
 - User-centric approach – LIBER
 - Website **FEEDBACK OPPORTUNITY 2 (later)**
 - Social media
 - Leaflet for SPs
 - Coming work & challenges
 - What else?

Objectives WP Training and Outreach Year 1



Provide general purpose material with the aim of transferring solutions about how to overcome technical, organisational and legal obstacles to make federated access more pervasive;



Provide promotional material and training for identified AARC user groups to optimise the uptake of federated identities in accessing electronic resources together with other library services;



Provide tailored trainings to ensure the uptake of AAI;



Outreach and Dissemination to raise awareness about AARC and the AAI concept.

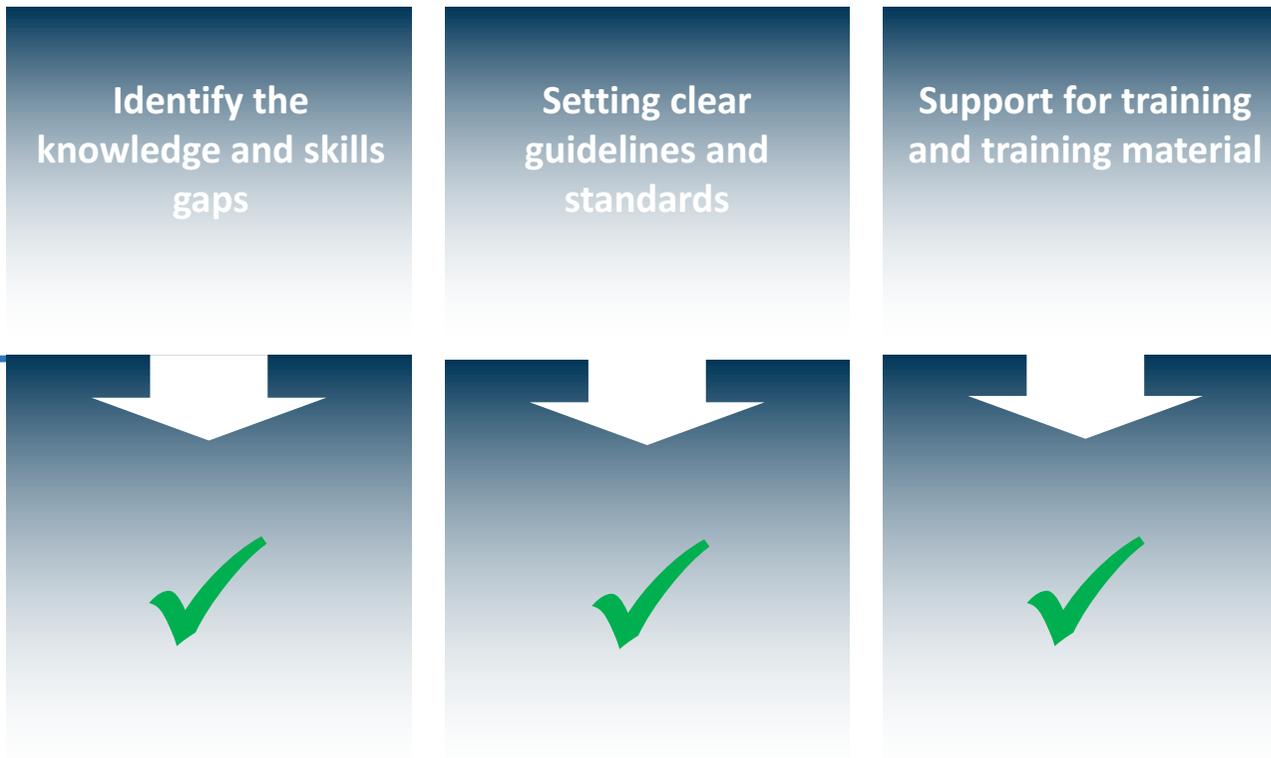


Identified and analysed user communities' requirements

T1: Learning needs analysis - Objectives & achievements

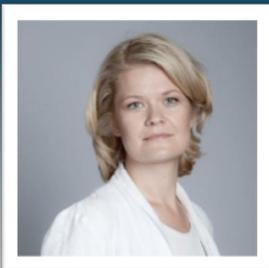


**Objectives
from
Technical
Annex**



**Year 1
Results**

T1 Learning needs analysis - achievements



Irina Mikhailava
GÉANT

- Standardised templates & models for community outreach:
 - Value Proposition model, Business Canvas model, pitching formula
- Standardised approaches for training delivery:
 - Learning Needs Analysis framework, Training Design template, participant engagement and feedback.
- Engaged with consultant to take training online
 - 1st product Srtfi (**Wed am more detail**)
- co-training activities identified with OpenAIRE
 - (libraries – AARC overlap on data protection)
 - Finding a date for their expert to speak to AARC
 - Need someone to present to OpenAIRE - **Volunteer please!!**
- Creating AARC expertise portfolio on Moodle platform
 - **goes into AARC2**

T3: Training for resource and service providers - Objectives & achievements



Objectives from Technical Annex

Training material For Resource and Service Providers

Training for ELIXIR Resource and Service Providers

Training for DARIAH Resource and Service Providers

Training for Worldwide LHC Computing Grid Resource and Service Providers

Year 1 Results



Planning stage



T3 Training for resource and service providers - achievements



Manne Miettinen
CSC

- Training workshop concept
- Training for Service Providers - module online;
- Training workshop carried out in collaboration with GÉANT:
 - DARIAH: Digital Humanities e-infrastructure communities
 - ELIXIR: The European biological, and biomedical user community.
- Preparing 2-day workshop for 4 April 2017.
 - Freiburg event for Elixir Service Providers (10-20 participants)
 - Updated material on Open ID Connect
 - <https://www.eventbrite.com/e/make-your-services-accessible-via-elixir-aai-tickets-30844269039>

T4: Training for identity providers - Objectives & achievements



**Objectives
from
Technical
Annex**

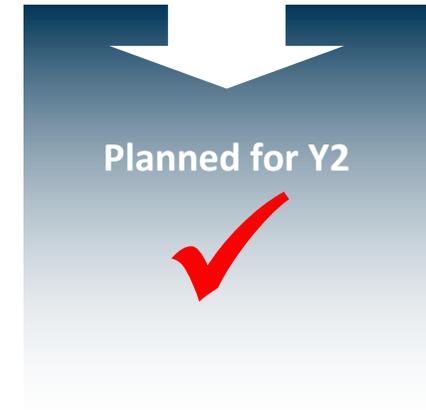
Solutions for the easy
creation of Identity
Providers

Analysis of the
targeted user groups
and libraries
requirements

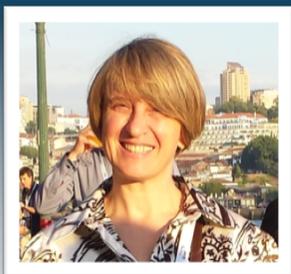
Training material for
Identity Providers

Trainings on the
results of JRA1 and
SA1

**Year 1
Results**



T4 Training for identity providers - achievements



Maria Laura Mantovani
GARR

- Identified requirements from user communities and libraries
 - Standard training on IdP deployment already done by federations
 - Need training module on scalable attribute release in federation and interfederation
 - Specific needs in the library space: federated proxy, federated discovery
- IdP training on attribute release
 - Module produced & reviewed by federation operators at TNC16
 - Transcribed & chunked content to make set of short lessons – **record 10-11 April**
- On basis of SA1 pilot
 - produced a guide targeted at libraries:
<https://wiki.geant.org/download/attachments/58131750/guidaEZproxyShibboleth-en-2.pdf?version=1&modificationDate=1463672915747&api=v2>
 - And a demo portal page to demonstrate the results of the pilot:
<https://wiki.geant.org/display/AARC/LibrariesCockpitPanelEZproxy>
 - Webinar for librarians and deployers of electronic resources at libraries, 18 Nov 2016:
 - Reported result as addendum to Deliverable DSA1.1
- Presentation to SMEs, incl. Srtfi slide
<https://www.soie.it/eventi/2017/datacenter-experience-milano-2017/area-visitatori/agenda/#menu> on March 14th.
- **GARR Workshop 4-7 April, with track on Federated Identity.**
 - Day training on Shibboleth 3.3 installation and configuration, & half-day training about the outcome of AARC-JRA1.
<http://www.eventi.garr.it/it/ws17/programma/programma-esteseso/seminario-nuove-architetture-per-le-federazioni-di-identita>
 - In the main programme have a dedicated session. Topics are:
 - SAML-OIDC integration to connect identity federation and clouds: that case of GARR federated Cloud;
 - eGOV identities used to access academic SPs: comparing experiences coming from 4 universities.

T2: Outreach and Dissemination - Objectives & achievements



**Objectives
from
Technical
Annex**

Basic Material

Legal material

Liaison with other
projects/communities

General
Dissemination about
AARC results

**Year 1
Results**



Planned for Y2



Communications going into Y2



Pilot platform approaching take off - *11 pilots of AAI components soon ready for research communities to test.*
Package of support materials per pilot, then 'advertise'.

Training – further develop materials and delivery, focusing on webinars - long-term legacy
- promote training events and content

Communications planning – ensure cover all needs of the project activities and tasks.

Messaging – ensure activity and task leaders think about audiences and calls to action.

Website – review, update, re-design to make more engaging and effective

More....

Blogs published

- <https://blog.geant.org/2017/03/20/welcome-to-iam-online/>
- <https://aarc-project.eu/architecture-guidelines-recommendations-for-comments/>
- <https://aarc-project.eu/aarc-progress-strategy-cern/>
- <https://aarc-project.eu/aarc-advises-hnscicloud-at-project-design-phase-kickoff/>
- <https://aarc-project.eu/a-hitchhikers-guides-to-the-aai-galaxy/>
- <https://aarc-project.eu/aarc-pilot-platform-approaching-take-off/>
- <https://aarc-project.eu/federate-to-win-an-aarc-workshop-at-the-liber-annual-conference-2016/>
- <https://aarc-project.eu/aarc-steps-into-2nd-year/>
- <https://aarc-project.eu/aarc-draft-blueprint-architecture-available-for-comments/>

AARC draft Blueprint Architecture available for comments

16th June 2016 | Written by Christos

Leave a Comment

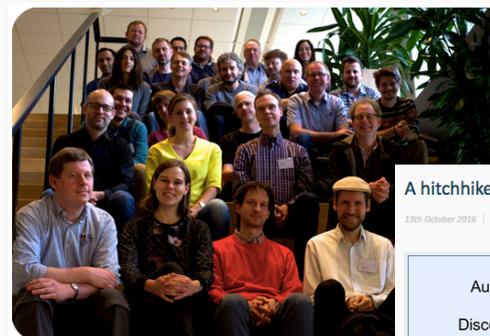


1st year of the AARC project, the architecture work package has designed a high-level (blueprint) AAI. The goal of this architecture is to help e-infrastructure operators and technical architects and the various research communities to enable secure, scalable, and interoperable federated access to by using proven technical solutions and/or implementation patterns.

AARC steps into its second year with praise for achievements already made

26th July 2016 | Written by Iulia Popescu

Leave a Comment



AARC is now entering its second year. And as all little toddlers do, it has taken the first steps. On 27-28 June the achievements of the AARC (Authentication and Authorisation for Research) project were presented to the European Commission's reviewers, who recognised AARC's very supportive of the work achieved so far.

A hitchhiker's guides to the AAI galaxy

13th October 2016 | Written by Ulija Florio

Leave a Comment

Authentication & Discovery Service	Different technologies supported
Attribute Management & Aggregation	Support for third parties attribute authorities
Proxy and Credential Translation Services	Convert credentials as needed to access different services
Authorisation	Support for authorisation policies based on local or external information

Blogs to come

- AARC scalable grouping of security and trust policies a significant step forward for research collaborations (David G interview)
- AARC delivers AAI architecture and guidelines for research communities (Christos interview)
- AARC guides libraries through federated access management (pilots & materials)

- Hitchhiker's guides – how AARC pilots pave the way to integrating with research infrastructures (EUDAT, PRACE – Paul v Dijk?)
- AARC training platform launched with x materials (Irina – later date)
- Pilots plugfest (Paul v Dijk)

- **YOUR BLOG / TOPIC HERE??**

User-centric approach

- 1st package of activity - libraries (SA1, LIBER, Moravian Library, EGI)
 - Objective: hands-on 'toolkit' collection of resources online
 - Public web page (eventual) information, training, flyers, Q&A, roleplay game, links for feedback etc
 - Ready-to-use format



Do you grant access to your library's resources based on IP-addresses? Do you maintain the correct IP-address ranges yourself – a labour intensive and inaccurate process? Can you manage multiple identity provider - service provider connections? Are your users confronted with confusing interfaces? Can walk-in guest users access e-resources easily?

AARC has piloted the following solutions - try them!

Centrally Managed Access for Consortia

- Manage publisher contracts centrally, as a consortium.
- Save time implementing and managing; no need to establish many one-to-one trust relationships between IIPs and SPs.
- Retain control of branding and all policies.
- Provide accurate statistics quickly and easily.

Guest Access for Walk-in Users

- Allow all users, even those without institutional accounts (eg. walk-in guest users), to access federated e-resources.
- Configure or change settings via an intuitive web-based interface.

Federated Access to all Resources

- Deliver quick federated access to all e-resources, even those which currently only support IP-based authentication, using AARC's suggested set-up of the EZProxy software.
- Give users one consistent method of authentication to access both federated and non federated e-resources.

We have been running EZProxy for many years now and we also have walk-in users. By adopting these solutions, we could change our configuration and it could solve our problems.

www.aarc-project.eu/libraries

Federated access information for libraries

Federated access management in a nutshell

Imagine a group of institutions managing digital user identities together at the organizational level. Now imagine the users of this group easily accessing all digital resources and services available in this group of institutions. Sounds good? That's what federated access is all about. Now let's get a little more technical. Federated access is based on a two entities model. The first entity is the Identity Provider (IdP), one of the member organizations, who has information about the user, for example role, affiliation, entitlement, name or identifier. With this information, the Identity Provider can authenticate the user. The second entity is the Service Provider (SP) that can authorize users to get access to resources. Service Providers can be member organizations or external providers, for instance virtual research environments or journals.

When a user initiates an access request to a Service Provider, the request is forwarded to the Identity Provider. The Identity Provider checks the user's credentials, and confirms this back to the Service Provider. Based on this verification, the Service Provider grants or denies access to particular resources.



Benefits for libraries

Federated access may require some investments, but it will help to overcome some of the problems associated with IP-based access, the limitation to a specific IP-range, or fuzzy statistics. Here are some of the long-term benefits for libraries:

- Higher security levels for both, digital resources and for users' personal information, because of the unified management of credentials.
- A more visible role for libraries when asking users to be identified by their federated identity, instead of just granting access through IP recognition.
- Easier integration of library services with virtual research environments where scientific resources and content can be accessed, used, stored and shared.
- Better statistics about the use of library resources, that can be used for reporting or strategic planning.
- Easier authentication and authorization in the long term for university libraries, as identity management processes are shared at the organization level. Libraries don't have to maintain their own user credentials.

InfoSheet: Federated access, information for libraries, 2017

AARC Your feedback on AARC project pilots for libraries

Pilot 1 - EZProxy

The EZProxy tool gives access to restricted content, no matter whether the service provider supports SAML or IP-address-based access control. Although EZProxy is known and used by many libraries across Europe, its 'Access Mode Switch' feature is relatively unknown. AARC piloted this feature and the demo is available here: <https://wiki.gant.org/x/04q5Aw>.

*** Did you try the AARC configuration of the EZProxy - pilot?**

Yes

No

Previous
Next

Q&A

Libraries

Why should we care about federated authentication and authorization?

There are many benefits to federated access, for libraries as well as end-users. End-users for example only need one set of credentials instead of many, experience much higher security levels and can access the facilities outside their institutions. Libraries have a much more visible role, can integrate library services with virtual research environments and for university libraries, identity management will be easier in the long term. It is also the best user experience library can provide to your patrons for accessing vast library resources. There is [AARC factsheet](#) with benefits summary.

What is federation and what is interederation?

Federations interconnect libraries and library service providers on a national level. **Interfederations** interconnect libraries and library service providers on international world wide level. There are national federations, academic **interederation** eduGAIN and commercial **interederation** OpenAthens. There is [AARC Federations 101](#) with basic **introduction** to identity federations.

How can I get a better understanding of what happens if I log in and federated access is in place?

If you want to know more about what happens when you log in, have a look at the [SWITCH On-line Demo](#). Workflows on several levels of detail are described here. If you want to go for a more fun approach, play the [AARC Federated Authentication Role Play](#) ([new link after it is published](#)).

- Inventory collaboration opportunities for outreach (12 projects + contacts identified)
- Shared meeting with comms officers similar projects in Den Haag
- Led work interviewing library decision makers - on current AAI, level of adoption, identify training needs
- Inventory upcoming events
 - Difficult without materials, social media channels etc.

Country	Organisation	Url	Type of stakeholder*	Contact	Collaboration	Actions	AARC contacts
EU	DARIAH DARIAH is a network of people, expertise, information, knowledge, content, methods, tools and technologies coming from various countries.	https://www.dariah.eu	ESFRI cluster project	Mike Mertens (CEO DARIAH) mmertens1@uni-goettingen.de	Working group, FIM4D: Federated Identity Management for DARIAH contact person Peter Gietz. DARIAH is already involved in NA.2. Training-Task 3, Manne Mietinnen (Task 3: Training for Resource and Service Providers) They have a Working team on e-Infrastructures (https://dariah.eu/activities/e-infrastructure/e-infrastructure-team.html) Ongoing collaboration on Policy Harmonization --> Accounting and Data Protection, MNA3.2. https://aarc-project.eu/wp-content/uploads/2015/11/MNA3.2-AccountingDataProt-20151130.pdf	Ask Peter for current developments within this working group and find further opportunities for collaboration. Contact e-Infrastructures team to find synergies and opportunities for collaboration.	Peter Gietz (peter.gietz@daasi.de) Martin Haase (DAASI)
EU	OpenAire2020 50 partners, from all EU countries, and beyond, will collaborate to work on this large-scale initiative that aims to promote open	https://www.opensaire.eu	e-Infrastructure / EU Project	Natalia Manola (Coordinator of OpenAire) natalia@di.uoa.gr	They would really love to discuss how we can work together	Get in contact with OpenAire coordinator to find synergies and opportunities for collaboration.	Melanie Imming (Melanie.imming@kb.nl)

Workshop at Liber conference 2016



- Including roleplay game: Federate to win! (collaboration Moravian Library)



Home > AARC toolkit for libraries

AARC toolkit for libraries

This page is dedicated to librarians interested in learning more about federated access.

- > Are you not sure what federated access is?
- > Are you still not convinced about the benefits?
- > Or are you not sure what you can do yourself?

These resources will help you.

About federated access



Infosheet: Federated access at a glance

Are you looking for basic information on federated access, the benefits and what you can do to take the lead?

[Download the infosheet \(PDF\)](#)



Training module: The basics of federated access

The training module **The basics of federated access** will take you through the basic principles and questions. Includes information, supporting movies and useful links.

[Explore the training module](#)



Training module for library service providers

[Explore the training](#)

Recent News

- > The challenges of accessing non-web based shared resources
- > Architecture guidelines and recommendations open for comments
- > AARC reviews progress and strategy at CERN meeting
- > AARC advises HNSciCloud at Project Design Phase Kickoff
- > A hitchhiker's guides to the AAI galaxy

Part of a wider work on project website



- Already been work on
 - Graphics & more interesting visually
 - Minor improvements to structure
 - Addition of materials

Download the **AARC Strategy** (pdf) for an overview of the project goal and outputs.

More information about AARC developments can be found on the **presentations** page.

AARC training modules contain a compilation of slide sets and other useful:

The technical annex shows the general description of AARC.

List of AARC project deliverables (webpage).

List of / (webpa

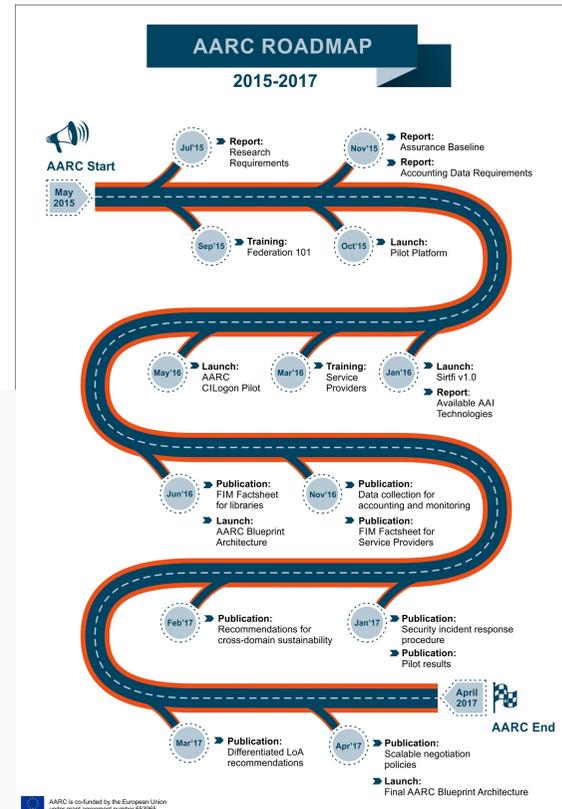
Download the **AARC leaflet** (pdf) for an overview of the project goal and outputs.

AARC Infoshare



The AARC project organises regular infoshares to promote AARC key achievements

- **Next Infoshare 2nd March 2017 14:00 CET** – Recommendations to resource providers and user communities to collect, provide access to, and publish any (personal) data related to the accounting, monitoring, logging – Uros Stevanovic
- **AARC Blueprint Architecture** – Christos Kanellopoulos Jan 2017



- Nov 2016: **FIM Use For Service Providers** Document presenting a set of architectural building blocks and implementation patterns that will allow the development of interoperable authentication and authorization infrastructures to support international research collaborations.
- June 2016: **Blueprint Architecture For Comments** Document presenting a set of architectural building blocks and implementation patterns that will allow the development of interoperable authentication and authorization infrastructures to support international research collaborations.
- June 2016: **Feedback for Librarians** A feedback to highlight the benefits of federated access across all libraries.
- May 2016: **AARC CILogon launched** A pilot based on the CILogon service operated in the US. The AARC version enables the creation of X.509 certificates on the fly upon user successful federated authentication.
- March 2016: **First IIP Training Delivered** A training module to support FIM and CARAN service provider to implement federated access use cases, with support of the eduGAIN team.
- Jan 2016: **Sirtifi v1.0 Published** AARC contributes effort to define Sirtifi v1.0, the final framework to enable a distributed response to a security incident in a federated context. Sirtifi v1.0.
- Jan 2016: **AAI Overview** Report on existing AAI and available technologies for federated access.
- Nov 2015: **Assurance Baseline** Document to describe a baseline assurance to support low risk use cases. This work continues to be open: [Sirtifi Working Group](#).
- Nov 2015: **Requirements on Accounting Data Published** Document to identify type of data generated by research and end-users and legal requirements to use them.
- Oct 2015: **Plus Platform created** AARC Stakeholder meetings resulted in share code and final components (SIP) was chosen due the possibility to enable federated access to it.
- Sep 2015: **Federation 101** First focus on federation package to describe federated access.
- July 2015: **Research Requirements** Researchers and library requirements collected via surveys and interviews.
- April 2015: **AARC Starts** 60-20 partners meet in Berlin to discuss the AARC plans and to align approaches.

Planning towards

- A more user-centric approach & restructure of website
 - No longer following the 'bureaucratic' project structure
 - Platform to deliver AARC outputs
 - Shelf-life beyond AARC
 - 'Brochure' to raise interest – link to more detail on e.g. wiki
- More detail later – **your feedback will be required!**

Social media

- About to be launched!
 - Facebook: @AARCproject
 - Twitter: @AARC_Project
 - Linked In: AARC Project

- To come
 - Upkeep & scheduling
 - Integrate into new website structure

- “How to reach global customers, with Federated Identity Management”



AARC

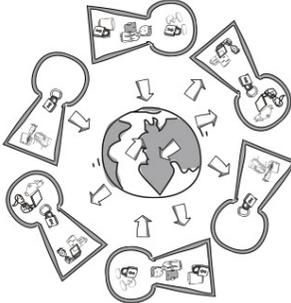
What can the AARC project do for you?

The AARC (Authentication and Authorisation for Research and Collaboration) project brings together 20 partners from among national research and education networking organisations (NRENs), e-infrastructures, libraries and service providers. AARC champions federated identity management (FIM) and eduGAIN. AARC facilitates the adoption of federated access in research collaborations. AARC provides technical and policy best practices to facilitate global access to online resources, data and services.

AARC supports services providers by offering:

- ◊ Training materials and opportunities to service providers;
- ◊ A point of liaison between service providers, eduGAIN, and other groups and initiatives working in the research and education identity federation space;
- ◊ A blueprint architecture to help identity architects in research communities and e-infrastructures to enable secure, scalable, and interoperable federated access to resources and services

How to reach global customers with Federated Identity Management



eduGAIN inter-federation helps everyone win!

Today online services are crucial to research and education. Students, teachers, researchers and institution staff rely on them for collaboration through webmail, e-learning, teaching and conferencing, analysing and sharing data, and for accessing journals and libraries.

But how do users access all the services they need? How do universities, museums, schools, research centres, teaching hospitals and other research and education institutions benefit from their users coming together with more services? And how do the services reach local or global customers?

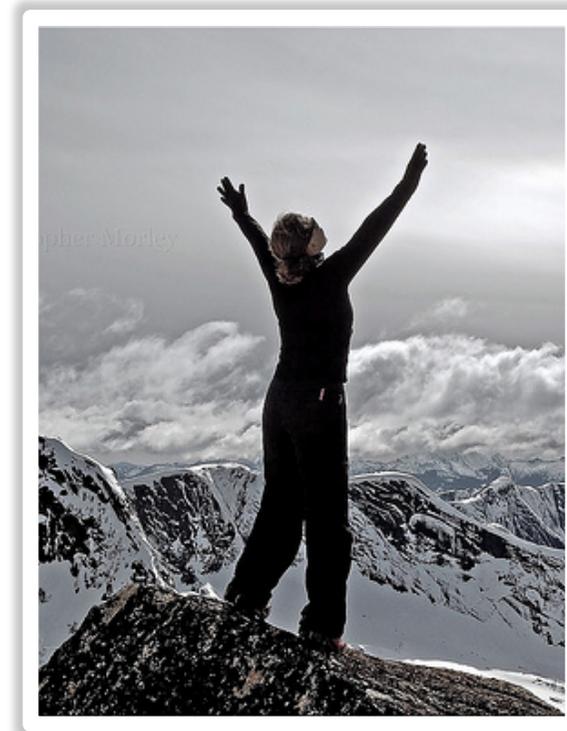
The eduGAIN service inter-links research and education identity federations - 'inter-federation' - to ensure that everybody wins.

This material was produced by the AARC project with funding from the European Commission's Horizon2020 Programme under Grant Agreement No. 853965 (AARC).
For more information, visit: <https://aarc-project.eu> or contact: aarc-contacts@lists.gesint.org
Images courtesy of GEANT: www.gesint.org

AARC Produced by the AARC project, updated 31 October 2016

Coming work & challenges

- Make JRA1.1 achievements visible
- ‘Digest’ deliverables for more user-friendly content on web & materials (DAASI)
- Reporting
FUNDING STATEMENT!!
“AARC is funded by the European Union's Horizon 2020 research and innovation programme under grant agreement number 653965.”
- AND
Creative commons!
- **PLEASE help get quotes, stories, engagement events!**



What else?

- In AARC –
 - NA2 big-picture gaps to be filled?
 - Specific gaps e.g. blogs, web content, flyers, promotion?
- What to anticipate for AARC2 NA2?
- Any specific suggestions about deliverables, reporting etc.?

Contact aarc-comms@lists.geant.org

Thank you Any Questions?

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<http://aarc-project.eu/>



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