
REFEDS Work Plan, Sep 2011 – Dec 2012

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1. Overview

The first funded “year” (it is actually a 13 months period) of REFEDS completes on 31st August 2011. A full report relating to the first year of operation is being prepared and will be circulated shortly.

Whilst the focus for Year 1 was on establishing REFEDS as a group and tackling some very well-defined projects, Year 2 presents the opportunity for the group to begin to manage more complex problems and issues with wide-ranging implications. These include issues around levels of assurance and attribute management and usage. The REFEDS Steering Committee (SC) is requested to approve the proposed plan.

2. Inputs

Proposals for the 2011 / 12 work plan have been put forward by WAYF (Denmark), RedIRIS (Spain), JISC Advance (UK) and Internet2 (US). Feedback from all REFEDS participants has been sought on the proposals during the REFEDS face-to-face in May 2011 and via the REFEDS mailing list.

The workpackage structure as defined during Y1 will be maintained with some slight alteration to package naming and focus to reflect the breadth of new work areas; the main changes are:

- The original REF2 “Domesticating Applications” and REF3 “Interface and Discovery” have been merged into a new REF2 called “Barriers to Effective Federation Use”; this new work item embraces all the issues related to service providers.
- REF3 is now a new work package, “Boundary Solutions”.



3. Work Items

<p>REF1: REFEDS Coordination and Promotion</p>
<p>Aim:</p> <ul style="list-style-type: none"> • To enhance REFEDS website; • To establish REFEDS relationship with relevant organisations and as a coordinator outside of Europe.
<p>Work Items:</p> <ul style="list-style-type: none"> • Liaising with Kantara initiative (by monitoring developments in relevant working groups) and other relevant initiatives world/wide • Establishing REFEDS BoFs in Asia (APAN) and US; • Developing the REFEDS website further in line with recommendations received (see Annex I); • Provide a REFEDS blog; • Continued effort to maintain website & wiki and promote REFEDS. <p>These work items will be led jointly by Licia Florio and Nicole Harris.</p>
<p>Output:</p> <ul style="list-style-type: none"> • 2 x REFEDS BoFs; • 3 x standard REFEDS meetings (Sept 2011, May 2012, fall 2012); • www.refeds.org, the REFEDS wiki and the REFEDS blog; • Development of a Metadata Explorer Tool (MET) to display information about federations (mostly about SPs and IdPs) and cross-reference them (i.e. how many federations offers service X ? how many SPs are participating in eduGAIN? etc). • Survey the usage of personal certificates in federations and whether certificates services are offered as part of the federation services.
<p>Time Allocation:</p> <ul style="list-style-type: none"> • Coordination support and reporting period 1st Sep 2011 – 31st Dec 2012: 30 days of which 10 days sponsored; • Meetings attendance LF/NH: 10 days sponsored; • Meetings preparation: 11 of which 8 sponsored; • REFEDS Promotion and website updates: 10 days (2 day funded). <p><i>Total sponsored days: 30</i></p>
<p>Budget Requested:</p> <p>Sponsored manpower: 17,000 euro (30 days above);</p> <p>Travel budget: 15,000 euro;</p> <p>Budget for MET: 10,000 euro.</p> <p>Total: 42,000 euro</p>



Reference:

MET document: <https://refeds.terena.org/images/2/23/REFEDS-MET-REQUIREMENTS-7.pdf>



REF2: Barriers to Effective Federation Use

Aim:

- To reduce the barriers faced by users of federated identity due to poor interface design.
- To improve the experience of Service Providers joining federations.

Work Items:

1. Discovery and Login (led by Rod Widdowson, EDINA)

This work item aims to create a toolkit for service providers (SPs) to lay out the importance of a better discovery service and to offer recommendations about:

- Guidance of terminology;
- Establish an editorial board for the toolkit;
- logo sizes and general layout;
- error messages;
- demonstrators of implementing the recommendations with existing discovery implementations.

For more details please refer to [1]:

https://refeds.terena.org/index.php/Revised_discovery_project

2. Barriers to SPs Project (led by Nicole Harris, JISC Advance)

This work item follows up on the recommendations contained in the "Barrier for Service Providers document" [2] written by Nicole Harris in the spring 2011.

During the REFEDS meeting in May 2011 a survey was carried out to identify which of the recommendations would be followed up on.

Based on the survey results, it was concluded that REFEDS would explore the following areas:

- Cross-federation supporting documentation for eduGAIN [3]
- Clearer interpretation of federation policies;
- One-off clauses within federation agreements and sponsorship letters;
- Funding models;
- Technical areas.

For more information please refer to [4]:

https://refeds.terena.org/index.php/Service_Provider_Study_Results

Output:

- Discovery Toolkit.
- Documentations/recommendations for each of the topics mentioned above.

Time Allocation:

For 1. Approx. 7 days coordinator support.

For 2. Approx. 10 days coordination support.



Budget Requested:

11,000 euro for Discover project. (inc. any travel budget).
6,000 euro for Barrier to SPs Projects (inc any travel budget).

Reference:

[1]:

https://refeds.terena.org/index.php/Revised_discovery_project

[2]

https://refeds.terena.org/index.php/Barriers_for_Service_Providers

[3]:

<http://www.edugain.org>

[4]

https://refeds.terena.org/index.php/Service_Provider_Study_Results



REF3: Boundary Solutions
Aim: <ul style="list-style-type: none"> To improve the experience of users in non-federated environments. <p>Many resources used on a regular basis by research and education users are not able to take full advantage of the federated experience for a variety of reasons. This workpackage will seek to make the interaction with such resources easier for users of federated identity via proxy and router solutions.</p>
Work Items <ol style="list-style-type: none"> Remote Configuration Server for federated rewriting proxies (proposal by David Simonsen (WAYF)/Diego Lopez (RedIRIS)) <p>The proposal is to create a repository accessed and controlled by the federation to manage the configuration rules for the proxy; instead of each proxy administrator being required to create bespoke information about resources in their local proxy, they will be able to pull configuration rules from a central point, that is the federation. These administrators would then access the information logging in via their federation. The idea is that a federation would offer the repository as a service and therefore it would be able to reach out a community that would normally not be interested in federations.</p> <p>An appropriate web-interface for proxy administrators will also be explored.</p>
Output: <ul style="list-style-type: none"> Open source software package releases to support the above mentioned work items;
Time Allocation: Approximately 1 MM (man-months)
Budget Requested: Current budget request is 10,000 euro.
Reference: See appendix



REF4: Federation Harmonisation

Aim:

To work across education and research federations to align technologies, policies and schema where harmonisation benefits have been identified. To align direction of education and research federations with broader communities where appropriate.

Work Item:

1. To define models of attribute release suitable for use by IDPs worldwide. (led by Steven Carmody, Internet 2)

This work item will focus on:

- Identifying possible approaches, explore alignment with legal constraints, and explore whether IDPs and SPs consider an approach as deployable and supportable,
- Approaching REFEDS members for discussion at the Sept Helsinki REFEDS meeting. The recommendations will likely require action by Federations, IDPs, and SPs.
- Investigate Data Protection issues and user-consent;

Output:

- Lightweight working group, led by Steven Carmody to discuss point 1.
- Recommendation on data protections issues, personal identifiable information and user-consent. This work will be carried out in collaboration with eduGAIN
- Hosting saml2int profile: define change management procedures and a fair way of solving disputes.

Time Allocation:

- None at this time. Currently manpower is being provided free of charge

Budget Requested:

No budget requirements have been identified at this stage.

Reference:

https://refeds.terena.org/index.php/REFEDS_Planning_Documents#REF_4:_Federation_Harmonisation



REF5: Inter-federation
Aim: <ul style="list-style-type: none"> • To identify the use-cases for inter-federations; • To define policies, procedures and technical tools to support the inter-federation use-cases;
Work Items: <ol style="list-style-type: none"> 1. To finalise the work known as PEER (Public Endpoint Entities Registry) [1] initiated in 2010 and to promote its adoption. (led by Leif Johansson, NORDUNET) PEER software (funded as part of the REFEDS 2010-2011 yearly plan) has been delivered in September 2011; new features have been requested and the further development will be carried out as part of the REFEDS 2011-2012 yearly plan. The general PEER project plan is online at [1].
Output: <ul style="list-style-type: none"> • PEER enhanced software and related documentation. • PEER PR documentation
Time Allocation: Time allocations follows PEER project plan [1].
Budget Requested: PEER project funding was allocated in the REFEDS 2010/11 budget. New development agreed for an additional 20,000 euro.
Reference: [1]: https://spaces.internet2.edu/display/PEER/Home



REF6: Levels of Assurance (LoA)
Aim: <ul style="list-style-type: none"> To establish a core level of assurance profile that can be adapted for interoperable use within multiple federations. Understanding LoA requirements for various inter-federation use-cases (i.e. eScience, government etc)
Work Items: <ol style="list-style-type: none"> LEGO (Linked Education and Government Online) Working Group (led by Leif Johansson) <ul style="list-style-type: none"> Define workplan for LEGO for the 2011-2012 Ensure the necessary support for the LEGO LoA requirements for federations (led by TBC) <p>Identify use-cases to derive LoA requirements and provide guidelines for federations to support the identified LoAs. This work will be carried out in cooperation with the eduGAIN project.</p>
Output: <ul style="list-style-type: none"> Interoperable Identity Assurance Framework for research and education federations.
Time Allocation: <p>No sponsored time allocated at this moment.</p>
Budget Requested: <p>No budget requirements have been identified at this stage, however LEGO is unlikely to be a zero budget activity. It is recommended that up to 15,000 euro be ring-fenced for this activity.</p>
Reference: <p>https://refeds.terena.org/index.php/LEGO</p>



4. Budget Requirements

These plans represent a budget of **104,000 euros** for 2011/12 AY. This breaks down as follows:

Area	Funding Allocation
REF1	Sponsored manpower: 17,000 euro (30 days); Travel budget: 15,000 euro; Budget for MET: 10,000 euro. Total: 42,000 euro.
REF2	11,000 euros for Discover project. 6,000 euros for Barrier to SPs Projects. Total: 17,000 euro.
REF3	10,000 euro.
REF4	No budget request at this time.
REF5	20,000 euro.
REF6	15,000 euro (ring-fenced).



5. Annex

REF1 - Summary of Known Issues

Two main recommendations were made regarding the website (REF1):

- There is no management of the frames in the site, which means that individual pages have to re-craft links, sub-headings etc. This could easily be improved with a small amount of additional technical work.
- Scrolling on the pages occurs within the site frames rather than by browser support, which gives the site an 'old fashioned' appearance. This again could easily be addressed by a small amount of technical development.

It is planned to implement these changes before the end of 2011.

During the REFEDS meeting in Prague there was a proposal for REFEDS to offer a central registry of SPs supported by the various federations; a tool that would be able to satisfy this requirement in an automated fashion would be (but there might others):

<http://wayf.labs.eduserv.org.uk/metadata-explorer/>

In the coming months REF1 will investigate the possibility to integrate a similar tool to the REFEDS website/wiki; this may result in some additional cost.

Some concerns have been expressed over the development of an interface on top of an existing commercial product (such EZProxy, see REF3). Steering Committee members are invited to discuss this concern and its relevance to REFEDS development.

REF3 - Remote configuration server for local rewriting proxy instances

Rewriting proxies have been traditionally used to provide off-campus access to resources subject to access control, when this control is applied by source IP address filtering. By means of such mechanisms, users access the resource through specific URLs that the proxy rewrites back to the original one. The resource finds a connection coming from an authorized IP address and returns the content, which is rewritten by the proxy before delivering it to the requesting user in order to keep the links inside the specific proxy URL space.

Though it can be argued that this approach predates and/or is against federated access control, it is not actually the case, as in a federation such proxies can be seen acting as SPs.



This proposal considers a usage pattern in which each institution runs an independent installation of rewriting proxies. This pattern is rather common, as a local proxy is able to take into account local IP-based license particularities, show a local IP address to some of the reference systems, and provide a closer integration with local mechanisms for information searching and retrieval.

Configuring such proxy services may become a tedious (if not complicated for certain resources) task for the staff in charge of the information system installation, as well as fall into pure reactive maintenance, only acting upon user complaints on malfunctions when the proxy rules must be adapted to a change at the resource remote site.

We propose here the implementation of a repository of proxy configuration rules, maintained by the identity federation operator, able to feed configuration data to local proxy installations. The local proxy admins will only need to establish a list of resources to keep an updated configuration for their proxy systems.

More information will be available on the REFEDS wiki and shared on the REFEDS mailing list.

