



Final Report

Provision of JISC-funded places on the Netskills workshop: Federated Access Management: Core Skills for Identity Providers

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Background

In June 2007 Netskills was funded by JISC to develop and deliver a workshop to help the community explore and assess the core technical skills required to deploy federated access management technology at their institutions. A pilot workshop was held in July 2007 and from that event and the feedback it produced, a full programme was put in place.

JISC funding through the JIEE committee enabled Netskills to deliver this training programme around the UK and offer over 100 free places on the events. Initially these were offered to participants from the FE sector, this was extended during the final phase to include participants from smaller HE institutions (JISC Band F-J).

Programme

The workshop programme ran from October 2007 to July 2008. JISC funding was in place from November 2007 onwards. In total 11 events took place during the funded phases, in the following locations:

Belfast	London
Coventry	Manchester
Cambridge	Newcastle
Edinburgh	Taunton
Glasgow	

The full programme is listed in Appendix 1.

Participants

136 attendees from 120 different institutions participated in the workshop programme. Around 95 percent of the attendees described themselves as working in an IT/ICT related discipline. Library staff or Athens administrators only made up a small part of the audience.

The institution total represented a range of sectors, but was significantly FE-biased as the funding (and hence the programme itself) was targeted towards this audience.

Institutions represented	Sector
93	FE
16	HE
3	Local Council/Schools/Library
7	JISC
1	Other

As the programme progressed it was also satisfying to observe a nice correlation between institutions that participated in the events and subsequent Federation registrations. In some cases this also followed with a speedy deployment – at our Cambridge event, one attendee had remotely built his first IdP before the workshop ended and had it registered in the federation the following week!

A more detailed institutional breakdown is presented in Appendix 2.

Content and Development

The content and structure of the course evolved throughout the programme keeping pace with the changes in the deployment landscape across the Federation community. The initial events featured guest speakers from institutions that had already had some experience with Shibboleth-related technology.

From May onwards, the most significant change was the reduction from three days to two. As the level of background knowledge within the community (and therefore within Netskills and our audience) increased, the guest slot was removed to allow for more exploration of alternative deployment options. This significantly increased the number events run and provided an opportunity for more attendees to attend.

Additionally, in response to audience feedback from the original pilot and the first live events, we were able to present clear, usable options for both Linux *and* Windows platforms – along with more practical exercises exploring configuration and attribute transactions.

A copy of the final workshop description is included with this report.

Attendance and Feedback

The events were very well attended and ran with an average fill rate of over 90%. Some individual events were fully booked within days of them being made available.

Feedback was collected in the days following each event, with a return rate approaching 75. The programme was received extremely positively, with an average feedback score of 4.5 out of 5.

The most consistent criticism of the course was that attendees would like to be able to get more hands-on with some of the tools. This was never the intention of this course and it is also worth noting that attendees also regularly stated that they would like this in addition to the material covered not instead of, which would have necessitated a longer course! When JANET began offering their technical training in the spring of 2008 we made a point of directing those who now wanted a further, intensive hands-on experience towards that programme.

A selection of quotes from the written feedback is available in Appendix 3.

JISC support

Access Management Transition Team

Netskills worked closely with the JISC Access Management Transition Team, both to secure the funding for the free place scheme and also to ensure that programme was directly contributing to the success of their transition activities.

As the core programme reached its conclusion, Mark Williams from the team said, "These courses have helped to firmly embed core IdP skills within the HE/FE community. The training has been particularly well received by its recipients and is providing institutions with genuine confidence that they can manage identity driven access management and participate fully in the UK Federation."

JISC RSCs

In order to effectively target the FE sector, Netskills used its existing relationships with the RSCs throughout the UK. Each RSC was contacted personally and informed about the programme and the free place offer. They were also provided with forthcoming dates and publicity ahead of time, to ensure that the take up of the free, funded places was as effective as possible.

In some instances Netskills worked very closely with individual RSCs to provide the widest geographical spread possible for the programme. In particular this relationship enabled fully subscribed events to take place in Scotland, Northern Ireland and Southwest England – which may have otherwise proved logistically difficult to run – as well as two larger events in Manchester.

The close co-operation of many RSCs has also allowed them to better support the colleges in their own region, by bring together local communities of practice and engaging them directly with ongoing JISC support. Terry Docking (RSC Northern) commented on the course, "It was very interesting seeing the delegates gradually seeing that the processes involved in setting up the Access Management made the DIY approach a "doable" option for their college."

Future Directions

Further training

Some funding has been brought forward into the 2008/09 as it was not possible to arrange a planned workshop in Wales before the end of the 2007/08 academic year. Netskills is working with RSC Wales to enable that to happen as soon as possible in the current year.

Service provider support

In the summer of 2008, JISC also funded the development of a complementary workshop, Federated Access Management: Core Skills for Service Providers for publishers providing online resources within the UK Federation, along with provision for some paid-for places. This programme is due to start in September 2008, with workshops in London, before being rolled out across the UK.

The initial development for this workshop has been funded by JISC and the primary aim for this training is to engage the smaller third party publishers who are yet to deploy services within the UK federation. However the training will be suitable for all of the UK federation community.



Appendix 1: Core Programme Dates: JISC-funded phase

Start Date	Venue
27th Nov 2007	JISC RSC Scotland South & West, Glasgow
18th Dec 2007	Newcastle University
15th Jan 2008	London Metropolitan University
19th Feb 2008	University of Manchester
18th Mar 2008	Learning Southwest, Taunton
1st Apr 2008	Newcastle University
8th Apr 2008	Cambridge University Computing Service
14th May 2008	Coventry University
21st May 2008	Queen's University Belfast
5th Jun 2008	JISC RSC Scotland North and East, Edinburgh
18th Jun 2008	University of Manchester

Appendix 2: HE/FE Institutional Breakdown

FE Institutions

Accrington and Rossendale	Dumfries & Galloway College	Northern Regional College
Adam Smith College	Edinburgh's Telford College	Norton Radstock College
Anniesland College	Elmwood College	Plymouth college of Art and
Aquinas College	Gateway Sixth Form College	Preston College
Ashton Sixth Form College	Gloucestershire College	Priestley College
Barony College	Greenwich Community College	Richard Huish College
Barrow 6th Form College	Havering Sixth Form College	Riverside College Halton
Belfast Metropolitan College	Henley College Coventry	Royal National College for the
Bishop Auckland College	Hereward College	Royal Scottish Academy of Music
Blackburn College	Highbury College	South Devon College
Blackpool & Fylde College	Hills Road Sixth Form College	South Eastern Regional College
Borders College	Hopwood Hall College	South West College
Brooksby Melton College	Hull College	Southern Regional College
Burnley College	James Watt College	Southport College
Bury College	Jewel & Esk College	St John Rigby College
Cheadle & Marple 6th Form	Kendal College	Stockport college
Cannington College	Kensington and Chelsea College	Stourbridge College
Cannock Chase Technical College	King George V College	Stratford upon Avon College
Cardonald College	Knowsley Community College	Strode College
Carmel College	Langside College	Sutton Coldfield College
Carnegie College	Leeds College of Music	Thurrock & Basildon College
Cirencester College	Lewisham College	Trafford College
City College Manchester	Leyton Sixth Form College	Waltham Forest College
City College Plymouth	Long Road Sixth Form College	Warrington Collegiate
City Lit	Manchester College of Arts &	West Lothian College
City of Bristol College	Middlesbrough College	Westminster Kingsway College
City of Sunderland College	Myerscough College	Weymouth College
Clydebank College	New College Stamford	Wigan and Leigh
Cornwall College Camborne	Newcastle College	Writtle College
Coulsdon College	North Warwickshire & Hinckley	
Cumbernauld College	North West Regional College	
Darlington College	Northampton College	

HE Institutions

City University

Glasgow Caledonian University

Harper Adams University College

Manchester Metropolitan University

Norwich School of Art and Design

Queen Margaret University, Edinburgh

School of Pharmacy

St Marys University College

The Open University

The Robert Gordon University Library

The University of Greenwich

UCB (University College Birmingham)

University of Bristol

University of Cumbria

University of Derby

University of Southampton

Appendix 3: Workshop feedback

Excellent presentation of materials. High technical knowledge of subject and advice on how to go about implementation.

Course was a great introduction to FAM. I was only aware of each of the technologies in isolation but have never been able to consolidate this knowledge. The workshop has given me the information I need to set up an IdP box and start to explore what can be done.

Met all my expectations and more. Information was clear and well presented. I now have the confidence to configure Access Management for our college. Easily the best short course I have encountered in a long time.

Very interesting & enlightening. Removed the shrouds of fear & uncertainty about the whole subject of Shibboleth & the processes involved. Inspired confidence in tackling the Project.

This was one a great course, I left feeling confident and at ease with the tasks ahead, this confidence was built by the skilled and professional trainers.

Came to the course not knowing what FAM is and had a 'not up for it' attitude. Left enthusiastic about the process and looking forward to getting stuck in! 10/10!

Helped fill in a lot of blanks and made next steps clearer :)

Excellent, just the right amount of info to get it installed, setup & running without overloading us with too much additional information that will fry our brains!

Just what I needed! Thanks!

The presenters went out of their way to find answers to address my specific issues even though these were not part of the course. This is much appreciated!

Nice course - gives a good detailed view of FAM - both technical and managerial

Good to see Windows covered, but also as a Linux newbie to get pointers on using that as server platform too.

I found the course very useful for examining the issues and technologies involved in Federated Access Management and useful in meeting IT professionals to experience issues from their point of view. Personally (as primarily a librarian) I had some difficulties with the technical side, but that was no reflection on the course leaders at all.

I was sent to the course under duress - not wanting to go, however, despite my initial reluctance I found the course very interesting and I came away with a lot of useful information and not just to do with federated access. Overall the course was good, well presented and informative.



Federated Access Management: Core Skills for Identity Providers

Federated Access Management (FAM) - for both internal and external resources - offers a secure, scalable and user friendly environment for organisations to manage and verify the online identity of their own members.

This two day workshop, developed with JISC funding, focuses on the technical requirements for organisations joining the UK Access Management Federation and acting as their own Identity Provider (IdP). Participants will be able to use the technology for themselves and explore the core skills and practical steps required to deploy it within their organisation.

For many academic institutions, the end of JISC funding for Athens access is a key driving factor in the decision to join the UK AMF, however the infrastructure required for FAM also allows much wider uses of the technology - both within and between organisations. These include management of access to shared resources, without replicating or exchanging user accounts and the deployment of genuine web-based single-sign-on (SSO) solutions.

Topics:

- What is Federated Access Management (FAM)?
- Why is FAM different and what does it offer?
- The UK Access Management Federation - what it does and how to join
- Technical infrastructure - including Apache, Tomcat and Java
- Linux or Windows? - options for both platforms
- Secure authentication - SSL, certificates and https
- What are Shibboleth and SAML? - installation and configuration
- Authentication, authorisation and attributes
- Who else to involve - why deploying FAM is not just a technical task
- Where to get further support and guidance

Who is it for?

The training has been developed for staff responsible for institutional access to online resources and/or the management of user authentication.

Technical staff will have the opportunity to see the systems working for real and explore the components that make them work. Non-systems staff will be able to gain an effective overview of the technical set-up required and how it fits in to an overall strategy for effective access management.

Ideally participants will need to be comfortable with basic administration of computer systems (installing software etc.) as well as having some general knowledge about internet networking and identity management principles.

By the end of the workshop participants will have:

- Discussed the current position of their own organisation with regards to Federated Access Management
 - Reviewed the technical and administrative steps required to join the UK Access Management Federation
 - Appreciated the position of the technical infrastructure as one part of an institutional strategy for access management
 - Reviewed the core skills required for an in-house IdP deployment
 - Investigated open source technologies for IdP deployment on both Windows and Linux platforms
 - Seen a complete Shibboleth-based IdP build
 - Examined the configuration of a Shibboleth-based IdP to work with the UK AMF
 - Explored XML files for Shibboleth configuration and the release of attributes
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