

# Building on Success

From Identity Federation to Interfederation



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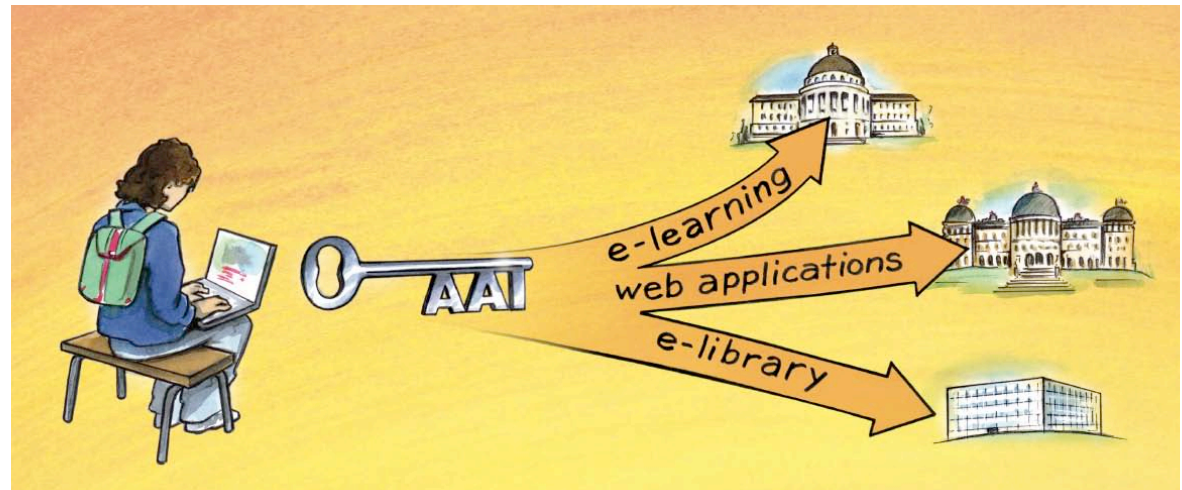
- Success stories of two European national federations
  - *Switzerland*
    - SWITCHaai Federation
  - *UK*
    - SDSS & UK Access Management Federation for Education and Research
- Interfederation
  - *Europe*
    - eduGAIN and GÉANT3 (2009 - 2011)
  - *US & International*
    - Federation soup, InCommon-USGov, ...

# SWITCHaai - The Swiss Federation

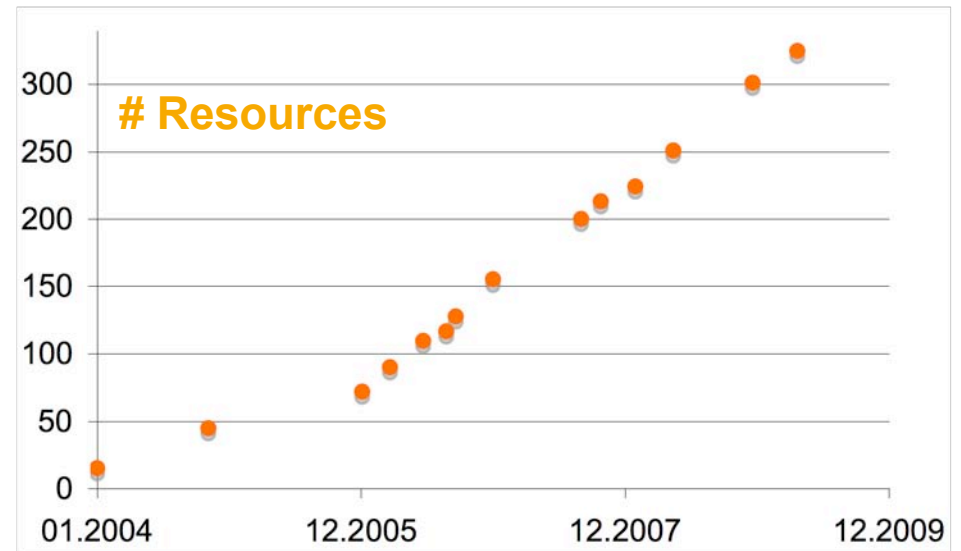
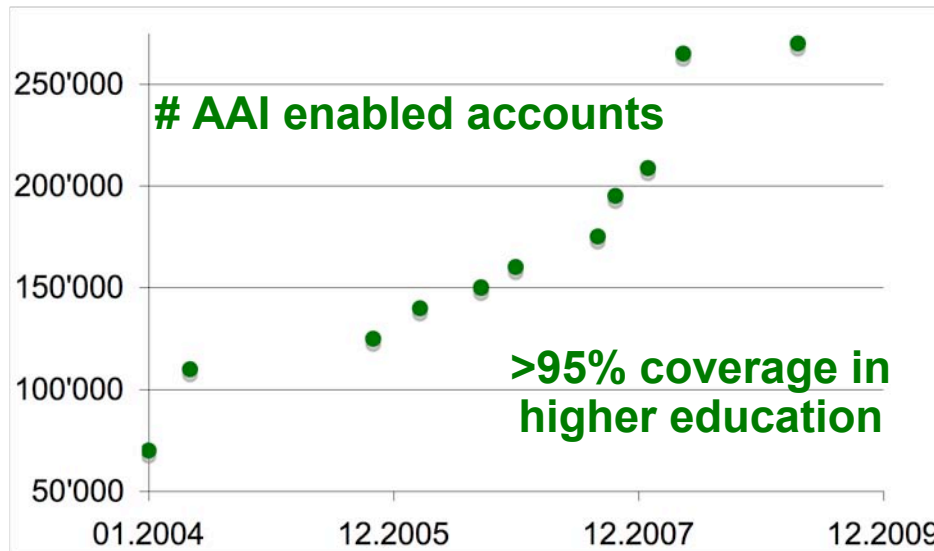
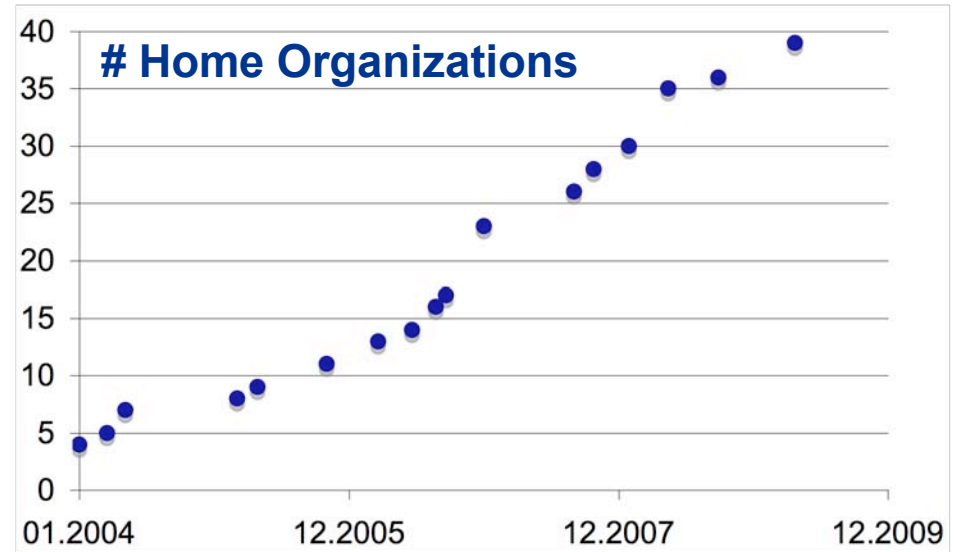
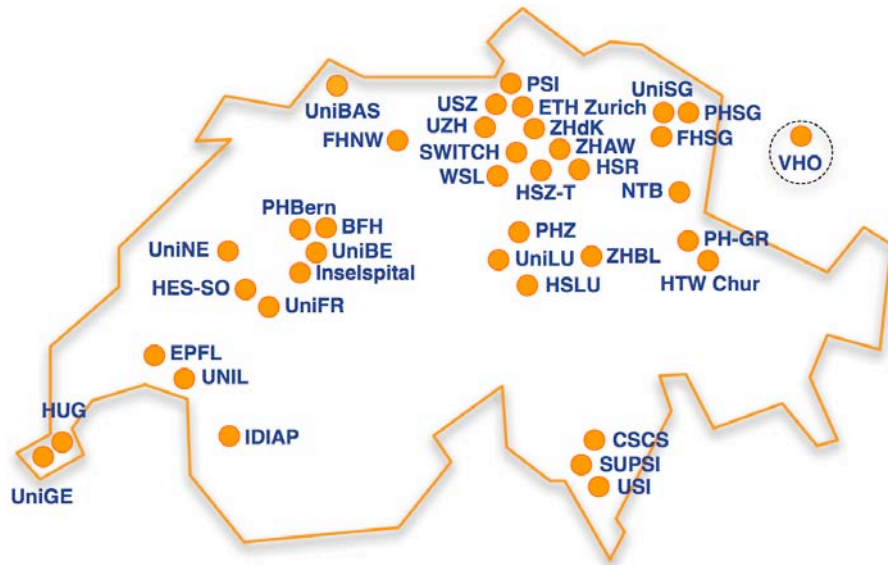
- SWITCHaai
  - SWITCH  
National Research and Education Network (NREN) for Switzerland
  - AAI  
Authentication & Authorization Infrastructure

<http://www.switch.ch/aai/>

- 1999  
AAI activity launched
- 2003  
Decision to use Shibboleth
- 2004  
Pilot Federation
- 2005  
Production Federation



# SWITCHaai Federation in Spring 2009



# Four Pillars for Success

1. Strong use case
2. Institutions adopt the AAI idea
3. Collaborative design and implementation
4. Well-staffed support team



# Strong Use Case

- What makes a use case strong?
  - Use case with no other simple and scalable solution
  - Important also for the IT services
  - Some need of urgency to increase priority
  
- *Use cases for AAI in Switzerland*
  1. A national initiative to increase the use of LMS by jointly developing and sharing content (Virtual Campus)
    - A variety of e-learning platforms (LMS) with course material multiple institutions need to access
  2. Replace IP based AuthZ for access to e-journals
  3. Discounted notebook sale for staff and students

# Institutions adopt the AAI Idea

- AAI is a chance to establish Identity Management
  - Effort to implement IdM may be significant
  - Adding AAI to existing IdM is simple
- What else to gain?
  - Visibility for early adopters
  - AAI also as local Web SSO system  
no longer direct LDAP access
- *Situation in Switzerland*
  - Management of the universities was regularly briefed by SWITCH
  - Good adoption - many took it as an opportunity
  - Dedicated federal subsidies convinced further institutions

# Collaborative Design and Implementation

- Collaboration from the beginning improves later adoption
  - Many people and institutions involved from early on
    - They also act as local promoters
  - Better knowledge about the heterogeneous environment
  - Better compatibility with existing processes
  
- *Situation in Switzerland*
  - SWITCH coordinated the preparation and hired external experts
  - Volunteers drafted for working groups
    - All groups with representatives from larger and smaller institutions and from different geographic areas of the federated country.



# Well-staffed Support Team

- Tailored documentation and tutorials
  - Pre-configured for the federation
    - Few changes to default configuration needed
  - Step-by-step guide through the federation specific process to add an IdP or SP
  - Beginners tutorial and hands-on 'Install Fests'
- Test environment
  - Configuration similar to production federation



# Well-staffed Support Team(2)

- Tools simplifying life for admins
  - Manage metadata and default attribute release
    - ➔ *Resource Registry*
  - A home for 'homeless' users
    - ➔ *Virtual Home Organization*
  - User consent of attribute release at IdP
    - ➔ *uApprove*
  - Very basic user and role management for SP admins
    - ➔ *Group Management Tool*
- Helpdesk to guide admins to the solution
  - Mail and phone support in the own language

<http://www.switch.ch/aai/tools/>



# Well-staffed Support Team(3)

- *Situation in Switzerland*
  - ca. 2 FTE for keeping the federation going
    - ca. 4 to 5 questions/problems per day [for 39 IdPs, 325 SPs, 17 partners in the federation]
    - not only answering questions...
    - review IdP/SP configs, update web documentation talk to people, administrative overhead,...



- ca. 2.5 FTE for new stuff

