"The Identity Project"

IDM and the academic community

Cardiff University

outline

- identity management
- "The Identity Project"
- how you can help

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a quick refresher

➢ identity management (IdM):

➢ IdM is not:

  ➢ a product (though one can certainly help!)

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basically

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Access Management (AM)->

➤ to borrow a phrase... "to connect people to resources"

➤ AuthN and AuthZ based on information such as personal affiliations, status, licensing, etc.

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AM -> Federated AM (FAM)->

- Same as AM, but done "properly"...
- "owner" of the person knows information about its people
- provider of a service trusts these "owners"
- "owners" assert information about its people – e.g. "The person trying to log in is a medical student"

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AM-> FAM-> Identity Management

➢ so... to correctly (technically & legally) assert information about your people, you need what?

➢ to know it in the first place!

➢ this is where IdM comes in

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IDM in UK academia

- very varied
  - some "good", some "bad"
  - some simple, some complex
  - some proprietary, some COTS
- different goals / different methods
  - different institutions have different ideas about IDM, so implementing in different ways
- a voyage into the unknown
  - have an idea but no conclusive facts & figures on where everyone is, and if they're compatible through FAM

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"The Identity Project"

➢ funded by the Joint Information Systems Committee

  ➢ 9 partner institutions, 1 associate partner (so far)

  ➢ 8 main areas of work (next slides)

  ➢ 5 key bodies on steering committee (Partners/RUGIT/UCISA/JISC/UKERNA)

  ➢ 1 year project

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who are involved?

- lead institutions:
  - cardiff university
  - london school of economics and political science
- partner institutions:
  - birbeck college
  - goldsmiths college
  - imperial college london
  - queen mary university of london
  - royal holloway college
  - school of oriental & african studies
  - university college london

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# why these partners?

- ➢ interested in IDM issues
- ➢ diverse group of HE institutions
    - ➢ large/small; single/general subject focus; research/teaching focus; traditional/non-trad' student base;
- ➢ diverse range of IDM issues
    - ➢ inc. grid use / shib installs/ SSO / long-term inter-institutional collaborations / internal & shared dynamic VOs / range of users / library access schemes / NHS involvement
- ➢ successfully completed past project work in collaboration with other partners.

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what we're doing

- eight main work areas
  1) broad survey of current IDM practice
  2) in-depth case studies of IDM practice
  3) investigate practise/policy around membership
  4) investigate how NHS links affects IDM
  5) investigate how grid infrastructure affects IDM
  6) identify common problems/solutions
  7) examine current tools for IDM
  8) identify best practice & future developments

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areas of work

work areas

1) In-breadth Survey

outputs

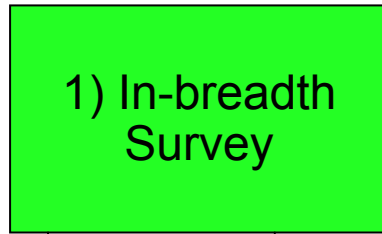Survey

Survey Results

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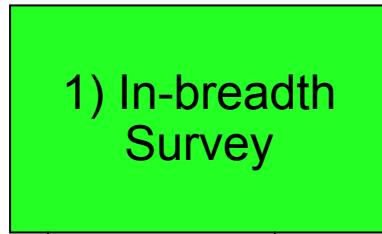
broad survey of IDM

- purpose
  - to get a general understanding of where the majority of institutions are at with IDM (IDM/DS/willingness/etc)
  - more detailed studies of representative institutions
- benefits
  - help build a picture of what needs to be done to get ready for FAM
- deliverables
  - broad information on current IDM

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WARNING!

➢ audience participation required!

➢ please make sure this survey is known about at your institution and that it gets filled in
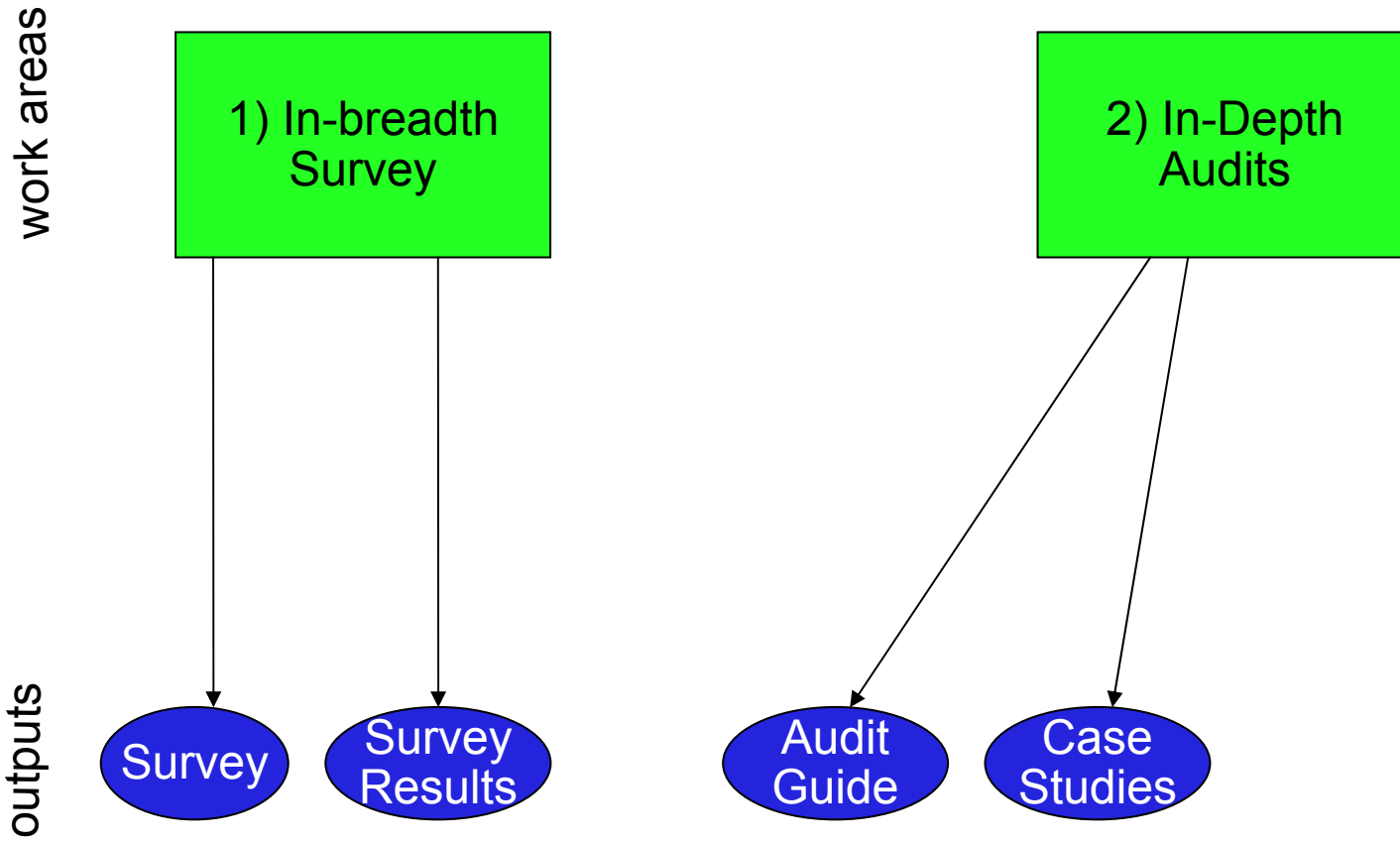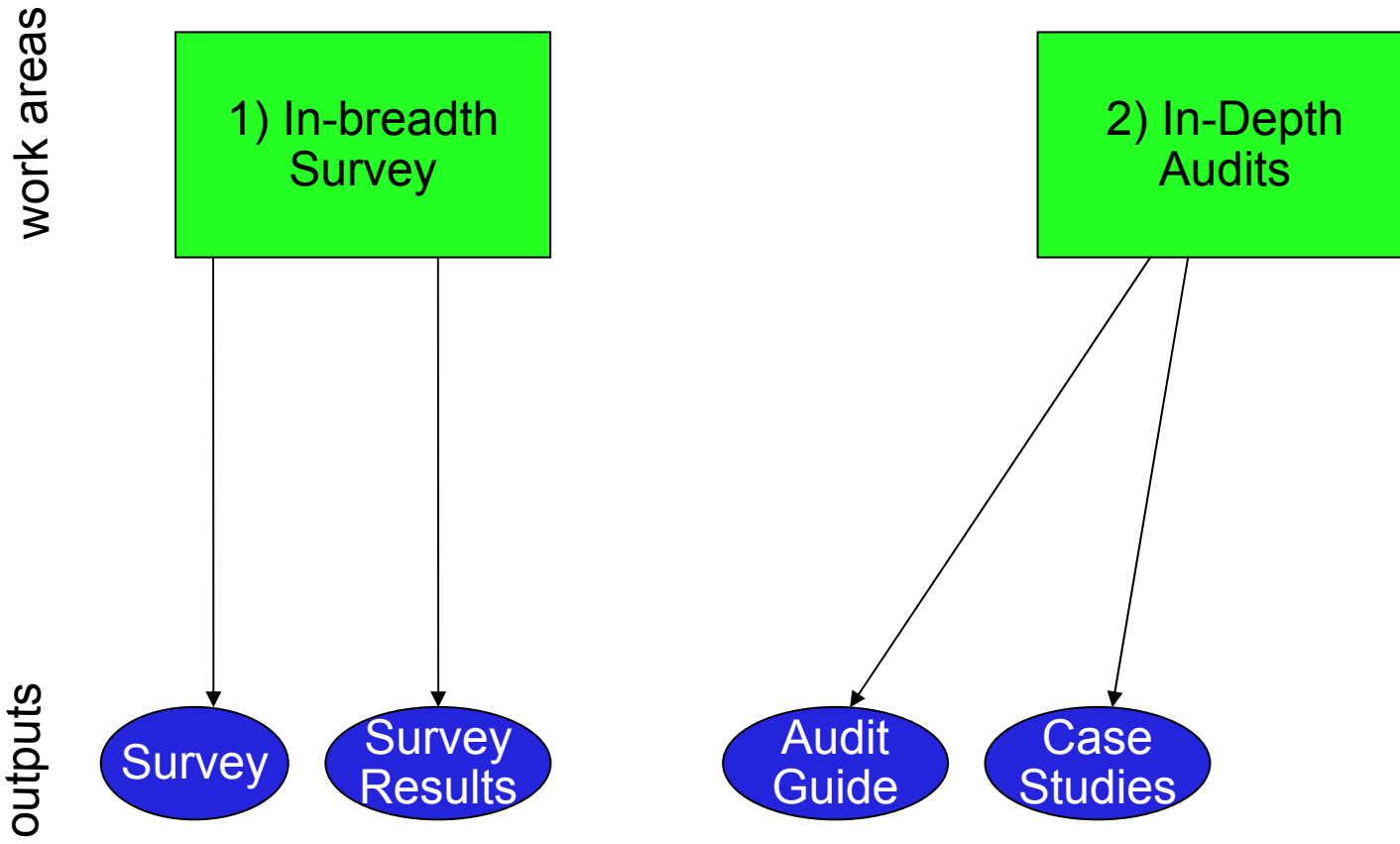
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Survey

Survey Results

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1) In-breadth Survey

2) In-Depth Audits

Survey
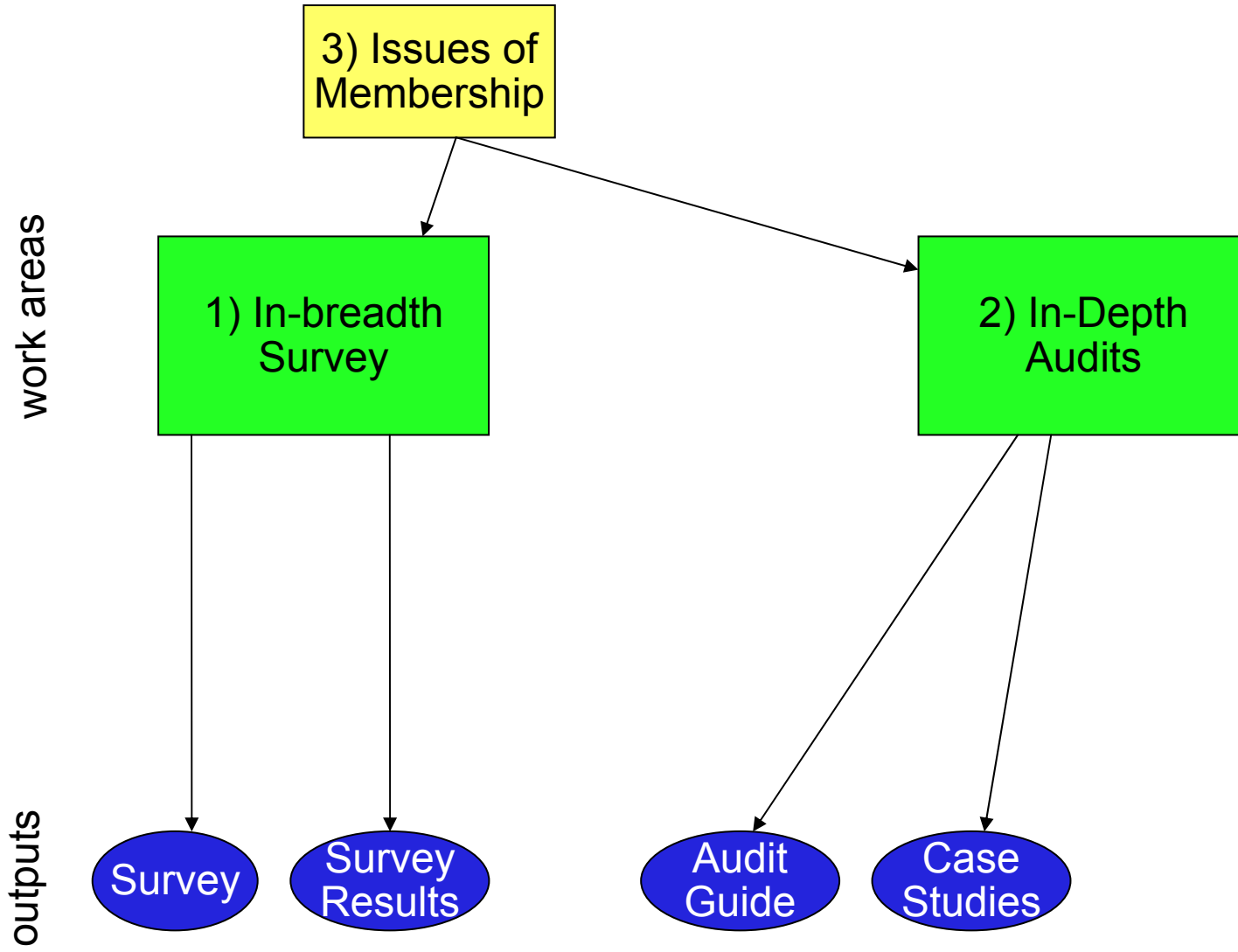
Survey Results

Audit Guide

Case Studies

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in-depth case studies of IDM

- purpose
  - to get a deep understanding of how IDM currently works in a wide range of representative institutions
- benefits
  - help build a picture of what needs to be done to get ready for FAM
- deliverables
  - a template for an institutional audit of IDM
  - several case studies of current IDM practice

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areas of work

work areas

| 1) In-breadth Survey | | 2) In-Depth Audits |

outputs

Survey   Survey Results   Audit Guide   Case Studies
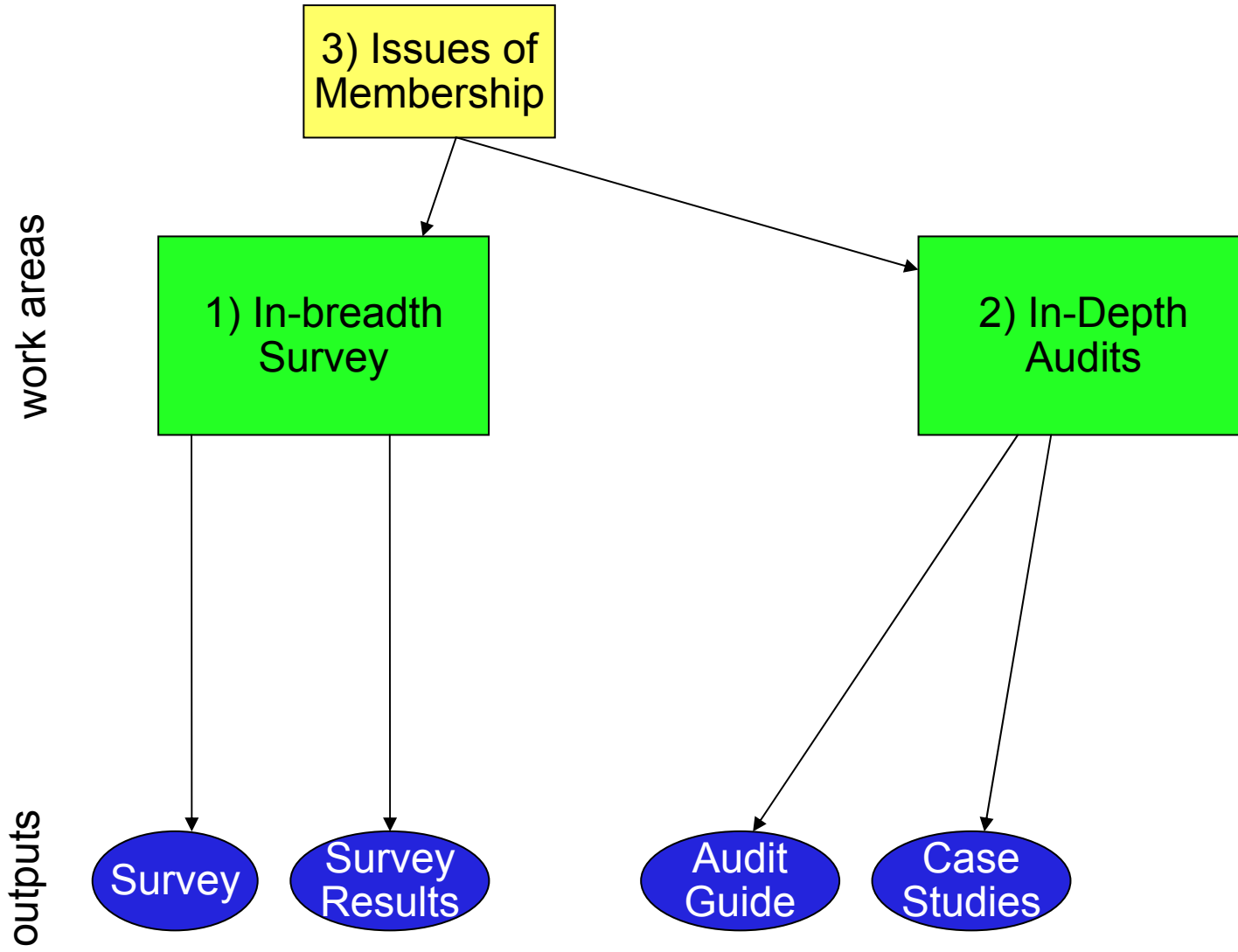
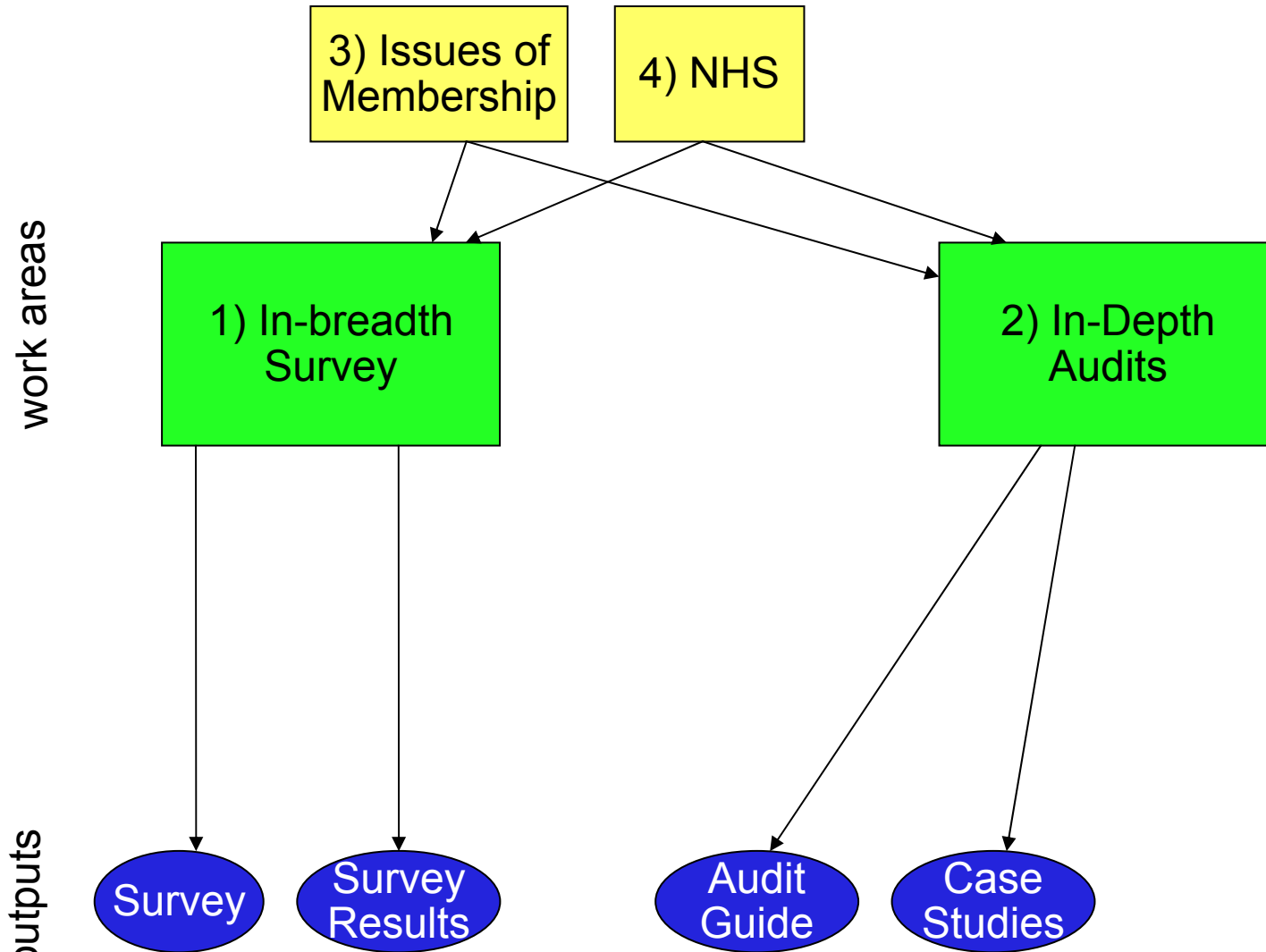**insrv**

areas of work

practice/policy of membership

- purpose
  - to understand how institutions currently define and classify "members"
- benefits
  - complying with legal requirements and license conditions requires a comprehensive set of policies and definitions in place
- deliverables
  - understanding of how these policies effect IDM

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areas of work

work areas

outputs

3) Issues of Membership

1) In-breadth Survey

2) In-Depth Audits

Survey

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Audit Guide
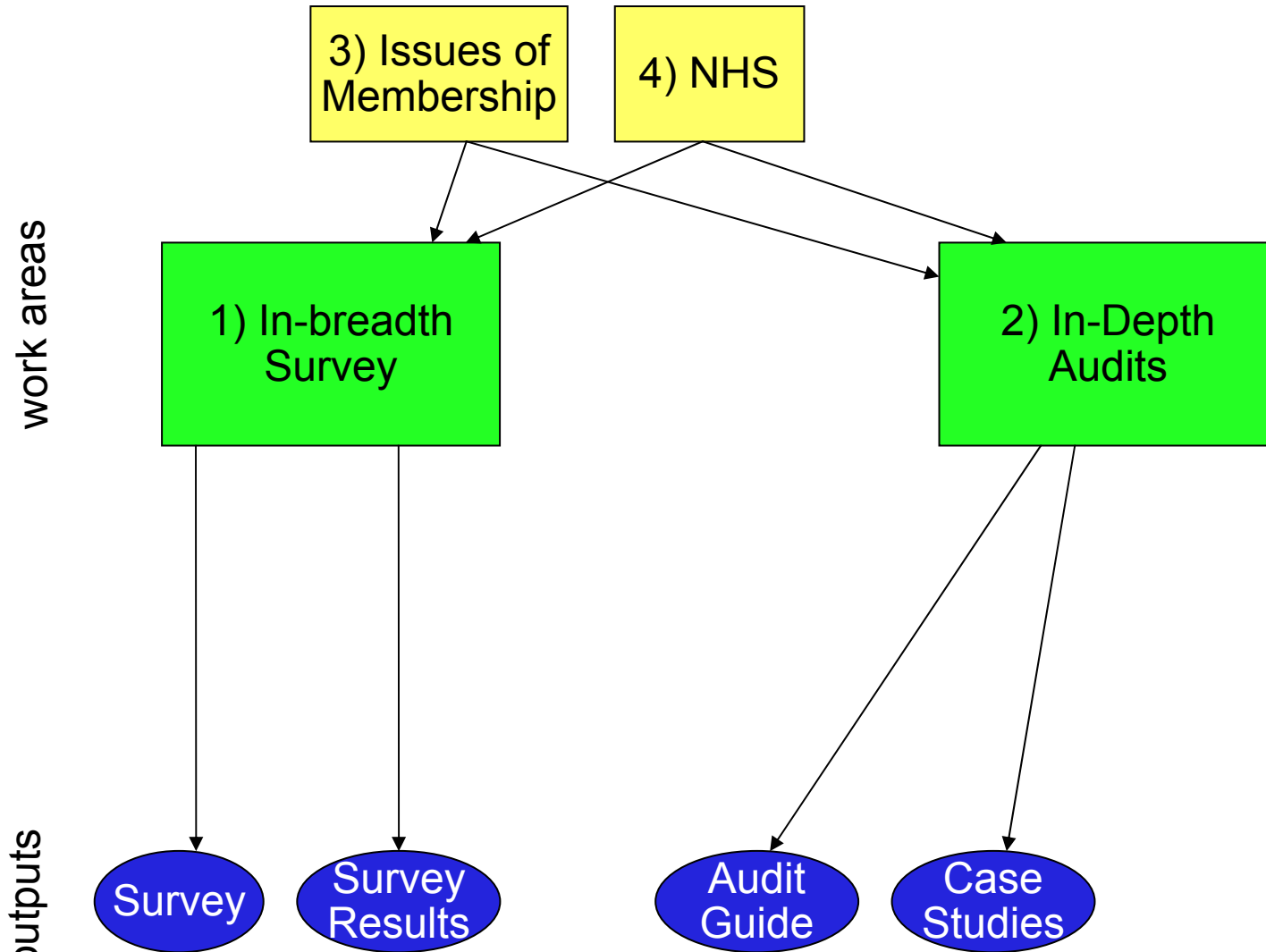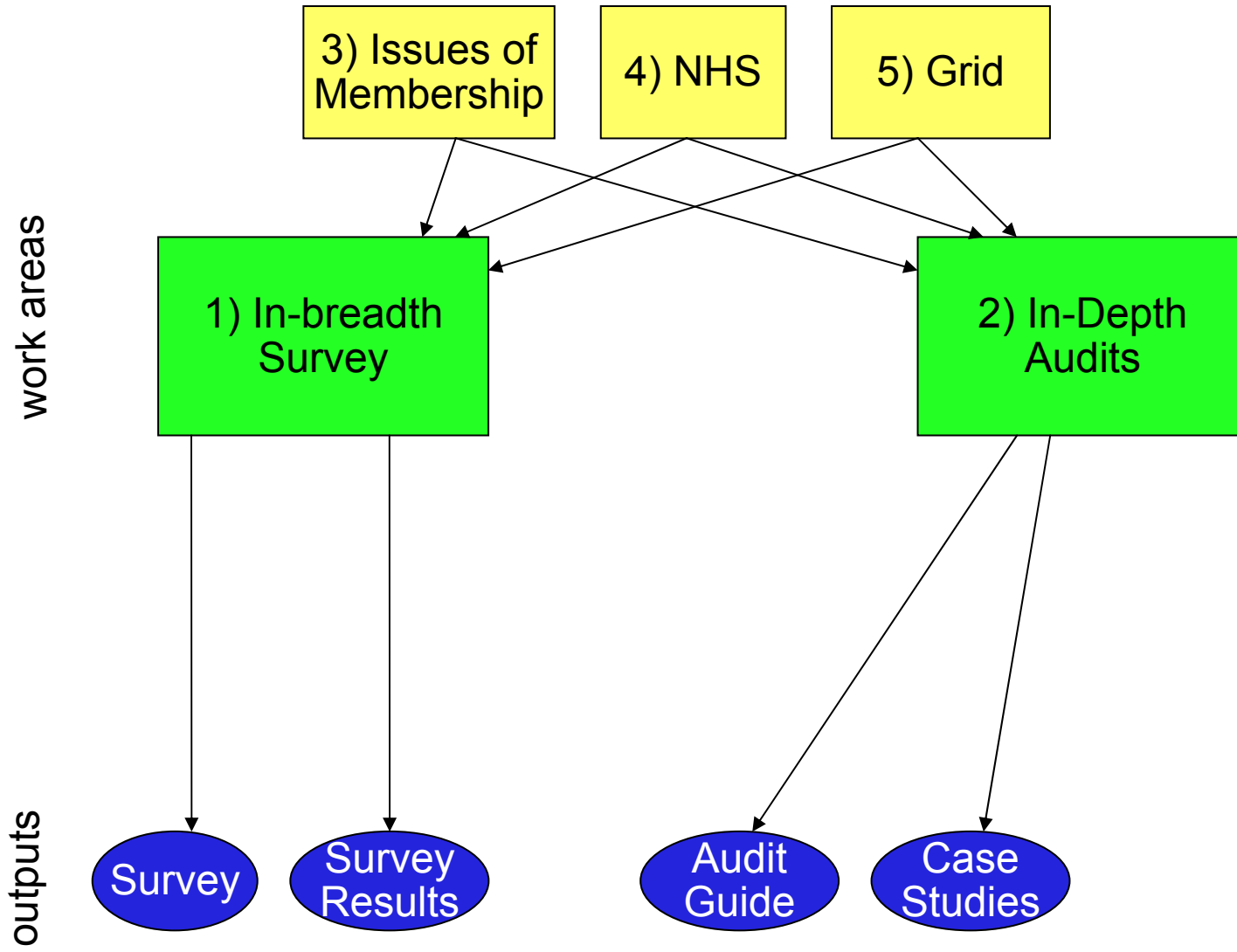
Case Studies

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areas of work

NHS effecting IDM

- purpose
  - to understand how having NHS links affects the needs of IDM
- benefits
  - the NHS are very strict about security (for obvious reasons) and potentially requires more from an IDM solution
- deliverables
  - understanding of how NHS links effects IDM needs

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areas of work

areas of work

work areas

outputs

3) Issues of Membership

4) NHS

5) Grid

1) In-breadth Survey

2) In-Depth Audits

Survey

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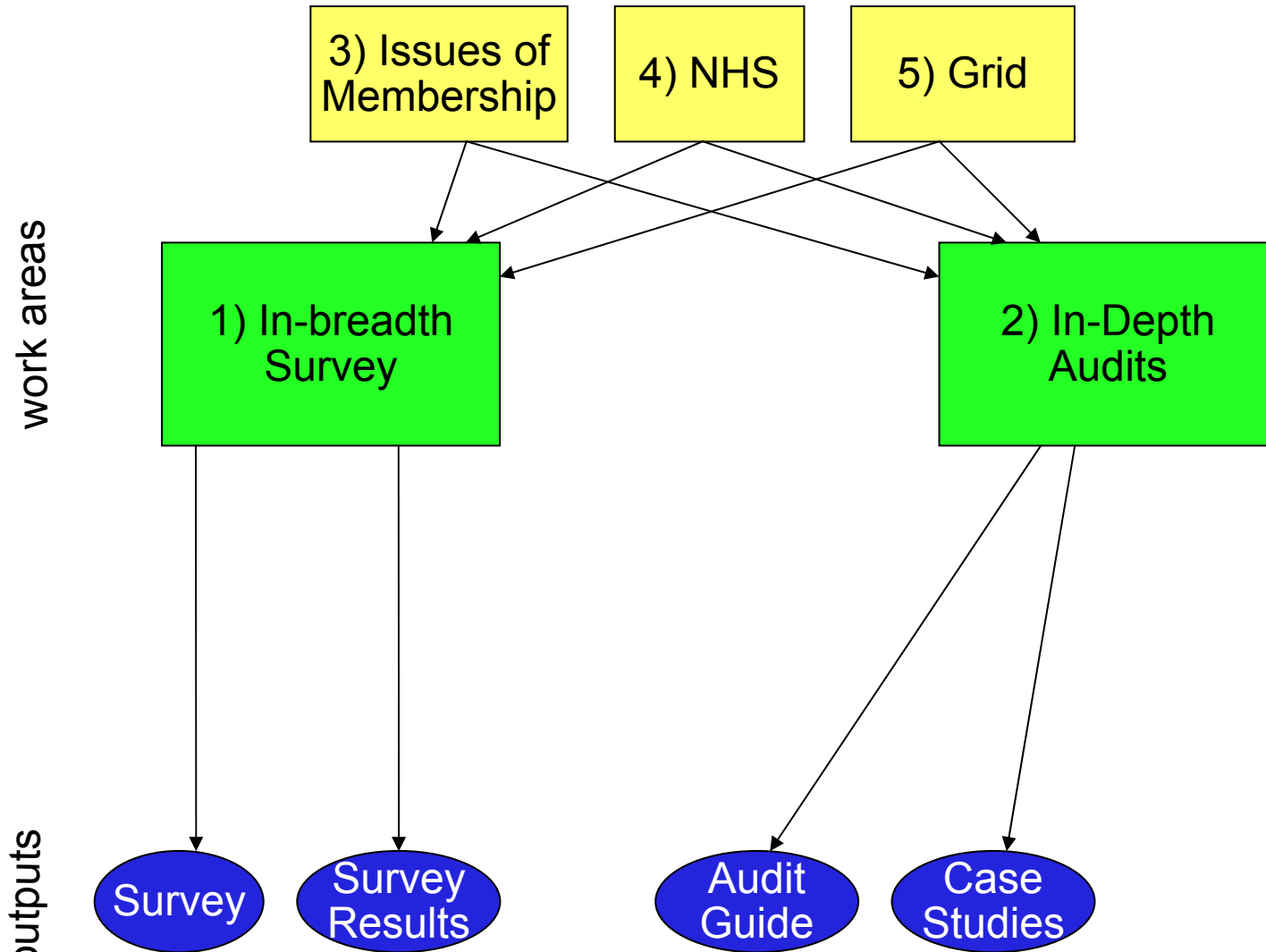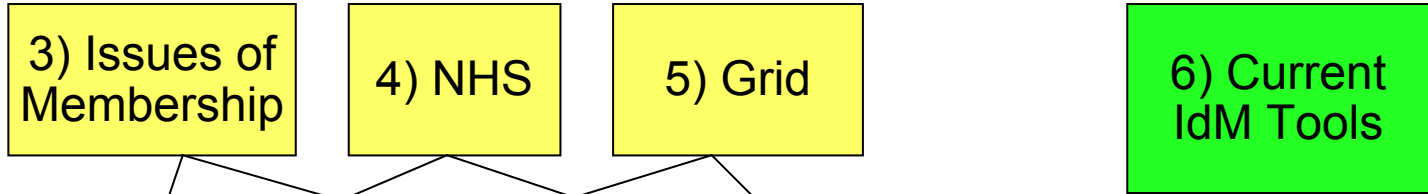
grid effecting IDM

- purpose
  - to understand how having grid infrastructure affects the needs of IDM
- benefits
  - the grid community are currently reviewing access management mechanisms, which potentially requires more from an IDM solution
- deliverables
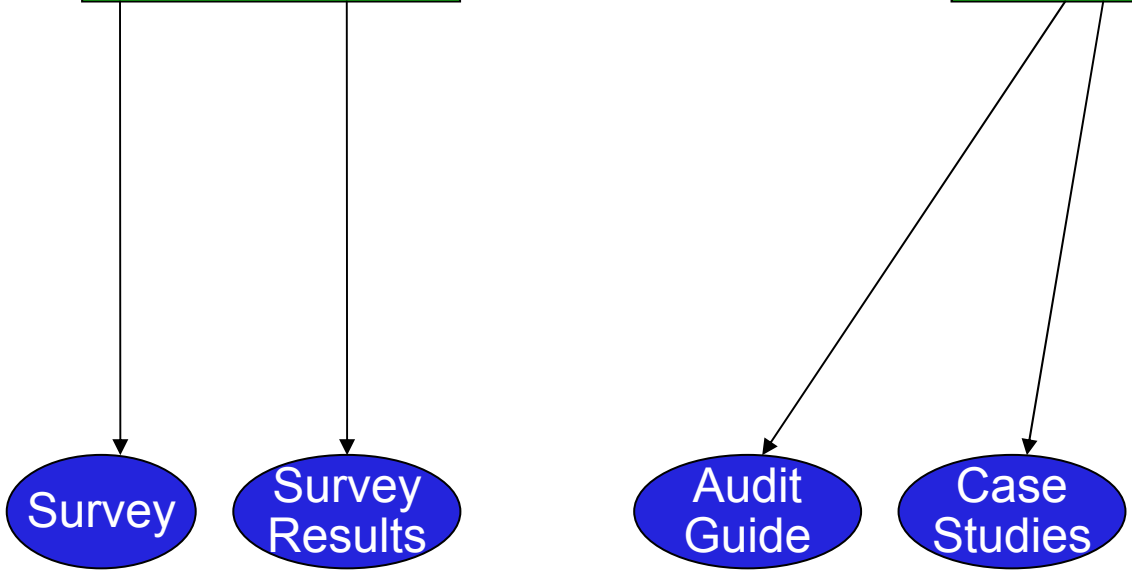 - understanding of how grid infrastructure effects IDM needs

areas of work
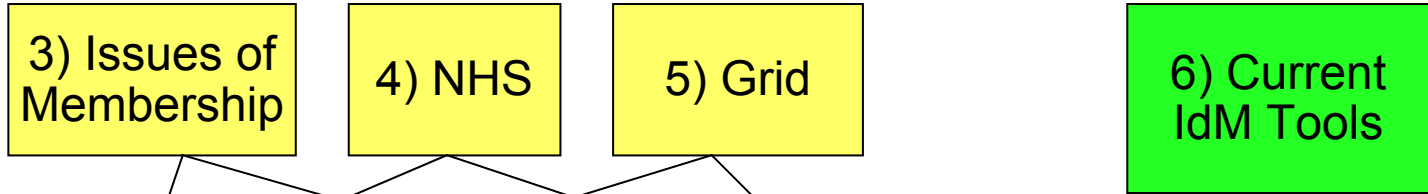
work areas

outputs

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areas of work

examine current tools

- purpose
  - to investigate existing tools (proprietary and open source) that assists with managing users and identities
- benefits
  - an understanding of how these tools work, and how they would help different kinds of institutions
- deliverables
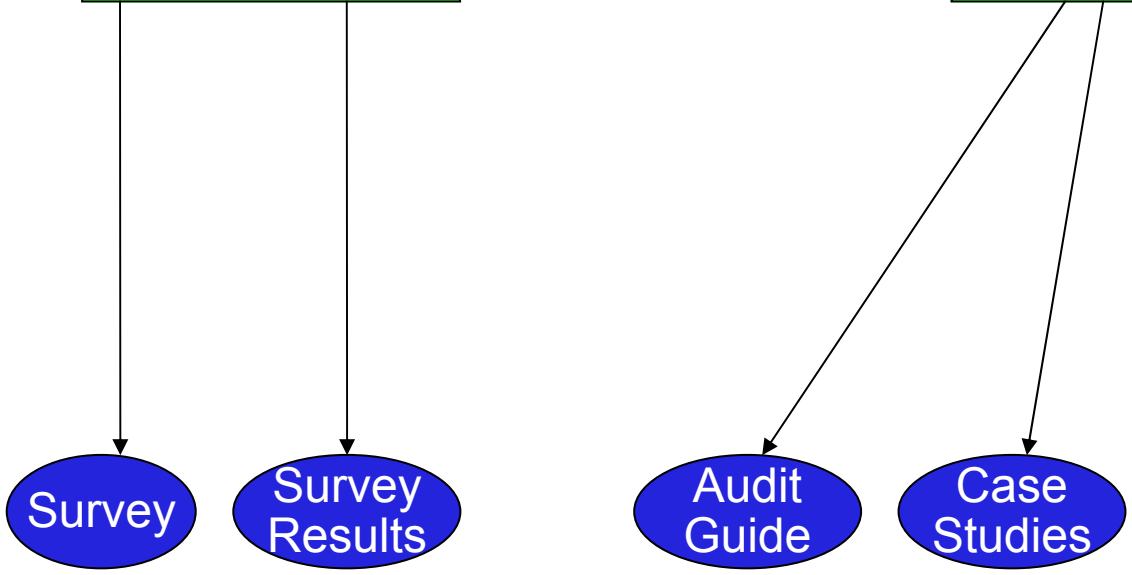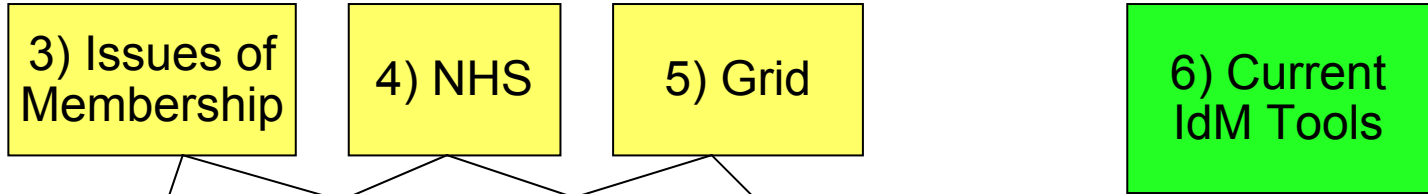 - a study of the tools in an institutional context

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areas of work

3) Issues of Membership

4) NHS

5) Grid

6) Current IdM Tools

work areas

1) In-breadth Survey

2) In-Depth Audits

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3) Issues of Membership

4) NHS

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6) Current IdM Tools

1) In-breadth Survey

2) In-Depth Audits

7) Common Problems/ Solutions

outputs

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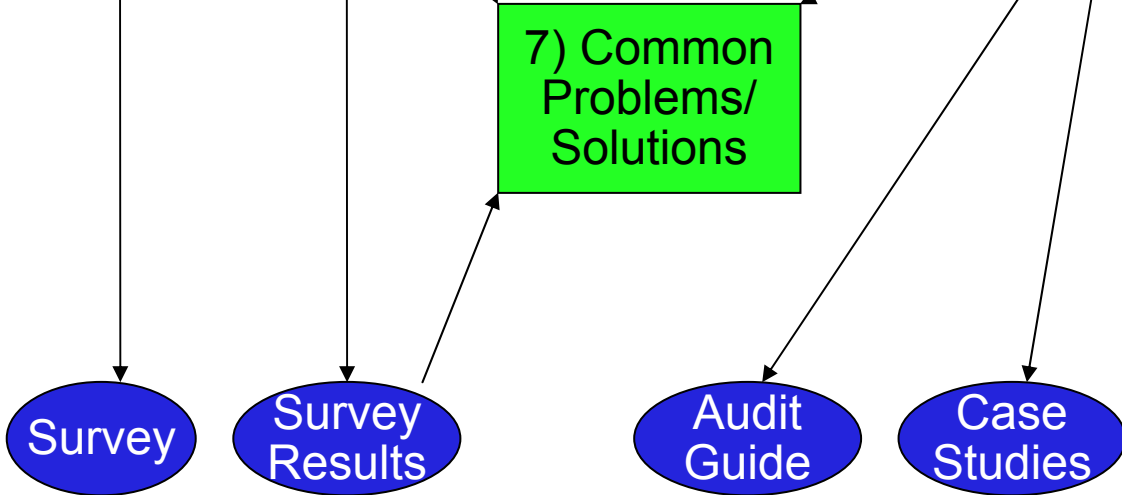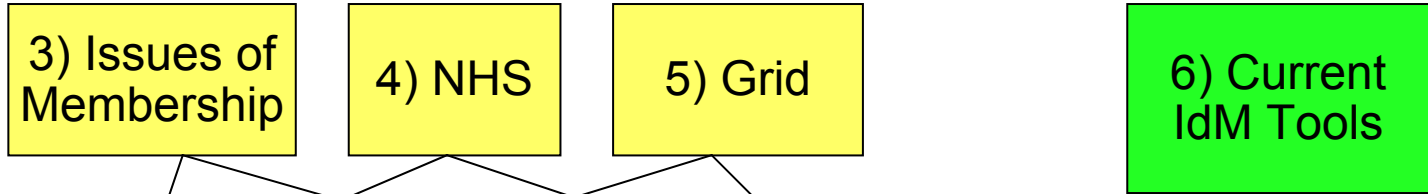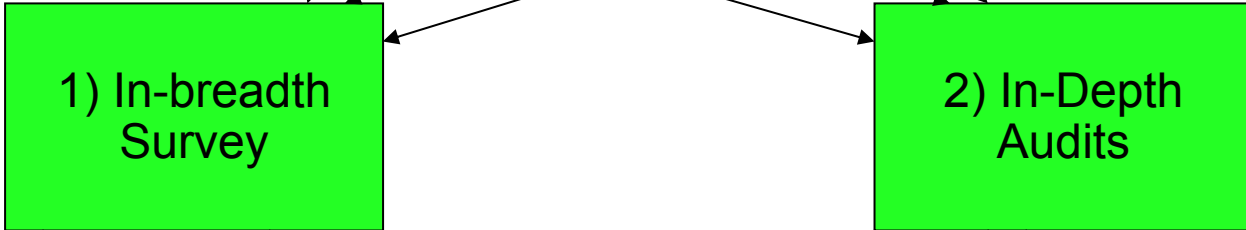
common problems/solutions

- purpose
  - to identify core problems that all institutions will face when implementing IDM, and their solutions (if possible!)
- benefits
  - quite obvious!
- deliverables
  - Documentation of common problems & their solutions

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areas of work

work areas

3) Issues of Membership

4) NHS

5) Grid

6) Current IdM Tools

1) In-breadth Survey

2) In-Depth Audits

7) Common Problems/ Solutions

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1) In-breadth Survey

2) In-Depth Audits

7) Common Problems/ Solutions

8) Best Practice / Future Dev

Survey

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Recommendations
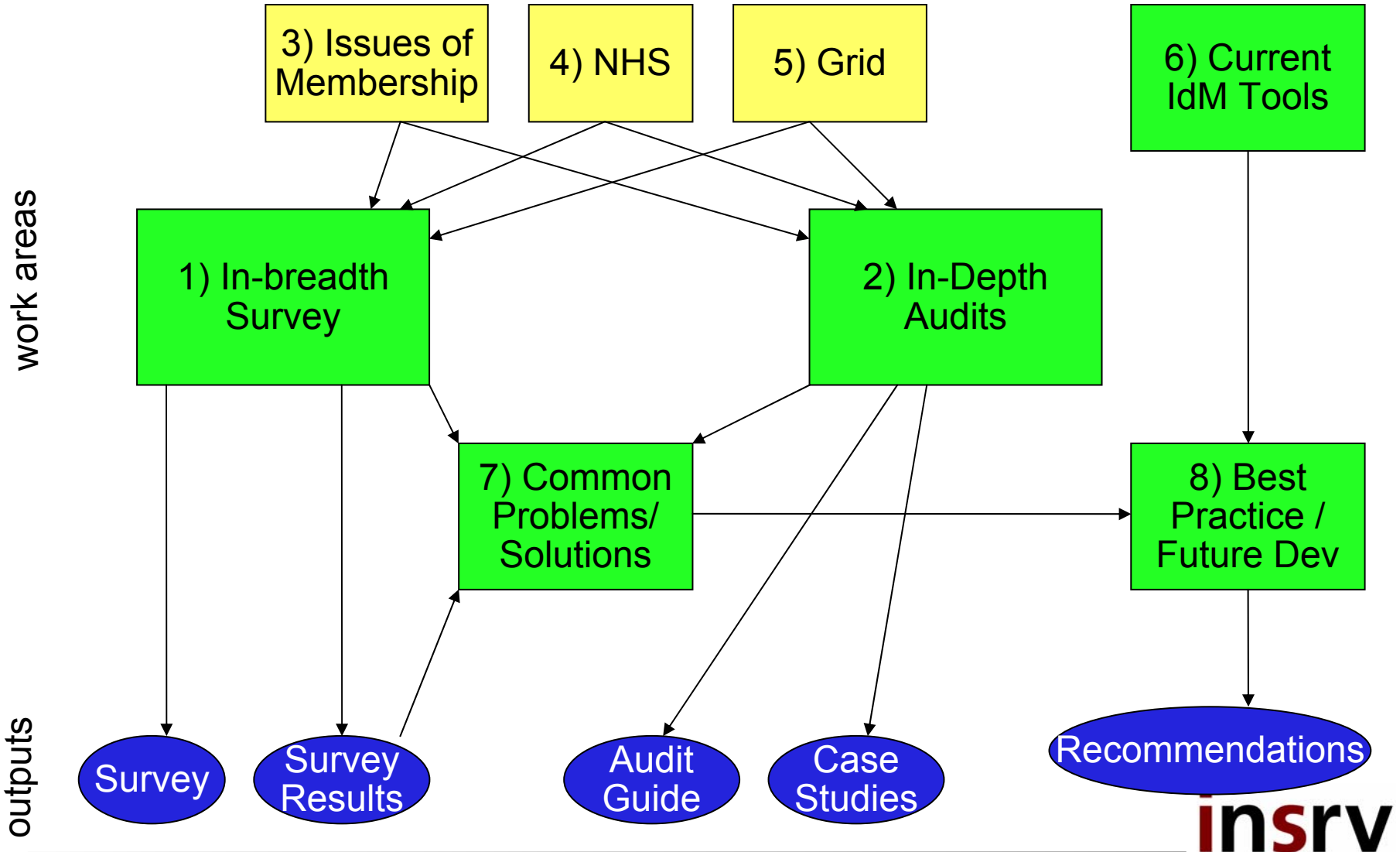
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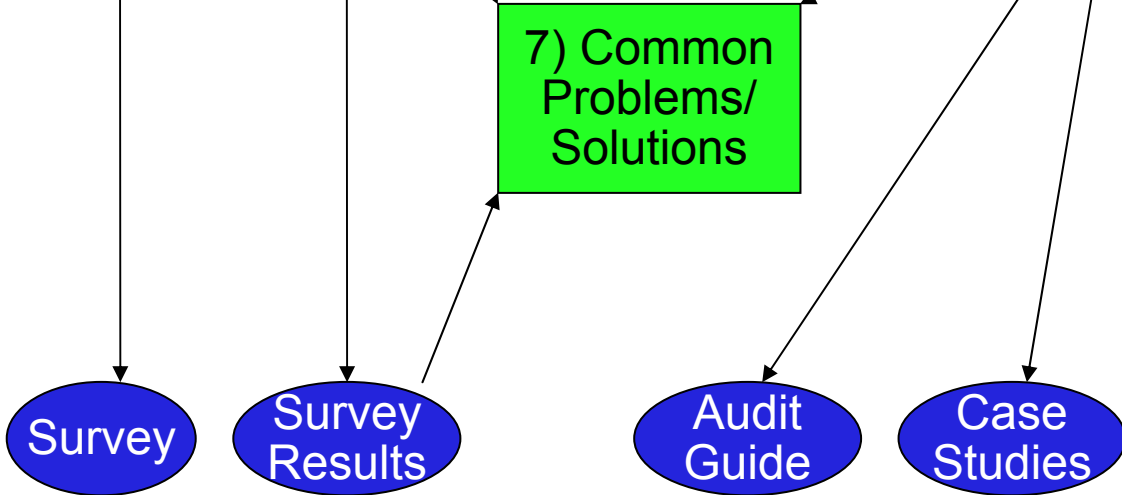
identify best practice/future dev

- purpose
  - to identify good practise for IDM to enable institutions to operate effectively on the UK Access Management Federation, and identify areas where further work is required
- benefits
  - help institutions in understanding what is necessary to implement IDM for FAM
- deliverables
  - Recommendation reports

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how you can help

- if you're from an academic institution...
  - please get in touch with me (later or via email)
  - working with us during this project ensures your institution's point of view will be included
  - community consensus ensures the project is useful to all
- if you're from a vendor with IDM tools
  - please get in touch with me (later or via email)
  - we want to investigate a wide range of tools
- Any suggestions are welcomed!

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The Identity Project Survey

- Already available:
  http://www.identity-project.net/survey.doc

- Respond by 18th May 2007

- (Gently) harass the relevant people at your institution to please fill it in and send it to us!

- See/email me for a copy

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urls

- http://www.identity-project.org/
  - http://www.jisc.ac.uk/
- http://www.ukfederation.org.uk/

- IDENTITY-PROJECT-PUBLIC JISCMAIL list

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the end

- for:
  - ▶ more info
  - ▶ a copy of these slides
  - ▶ clarification of any points
  - ▶ meaningful discussion about IDM

  email: smith@cardiff.ac.uk
  email: leonardcl@cf.ac.uk

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