

Meeting Report: JISC Access Showcase Day

Institute of Civil Engineers, London, 18 July 2006

This day, hosted by JISC at the grand offices of the Institute of Civil Engineers in Westminster, aimed to bring a variety of stakeholders up to date with Shibboleth, the replacement to Athens for access management. The principle was clear: Shibboleth is here to stay, and is easier for users, but there's a lot of work for someone to set it up and to administer it. The audience, numbering around 150, included publishers and service providers, but comprised mainly librarians and information managers. The day was very useful in giving an insight into aspects of JISC's work in access management. However, it was rather a curious day in some respects. It was organised into four separate "discussion groups" (these were for the most part PowerPoint presentations with little time for questions) organised in three parallel tracks. This meant that any attendee could only attend four of the eleven available sessions (one session, demonstrations, was repeated). My account, therefore, is inevitably partial and reflects the sessions I attended.

Sarah Porter of JISC gave an overview of how access management will look for institutions. Athens will not be funded or supported by JISC beyond July 2008, although it will still be available. Instead, JISC and BECTA will create the "UK Access Management Federation", for accessing resources via Shibboleth. Institutions will then have three choices:

1. Become a full member of the UK federation, using community-supported tools (this means the institution has to devote IT skills to make it happen).
2. Ditto, but using paid-for support (which means the institution will have to pay an external supplier)
3. Continue subscribing to an outsourced identify provider, which will work through the federation on the institution's behalf (this means continuing to use Athens but paying a subscription for its use, and getting none of the benefits of Shibboleth).

She closed her presentation with a wonderful graphic roadmap, illustrating the stages for institutions to implementing federation management:

1. institutional audit
2. directory development (adding attributes about student and staff)
3. authentication development (choosing a system)
4. implement identity provider software (IdP)
5. join federation
6. institutional roll-out

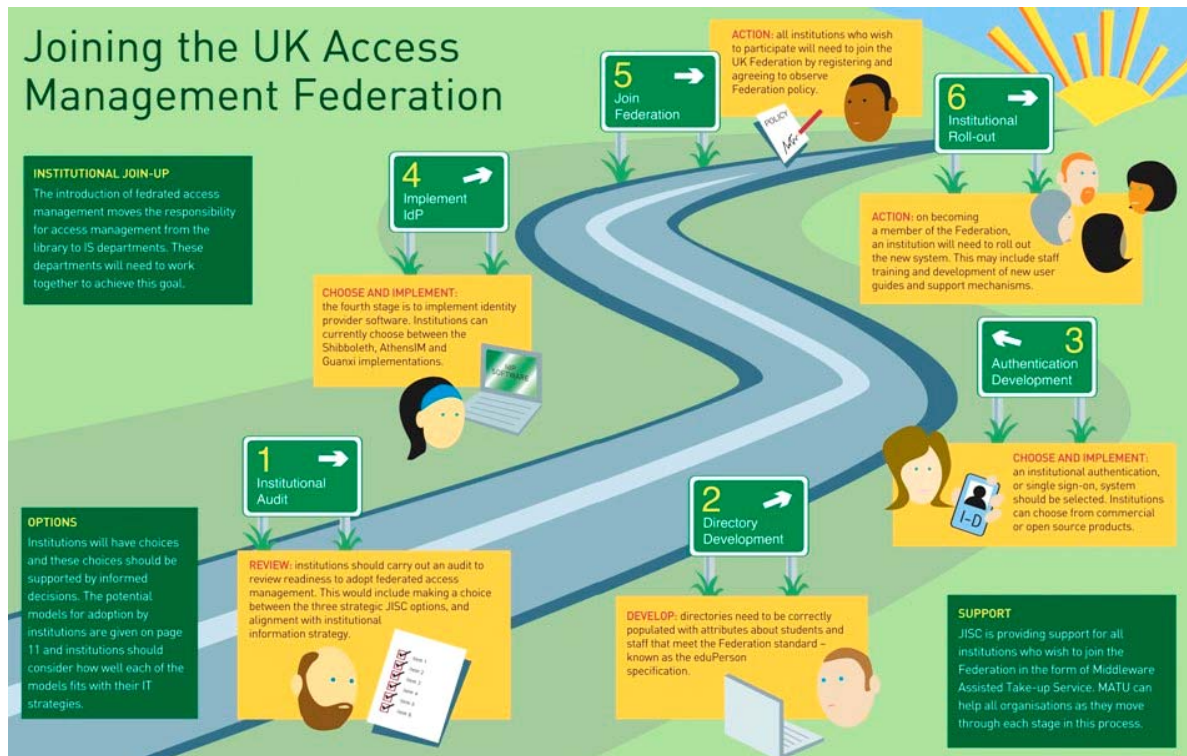


Figure 1: The JISC Roadmap for institutions

It's clear there is a requirement for "institutional join-up", for departments within an institution to unite for access management.

The subsequent sessions varied widely in their need for technical understanding on the part of the audience. The morning session on "international developments", from Elsevier and others, made it clear that Elsevier has put lots of effort into developing Shibboleth access. What worried me was how much of a challenge it would be for a smaller information provider to do the equivalent work required to provide access. After all, Science Direct is a monster, with 2,000 journals, over 160 series of books, and 50 reference works. At that scale, Elsevier can afford to devote considerable time getting their access management sorted, but it was worrying to discover (for example) that there can be many, even hundreds, of federations,

What is a federation? Well, from the Internet2 site:

A Shibboleth federation is a set of campus services, multiple universities, corporations, content providers, etc. who collectively exchange attributes using the SAML/Shibboleth protocols. Joining a federation is not necessary for the operation of the Shibboleth System, but it simplifies the process of interoperating with multiple identity and service providers without exchanging and managing technical information for each prospective partner.

As I understood it, a major advantage of Shibboleth is that you no longer have to answer the question “who are you?” since your personal identify is irrelevant. All that is necessary is that the system knows which institution you are from – hence the need a WAYF (where are you from) message. This sounds good, but Elsevier pointed out several problems with implementation:

- implementation is technically challenging;
- There is often no central source of IDs for all users within an institution.
- there is no WAYF of WAYFs
- there is no standardisation of federations

The benefits of Shibboleth are described as inter-institutional and international interaction, but it looked from this presentation there is quite a challenge, at least to publishers, to get Shibboleth implemented.

The Elsevier session was followed by a presentation called “Shibboleth 2 and beyond”, but I found this presentation of little value since I was struggling to grasp the implications of Shibboleth itself. More valuable was a session on how to become a service provider. Intriguingly, this talk didn’t contemplate working with Shibboleth without having enrolled in a federation. And the process of becoming a service provider involved several stages.

The afternoon sessions included an interesting overview from James Farnhill on JISC’s research programme provided a clear picture of JISC’s role in developing information access in higher education. This research is focused on four areas:

1. community engagement and support
2. knowledge organisation and semantic services
3. grid services and tools
4. E-information security.

The final session, on JISC Collections and Services, was also useful. Liam Earney from JISC Collections asked us not to give him any technical questions on Shibboleth, which was refreshing (and welcome, at the end of a hot day). He revealed that JISC Collections is to be spun off as a separate company, which makes sense, since the users it can serve don’t overlap exactly with the UK higher education community – for example, overseas members of an HE institution. Higher education is increasingly global, and most institutions will have some kind of distance-learning or overseas affiliate for whom they want to provide the same resources they do for the UK. Questions for Liam unsurprisingly included the frequently asked “what constitutes a valid user?”, and I suspect with a new role from JISC Collections, this one should become easier to answer.

Overall, a useful if sometimes challenging day. Oh, and I came away with a new definition of “middleware”. One of the services provided by JISC to implement the move to Shibboleth is MATU, the Middleware Assisted Take-up service. Asked to define middleware, one speaker wittily responded with “underwhelming when it works, overwhelming when it doesn’t”.

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