

Identity and Access Management in the KAREN Community

A supplementary report on the development of identity and access management systems

Neil James, University of Otago, KAREN IAM Workshops Project Manager
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Introduction

There have been a number of developments since the IAM Workshops in November that warrant reporting within the context of the IAM Workshops Project. This supplementary report should be read in conjunction with the original December 2007 report.

Cross sector IAM discussions

The Ministry for Research Science and Technology (MoRST) has convened a group of interested parties from the education, government and research sectors for discussions on IAM. The first meeting took place on 26th October in Wellington and included representatives from BeSTGRID, the Advanced Network Capability Build Advisory Panel, REANNZ, the Ministry of Education, the NZVCC Standing Committee on IT, the New Zealand Qualifications Authority, the New Zealand Teachers Council, and MoRST.

Significant work has been done by the Ministry of Education in the IAM area, and in preparation for IT trust federation. The group expressed a strong will to ensure that initiatives undertaken by the KAREN community and the Ministry were compatible and complimentary. It was agreed that ongoing dialogue across the sectors was vital to ensure this.

At a subsequent teleconference meeting held on the 5th of December it was agreed that it would be useful to formalise the MoRST convened group to take a central role in New Zealand's research, government and education IAM developments. Further informal discussions are now starting to shape how the involved sectors will move ahead with IAM infrastructure and the challenge of IT trust federation.

Progress on recommendations from the Workshops report

Recommendations

Recommendation	Detail	Initial Progress
1 Building capability and capacity in New Zealand to support IAM development and IT trust federations membership	Investigate the establishment of an IAM and trust federation working group supported by REANNZ. This group should include technical and organisational skills, and should provide the coordination for work in the area. It could also be responsible for the running of local workshops, perhaps in partnership with MAMS. One or more of this group should build and maintain international connections including attending international forums such as the Internet2 meetings, and participation in inter-federation policy and implementation discussions.	It now seems likely that the MoRST convened group will be able to assume the lead role in coordination of IAM and IT trust federation developments. The group has agreed to become formalised through the adoption of a Terms of Reference statement, and has undertaken to establish connections across the sectors, and provide some formal communication with the Australian Access Federation (AAF) and the Australian government Department for Education, Science and Training (DEST). The relationship between the MoRST coordinated group and BeSTGRID, that has led and coordinated technical development of eResearch infrastructure in the research and education community, needs to be determined. If the group is to take on activities such as running workshops it will need to

		have an associated executive agency. Potential candidates for such work could be REANNZ, BeSTGRID or MoRST. Discussions are continuing.
2 Create a support environment for those people involved in the development of IAM and trust federation	Form a mailing list for interested New Zealand people, and encourage discussion on implementation issues. Create a wiki for collation of useful support material, providing a forum for the interchange of technical information between the IAM Working Group recommended in 1 above and members of the KAREN community. The actions for this recommendation could be initiated and maintained by the IAM Working Group recommended in 1 above.	It has been proposed that REANNZ could provide communication services and support, including a wiki, for national research and education IAM work. Clearly this should be complimentary with the technical communication and resource support provided by BeSTGRID
3 Develop a briefing paper on IAM and IT trust federation for senior management	This could be actioned through seeking expressions of interest from KAREN member organisations, or other appropriate bodies, to contract for the development of a briefing for senior management, and the mounting of a series of meetings with senior executives (CEO, Vice-Chancellor, Deputy VC) of KAREN member organisations. This briefing would need to have compelling 'use cases' that senior executive can intuitively understand and identify with.	The MoRST coordinated working group is currently looking at collating use cases from existing projects and websites. These could be added to the central IAM wiki as a resource to assist the development of IAM direction and policies. The MoRST coordinated group would be the most appropriate to oversee the development of executive briefing resources. However it is likely that the actual development work will have to be contracted out and funded from a source yet to be identified.
4 Identify key services for federated access	Conduct a review and document strategic services that would drive federation adoption, prepare a plan for bringing these services into federations. This action could become part of the contract for the development of the senior management briefing.	As noted in 3 above it is likely that this work will have to be contracted out.
5 Encourage	Members of the KAREN community need to investigate and develop	The MoRST coordinated group will work to ensure that a timetable of upcoming events, such as MAMS

<p>prioritisation of SSO and local directory development within institutions to help them prepare for joining the trust federation</p>	<p>appropriate internal programmes to support IAM development.</p> <p>Organisations should be encouraged to send staff to MAMS workshops where appropriate. To encourage this further the capability travel fund could support attendance at such workshops, and the availability of the workshops and the potential travel support should be widely advertise in the KAREN member community.</p>	<p>workshops, is available and existence of training opportunities is well advertised to the research and education community. The wiki noted in 2 above will provide a convenient location for displaying such information.</p> <p>The Advanced Network Capability Build Advisory Panel could promote attendance through use of the Capability Build Fund (CBF) Travel programme.</p>
<p>6 Liaison with government departments</p>	<p>Continue liaison with government Ministries and in particular the Ministry of Education on trust federation, and continue technical interoperability trials.</p>	<p>The MoRST coordinated IAM working group is currently doing this and at its 5th December meeting it was agreed to widen the membership to include CRIs, the National Library and CONZUL representation.</p>
<p>7 Direct financial support of IAM and federation initiatives</p>	<p>Consideration should be given to the establishment of a mini-grant scheme such as that operated by the AAF. See Appendix 4.</p>	<p>Advanced Network Capability Build Advisory Panel and the MoRST coordinated group should discuss opportunities in this area.</p>
<p>8 Explore the opportunity to lead in the development of account linking technology</p>	<p>Within the liaison activity between the universities and the Ministry of Education there should be consideration of the establishment of a specific project to develop open source identity management account linking policy and technology</p>	<p>Advanced Network Capability Build Advisory Panel and the MoRST coordinated group will further discuss possibilities in this area with the Ministry of Education.</p>