

REFEDS MEMBER PROPOSAL [DISCOVER1210]

Proposal Title	Discover Project [DISCOVER1210]
Funding Required	€47,000
Funding Model	Part REFEDS funded with additional contributions sought from interested parties.
Timescale	1 January 2011 - 31 August 2011
Proposer	Nicole Harris, JISC Advance
Poll Open	6th December 2010 - 20th December 2010

1. Project Overview:

The Discover Project is a proposal that brings together two concepts to improve the user experience for federated access management – the ULX [KANTARA-DISCOVER] approach and ‘eduID’ [CURTIS&CARTWRIGHT].

It is proposed that a guide be created that identifies two possible workflows for improving the ‘discovery problem’. The guide will promote the use of a single entry point for all access management used by a service, centralised on the word ‘login’. This will take the user through to a type-ahead box that will display potential identity providers using both logos and text. On next visit, this selection will be remembered by the service. Such work can be seen in practise in the Kantara ULX demo, the Shibboleth Discovery Service [SHIBBOLETH-DISCOVER] and work undertaken by Feide [FEIDE-DISCOVER]. All access management routes will be encapsulated in this approach, whether federated, local or other customised options. No other links that guide through to authentication processes should be used on the service page.

Whilst promoting this approach as the best flow for access management, the guide will recognise that a single link may be a step too far in interface design for some services. A secondary option will be given that recognises that many services will be operating multiple links to authentication flows for sometime to come. It will propose a single slogan to be used as the entry point for the federated access management process for further and higher education. Whilst the term ‘eduID’ has been used as a concept phrase for this work, the project will not predicate this term and will appoint experts in brand approaches to create this slogan.

Part of the work of the project will be the process of defining what type of format this guide should take (new website, print, wiki etc.). The guide will include clear and comprehensive descriptions of the options available for discovery, video clips of login demos, links to preferred code, proposals for graceful fail messages and other supportive material.

The project will need to work closely with the Kantara ULX group, the Shibboleth Consortium and FEIDE / GN3 Identity Federation developments to be successful.

2. Background / Statement of the Problem:

A significant amount of work has been undertaken to improve the user experience of access management and deal with the 'discovery problem' introduced by federated access management processes. It is clear that the current experience is unsatisfactory, and that users are still very much confused by the process of logging in to resources. The world cloud below from Birmingham City University [BIRMINGHAM] in the UK shows the most popular terms used in helpdesk queries for library resources.



In recognition of this problem, JISC commissioned the Service Provider Interface Study [JISC – SPIS] in March 2009 to review the space and make recommendations for

improvements. The study suggested that an approach that introduced something like a brand that users could easily recognise, along with clear guidelines on access management process for services, would ameliorate the problem. This was given the codename 'eduID'.

Following on from this proposal, REFEDS commissioned Curtis & Cartwright to examine the business case for federations creating such a branded approach. This business case has recently been submitted to REFEDS and recommends the development of the eduID concept.

Alongside this work, significant developments have been made regarding GUIs for access management.

The Kantara ULX group is focused on providing a universal login approach that caters for a variety of single sign-on methods such as federated access, openID and infocard. An example of the process in use is available on the Kantara website, and the work has been tested and extended by FEIDE. In flow and style, it is very similar to the new Shibboleth Embedded Discovery Service, although the Shibboleth work has been driven from a security standpoint whilst the Kantara work explicitly focuses on the GUI. Alongside these developments, Google have been investigating the login experience with a focus on OAuth, but with similar results to the Shibboleth and Kantara work.

3. Project Detail:

3.1 Aims and Objectives

Strategic Objective:

- To improve teaching, learning and research outcomes through a better user experience and increased and more efficient use of Service Provider resources.

Project Objectives:

- Establish effective governance and operational structures to enable the project and its outcomes to be supported.
- Create an engaged and supportive stakeholder community.
- Achieve an enhanced user experience resulting from implementing a consistent, simple and transparent user interface for the access management aspects of sign-on.

3.2 Methodology

The project will be run as a work item under the REFEDS work-plan. The project manager will establish an appropriate project management style for the agile nature of the work.

The project will be highly consultative by nature and work closely with the REFEDS community and the stakeholders identified below.

The major funded items will be tendered using the most appropriate organisation, depending on funding models and decisions of the Discover Project steering group.

3.3 Stakeholders

The stakeholders for the project are as follows:

- REFEDS members;
- Federations;
- Federation funding organisations;
- Kantara;
- Shibboleth Consortium;
- Service Providers;
- Identity Providers.

3.4 Gantt

A timeline including work-packages for the project is included as Annex A to this report.

4. **Resources:**

The Curtis & Cartwright Business Case proposes a project budget of £174,000 over a three year period (2010 – 2013). Given the current demand for improved discovery solutions, the economic climate and the change in focus of this proposal from that of a pure eduID solution, it is proposed that a more agile funding and development model be used.

The project timeline attached as Annex A suggests an 8 month development model for the Discover Project. The ongoing communications and outreach effort proposed by Curtis & Cartwright will be provided by existing REFEDS effort and through promotion via individual federations. This cheaper and quicker solution relies heavily on the support of each of the REFEDS member organisations, so the results of the REFEDS poll for the Discover Project will be essential in taking this work forward.

The following budget is proposed for the Discover Project:

Item	Description	Total
Project Manager	30 days effort @ €450 per day	€13,500
Slogan Development	Appointed via ITT	€20,000
Editorial Work for Guide	30 days effort @ €450 per day	€13,500
Total		€47,000

Such funds would exceed the available budget at REFEDS so external funding will need to be sought from interested funders. Calls for external funding will be included as part of the Discover Project Poll for REFEDS.

5. Governance:

Governance will be provided by the current eduID steering group as part of the REFEDS Discovery and User Experience workpackage. As part of the REFEDS Poll, members will be invited to join the group or ask to step down. Members should only put themselves forward to join the group if they have the ability to commit at least 10 working days to the Discover Project.

6. Evaluation:

An evaluation methodology will be developed by the Steering Group. This will be based on a metric of uptake by Service Providers. Core services will be identified by the Steering Group as priority targets for implementation.

7. Risks:

These core risks represent a measurable subset of a full risk profile included in the Curtis & Cartwright Business Case. These risks will be monitored throughout the project:

- Solution does not meet the needs of Service Providers;
- Inability to gain consensus on solution;
- Poor selection of slogan impinges take-up;
- Inability to find a balance between education requirements and other approaches.

8. Benefits Realisation:

These core benefits represent a measurable subset of a full benefits profile included in the Curtis & Cartwright Business Case. These outcomes will be measured throughout the project:

- Better User Experience;

- Reduction in level of ‘turn aways’;
- Reduced user training overhead for IdPs.
- Reduced support overhead for IdPs and SPs.

9. References

[BIRMINGHAM] Damyanti Patel, Finding that pot of gold at the end of a rainbow: <http://www.meanboyfriend.com/bunsblanketsbears/>. Accessed 05 December 2010.

[CURTIS&CARTWRIGHT] Geoff Curtis and Matt Shreeve, Business Case for eduID. Available from REFEDS.

[FEIDE-DISCOVER] Andreas Solberg: <https://rnd.feide.no/category/idp-discovery/>. Accessed 05 December 2010.

[KANTARA – DISCOVER] <http://kantarainitiative.org/confluence/display/ulx>. Accessed 05 December 2010.

[JISC SPIS] Rhys Smith: <http://www.jisc-collections.ac.uk/Reports/Service-provider-interface-study/>. Accessed 05 December 2010.

[SHIB-DISCOVER] Chad La Joie and Rod Widdowson: <https://spaces.internet2.edu/pages/viewpage.action?pageId=14090651&navigatingVersions=true>. Accessed 05 December 2010.