Training Materials

The following resources can be used for training associated with federations. Some of this material was created by REFEDS and some by other organisations. Please note the acknowledgements and licenses.

- Getting Started - Business Case
- Getting Started - Federation 101
- Community Use Cases
- Building a Federation
- For IdPs / SPs
- Campus Education

Getting Started - Business Case

Resource	Description	Audience	Authors / Licenses
Value Proposition for Identity Federations (supporting slides)	High level overview of the value of identity federations. Slides create for APAN training event by Heather Flanagan for NSRC.	Decision Makers	Heather Flanagan for REFEDS. Creative Commons CC BY 3.0.
Jisc Business Case Toolkit (supporting slides)	Business Case for adopting SAML based federations at institutions.	Decision Makers / Project Managers.	Curtis and Cartwright for JISC. Unknown license.
Jisc Institutional Preparedness Report	An approach taken by Jisc to assess the readiness of its organisations to adopt federated access. Approach could be reused.	Decision Makers.	Curtis and Cartwright for JISC. Unknown license.
Federation "Soft" Skills	A federation provides a technical framework for in which the federation operates. The federation however requires some additional soft components to ensure its growth and sustainability. • Marketing. • Support. • Sustainability. • The business model.	Federation staff.	Terry Smith, AAF and APAN TF-IAM.
Introduction to Federated Identity	Introduction designed for NREN Development Support workshop in Sofia, 2014.	Decision makers	Brook Schofield for GÉANT

Getting Started - Federation 101

Resource	Description	Audience	Authors / Licenses
AAI Training for non-technical staff: AAI Fundamentals AAI Under the Hood AAI Supply Chain	Training module developed by Ann Harding and Nicole Harris for staff at GÉANT.	Non-technical / customer facing staff.	Ann Harding and Nicole Harris. GÉANT Project.
What is Federation?	Training developed by APAN TF-IAM group for new federation development in the APAN region. • Overview of federations, the key components - Metadata, Identity Providers and Services Providers. • Comparison of the different types of federation that can be constructed • Introduction to the Trust Framework that underpins a federation • The difference between Identity Federation and EDURoam • What is REFEDs?	Project Managers / Decision Makers.	Terry Smith, AAF and APAN TF-IAM.
AARC Federation 101	Various documents supporting a 101 approach to understanding federations.	Project Managers.	AARC project.
Federation 101 Refresher	Part 1 of a course developed for Federation as a Service training. Covers authentication / authorisation, attributes in federations and main roles within the federation.	Federation Operators.	Peter Schober, Aconet for GÉANT
What is Federation?	Part 2 of a course developed for Federation as a Service training. Covers basic federation structure.	Federation Operators.	Lukas Hämmerle, SWITCH for GÉANT.
Interfederation	Part 3 of a course developed for Federation as a Service training. Covers interfederation approaches.	Federation Operators.	Peter Schober, Aconet for GÉANT

Community Use Cases

Resource	Description	Audience	Authors / Licenses
Federation for Virtual Organisations	Slideset looking at the use cases for federation for researchers and virtual organisations.	Project Managers	Heather Flanagan, NSRC.
Research Community Requirements	Part of training module developed by Ann Harding and Nicole Harris for staff at GÉANT.	Project Managers	Ann Harding, SWITCH for GÉANT
NREN Identity Strategy	Part of training module developed by Ann Harding and Nicole Harris for staff at GÉANT.	Project Managers	Ann Harding, SWITCH for GÉANT
NREN Identity Strategy	Introduction designed for NREN Development Support workshop in Sofia, 2014.	Project Managers	Nicole Harris, REFEDS Creative Commons CC BY 3.0.

Building a Federation

Resource	Description	Audience	Authors / Licenses
Federation Policy Template	Template document for federation policy creation.	Federation Managers / Federation Steering	Marina Vermezovic, Mikael Linden, Natalija Radosevic, Peter Schober, Brook Schofield. GÉANT Project.
Federation Policy Training	Training associated with federation policy development.	Federation Managers / Federation Steering	Nicole Harris for REFEDS. Creative Commons CC BY 3.0.
Federation Policy Training	Training developed by APAN TF-IAM group for new federation development in the APAN region. The federation rules provide the basic trust in the federation. • REFEDs tools to assist in the creation of federation rules	Federation Managers / Federation Steering	Terry Smith, AAF and APAN TF-IAM.
Metadata Registration Practice Statement	Template document for a federation metadata registration practice statement.	Federation Managers / Federation Steering	Nicole Harris for REFEDS. Creative Commons CC BY 3.0.
Metadata 101 - Essentials Metadata 101 - Upper Layers User Interface Exercise Book Federation Operator Game Resource Registry Interfederation Federation Part 2 and Federation Part 1	Part of course developed for Federation as a Service training.	Federation Managers / Operators	Lukas Hämmerle, SWITCH for GÉANT. Peter Schober, Aconet for GÉANT.
Implementing a Federation Resource Registry	Training developed by APAN TF-IAM group for new federation development in the APAN region. • Function of the Federation Registry • Comparison of available Open Source Federation Registry tools • Using the AAF Federation Registry • The creation wizard • Work flows • Contacts and Administrators • Navigation • Generating and distributing Federation Metadata	Federation Managers	Terry Smith, AAF and APAN TF-IAM.
SWITCH Resource Registry	Example of how SWITCH operates a resource registry.	Federation Operators	Lukas Hämmerle, SWITCH for GÉANT.
JAGGER training	Training book for JAGGER as used by Federation as a Service.	Federation Operators	GÉANT project.

eduGAIN Best Practice Guide	Assists federations to produce all the required information for each step in order to streamline the process for both joining federations and the eduGAIN Operations Team.	Federation Managers / Federation Steering	Enabling Users team, GÉANT.
Attribute Release / Entity Category Training See also the new online course: https://e-academy.geant.org/moodle/course/view.php?id=22	The goal of the training is to assist identity federation operators in deploying attribute release practices for the Home Organisations and Service Providers in their federations. The training covers: • GÉANT Data protection Code of Conduct (CoCo) • REFEDS Research and Scholarship Entity Category (R&S) • Case presentations from several federations with different technical architectures	Federation Operators	Mikael Linden for GÉANT. Nicole Harris for REFEDS. Creative Commons CC BY 3.0. Rhys Smith, JISC. Lukas Hämmerle, SWITCHaai. Femke Morsch, Surfconext.
APAN 42 - TF-IAM: Bringing the Campus into a Federation (PDF)	Presented at APAN 42; day two of a three-day workshop on identity and access management from the campus level (day 1) to the federation.	Federation Operators / Federation Managers	Nicole Harris, GÉANT Brook Schofield, GÉANT Creative Commons CC BY 3.0

For IdPs / SPs

Resource	Description	Audience	Authors / Licenses
Discovery Guide	Guidelines on how to implement the AAI discovery process effectively.	Service Providers (and Identity Providers).	REFEDS. Creative Commons CC BY 3.0.
Discovery Service	Training developed by APAN TF-IAM group for new federation development in the APAN region. • Why do we need Discovery • Comparison of Discovery options • How to ensure Discovery is highly available • The Virtual Home - an IdP for the homeless	Federation Operators, Service Providers and Identity Providers.	Terry Smith, AAF and APAN TF-IAM.
AARC training for Service Providers (SPs) (supporting slides)	Guidelines and slides associated with SP training run by AARC.	Service Providers.	GÉANT for AARC.
IAM Online Series	Really useful series of monthly meetings hosted by InCommon. Recent highlight sessions include (but there are many many more): • Records and Registries. • Stronger Authentication / Multifactor Authentication. • External Identities in Higher Education.	Identity Providers, Service Providers, general audience.	InCommon.
Sirtfi Training	Training on the Sirtfi Entity Category and framework.	Federation Operators, Service Providers and Identity Providers.	GÉANT GLAD Team
Attribute Release Training	Training on attribute release.	Federation Operators, Service Providers and Identity Providers.	GÉANT GLAD Team

Campus Education

Resource	Description	Audience	Authors /License
APAN42 TF-IAM: Bringing IAM and SSO to the Campus (PPTX, PDF)	A slide deck, expanded from the material presented at WACREN 2016, for educating campuses around why SSO, why federation, and best practices in this space.	general audience, Federation Operators, Campus Administrators	Creative Commons CC BY 3.0.