

# eduGAIN Candidate Process

When a new identity federation applies to join eduGAIN, the eduGAIN Secretariat and business development team will work closely with them to help them prepare and meet all the membership requirements. The following steps will be taken and will be used as a template to manage Candidate applications. Each "step" may run concurrently, depending on the readiness of the federation.

Candidate Name	Federation X
OTRS Ticket Number	TT#2024031934000959

## eduGAIN New Candidate Process

Steps	Requirements	Actions	Owner	Timeframe	Notes
Step 1: Initial application meeting / readiness discussion	<p>This initial meeting will talk the candidate through the joining process, get an understanding of the technical infrastructure of the federation and its maturity and also share information about useful resources for the federation such as the eduGAIN website and wiki and the <a href="#">REFEDS resources</a>.</p> <p>If not already familiar, federations will also be talked through the available document templates and the various eduGAIN tools that can be used for testing compliance and reviewing issues.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Organise meeting with federation, eduGAIN Secretariat, eduGAIN BD and other relevant parties</li> <li><input type="checkbox"/> Add federation to edugain-discuss mailing list and eduGAIN Slack workspace</li> <li><input type="checkbox"/> Ensure a formal ticket is open for the federation application in OTRS</li> <li><input type="checkbox"/> Set up candidate profile on wiki to track progress</li> </ul>	BD  Sec	Set up meeting within 2 weeks of receiving request	
Step 2: Collect required information for membership application	<p>There are a number of formalities that need to be addressed before a federation can become a membership candidate. These are known as the "joining checklist" and represent the core information that is held about each federation to enable metadata consumption and to start the trust building process.</p> <p><a href="https://technical.edugain.org/joining_checklist">https://technical.edugain.org/joining_checklist</a></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Contact email</li> <li><input type="checkbox"/> Security contact</li> <li><input type="checkbox"/> Management contact</li> <li><input type="checkbox"/> Signed declaration</li> <li><input type="checkbox"/> Metadata source</li> <li><input type="checkbox"/> Signing certificate</li> <li><input type="checkbox"/> Governance delegate and deputy</li> <li><input type="checkbox"/> Federation website</li> <li><input type="checkbox"/> Federation policy</li> <li><input type="checkbox"/> Federation MRPS</li> <li><input type="checkbox"/> Contact OT to add federation as a candidate on the eduGAIN website</li> </ul>	Sec / OT	TBD - depending on maturity of federation	
Step 3: eduGAIN Secretariat review of federation documentation	<p>The eduGAIN Secretariat will undertake an initial review of the federation Policy and MRPS documents and may invite others to help support this process. The aim of this step is to help the federation identify any potential issues that might come up from the community review process and ensure step 5 goes as smoothly as possible.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Undertake review of federation documentation</li> <li><input type="checkbox"/> Initial feedback from the eduGAIN Secretariat on documentation review</li> <li><input type="checkbox"/> Organise meeting to discuss feedback if appropriate</li> </ul>	Sec	4 - 6 weeks	

Step 4: Technical review	The purpose of the technical review is to iron out any issues the federation may have with publishing and consuming eduGAIN metadata on a daily basis to ensure that the federation can run successfully with no / low error rate when membership is approved.	<input type="checkbox"/> Work with OT to ensure certificate is correct <input type="checkbox"/> Review of metadata against validator checks <input type="checkbox"/> federation metadata should run with no errors for the period of time taken to complete the candidate assessment	Sec / OT	Concurrent with Step 5 & 6	
Step 5: membership review of federation documentation	As stated in the eduGAIN Constitution, the eduGAIN Steering Group (eSG) is responsible for: "Reviewing and approving the membership of new Federations". Step 5 and Step 6 support this requirement.	<input type="checkbox"/> Announce review on edugain-discuss and edugain-sg mailing lists <input type="checkbox"/> Invite comments to made on appropriate wiki page <input type="checkbox"/> Run review process for a period of 4 weeks	Sec	4 weeks (or 2-3 weeks for assessment + 1-2 weeks for the applicant to process the feedback?)	
Step 6: voting	Formalised vote for membership acceptance	<input type="checkbox"/> Prepare vote in Zeus <input type="checkbox"/> Prepare voting record page on wiki <input type="checkbox"/> Run vote for period of 2 weeks	Sec	2 weeks	
Step 7: formal registration	This final step ensures that the candidate is able to fully utilise the eduGAIN service after the community vote is successful.	<input type="checkbox"/> Liaise with OT to update federation from candidate to member <input type="checkbox"/> Add federation to edugain-sg mailing list <input type="checkbox"/> Add federation to eduGAIN reporting tool	Sec		

#### eduGAIN New Candidate Assessment Feedback

Assessment Period: DATES

Comment #	Document (Policy / MRPS)	Document line / reference	Proposed Change or Query	Proposer / Affiliation