

# Configure IdP to release R and S attributes

To release attributes to all current and future Research & Scholarship SPs with a one-time configuration, an Identity Provider defines the attribute release using entity attributes instead of [entity IDs](#). This page provides instructions for popular Identity Provider software.

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## Step 1: Configure your IdP

### Configure Shibboleth IdP to release R&S Attributes

The following example illustrates how to configure a Shibboleth IdP (v3 or newer) to release the [R&S Attribute Bundle](#) to all eduGAIN Research & Scholarship SPs:

## Related content

- [REFEDS Research and Scholarship category](#)
- [InCommon-Only Research and Scholarship category \(deprecated\)](#)
- [Entity Categories](#)
- [Service provider - apply for Research and Scholarship category](#)
- [Research and Scholarship FAQ](#)
- [Tagging an entity with Research and Scholarship entity attribute](#)
- [Configure IdP to release R and S attributes](#)
- [Registered by InCommon category](#)
- [Sirtfi category](#)
- [Declare R and S support for an identity provider](#)

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## A Shib IdP config that releases the R&S bundle to ALL R&S SPs

```
<!-- for Shibboleth IdP V3.2.0 or later -->

<AttributeFilterPolicy id="releaseRandSAttributeBundle">

  <PolicyRequirementRule xsi:type="EntityAttributeExactMatch"
    attributeName="http://macedir.org/entity-category"
    attributeValue="http://refeds.org/category/research-and-scholarship"
  />

  <!-- a fixed subset of the Research & Scholarship Attribute Bundle -->

  <!-- release of ePPN is REQUIRED -->
  <AttributeRule attributeID="eduPersonPrincipalName">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>

  <!-- if your deployment of ePPN is non-reassigned, release of ePTID is
  OPTIONAL -->
  <AttributeRule attributeID="eduPersonTargetedID">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>

  <!-- release of email is REQUIRED -->
  <AttributeRule attributeID="email">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>

  <!-- either displayName or (givenName and sn) is REQUIRED but all three
  are RECOMMENDED -->
  <AttributeRule attributeID="displayName">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>
  <AttributeRule attributeID="givenName">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>
  <AttributeRule attributeID="surname">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>

  <!-- release of ePSA is OPTIONAL -->
  <AttributeRule attributeID="eduPersonScopedAffiliation">
    <PermitValueRule xsi:type="ANY" />
  </AttributeRule>

</AttributeFilterPolicy>
```

## Configure ADFS to release R&S attributes using ADFStoolkit

Microsoft Active Directory Federation Service (ADFS) does not have built-in support for REFEDS R&S attribute release. However, it is possible to do so with ADFStoolkit.

ADFS toolkit, a set of PowerShell scripts developed by CANARIE (the Canadian research and education federation) connects your ADFS IDP with the R&E Federation. ADFStoolkit by default works with R&S. To learn more:

- [Get ADFStoolkit](#)
- [Canadian Access Federation ADFStoolkit Installation Guide](#)
- [Consuming federation metadata with ADFStoolkit](#) (documentation from SWAMID, the Swedish federation)

## Step 2: Cleaning up - remove obsolete attribute release rules

Once you've configured your IdP to release attributes to R&S SPs as described below, you should optimize your IdP configuration files by removing all references to the entity IDs of individual R&S SPs. (That is, in fact, the whole point of using entity attributes to configure attribute release policy.) In particular, if your IdP already releases attributes to [CILogon](#) (or any other R&S SP), you should [convert your CILogon configuration to R&S](#).

## Step 3: Declare your support for R&S

Don't forget to let others know you now support R&S. [Declare your support for R&S via the Federation Manager](#).

## Step 4: Validate your configuration

Once you have verified that your declaration has been published in the InCommon metadata, you can verify your configuration using one of the following test tools:

- [eduGAIN Attribute Release Check](#)
- [Federated SSO test page](#), provided by the [GENI Experimenter Portal](#), an official R&S SP.