

# Identity provider - support Research and Scholarship

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An Identity Provider (IdP) supports the Research and Scholarship (R&S) category by releasing a minimal set of user directory information to qualified R&S service providers (SPs) and self-asserting that support via the Federation Manager management portal. Follow these steps:

## 1 - Release basic user directory information

The Research & Scholarship category is created to ensure that users accessing academic resources have a successful experience the first and every time. A key ingredient of that seamless experience is to make sure the academic resources have the necessary user information at sign-in time to identify the user, provision access, and maintain communication.

To accomplish that objective, The [REFEDS Research & Scholarship category](#) specifies a minimum set of user attributes that a qualifying Identity Provider shares, and that a qualified R&S Service Provider agrees to keep safe. To support R&S, An IdP must release at least the following attributes:

- eduPersonPrincipalName
- mail
- displayName OR (givenName AND sn)
- (eduPersonTargetedID)

To ensure proper identity binding, an IdP must release a non-reassigned persistent identifier. If your implementation of eduPersonPrincipalName meets that requirement, it will suffice. Otherwise, you MUST also release eduPersonTargetedID (which is non-reassigned by definition) in addition to eduPersonPrincipalName. We recommend releasing both.

## Releasing information for only a subset of your users

When configuring release rules, the R&S category does not require you to release information for all of your users. It is sufficient to release information for users who are likely to participate in cross-organization scholarly collaborations. Remember: overly strict release rules causes you to have to frequently process exception release requests. It defeats the goal of enabling seamless, on-demand access to research and scholarly collaboration.

If you have a user information release consent mechanism in place, it may be a good way to mitigate the manual exception release handling requests.

## 2 - Configuring an IdP to release R&S attributes

See: [ConfigureIdP to release R&S attributes](#)

## 3 - Declare Support for Research & Scholarship in the Federation Manager

Once you have configured your IdP to release the appropriate attributes, let others know about it by tagging your IdP with the "Support R&S" entity attribute in the Federation Manager. To learn how, see [Declare your support for R&S in Federation Manager](#).

## Check these items while you are in the Federation Manager

As you make updates to your IdP metadata in the Federation Manager, it is a good time to double check that your IdP has current MDUI information (display name, logo URL, privacy statement, information URL, etc.) and contact information.

In addition, add your [Error Handling URL](#) to your metadata. It lets SPs direct the user back to you for assistance should s/he encounter trouble signing into a R&S SP because the necessary attributes aren't there at sign-in time.

## Further reading

### Related content

- [incommon-only-r-and-s-category](#)
- [entity-categories](#)
- [research-and-scholarship](#)
- [Service provider - apply for Research and Scholarship category](#)
- [Research and Scholarship FAQ](#)
- [Tagging an entity with Research and Scholarship entity attribute](#)
- [idp-support-pseudonymous-access](#)
- [sp-register-pseudonymous-access](#)
- [idp-support-anonymous-access](#)
- [idp-support-personalized-access](#)

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### Get help

Can't find what you are looking for?

- Releasing a [dynamic subset of the R&S attribute bundle](#) based on [requested attributes](#) in SP metadata
- [Research and Scholarship FAQ](#).