

Attendees: Mike, Julian, Derek, Phil, Danny, Gustavo

Goals for the meeting

- Get background on ORCID/OAuth prototype.
- Compare to Shibboleth.
- List what needs to be resolved, what problems to solve and not to solve.
- Figure out a process for UI/UX for code that originates outside the third floor of IQSS.

Background

- In addition to local accounts, Dataverse supports "institutional login" as documented in the User Guide:
<http://guides.dataverse.org/en/4.5.1/user/account.html#institutional-log-in>
- Institutional login is powered by Shibboleth/SAML and requires setup by the sysadmin installing Dataverse: <http://guides.dataverse.org/en/4.5.1/installation/shibboleth.html>
- In addition to Shibboleth/SAML, we plan to support login via OAuth providers such as ORCID, Google, and GitHub.
- Login via ORCID is the main and perhaps only way that SBGrid plans to run their production installation of Dataverse.
- Pete from SBGrid has written "ORCID_login_features20161006" which explains how they would like ORCID login and related features to work:
<https://docs.google.com/a/hkl.hms.harvard.edu/document/d/173A8LOmaYcDfXHOSiLdaZBTfRW8-QxKUj9i44-cMCXk/edit?usp=sharing>
- Pete and Phil have collaborated on the description of <https://github.com/IQSS/dataverse/issues/3338> to include what they feel is "in scope" and "out of scope" for the current development effort taking place in the "ORCID-integration" branch, authored mostly by Michael and tweaked here and there by Phil.
- On 2016-10-18, Michael gave a demo of the code so far. Notes and screenshots were captured at
<https://docs.google.com/document/d/1Lja6sqG0Ljg2Q6suoMJbYr3J01DTpw6HkgvRwdbEDXQ/edit?usp=sharing>
- The design team is tracking the current effort at <https://trello.com/c/GJ2Yu115/6-orcid-oauth2-4-6>
- OAuth is highly related to Shibboleth and on 2016-08-30 Amber Leahey from Scholars portal wrote down many ideas in a "Shibboleth integration + deposit workflows" thread at <https://groups.google.com/d/msg/dataverse-community/HtbqpVla-SU/xo3zIVSPAQAJ>
- On 2015-06-10 at the 2015 Dataverse Community meeting, there was a breakout session about auth and OAuth was mentioned specifically with notes captured at https://docs.google.com/document/d/17TI2RLqdntd5vnrygDrFgYNNmqb_eoTdSFita-L1Azk/edit?usp=sharing and subsequent notes were taken about OAuth specifically at

<https://docs.google.com/document/d/1tMnXwPjTTQfBVBmznCvijvS3ZoN-sViWKk-vl63dSAw/edit?usp=sharing>

- On 2015-04-30 Merce and Phil met to discuss the direction in which they'd like to see auth go:
<https://docs.google.com/document/d/157sw9gaFGwrb0EtCGGILMxSg0cooHfKEvlsjcebPcA8/edit?usp=sharing>
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Notes

- Phil has deployed the OAuth/ORCID code to <https://shibtest.dataverse.org>
- We want testers who know Dataverse and ORCID well. We especially want Pete to test since he falls in this category and also is a stakeholder.
- Demo of Shibboleth account creation (new account).
- Demo of Shibboleth account conversion (from local account). Workflow begins if the email from Shibboleth matches the email of a local account.
- Bug: When converting an account to Shibboleth, the email address should be verified already because we trust the email addresses from Shibboleth identity providers.
- Demo of creating a "sandbox" ORCID account. Fail due to not being able to get past "I am not a robot".
- Switched to screenshots from Michael's 2016-10-18 demo (link above).
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UI Problems to solve

- How are we going to have a scalable UI solution for countless remote authentication options (Google, Github, etc.)?
- Prompt user to store the email address that may come OAuth provider (by default ORCID does not release an email address).
- Verify email workflows - fix the prototype to remove this workflow for use cases when an email is provided. No email? User manually enters email, and MUST verify.
- Cleaner "there is a system config problem" messages

Other Non-UI Problems

- Sysadmins setting up OAuth need to know to configure OAuth2CallbackUrl and whatever else to get the feature working in their installation. Currently a " OAuth2 configuration warning" is shown on the Login Page.
- Support teams need to understand the difference between how user information is updated for Shibboleth accounts (overwritten on each login) as opposed to OAuth accounts (fields are editable, as they are for local users).

Problems we are not trying to solve at the moment

- The ability to hide/disable local login/signup:
<https://github.com/IQSS/dataverse/issues/2974>
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Next steps

- (Phil) Open bug about how Shibboleth users who just converted see a "Verify Email" button but shouldn't because we should be trusting email addresses coming from Shibboleth.
- (Mike) Mockups for dev revisions to prototype.
- (Phil) Configure stable, working environment on <https://shibtest.dataverse.org> where ORCID sandbox works (no robot captcha problems) and Google and GitHub login is working.
- (Derek) Do usability testing once the shibtest box is ready.

Figure out a process for UI/UX for code that originates outside the third floor of IQSS

- Deferred. UI/UX team will work on a process as we make progress on UX of ORCID feature