



Foothill De Anza Community College District
Follow-up Report for February 17 - 18, 2009
IAM Architecture and Planning Workshop
February 20, 2009

Account Information	
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Distribution		
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Objectives

The objectives of the Tactical Identity and Access Management Workshop included the following:

- Provide the FHDA participants with a framework for implementing their IAM solution as currently planned. Banner Finance end users will need to access Banner via Luminis as of the July 1, 2009 Go Live.
- Provide explanation of the structure and function of the SunGard Higher Education Banner Enterprise Identity Services as relates to Banner identity provisioning with Banner/Luminis.
- Review and validate critical areas of input to IAM architecture plan; Banner Implementation Plan, Data Migration Plan, and IAM Strategic Plan
- Create identity provisioning implementation plan, resulting in Banner identity provisioning coinciding with the Go Live of Banner Finance.

Progress Report
Accomplishments

Through the delivery of the workshop content the following was achieved:

- Reviewed SGHE services provided to date and stressed the relationship or contribution of these services to the IAM architecture at FHDA.



- Discussed the implementation timeline of each Banner module and the correlation to the IAM architecture and implementation timeline.
- Discussed the data migration timeline, specifically the General Person conversion, as a prerequisite to the provisioning of identities from Banner.
- IAM Reference Architecture further defined by the identification of the integration requirements; General Person records from the legacy Plus system.

Decisions Made by FHDA			
Date	Decision	Next Step	Next Step Owner
2/17/2009	Spriden ID - <ul style="list-style-type: none"> • Legacy Accounts: Spriden ID will be populated during conversion for all current Legacy users with the CWID (Campus Wide ID). • New Banner Accounts: Spriden ID will be system-generated via Banner for any new Banner User Accounts, post conversion. 	<ol style="list-style-type: none"> 1. Ensure CWID exists for all users scheduled for migration 2. Create GP conversion and synchronization rule. 	FHDA Technical Team
2/17/2009	Grandfather CWID into Banner Spriden ID via GP Conversion/GP Synch. (See Note 1)	<ol style="list-style-type: none"> 1. Ensure data is in PLUS 2. Create GP Conversion and Synch Rule. 	FHDA Technical Team
2/17/2009	Grandfather existing usernames (ugly name) for Staff / Faculty into Banner 3 rd Party ID via GP Synch/GP Conversion. (See Note 2)	<ol style="list-style-type: none"> 1. Ensure data is in PLUS 2. Create GP Conversion and Synch Rule 	FHDA Technical Team
2/17/2009	Post-conversion, Banner will generate GOBTPAC_EXTERNAL_USER (3 rd Party ID) based on the default Banner convention. (See Note 2)		FHDA Technical Team
2/17/2009	For users who have email addresses in legacy, those email addresses will be converted into Banner's GOREMAL_EMAIL_ADDRESS field.		FHDA Technical Team.
2/17/2009	Post-conversion, Banner will generate email address in the format: LastnameFirstname[0..n] with	Use a simple database trigger which executes on SPRIDEN Inserts.	



	the trailing digit used to assure uniqueness. This will operate as a trigger that executes on INSERT to table SPRIDEN. (See Note 3)	Build and populate the email address appropriately	
2/17/2009	Define Roles External Table - With the exception of Finance, in the transition period, before modules go live in Banner, tables in the Banner database, called Role External Tables will be used by Banner role calculation processes to determine roles in Banner. (Finance role will be determined by Finance module data)	Define and create Role External tables	FHDA Technical Team
2/18/2009	CWID will be used as the log in to the Luminis portal.		FHDA Technical Team
2/18/2009	Since the CWID is used as a log in to Luminis, create a way for PDS Login Alias to be populated in the Luminis LDAP to allow for alternate usernames to be used.	Implement PDS Login ID solution	FHDA Technical Team
2/18/2009	INB ID (Oracle ID) will be the CWID/Spriden ID prefixed by a letter. (Oracle requires that the value have a letter, so the numeric CWID/Spriden ID value must have a letter prefix.)		FHDA Technical Team
2/18/2009	Scope of the General Person data conversion - The scope of the General Person data conversion was discussed. The options presented were: <ul style="list-style-type: none"> • Convert Faculty and Staff only • Convert Finance users only • Convert everyone (but focus on Finance users who are in suspense) • Manual entry of Finance 		FHDA Technical Team



	users		
2/18/2009	Identity Data Model This is like the ultimate composite key, used to uniquely identify a person The information we will use is: <ul style="list-style-type: none"> • CWID • SSN • Last name • Middle name • First name • Date of Birth • Gender • Email • Address • Phone • Username / Ugly Name 		FHDA Technical Team

Action Items and/or Assignments for FHDA				
Date Assigned	Description	Owner	Critical Date for Completion	Status
11/18/09	Data Mapping	Joe	4/10/09	Open
11/18/09	Create Plus extracts	Tom R, Randy, Joe	4/10/09	Open
11/18/08	Author and create the PL/SQL trigger which will create the email addresses, check for uniqueness and insert them into GOAEMAL	Matt	4/24/09	Open
11/18/08	GP Conversion rule definitions	SGHE, Tom R, Joe	4/24/09	Open
11/18/08	GP Synch rules	SGHE, Tom R, Joe	4/24/09	Open
11/18/08	Roles External table conversion		5/8/09	Open
11/18/08	Channel definitions	Drake, Luminis Core Team	5/8/09	Open
11/18/08	PDS Login Alias	FHDA Technical Team	07/2009 - 01/2010	Open

Status: New, Open, Completed, Cancelled, Deferred



Action Items and/or Assignments for SunGard Higher Education				
Date Assigned	Description	Owner	Critical Date for Completion	Status
11/18/09	Provide reference for a sample of email creation trigger	Damon Cody	3/6/09	Complete
11/18/09	Provide copy of Banner Enterprise Identity Services Handbook 8.0	Barry DeMillion	3/6/09	Complete

Status: New, Open, Completed, Cancelled, Deferred

Attendance				
Name	Email Address		Day 1	Day 2
Chien Shih			X	X
Tom Roza			X	X
Matt Rapczynski			X	X
Drake Lewis			X	X
David Gillett			X	X

Issues / Concerns

Additional Notes

Note 1: Spriden ID

- **Legacy Accounts:** Spriden ID will be populated during conversion for all current Legacy users with the CWID (Campus Wide ID).
- **New Banner Accounts:** Post-conversion, Spriden ID will be System-Generated via Banner for any new Banner User Accounts. (Format is 9 characters, null followed by 8 digits)

Note 2: GOBPAC_EXTERNAL_USER (3rd Party ID)

- **Legacy Accounts with username:** GOBPAC_EXTERNAL_USER will be populated with the current username (ugly name) during conversion for all existing legacy accounts which have that value.
- **New Accounts and accounts with no username:** GOBPAC_EXTERNAL_USER will be populated using the default Banner algorithm, function F_Generate_External_User:
 - Uses first initial and up to seven characters of last name
 - Checks for uniqueness
 - If not unique, truncates letters from end of string and adds numbers until a unique value is found



Note 3: Email address:

- **Legacy Accounts:** GOREMAL_EMAIL_ADDRESS will be populated during conversion for all existing legacy accounts following the current FHDA naming conventions.
- **New Banner Accounts:** Create email address:
 - LastnameFirstname[0...n] format for FHDA email accounts.
 - Creation of database trigger required
 - Although email addresses are created based on user's name, they will **not** be automatically updated when name changes occur.
 - Email changes will occur based only on **user request**.

New Banner Accounts:

- **Banner General Person** will serve as the **authoritative source** of identity information; in essence it will be the entity management system. The entity management system is responsible for reconciling and creating unique digital identity that cascades entity relationships.
The **username** is an identity data element owned by the Banner General Person registry. It is used to gain access to applications, services, etc. deployed within the enterprise. In the context of Banner this value is most often maintained in the **GOBTAC_EXTERNAL_USER** (3rd Party ID) field of the GOBTAC table.
The Banner default algorithm for the creation of this value (FirstInitial+LastName+[0...9] in F_Generate_External_USER) will be used when Banner creates new accounts.

FHDA has the **option of adopting the Banner Baseline** (noted above) **or modifying the Banner function**, changing the PL/SQL code to meet institutional needs. Things FHDA may want to consider in the decision:

- It is a modification
- It will require PLSQL and Banner API knowledge
- It will need to be maintained
- It is a modification that has been made by many Banner clients
- It will create a username conforming to FHDA standards
- Solution document in Support Center

Provisioning:

For existing Faculty, Staff and Students who will be included in the conversion, their current CWID will be grandfathered into the Banner General Person record. Therefore converted faculty and staff will use CWID for **INB (CWID will need to be prefixed with a character as required by Oracle)** and **Luminis** access.

Luminis Account Provisioning:

Spriden ID (legacy CWID or newly generated Spriden ID's) will be used to log into Luminis. In the latter half of 2009, FHDA will plan how they will leverage the pds Login Alias attribute of the Luminis LDAP to allow alternate usernames to be used to log into the Luminis platform.