



HARVARD UNIVERSITY
Information Technology

Identity and Access Management
IAM Lifecycle Committee
Kick-off Meeting

April 2, 2014

Wednesday

12:00 - 2:00

Holyoke 561

Agenda

- Meeting Purpose and Intended Outcome
- Why are we here? – IAM Program Governance
- IAM Program Overview – Need, Vision and Projects
- IAM Program Governance Detail
 - IAM Lifecycle Committee
 - Related Committees
 - Process
 - What do we need from you?
- Discussion
- IAM Program Overview
 - Progress Against the Plan – Key Accomplishments
 - Next Steps/Major Milestones

Meeting Purpose and Intended Outcome

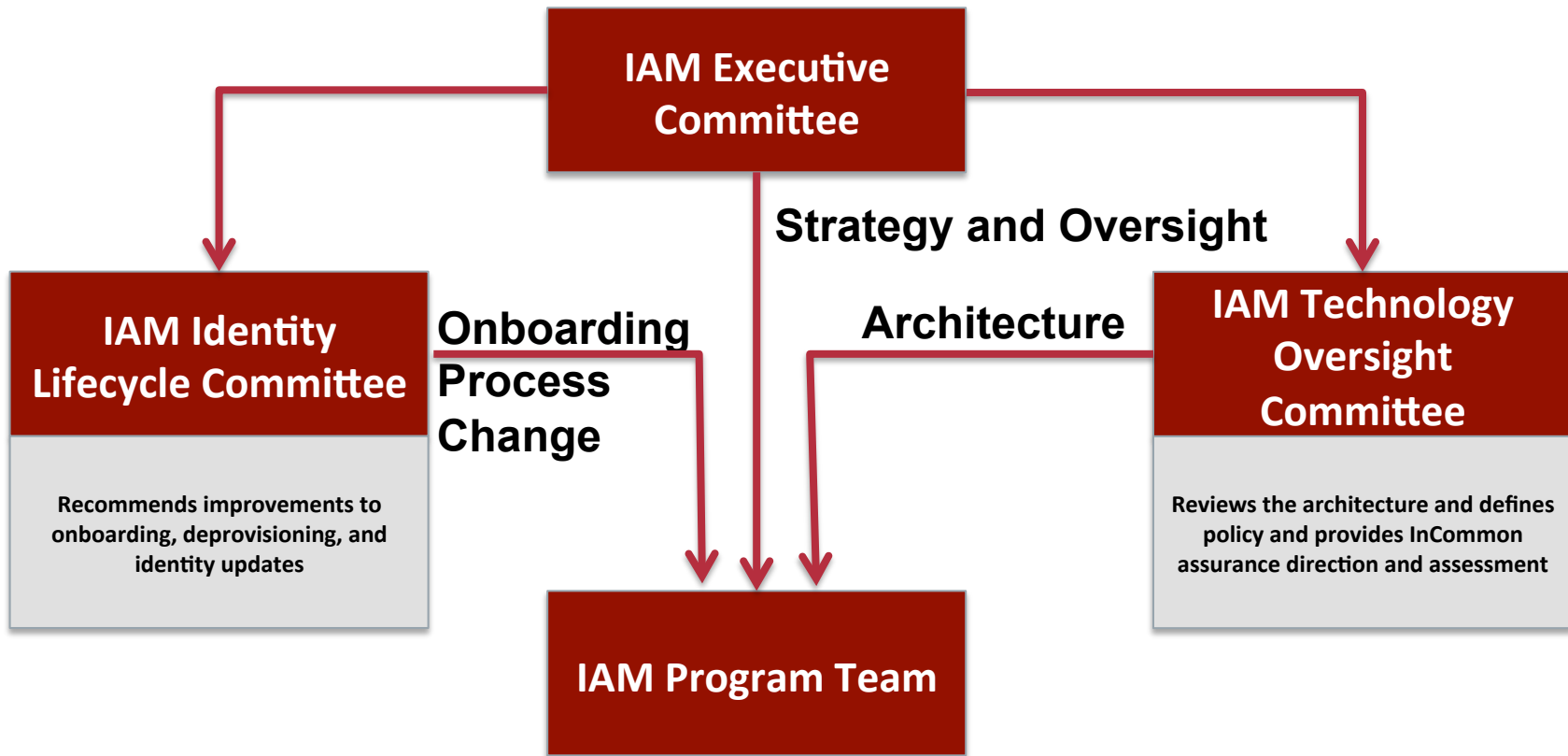
Purpose

- Introduce the IAM Program Governance and the responsibilities for this committee as well as the IAM Program Plan.
 - Get to know each other...
- Provide a status update
- Discuss the what is meant by 'IAM Lifecycle' and topics for Harvard

Intended Outcome

- Provide an overview of the IAM Program Governance.
- Provide an overview of the IAM Program Implementation Approach
- First topic(s) to work on in our next meeting

Why are we here? – IAM Program Governance



IAM Program Overview - Vision

The Vision for Identity and Access Management (IAM)

Provide secure access to applications that is easy for the user, application owner, and IT administrative staff with solutions that require fewer login credentials, enable collaboration across Harvard and beyond, and improve security and auditing.

Strategic Objectives

1. Simplify the User Experience

“Simplify and improve user access to applications and information inside and outside of the University.”

2. Enable Research and Collaboration

“Simplify the ability for faculty, staff, and students to perform research and collaboration within the University and with colleagues from other institutions.”

3. Protect University Resources

“Improve the security stature of the University with a standard approach.”

4. Facilitate Technology Innovation

“Establish a strong foundation for IAM to enable user access regardless of new and/or disruptive technologies.”

Guiding Principles

- **Harvard Community needs will drive the technology supporting the Identity and Access Management Program**
- **Tactical project planning will remain aligned with the Program strategic objectives**
- **Solution design should allow for other Schools to use the foundational to communicate with the IAM system in a consistent, federated fashion**
- **Communication and socialization of the program are critical to its success**

Key Performance Indicators

- **The number of help desk requests that relate to account management per month.**
- **The number of registered production applications that use the IAM system per month.**
- **The number of user logins and access requests through the IAM system per month.**
- **The number of production systems that the IAM system provisions to per month.**

IAM Program Overview - Business Need

Stakeholder	Experience Today	Imagine If...	Program Benefit
End Users	<ul style="list-style-type: none"> • End users have different user names and credentials to access applications and data both internal and external to the University. • End users rely on manual, paper based process for creating and managing user accounts. • End users have no access or are forced to register for accounts to access external sites. • The identity of an end user is not consistent throughout the identity lifecycle resulting in interrupted access to services and resources. 	<ul style="list-style-type: none"> • End users could access information and perform research across schools and with other institutions without having to use several sets of credentials. • End users could manage their own accounts and sponsor others through a centralized web application. • End users could use internal Harvard credentials to access common external sites. • End users could keep using the same set of credentials despite change in status, role, or affiliation. 	<ul style="list-style-type: none"> • Simplify Account Management • Increase Self-Service • Expand Access to Resources • Allow Choice of Credentials • Ensure Continuity of Identity
Application Owners	<ul style="list-style-type: none"> • Application owners have difficulty integrating access management into their solutions creating long implementation timelines and higher costs. • Application owners have to grant application access to users with the same access rights for each user separately. 	<ul style="list-style-type: none"> • Application owners can easily integrate Harvard users with internal and external applications using an application portal. • Application owners can easily manage groups for controlling access to their applications. 	<ul style="list-style-type: none"> • Simplify Application Set-up • Simplify Application Administration
People Administrators	<ul style="list-style-type: none"> • People administrators manually create sponsored guest identities resulting in delays in end user productivity. • People administrators cannot streamline the de-provisioning of user access privileges across multiple systems 	<ul style="list-style-type: none"> • Sponsors can create and manage an external person's identity and access. • Automated provisioning reduces the burden of people administrators of disparate systems and increases the security posture of the University. 	<ul style="list-style-type: none"> • Reduce Manual Process for Guest Membership • Reduce Local Administrative Overhead

IAM Identity Lifecycle Committee

IAM Identity Lifecycle Committee
<p>The mission of the IAM Identity Lifecycle Committee is to work towards improving the end-user experience at Harvard. This will be accomplished by bringing the collective and varied expertise of a representative set of campus business process owners to bear on topics related to the management of identity related processes and services.</p> <p>The primary objective of the group is to contribute meaningful recommendations on process improvement and service offerings, and to serve as a catalyst for projects across the University that will improve onboarding and the lifecycle of user experience through better systems, processes, education and raising awareness of process and policy.</p> <p>The group will advise the product and practice management team of the Identity and Access Management Program, including endorsing recommendations to the IAM Executive Committee. The Committee will meet on a monthly basis.</p>

Objectives	Guiding Principles	Standing Agenda
<ul style="list-style-type: none"> ● Participate in improving the end-user experience at Harvard ● Provide a catalyst for projects across the University that will measurably improve onboarding and other lifecycle processes ● Recommend IAM service enhancements and new offerings ● Provide forum for related policy discussion ● Provide input on the IAM product strategy ● Serve as a sounding board for new ideas and approaches to providing identity and access management services ● Assist with quantifying the impact of proposed process changes and recommending implementation approach 	<ul style="list-style-type: none"> ● Commit to improving the user experience ● Act in the interest of Harvard as a whole ● Openly acknowledge problem areas and promote change when needed ● Work towards eliminating the historical silos that may have previously hindered the improvement of processes and systems ● Encourage broad communication and offer direct support as a stakeholder ● Operate with transparency around process and decision making ● Use criteria and metrics to evaluate ideas and measure them against desired outcomes ● Accept uncertainty, ambiguity, and absence of absolutes when necessary 	<ul style="list-style-type: none"> ● Approval of Prior Minutes ● Chairs Report ● Program Update ● Requirements Discussion ● Working Group Updates ● General Discussion Topics

IAM Lifecycle Committee – What do we need from you?

- Frequency: Monthly
- Monthly Agenda:
 - Approval of Prior Minutes
 - Chairs Report
 - Get Started with an IAM Service
 - Shared Topics of Interest
 - Proposal Review and Recommendations to Approve
 - New Business
- Your Commitment
 - Attend monthly meetings
 - Represent the concerns of your organization in the meetings
 - Bring back information from the meetings into your organizations
- What day of the week would work the best for a monthly recurring meeting?

Discussion:

Committee: Scope and Approach

- Collective experiences on other groups like this at Harvard before
 - What worked well (or not so well?)
 - Factors that contribute to success?
- What is meant by Identity Lifecycle?
- What is the best way to determine what topics need work?
- What our existing connections to other groups?
 - Internal?
 - External user groups?

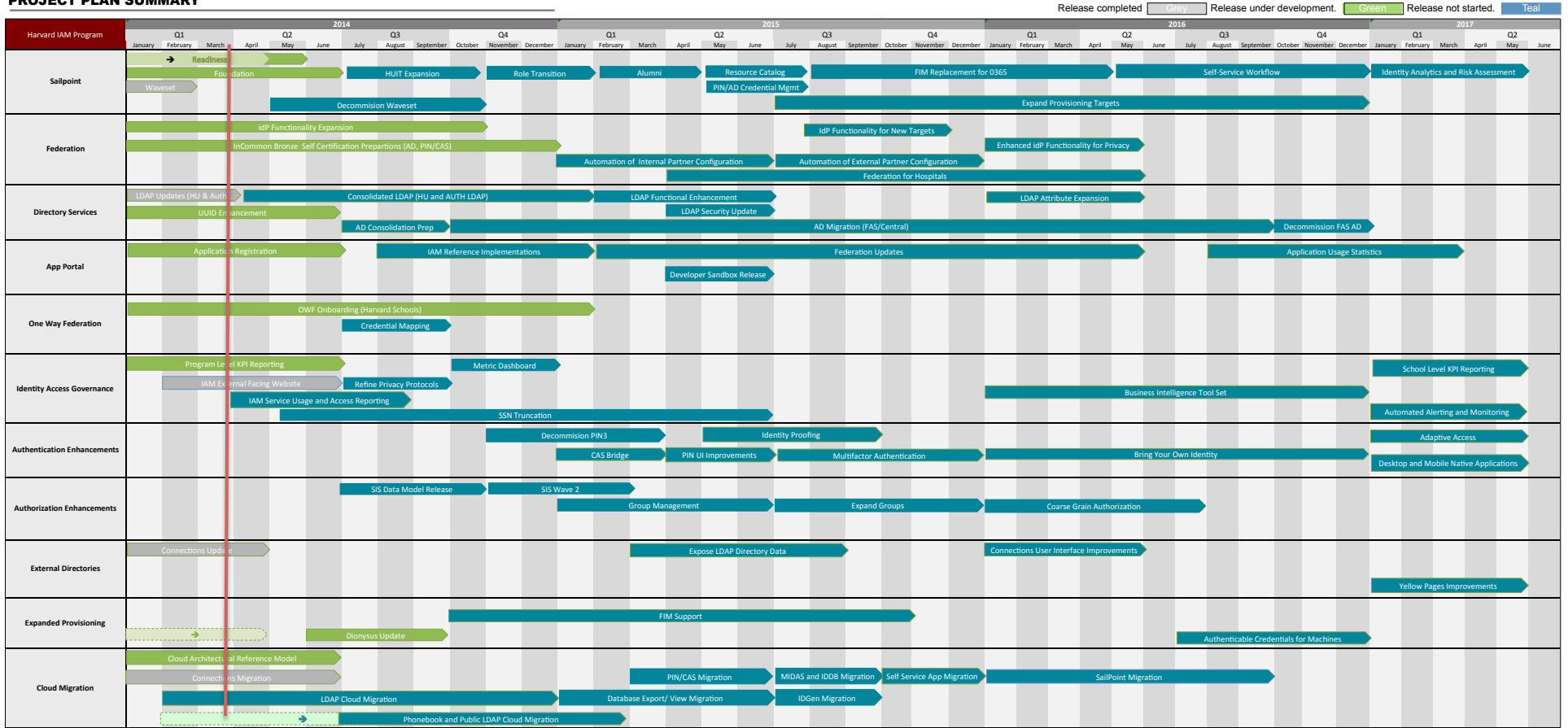
IAM Program Overview - Implementation Approach

The IAM Program will be implemented in accordance to the four strategic objectives and work will be managed as a portfolio of eleven projects:

Project	Project Description
SailPoint	The SailPoint Project introduces improved user processes for account management. The team will replace an outdated solution with a new, feature rich, solution that can be expanded for local use by interested Schools across the University.
Federation	The Federation Project enables Harvard users, users at Harvard affiliated institutions and non-Harvard users to collaborate and easily gain access to applications and resources, internal and external to the University.
Directory Services	The Directory Services Project reduces the number of systems of record for user information, while expanding the data model and user attributes stored within the central IAM identity repository. This will allow quick, consistent and appropriate access across LDAP, Active Directory (AD) and as well as web authentication protocols.
App Portal	The App Portal Project enables the Harvard Application Owner community to learn about and easily integrate applications and software services with central IAM Services.
One Way Federation	The One Way Federation Project consists of a series of authentication releases and School onboarding efforts that provide Harvard user with the flexibility to access applications with a credential of their choice.
Identity and Access Governance	The Identity and Access Governance Project will deliver visibility into the IAM Program metrics, new user certification processes and audit reporting. It will evolve to encompass business intelligence and identity analytics to support risk management and strategic decision-making.
Authentication Enhancements	The Authentication Enhancements Project provides users with a simplified login experience as well as enhanced security options for sensitive data and applications.
Authorization Enhancements	The Authorization Enhancements Project provides application owners and administrators with the ability to manage users via groups for access as well as the ability to manage authorization rules for access to an application or software service.
External Directories	The External Directories Project securely exposes user identity information inside and outside of the University.
Expanded Provisioning	The Expanded Provisioning Project enables identity creation, authentication, and account provisioning for non-person objects.
Cloud Migrations	The Cloud Migration Project provides the University with cloud reference architecture for Harvard application deployments and includes the migration of IAM Services from on premise hosting to Amazon Web Services.

IAM Program Overview - Timeline

PROJECT PLAN SUMMARY



Today

Discussion: Process Change Topics Already On Roadmap

- Change in process
 - Person of Interest Process: Issue permanent HUIDS (June 2014)
 - Reduce volume of full SSN data in the identity database
- Projects In Flight with Lifecycle Process Impact
 - User Management and Provisioning (aka 'Sailpoint')
 - User Account Claiming (Initial onboarding)
 - User Password Reset / Login Name Recovery
 - Sponsored Account Management
 - Mapping Identity: ID Services for Schools/Depts (UUID, HUID, Person Matching)
 - Cross Registration
 - New SIS Data Model (Wave 0, Wave 1)

Wrap-Up & Next Steps

Collaboration Spaces:

- IAM Lifecycle Committee Wiki Space
- IAM.harvard.edu (Program website)

Next meeting:

- Best timing options?
 - Possibilities: First week of Month, Thursday: 1 to 2:30
 - Other suggestions?

Next Agenda:

- Proposed on-boarding process for new users of FAS, Central
 - Identify key implementation considerations for these widespread changes

Appendix

Other IAM Program Information

Progress Against the Plan – Key Accomplishments

The following table outlines the key program accomplishments achieved in the past month :

Project	Release	Description	Plan Date	Actual Date	Impact
SailPoint	Waveset	Deliver Waveset changes to support transition of student users to the @g Google domain.	March 2014	March 2014	<ul style="list-style-type: none"> ✓ Enable Google users to opt out of having personal information searchable in the Google directory. (i.e. FERPA status) ✓ Enable GSAS users to have the option to request a Google account.
Directory Services	LDAP Updates	Update the end of support software and hardware for HU LDAP.	March 2014	March 2014	<ul style="list-style-type: none"> ✓ Improve the reliability of IAM services.
Identity Access Governance	IAM External Facing Website	Replace the IAM wiki site with a standardized, externally facing website.	June 2014	March 2014	<ul style="list-style-type: none"> ✓ View IAM program information and status at iam.harvard.edu.
External Directories	Connections Update	Replace the IBM Connections product with a homegrown application.	May 2014	March 2014	<ul style="list-style-type: none"> ✓ Meet IBM license requirements to avoid financial penalty. ✓ Provide foundation to improve search functionality in future releases.
Cloud Migration	Connections Migration	Deploy the new Connections application to the AWS Cloud.	July 2014	March 2014	<ul style="list-style-type: none"> ✓ Deliver first IAM service to the cloud.

Next Steps / Major Deliverable Milestones

Milestone	Target Date	Status	Benefit
Readiness Release (SailPoint)	May 2014	On-track	Simplified Account Management
Connections Update (External Directories)	May 2014	On-Track	Product Replacement
Foundation Release (SailPoint)	July 2014	On-track	Simplified Account Management Improved Sponsored Guest Functionality
Application Registration (App Portal)	July 2014	On-track	Reduce Complexity of IAM Integration
UUID Enhancement (Directory Services)	July 2014	On-track	Simplified Account Management Simplified Application Administration

IAM Technical Oversight Committee

IAM Technical Oversight Committee Mission

The primary objective for the IAM Technical Oversight Committee is to provide consistent, timely and meaningful review of proposals of architecture and standards for the Identity and Access Management Program. The IAM Technical Oversight Committee will identify the need for technical solutions, architecture, and standards. When those have been developed, provide feedback as well as recommendation for adoption to the IAM Executive Committee. The Committee will meet on a monthly basis.

Objectives

- Guide and approve recommendations to the IAM Executive Committee for architectures and standards
- Identify the need for technical solutions, architectures and standards
- Recommend the set of resources outside the IAM Program Team to be involved in drafting architectures and standards
- Coordinate around technical change management to ensure change will be included in local planning

Guiding Principles

- Promote change and acknowledge areas that need improvement to improve the University
- Urge the crossing of silos where it would improve business processes
- Encourage broad communication and support among stakeholders
- Be transparent in our processes and decisions
- Use criteria and metrics to evaluate ideas and measure them against desired outcomes
- Accept uncertainty, ambiguity, and lack of absolutes when necessary

Standing Agenda

- Approval of Prior Minutes
- Chairs Report
- Get Started with an IAM Service
- Shared Topics of Interest
- Proposal Review and Recommendations to Approve
- General Discussion

Technical Oversight Committee Members

Name	School/Group
Steve Duncan	Harvard Kennedy School
Tyson Kamikawa	Harvard Medical School
Sherif Hashem	Harvard Law School
Indir Avdagic	SEAS
Ken Ho	GSE
Jake Yerdon	HSPH
David Faux	HUIT Admin Tech/FAS & College
Jonah Pollard	Unified Communication/Cloud
Tim Gleason	HUIT IAM/AD

Name	School/Group
Carolyn Brzezinski	SIS
Sara Sclaroff	HUIT Admin Tech/HR
Rich Ohlsten	HUIT Admin Tech/Alumni
Colin Murtaugh	HUIT Academic
Dan Fitzpatrick	Partners
Eileen Flood	Campus Services
Randy Stern	Library IT
Joe Zurba	HUIT Security