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software development simplified

## Kuali – IDM Requirements Summary

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# Method for Gathering

- Meetings with:
  - **Kuali Applications**
    - Kuali Financial System
    - Kuali Student
    - Kuali People Management (KPME, a.k.a. HR / Payroll)
    - Kuali Open Library Environment (OLE)
    - Kuali Coeus (Research Administration)
  - **Institutional Stakeholders**
    - Indiana University
    - Iowa State University
    - The University of Arizona
  - **Commercial Affiliates**
    - rSmart
    - VivanTech

# Method for Gathering (contd.)

- Asked each to:
  - Help identify major IDM components that would constitute a “suite” solution from their perspective
  - Provide use cases or user stories for their top needs
  - Limited to 30 minutes to keep focus on the high level items instead of deep details
- Tracked re-occurrence of common needs to assign priority weight

# Components and Priorities

Person Registration and Profile Management

Provisioning and De-provisioning

Identity Reconciliation

Directory

Group Management  
Presence and Location

Role Management

Compliance and Privacy

Authenticator Management

Delegated Administration and Self Service

Federation of Identity Data

Up-to-date Documentation

Access/Permission/Privilege Management

Identity Data Workflow

Authentication

Connectability

Single Sign On (Local and Federated)

Modern UI

Reporting

Batch Processing/Syncing

# High-Priority Areas

- *Identity Reconciliation*
- *“Connectibility”*
- *Batch Processing/Syncing*
- *Person Registry and Profile Management*
- *Provisioning and De-provisioning*

# Identity Reconciliation

- Important from perspective of:
  - HR/Payroll (KPME)
  - Student Systems (KS)
- Multiple people entering identities
- Preventing and detecting duplicates
- Resolving duplicates
- Merging duplicates

# “Connectability”

- Ability to integrate with other products
- Open Source, Commercial, or home grown
- Possibly offering out-of-the-box connectors for largely deployed solutions such as PeopleSoft
- Ability to connect to other solutions such as address verification services
  - Important to have snail mail addresses accurate and up to date for certain types of communication

# Batch Processing/Synching

- Ideally, this actually includes the elimination of as many batch processes as possible
  - Person registry helps
- However, there will still be instances where person records need to be sourced externally
  - Iowa State Example: facilities department using external system for assignment of keys based on employee status
- Having good tools to support these scenarios will help and allow for easier adoption



# Person Registry

- Single institutional source to store all persons
- KPME and KS will use this as their identity store of record
- Support for persistent identifiers
  - Including “gaps” in affiliation with the university
  - Requirement for Registrar “accreditation”
- Person Relationships
  - Student to Advisor
  - Employee to Supervisor
  - Student to Parent

# Other Stakeholder Requirements

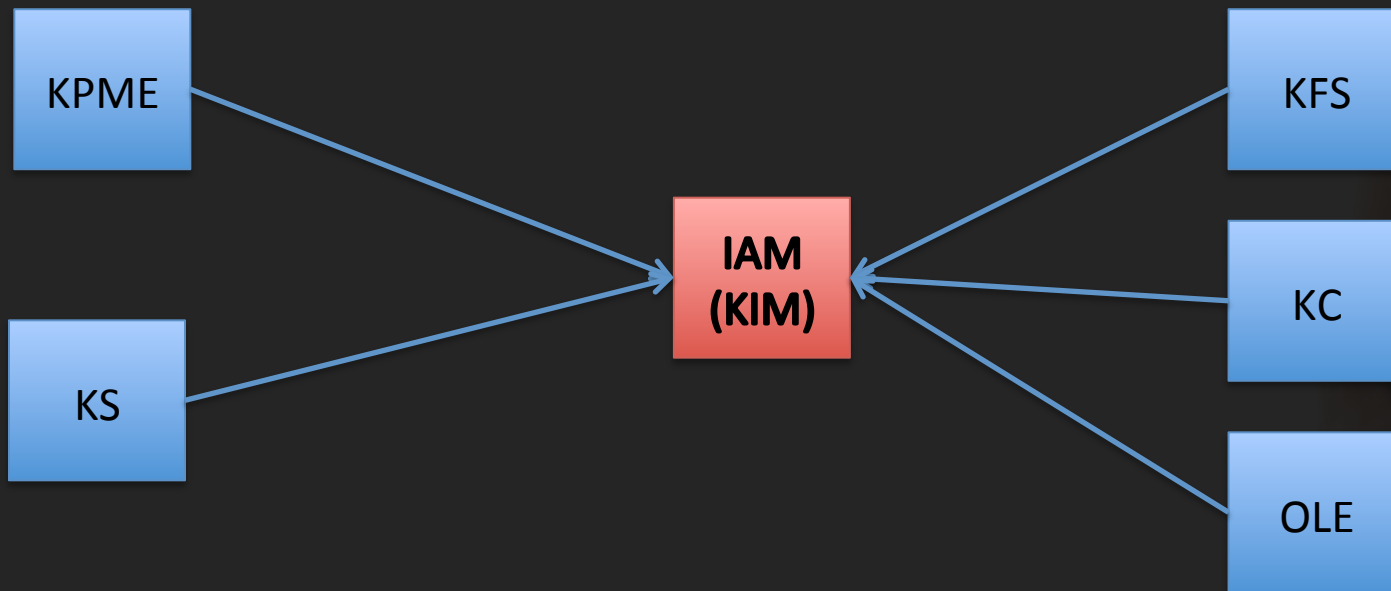
- Access Certification
- Provisioning and De-Provisioning
- Federated Identity
- Distributed Sessions
- User preferences/profiles across systems
- Compliance/Privacy – FERPA, FIPPA, HIPPA, etc.
- Role Management

# The Path Forward

- Regardless of the outcomes of this workshop...
- Kuali will at the very least:
  - Need to implement improved functionality in registry to support KPME and KS requirements
  - Including dealing with the problem of reconciliation
  - Including improved functionality (UI and apis) for maintenance of data in the registry
- Plus other requirements that surface and are needed to support Kuali application baseline functionality

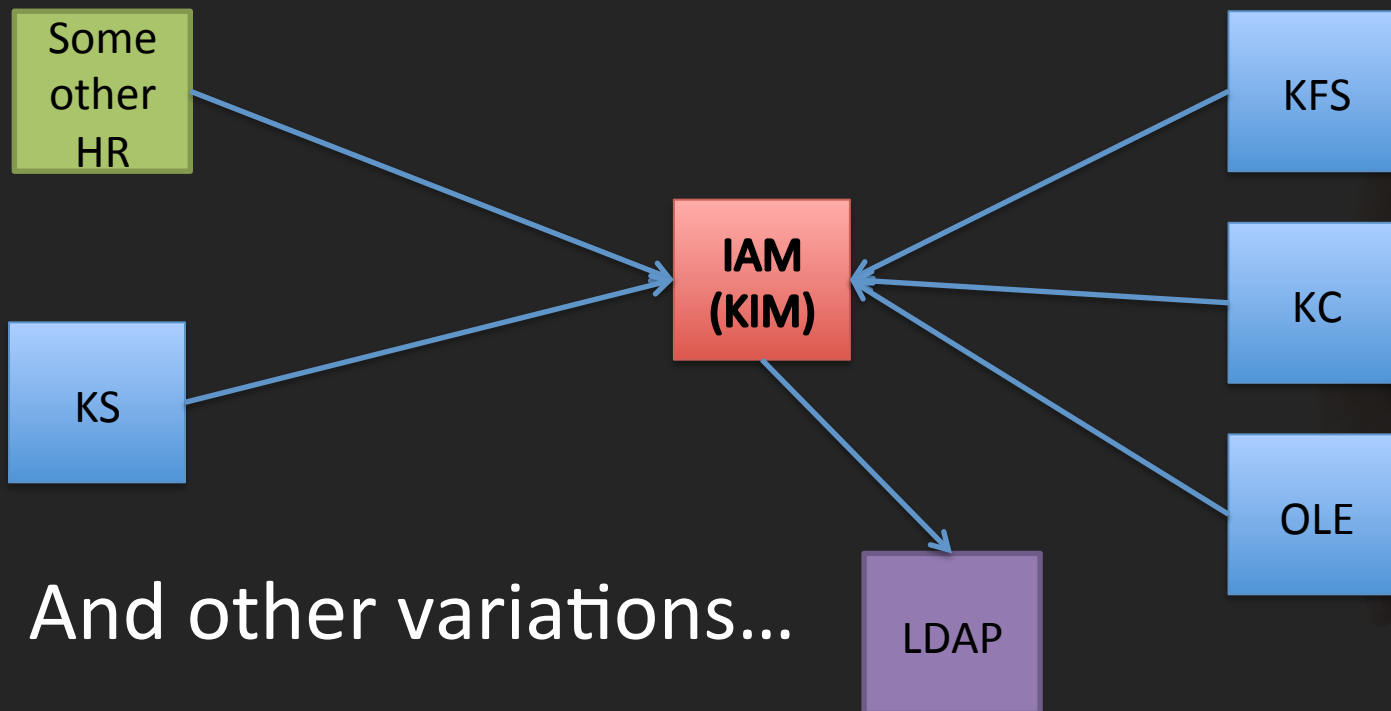
# Architecturally Speaking...

What we strive for:



# Architecturally Speaking...

What we realistically need to support:



And other variations...