CSUconnect Federation Campus Implementation Plan

Activity	% Work	Primary Owner	Validation Test Procedures	CO Only	Phase 1
Last Updated					
CSUconnect Administrative Processes (~25 FTE Hours)					
1. Complete Shibboleth IdP Training (16 Hours/FTE)	**65%**	Campus	Campus staff should be able to install campus ID	Mar-09	Oct-08
- A. Review training information and select technical staff to participate	5%	Campus			
- B. Attend training and receive training materials	60%	Campus			
2. Complete Registration with InCommon (8 FTE Hours)	**30%**	Campus	Metadata is available to the Systemwide Discove	Mar-09	Jan-09
- A. Review InCommon documents {Provide Link or List Documents at Bottom}	5%	Campus			
- B. Prepare InCommon Agreement and process for approval	5%	Campus			
- Identify campus Executive and Administrator		Campus			
- C. Prepare Campus Participant Operational Polices (POP) document	15%	Campus			
- D. Forward completed Agreement and POP documents to InCommon	2%	Campus			
- E. Post a link to the campus POP document on the InCommon Administration website	1%	Campus			
- F. Complete the IdP Registration Process	2%	Campus			
- Request and obtain a Provider ID and certificates from InCommon		Campus			
- Register metadata for campus Identity Provider with InCommon		Campus			
3. Complete CSUconnect Federation membership registration (1 FTE Hour)	**5%**	Campus	Response from CO IAM demonstrating receipt a	Mar-09	Jan-09
- A. Forward an electronic copy of the InCommon Agreement and POP documents to the CO IAM team	1%	Campus			
- B. Forward a link to the campus POP document to the CO IAM team	1%	Campus			
- C. Complete and forward the CSUconnect Federation Agreements to the CO IAM team	3%	Campus			
- Member Certification of Compliance and Compliance (Attachment C-1)		Campus			
- Compliance with Identity Provider Responsibilities (Attachment C-2)		Campus			
Infrastructure (~256 - 1240 FTE Hours)**					
1. Campus Enterprise Identity Management System (200-1000 FTE Hours)	**85%**	Campus	Will vary by campus; at minimum, directory shou	Mar-09	Jan-09
- A. Identify and Implement a Shibboleth Compatible Authorization System (e.g. Enterprise Directory with LDAP support) (40-320 FTE Hours)	10%	Campus			
- B. Initially Populate Authorization System with Campus Affiliate Identities (80-320 FTE Hours)	25%	Campus			
- C. Implement Campus Procedures to Manage Campus Affiliate Identity Data (80-320 FTE Hours)	50%	Campus			
- (At the Minimum, Must Meet CSUconnect Standards and InCommon POP Agreement)		Campus			
2. Centrally Provided Test and Production Federation Systems (120 FTE Hours)	**10%**	CO	SW Service Provider (SP) displays released prepr	Feb-09	N/A
- A. Implement SW Test Discovery Service (Previously Know as the WAYF Service)	3%	CO IAM			

Task	%	Owner	Success Criteria	Target	Actual
- B. Implement SW Test Service Provider	4%	CO IAM			
- C. Post Instructions for Systemwide Test Services on Intranet	2%	CO IAM			
- D. Implement SW Production Discovery Service	1%	CO IAM			
3. Campus IdP Service (58 - 100 FTE Hours)	**5%**	Campus	Successful assertion to the InCommon Test (SP):	Mar-09	Jan-09
- A. Work with CO IAM to Order Server (1-2 FTE Hours)	0.25%	CO IAM / Campus			
- Select Quantity of Systemwide Standard Server or		Campus			
- Send Specifications and Cost of Campus Selected Server		Campus			
- B. Install Server in Campus Data Center Upon Receipt (4 FTE Hours)	0.50%	Campus			
- Work with Network Security Team to Configure Access		Campus			
- C. Transfer Funding to / from Campus (Based on Server Selection)	0.50%	CO IAM / Campus			
- D. Install and Configure Shibboleth IdP Software (50-80 FTE Hours)	3%	Campus			
- Should include the setup of a development environment					
- E. Register and Test Installation with Systemwide Test Environment (1-4 FTE Hours)	0.25%	CO IAM / Campus			
- F. Register IdP with InCommon (Automatically Registers IdP with SW Discovery Service)	0.25%	Campus			
- G. Install Metadata Provided by InCommon on IdP	0.25%	Campus			
- H. Migrate IdP from Systemwide Test Environment to Production (1 FTE Hour)	0.25%	Campus			
Federated Directory Data Management and Supporting Campus Business Process (~64- 416 FTE Hours)					
1. eduPerson/calstateEduPerson version 2.1 schema extensions (56-376 FTE Hours)	**95%**	Campus	Successful assertion of cEP attributes to the SW	Jun-09	Jun-09
- A. Identify Shibboleth Compatible Attribute Provider (e.g. Enterprise Directory with LDAP Support or Identity Registry Database) (8 FTE Hours)	5%	Campus			
- B. Implement eduPerson and calstateEduPerson Object Classes in Attribute Provider (40-80 Hours)	20%	Campus			
- C. Implement Processes to Populate eduPerson and calstateEduPerson Attributes (8-320 Hours)	70%	Campus			
2. Shibboleth IdP Attribute Resolution and Release Policy Configuration (8 FTE Hours)	**5%**	Campus	Successful assertion of cEP attributes to the SW	Jun-09	Jun-09
- A. Configure and Test Connectors to Attribute provider(s) for eduPerson and calstateEduPerson Values	2%	Campus			
- B. Define SAML1/SAML2 Encoded Attributes for eduPerson and calstateEduPerson Attributes	1%	Campus			
- C. Define General Attribute Release Policies for eduPerson/calstateEduPerson Attributes	1%	Campus			
- D. Test Attribute Release Policies with Systemwide Test Environment	1%	Campus			
Systemwide Application Rollout (Federation Components Only)					
Consolidated Financial System (CMS CFS)					
1. Identify and Select Potential Shibboleth / Application Interoperability Solutions		CO	Review qualifications and test against known fun	Jun-09	
- A. Document Functional Requirements		CO OSS			
- B. Create and Post RFQ for Interoperability Solution		CO IAM / OSS			
- C. Identify Potential Interoperability Vendors and Solutions		CO IAM / OSS			
- D. Design and Develop Test Infrastructure		CO IAM / OSS			
- E. Evaluate Solution(s) Against Functional Requirements		CO IAM / OSS			

Task	Responsible	Comment		
2. Select Interoperability Solution and Prepare Requirements for Productionalization	CO	Test Against Functional Requirements	Jun-09	
- A. Develop and Document Security Model	CO IAM / OSS / CMS			
- B. Identify Application Specific Identity Attribute Requirements	CO IAM / OSS / TAG			
- C. Create/Update Shibboleth SP attribute map and filter definitions for CFS on Intranet	CO IAM			
- D. Identify Pilot Campuses and Working Groups	CO OSS			
3. Enable Federated Interoperability	Campus	TBD	Apr-10	Apr-10
- A. Identify Identity Attribute Data Sources	Campus			
- B. Identify Identity Attribute Data Maintenance Processes	Campus			
- D. Populate Attribute Data in Campus Enterprise Identity Management System *	Campus			
- E. Update Shibboleth IdP Attribute Resolver Definitions and Release Policy for CFS	Campus			
4. Application Productionalization	CO	TBD	Jun-10	Jun-10
- A. Implement Interoperability Solution in CO Integration-Stage Environment	CO OSS			
- B. Register CFS Stage-SP with InCommon Federation	CO IAM / OSS			
- C. Run Testing with Pilot Campuses and / or Working Groups	CO IAM / OSS/ Camp			
- D. Register CFS SP with InCommon Federation	CO IAM			
- E. Implement Interoperability Solution in Production Environment	CO OSS			
Data Warehouse				
1. Identify and Select Potential Shibboleth / Application Interoperability Solutions	CO	Review qualifications and test against known fur	Jun-09	
- A. Document Functional Requirements	CO DW			
- B. Identify Potential Interoperability Solutions	CO IAM / DW			
- C. Design and Develop Test Infrastructure	CO IAM / DW			
- D. Evaluate Solution(s) Against Functional Requirements	CO IAM / DW			
2. Select Interoperability Solution and Prepare Requirements for Productionalization	CO	N/A	Aug-09	
- A. Develop and Document Security Roles	CO DW			
- B. Identify Application Specific Identity Attribute Requirements (Role Mapping)	CO IAM / DW / TAG			
- C. Create/Update Shibboleth SP attribute map and filter definitions for DW on Intranet	CO IAM			
- D. Identify Pilot Campuses and Working Groups	CO DW			
3. Enable Federated Interoperability (Pilot Campuses)	Campus	TBD	Mar-10	Mar-10
- A. Identify Identity Attribute Data Sources	Campus			
- B. Identify Identity Attribute Data Maintenance Processes	Campus			
- C. Populate Attribute Data in Campus Enterprise Identity Management System *	Campus			
- D. Update Shibboleth IdP Attribute Resolver Definitions and Release Policy for DW	Campus			
4. Application Pre-Production (Pilot Campuses)	CO	TBD	Mar-10	Mar-10
- A. Implement Interoperability Solution in CO Integration-Stage Environment	CO DW / DCS			
- B. Register DW Stage-SP with InCommon Federation	CO IAM			
- C. Run Testing with Pilot Campuses and / or Working Groups	CO IAM / DW / Camp			
- D. Register DW SP with InCommon Federation	CO IAM			
- E. Implement Interoperability Solution in Production Environment	CO DW / DCS			
5. Application Production (All Campuses)			Jun-10	Jun-10

Systemwide Intranet

Task	Owner	Notes	Start	End
1. Identify and Select Potential Shibboleth / Application Interoperability Solutions	CO	Review qualifications and test against known fur	Apr-09	
- A. Document Known Use Cases	CO IAM / CASS			
- B. Document Functional Requirements	CO IAM			
- C. Identify Potential Interoperability Solutions	CO IAM / CASS			
- D. Design and Develop Test Infrastructure	CO IAM / DCS			
- E. Evaluate Solution(s) Against Functional Requirements	CO IAM / CASS			
2. Select Interoperability Solution and Prepare Requirements for Productionalization	CO	N/A	Jun-09	
- A. Identify Application Specific Identity Attribute Requirements	CO IAM / CASS / TAG			
- B. Create/Update Shibboleth SP attribute map and filter definitions for SW on Intranet	CO IAM			
- C. Identify Pilot Campuses and Working Groups	CO CASS			
3. Enable Federated Interoperability	Campus	TBD	Aug-09	Aug-09
- A. Identify Identity Attribute Data Sources	Campus			
- B. Identify Identity Attribute Data Maintenance Processes	Campus			
- C. Populate Attribute Data in Campus Enterprise Identity Management System *	Campus			
- D. Update Shibboleth IdP Attribute Resolver Definitions and Release Policy for SW Intranet	Campus			
4. Application Productionalization	CO	TBD	Aug-09	Aug-09
- A. Implement Interoperability Solution in CO Integration-Stage Environment	CO DCS			
- B. Register Systemwide Intranet Stage-SP with InCommon Federation	CO IAM			
- C. Run Testing with Pilot Campuses and / or Working Groups	CO IAM / DCS / Camp			
- D. Register Systemwide Intranet SP with InCommon Federation	CO IAM			
- E. Implement Interoperability Solution in Production Environment	CO DCS			

Definitions *
- **Campus Enterprise Identity Management System** includes any technology components required to participate and function in the CSUconnect Federation.

Additional Notes **
- Estimated FTE requirements will vary significantly by campus based on current status of rollout, number of identities, and complexity of infrastructure
  - Estimates are based on feedback from phase one campuses

Target Dates		Phase 1 Campuses (Work Completed Per Milestone)												Phase 2 Campuses (W
Phase 2	Phase 3	Chancellor's Office	Dominguez Hills	East Bay	Fresno	Humboldt	Monterey Bay	MLML	San Bernardino	San Jose	San Luis Obispo	Sonoma		Chico	Fullerton	Pomona
Mar-09	May-09															
Jun-09	Aug-09															
Jun-09	Aug-09															
Jun-09	Aug-09															
N/A	N/A															

Jun-09	Aug-09															
Aug-09	Aug-09															
Aug-09	Aug-09															

Apr-10	Apr-10
Jun-10	Jun-10
Mar-10	Mar-10
Mar-10	Mar-10
Jun-10	Jun-10

| Aug-09 | Aug-09 | | | | | | | | | | | | | | |
| Aug-09 | Aug-09 | | | | | | | | | | | | | | |

ork Completed Per Milestone)				Phase 3 (Work Completed Per Milestone)							
Sacramento	San Francisco	Stanislaus		Bakersfield	Channel Islands	Long Beach	Los Angeles	Maritime Academy	Northridge	San Diego	San Marcos