

# Case Study - Southern Methodist University

## The Problem

Southern Methodist University (SMU) has a home-grown account provisioning system designed and developed in 2009 as a tie-in to PeopleSoft. This system no longer addresses many of the current and future objectives of the university's identity and access management program.

SMU planned to gather information about open source solutions, with the ultimate goal of evaluating and selecting identity and access management software to meet future needs, as well as identifying a professional services partner for implementation. In the words of the project plan, "Vendors come to campus with a team to sell, and open source does not do this, so it can be difficult to convince people that these are stable products with a future and that they won't be abandoned."

## The Solution

SMU joined the Collaboration Success Program (CSP) to dig into the details of the community-developed InCommon Trusted Access Platform open source solutions for identity and access management. Specifically, they wanted to gauge the level of support available from the open source software developers and the associated community. Ultimately, this would help with determining whether the InCommon software was a good fit or if a commercial solution was needed.

During the CSP, SMU studied the InCommon Trusted Access Platform reference architecture, which provides an overview of the functional components for identity and access management in a higher education institution and how those components relate to one another. SMU used that document to develop its own reference architecture as a way to evaluate both open source and commercial offerings.

## The Result

The SMU analysis concluded that the InCommon Trusted Access Platform would work in their environment and meet their needs. As the team's final report stated, "Participating in the CSP made us feel more comfortable with the commitment to these products and long-term sustainability. We received an education on what open source means. Ultimately, our decision was driven by budget, but with the knowledge learned in CSP we were more confident that this was the right decision for our campus."

The SMU staff continue to work on an IAM architecture plan. Early drafts indicate the university will look at adopting Grouper and COmanage and likely hire a consulting company to help with the implementation.

## Lessons Learned

- Vendors come to campus with a team to sell, and open source does not do this, so it can be difficult to convince people that these are stable products with a future
- Participating in the CSP made the project team feel more comfortable with the commitment to the open source software and long-term sustainability
- The team spent more time investigating access management and guest systems than expected.
- Initially there was a preference for having a commercial solution due to perceived supportability, but in the end it came down to budget. With the onset of the COVID-19 virus, having no budget left open source as the choice.

## About Southern Methodist University

Southern Methodist University (SMU) is a private research university in University Park, Texas. Enrollment totals about 12,000, including about 5,000 graduate students, and has a Carnegie classification of "Doctoral Universities - High Research Activity."

**Project Team:** Tommy Doan (SMU), Tom McMahon (SMU), Pery Doan (SMU), Allen Hughes (SMU), SMU Global Online department, Chris Hyzer (UPenn), Chris Hubing (Internet2), Nick Roy (Internet2), Scott Koranda (Spherical Cow Group), Benn Oshrin (Spherical Cow Group), Paul Caskey (Internet2)