

Shared Services Team

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At the January 2012 F2F in Phoenix, a new workstream was identified and called "Shared Services". This workstream involves several work items or capabilities that represent common needs or services across all the other workstreams of registries, provisioning, authentication and access management. This page defines in more detail the high level expectations of what the common needs are. The following is the high level gap analysis of required shared service capabilities originally identified at the F2F meeting.

Timeline	Shared Services	Est
< 3 months	- Convene standards/API team	Low
< 6 months	- Convene cross stream project steering team - Publish initial standards - Publish baseline policy & lifecycle use cases	Low
< 12 month	- Establish UI mgmt console team and environment - Establish QA/Integration team and environment - Establish Audit/Report team requirements	High
< 18 months	- Create baseline management console - Create baseline QA/Integration tests - Create baseline data warehouse and reporting - Establish training & support team	High
< 24 months	- Create 2nd version of audit/reports - Create 2nd version of mgmt console - Create baseline training & support program	Med
Gimme	KEW Developer tools	

Resources Estimates assume 1 FTE for **Low**, 3 FTE for **Med**, and 5 FTE for **High**. This is the estimated number of development or support resources needed for the specified tasks / deliverables per period.

The following is a preliminary breakdown on the major services and capabilities with assumptions of approach and features required.

Service Capability	Work / Features	Drivers / Assumptions
Standards / API	<ol style="list-style-type: none"> 1. Convene Work Team 2. Create Standards / API Site 3. Document Standards / API 4. Create governance process 	<ol style="list-style-type: none"> 1. Project work team. Need architect type representatives from each workstream. Must be knowledgeable in current industry practices and standards. 2. Common wiki site for documenting, format styles, templates developed 3. Define and document existing and new standards and APIs for each workstream and existing products. Must be open standards as this is key selling point. 4. Determine how standards / APIs will be reviewed and refined and who will audit for compliance. This may need to turn into a certification process to ensure products have the OSIdM4HE seal of approval. Establish policies and lifecycle procedures.
IAM Console	<ol style="list-style-type: none"> 1. Convene Work Team 2. Establish development tools, frameworks and methods 3. Project Management and Planning 4. Analysis and Design 5. Coding and Testing 	<ol style="list-style-type: none"> 1. Project work team composition is typical software development team. PM, Architect, Business Analyst, UX Designer, Coders, Tester, etc. 2. Assume use of Quali Rice for app dev (KRAD) and middleware services (KEW, KSB, etc.). Development environment includes Java, IntelliJ, Spring, Subversion, Maven, etc. 3. Establish governance processes for determining feature, milestone, build and test cycles. Requires cross workstream representatives. 4. Research and design of IAM console will require in depth review of existing UI of current products. Will need to provide requirements back to existing products on how to instrument so they can be easily plugged into the console. Console will need to provide SSO to plugin components. Easy navigation, search and view across plugin components. Batch load and review of plugin audit logs. Will require workflow capabilities with action lists for administrators. Easy access to help system and standards and API documentation. Access to provisioning cookbooks and instructions, etc. 5. Will use agile iterative coding and testing style. Need to setup test harnesses and jira bug tracking. Create sample applications and baseline reference implementations of products.

Integration, Configuration and Testing	<ol style="list-style-type: none"> 1. Convene Integration, Config & Test Team 2. Establish Baseline Environment & tools 3. Develop test plans 4. Write and Execute tests 5. Establish Benchmark Targets 6. Establish Certification Process 	<ol style="list-style-type: none"> 1. Program team supporting long term needs, Need QA lead, configuration management lead, systems administrator, integration specialist, test engineers, etc. 2. Assume cloud based test environments that simulates large and small university environments. Multiple configurations with invested and endorsed product combinations. Automated test tools for unit tests and end to end regression tests. Baseline test data simulating product combinations. 3. Assume continuous integration testing needs, as well as end to end system testing. Assume load and stress test scenarios. 4. Assume initial scripting effort is large but reused and leveraged ongoing. Assume uses IAM console application to simulate and verify. 5. QA integration team works with early adopters to document deployment environments and benchmark results. 6. QA integration team works to develop process in which existing IAM vendor products are tested and verified as conforming to standards and API's.
Data Warehouse and Reporting	<ol style="list-style-type: none"> 1. Convene EDW / Reporting Team 2. Establish environment and tools 3. Analysis and Design 4. Coding and Testing 	<ol style="list-style-type: none"> 1. Project work team. PM, Data Modelers, ETL Developers, Report Developers 2. Evaluate and select open source ETL / BI toolset (Talend, Pentaho, Birt, etc.) Establish cloud based dev, test, production database environment. Assume use same integration test environment systems for baseline data. 3. Research and design operational and analytical data structures. Assume operational first phase, analytical second phase. Create mapping specifications from source products to structures. Establish ETL frameworks. Design audit and compliance reports. Design real time search lookup and display of individual people or transaction type reports. Design event monitor and alert type reports. Design trending and volume usage type of reports. Design fraud detection and prediction type of reports. 4. Create and execute ETL. Build and test reports 5. Create ETL scripts and reporting objects.
Training and Support	<ol style="list-style-type: none"> 1. Convene Training and Support Team 2. Establish baseline guidelines and procedures 3. Establish Governance Processes 	<ol style="list-style-type: none"> 1. Project work team. Business Analysts, Technical Writers 2. Design and create outlines and baselines of training programs. Assume that vendor affiliates create and deliver training products following outlines and baseline procedures. 3. Design and implement ongoing support processes and procedures. Need intake mechanism for receiving enhancement and bug fix requests. Need email list serves and/or web application. Need triage function to send to and communicate with caretakers. Need user feedback and communication protocols to track incidents and requests.

Questions:

1. Does it make sense to maintain an ongoing program team for integration, configuration and testing purposes?
2. Each caretaker has their own development, configuration and testing environments. Can we consolidate onto the same infrastructure for easier test coordination?
3. The IAM Console and EDW / Reporting development could be large. How much scope should be planned initially? After initial construction how will these tools be supported and maintained?
4. Do birds have ears?
5. Why does hair turn gray?
6. When you stand up, where does your lap go?