Migration Strategy Planning

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Migration Strategy Planning

= preparatory work for adoption of SWITCH edu-ID
= project planning

1. Have/develop a clear vision (now → future)
2. Define goals, tasks and outline
3. Involve the right people
4. Identify risks
5. Describe work/steps
6. Define roadmap
Reach the finish line together

SWITCH edu-ID

University (IAM project)

Integration
The early birds are

- EPFL
- FHNW
- UNIFR
- UNIGE
- UNIL
- UNISG
- ZHAW
The early birds do

1. Work on their migration strategy

2. Show other birds how to “catch the worm”
Migration strategy project
@fhnw
Motivation

- Timing is everything
  - Identity and Access Management (IAM) Project
  - Benefit from each other
  - Good starting point for IAM project
- AAI very important for FHNW, high number of AAI enabled resources
  - SWITCH edu-ID is the evolution of AAI
  - Strategic topic
- Guidance from head of IT (initiated by enterprise architecture team)
Benefits

- Gives the possibility to re-engineer and automate various processes (e.g. ONLA – onboarding of students)
- Ability to eliminate media disruption and make the processes more consistent
- Bring your own account
  - Account management and Self-service functionalities can be outsourced for external and guest Accounts
- One Account for everything
  - Medium-term: specific target groups no longer need a local account (e.g. ONLA → moodle → inside → eduroam …)
  - Long-term: one account for all services
Putting all pieces together

- Small project team (4-6 people from central IT)
- Focus on fundamental work, get the necessary technical expertise
- Work out the relevant parameters together with SWITCH
- When the «big picture» is all there we expand the project scope
  - Plan and initialize Communication
  - Start with the decision making process
Communication

- The question is when, how much to whom?
  - Communication is one of the key steps in this project

- What we did until now:
  - Specific selective communication in the pilot project scope
  - Respective product owner defined the communication strategy

- What we do in the future:
  - After «big picture» is assembled
  - Brood communication inside and outside of IT (different stakeholder)
  
  Ideas: raffle aligned with project marketing
  notice on the AAI Login Page

Corporate IT, FHNW
29/6/17 10
Technical challenges

- Integration of SWITCH edu-ID as federated identity into IAM system
- «Hybrid» edu-ID adoption scenario
- Custom attribute synchronization
- Kerberos integration for login
- Technical edu-ID Accounts
Ressource

- 3 Workshops (→ 1.5 day per person)

- Note:
  - a big part of the groundwork was done in the IAM project
  - preparation time for the workshops was therefore not excessive

- Pilot projects handled outside of the migration project
Next Steps

- 3 pilots go live within the next months
- One more workshop with SWITCH to finalize the big picture
- Decision making across all departments
- Setup the communication strategy
- Initialize the implementation project in coordination with the IAM project
Questions?

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Risks

- Strict regulations about exchange of private user data
- Acceptance of first movers’ risks is very low
- Integration of SWITCH edu-ID at minimal cost
Strict regulations about exchange of private user data

- No answers from the Federal Data Protection and Information Commissioner (FDPIC)
- Technical alternatives without attribute cache seem possible
Acceptance of first movers’ risks is very low

- Mostly all current EPFL WEB use cases are well managed by SWITCHaai
- Main stakeholders are not against SWITCH edu-ID. It may be a solution for the future. They are waiting
- Scientists have a strong need for Non-WEB Authentication at a Federation level
Integration of SWITCH edu-ID at minimal cost
FIRST WORKSHOPS – SWITCH EDU-ID
Full redesign of the Information System (Campus Management)
WHY PILOTING?

- PROs
  - «baby-sitting» by SWITCH

- CONs / RISK
  - Low maturity on both sides
OUR JOURNEY WITH SWITCH (…SO FAR)

- Objectives set upfront:
  - Architecture & migration strategy defined by end 2017

- 3x 2h workshop
  - Unifr participants: security officer, AAI admin, AD admin, software architect

- 3x 1h technical discussion (1-to-1)

- Preparation work (AAI admin): ~10h
TARGET ARCHITECTURE

- Meta Directory approach
- Centralised Provisioning approach
- Leading System approach
MIGRATION / ONBOARDING APPROACHES (TBC)

- **Onboarding** (new students & new staff)
  - Edu-ID account required on 1st access to AAI ressources, after cut-off day

- **Migration** (existing students & staff)
  - Same as above

- **Current discussions**
  - *Moodle users migration*
  - *Ok from Direction*
  - *Technical design and development*
THANK YOU FOR YOUR ATTENTION

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Swiss edu-ID – UNISG Status Update

29. June 2017
## Project Information

<table>
<thead>
<tr>
<th>Project Goal</th>
<th><strong>Base for SWITCH edu-ID is provided at UNISG</strong></th>
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| **Tasks**             | • Define onboarding processes for students & staff  
                        • Create tool for mapping of SWITCH edu-ID and UNISG accounts  
                        • Store SWITCH edu-ID Identifier  
                        • Integrate login mechanism via ADFS |
| **Benefit**           | • Replacement of SWITCHaai  
                        • Access for library users (Swiss Library Service Platform (SLSP))  
                        • Redesign of future registration process: Use of SWITCH edu-ID  
                        • Joint Medical Master HSG & Uni ZH – possible collaboration |
Integration Scenario(s)

Best Chances:
Mix between «Meta-Directory» and «Centralised Provisioning»

Reasons:
• Many independent Business Units administer their own applications with own data sets
• Within project Swiss edu-ID only base is elaborated
• Swiss edu-ID project depends on other identity management projects ongoing at UNISG (CRM, account management)
ICT – F&S

SWITCH EDU-ID
SWITCH edu-ID

GOALS & EXPECTATIONS

- **benefit** for ZHAW: usability, performance, management of overlapping roles etc.
- **impact** on users & processes, e.g., change of user id
- **coverage of the overall life-cycle** with the changing roles (e.g., applicant, staff, student, alumni)
- **efficiency** in relation to business processes and IT-infrastructure
- **realistic roadmap** for transition to SWITCH edu-ID
SWITCH edu-ID

PEOPLE

- IDM project leader
- IT head & team leader
- security officer
- business applications
- access management
- online registration project

Others: ZHAW responsible for communication inside of ZHAW and (if necessary) involvement of additional stakeholders

Nisanth Muthukirushnasamy
SWITCH edu-ID

WORK & CHALLENGES

Work:
• Analyse current use of SWITCHaai
• Identify impact on existing processes/systems

Effort (so far):
preparation for workshops: 1 day
+ analysis of impact: 3 days
+ 2 workshops (6 people): 6 days

Challenges:
• Deeper understanding of internal IAM processes
• Identification of stakeholders
• Few adaptations on existing systems and processes
SWITCH edu-ID

BEST POSSIBLE INTEGRATION SCENARIO: MIXED

Onboarding
1. existing users (students & staff):
   Provisioning of edu-ID account by ZHAW for all people with SWITCHaai account
2. new students:
   via online registration (ONLA)
3. staff:
   via internal IdM with notification to edu-ID (→ new affiliation)

Offboarding (students & staff):
• Notifications (→ loss of affiliation)

Communication strategy
to grant deposit of private (primary) email address before leaving ZHAW
SWITCH edu-iD

NEXT

1. Evaluate scenarios in detail
2. Elaborate planning for integration of SWITCH edu-ID
Show how to catch the worm (1)

Ask & answer questions:
- What can/should be improved?
- What are the requirements?
- How does the current system look like?
- What interfaces are provided?
- How should notifications be used?
- Which services need the extended model?
- How do on- and offboarding processes work?
- Which scenario(s) would fit best?
- Who has to be informed and how?
- What has to be developed?
- Is a contract necessary?
- Who will decide?
- ....
- ....
Show how to catch the worm (2)

Generic Documentation for next planning phases:

Guide with Checklists

A) …
B) ...
C) ...
D) …