



Core User Directory Project Workshop - Summary of discussion -- DRAFT

Monday 19 May 2008, Said Business School

Present: Beth Crutch, Alana Davies, Chris Cattermole, Maureen McNaboe, Lyn Waddington, Ray Miller, Ilana Veitch, Anne Bowtell, Anne Gavin, Mike Heaney, Mike Fraser, Paul Jeffreys, Miranda Turner (with Neil Jefferies for Dave Price).

Facilitated by: Dave Nesbitt, Identity Architect at Oxford Computer Group

In attendance: Tom Jones, John Ireland, Jonathan Marks, Tony Brett and Jonathan Ward

Apologies: Tom Payne, Peter Bushnell, Emma Potts, Dave Price, Mirjam Siderius, Heather Skevington and Jim Davies

Proposed Next Steps:

- Scope implementation plan for pilot CUD, including:
 - Define core attributes, including unique identifier
 - Where possible build on existing 'cloud' and ldap activities
 - Address multiple 'status at affiliation' issue

Overview of the issues (Dave Nesbitt)

- Pilot fixed period of time fixed set up of objectives.
- Suggest that it will not necessarily continue to provide services.
- Consider a 'lab' environment to save on full hardware deployment
- In general, next questions can only be answered by doing something,
- Initial assumption – LDAP directory.
- Then 'cloud' activity
- Since you have Oak LDAP – why build another?
- The first element – LDAP directory (possibly OAK LDAP)
- What attributes go in here?
- What is going to read it?
- Who is reading it – that needs to be answered first.
- Obvious place - LDAP may point here

Use Case 1 Notes (John Ireland, Jesus College)

- University card database in the picture

- Not sure whether this is authoritative in terms of people – or if trying to go back to the College to see they would provide an import?
- College output – feasible for College to read in?
- Currently, college data goes in via card database?
- Authoritative sources of data include student system
- It is clear that units are actually authoritative sources of data for many attributes. The deficiencies of the card database (two affiliations (college/dept), one status) means authorisation decisions at risk?
- Appropriate that the pilot tries to address the multiple affiliation situation, one of the more difficult aspects.
- There is no one definitive source concerning the status of the person – no definitive list anywhere. The authoritative source needs to be someone you trust.
- Possibility of the Oak Groupstore allowing for the creation of college or unit-level groups of staff.
- If other people allowed to add to what is already there – then we have something which looks like an enterprise database.

Use Case 2 Notes (Maureen McNaboe, University Card Office)

- Card fed from OSS based on contract. Fed overnight. Completed staff forms are manually input to the system. Again, the key issue appears to be multiple affiliations-status not captured.
- Congregation database is used to authenticate for e.g. Governing body. The link between the congregation database and OpenDoor is a month in arrears. Opendoor data is a month in arrears because it is only keyed-in once a month (because people paid monthly?)
- Faculty membership is maintained by Congregation database.
- Some discussion about what else could be stored in CUD apart from the 'key' attributes. But by what principle are they decided to be located in the CUD? The CUD can't 'own' any attribute but rather provides the authoritative set, derived from authoritative sources.

Requirements Phase Notes (Jonathan Ward)

- Careers Service make use of home address and attempt to identify the correct address for any given student in order to make returns to Hesa etc.
- Discussion about dept vs college requirements. The CUD should assist in identifying that a person in the source is the same person in the destination. Synchronisation of databases is often two-way (e.g. College office vs OSS).
- Key question: where are the interfaces for updating the data? At each database not at the CUD.
- Still need to define the definitive source for each attribute held in more than one place.
- Should CUD contain pointers? Better to define the sources and interfaces for attributes.

Pilot objectives:

1. Establish the set of attributes for the Core User Directory.
2. To investigate solution to multiple affiliation and statuses (investigate not necessarily deliver a solution). Notes that multiple affiliations and status belongs with attribute set.
3. Establish authoritative sources for key data
4. Establish unique identifier

Plenary Discussion

Two possibilities suggested:

- (a) Extend the Card database and allow it to cope with multiple affiliations
- (b) Build on Oak service and consider piloting an identity synchronisation tool for the 'cloud' activity.

Discussion

- University Card database intended for the management of University cards. Not appropriate to further overload it with additional demands. CUD needs to embrace non-Card holders.
- Suggested that the requirements for any identity synchronisation tool should be defined as a n outcome of the project. Unfortunately, we do not currently know what our requirements are for a synchronisation tool. In the meantime, programmatically, we have little choice but to use logic concerning e.g. Name and DoB and then human intervention. It was noted that existing off the shelf solutions tend to be quite poor at e.g. Holding multiple mappings.
- As part of the pilot, learn from other institutions (e.g. Michigan, KCL)
Acknowledged that the implementation phase is short and therefore it will be impossible to encompass all use cases. However, general agreement that it is self-defeating to constantly define and refine the CUD. Priority is to get something up for testing – work out where we get each attribute from, who is responsible for it, capture it and turn it onto a solution. CUD should harvest material and provide the interface – it does not become the definitive source per se.
Build on, but not be subsumed by, the OUCS 'cloud' activities undertaken by OUCS Registration. The equivalent of the Registration database feeds the CUD, providing an LDAP interface and possibly a simple web based interface.
- Need to consider deficiencies in the current business processes which could be streamlined. Clearly, the allocation of multiple affiliations is one such process.
- Should consider including alumni in the CUD pilot and/or OULS readers.
- Agreed that bringing together data which is put into different databases into one place is a valuable selling point of the CUD. At minimum units should only be re-keying in visitor information, resulting in better security and authorisation decisions.

Agreed to use workshop as basis for scoping implementation plan for next six months.

Miranda Turner, Michael Fraser