

# Identity Services

Role Engineering & Management

Pursuit of the Holy Grail

[Paul.Rarey@Safeway.com](mailto:Paul.Rarey@Safeway.com)

# Agenda

- Charting the Course
- Launching the Ship
- Process, Data, Roles, Rules, Hierarchies...  
& *Politics*
- Achieving Systemic Capability

# Charting the Course....

- Six Releases over 18 Months
  - Each Release  $\leq$  90 days
  - Release 1 is Foundation for Releases 2 -- 6
- Capability Delivery Streams
  - Identity Self Service
  - Provisioning Services
  - Orchestration & Automation
  - Access Management
  - Compliance Reporting
  - **Role Engineering & Management**

# Charting the Course....

- Release 1

- Role Discovery
- REM Methodology
- Role Governance

- Release 2

- Ownership & Accountabilities
  - ITIL Services & Applications
  - Delegation Framework
- Integrate Hierarchies
  - Location Hierarchy
  - Organization Hierarchy
  - Reports-To Hierarchy
  - Cost-Center Hierarchy

# Agenda

- Charting the Course
- Launching the Ship
- Process, Data, Roles, Rules, Hierarchies...  
& *Politics*
- Achieving Systemic Capability

# Launching....

- Document As-Is Environment
- Identify Change Sources of ID.Data
  - HR | PMO | SDLC | ITIL Service Delivery | IT Systems | CMDB
- **Ownership & Accountability of Changes Sources**
- Master Data Dictionary - Identity Data
- Prioritize Systems to be Managed
  - Velocity of Change
  - Compliance Controls & Reporting
  - Process Optimization

# The Ship

- Hierarchies

- Cost-Center:

Lawson

- Location:

Many Sources ... Quality of Data

- Organization:

OrgMaster (MF)

- Separation Of Duties

Many Sources ...

- Within Applications

- Across Applications

- Approvals

- Reports-To:

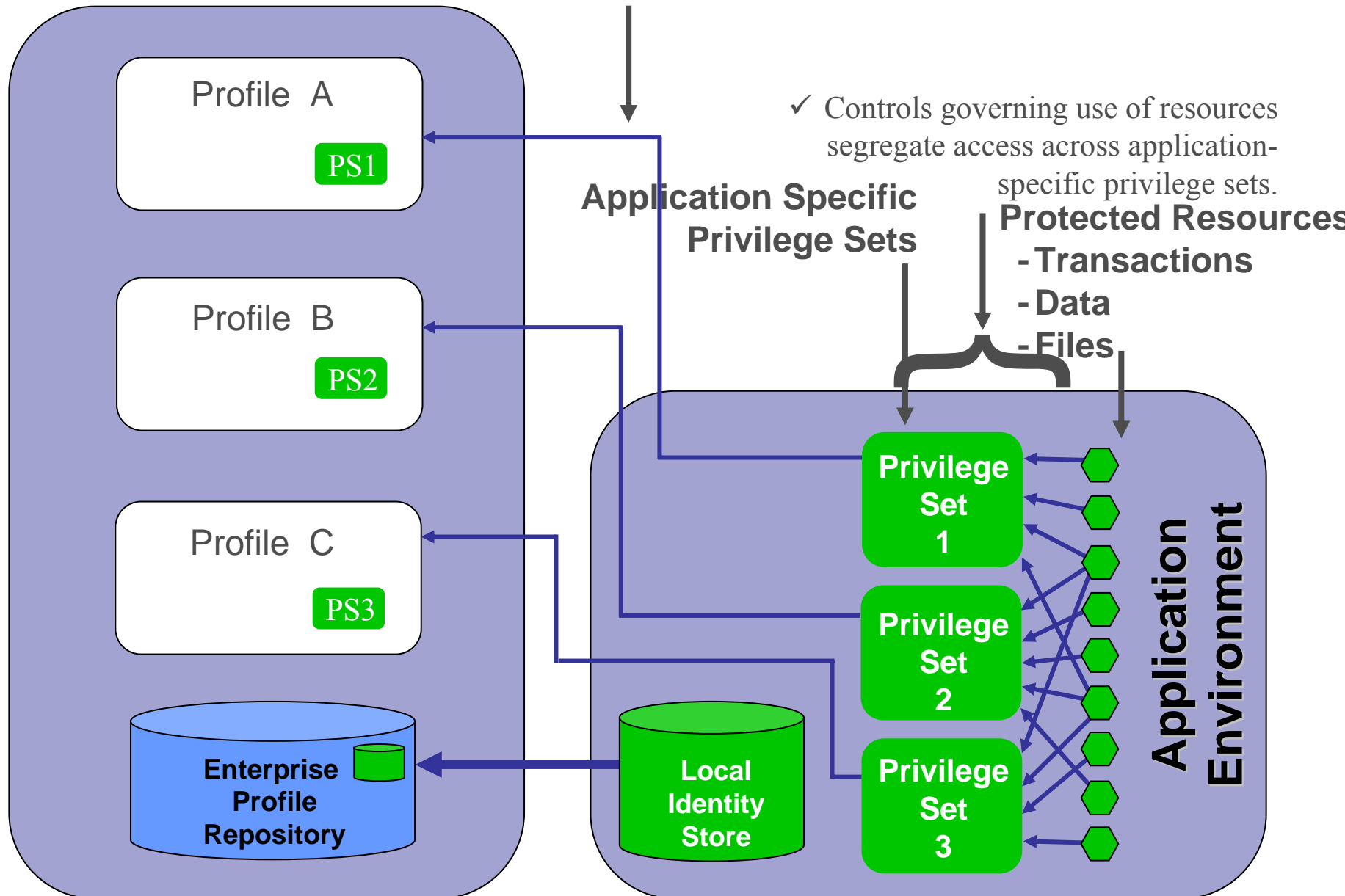
PeopleSoft ... Subset of People

# Agenda

- Charting the Course
- Launching the Ship
- Process, Data, Roles, Rules, Hierarchies...  
& *Politics*
- Achieving Systemic Capability

# Enterprise Profiles

✓ Application specific privilege sets are aggregated to Enterprise Profiles.





# Positions, Rules, Roles, Roles and More Roles

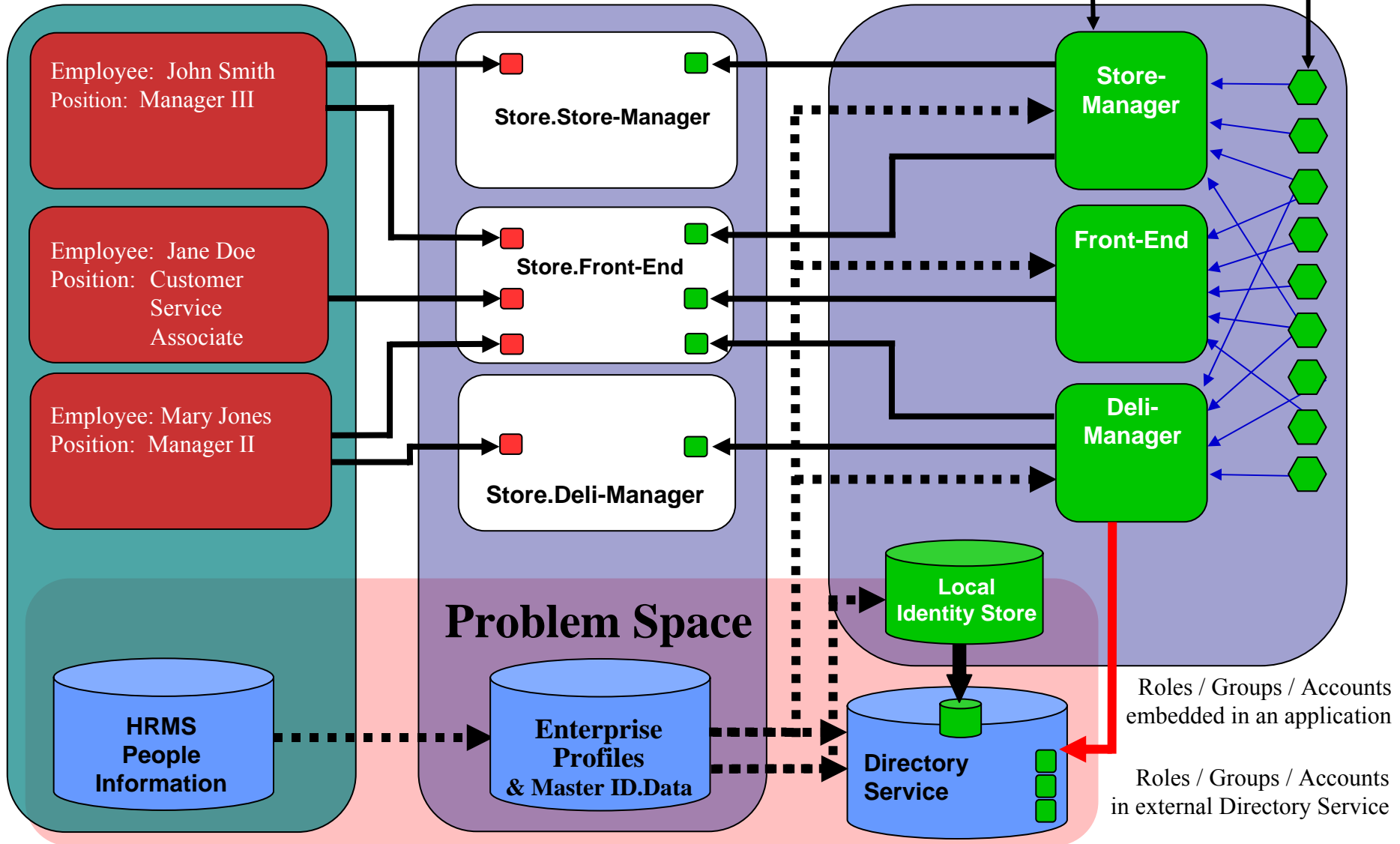
## Store Portal

### ID.Data

### Provisioning

### Portal Profiles / Roles

### Portlets & Applications





# 360 Process Review



**Partner/Vendor Delegated Admin**

**Non-Employee Ad-Hoc Requests**



**HR Processes:**

- New Hire
- Re- Hire
- L.O.A.
- Transfer
- Re-Orgs
- Separation
- Resign / Terminate
- Retire

**Non-Employee**

**Employee**

**Safeway Ad-Hoc Requests:**  
ITIL Services, User/System Accounts

**Request Orchestration (Request/Approve/Deny)**

**Approve/Deny**

- Hiring Mgr. =
- 2nd Level Mgr. =
- SME =
- App/Owner =

**Exception Remediation**

**Provisioning Services:**

- Create
- Modify
- Suspend
- Deactivate

**Provisioning Automation**

**Master ID.Data & Provisioning Rules**

**Managed Systems**

RACF	UDB/DB2
Active Directory	Oracle
SunONE Directory	PeopleSoft
EXE	Lawson Financials
Unix / Linux	Badges, Telephony .....

**Controls, Compliance Reporting & Evidence**

- Accounts & Roles
- Recertification
- Reconciliation
- Separation

**Reporting Database**

404

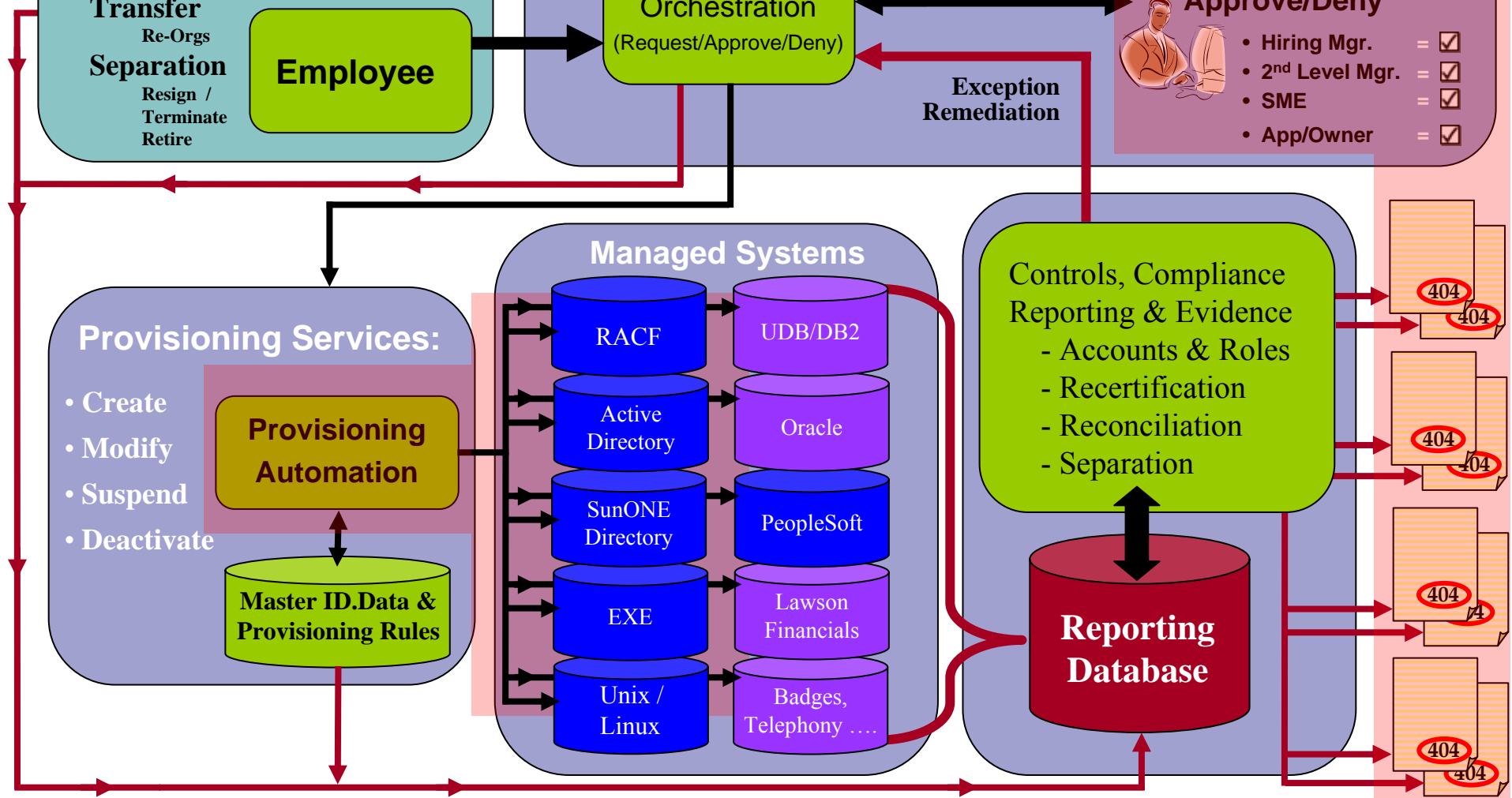
404

404

404

404

404



# The Problems to Solve

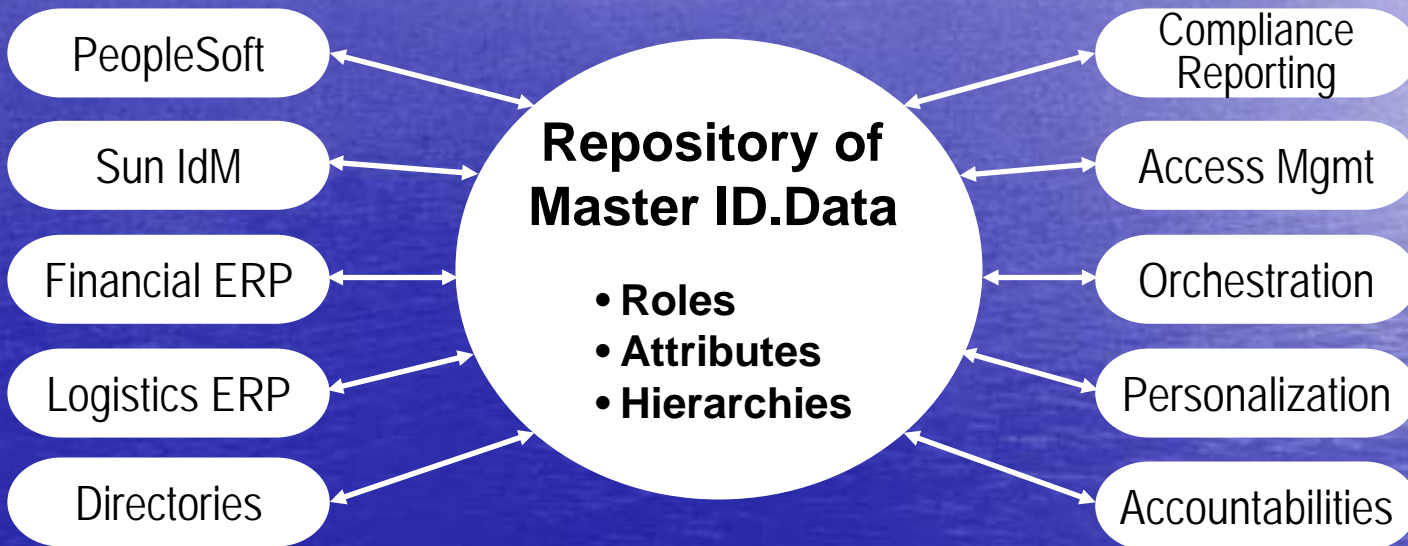
## Lack of Data-Points for Auto-Provisioning

- What Organization(s) is the Person In?
  - What Teams does the Person Work On?
- What Accountabilities does the Person Have?
  - What Authorizations?
- Who Supports the Person?
  - Who does the Person Support?
- What Permissions Should the Person have in an Application?
  - What Permissions Should the Person be Denied (SOD)
- Who Approves What Requests?

# The Solution

Keep Disparate  
People Data In-synch

Provide Crucial ID.Data to  
Target Systems & Services



Master ID.Data Repository gathers the people information and serves as the authoritative source of roles, identity attributes and hierarchies (such as Accountability of Cost-Center) for many consuming system.

# Agenda

- Charting the Course
- Launching the Ship
- Process, Data, Roles, Rules, Hierarchies...  
& *Politics*
- Achieving Systemic Capability

# Achieving Systemic Capability

- Role Engineering & Management (REM)
  - Adopt as a Core Discipline within IT *and* the Business
  - Do not Fund REM as Projects
  - Bake Into the Standard Processes of *Manage IT and Manage the Business*
- Project Management Office
  - Adapt Project Control Point to Include REM Deliverables
    - At Appropriate Phases (not just one)
    - Earlier the Better
  - Include Information Systems Needs as Part of Project Role Assignments & Accountabilities

# Achieving Systemic Capability

## Do Not Underestimate Complexity & Politics

- HR Processes
  - Organizational & Skill Planning:
    - Role Engineering as an SME Discipline - not as “projects”
    - Require Information System Needs as part of FTE Justification
- Systems Development
  - Adapt SDLC Control Point Deliverables to Include Role & Hierarchy Analysis at Appropriate Phases
    - Earlier the Better
  - Create Master ID.Data Dictionary
  - Manage ID.Data as Core Business Data

# Questions?

## Identity Services

Role Engineering & Management

Pursuit of the Holy Grail

[Paul.Rarey@Safeway.com](mailto:Paul.Rarey@Safeway.com)