

IDENTITY REGISTRATION 201

baseCAMPING WITH THE COW COMANAGE REGISTRY

YOUR CAMP COUNSELOR

Laura Paglione serves as an independent consultant with Spherical Cow Group helping technology companies, research institutions and nonprofits develop, implement and market their research infrastructure products. She seeks to inspire organizations to take the road less traveled, embrace alternative solutions, and ditch rigid ideals. She facilitates community engagement for COmanage, coordinates stakeholders of the open source project, and develops resources for the community including the training materials for COmanage. Laura also serves as the Vice Chair of the InCommon Steering Committee and a member of the Trust and Identity Program Advisory Group. (LauraPaglione.com)

Spherical Cow Group (SCG) was established in 2012 and has been involved with InCommon for over 10 years. Its eight partners work with organization in higher education, research, scholarly communications, standards and NGOs, including virtual organizations. SCG leads the COmanage Open Source project and development, designs and teaches its training programs, and works with clients who seek to customize COmanage for their needs. (SphericalCowGroup.com)



MO

GETTING READ

BACKGROUND: IDENTITY REGISTRIES & COMANAGE

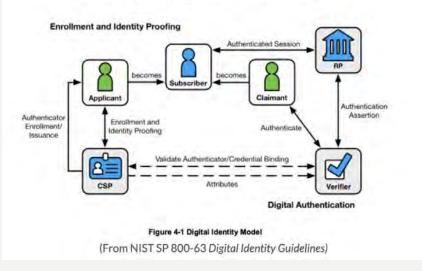


Identity Registries and Person Repositories



Concepts to cover:

- Aggregating person data
- Person matching and deduplication
- Repositories (directories, databases, MDM)
- Identity proofing and credentialing



Identity Registration	Authentication
Collect and manage information about people	Mediałe secure access k vervices
Grouping	Provisioning
	Connecting people and

IDENTITY REGISTRY & PERSON REPOSITORY

KEY FEATURES

Aggregating person data

Matching & deduplicating person data

Person information storage

Directories, databases

Use of person data

ldentity proofing, credentialing, use by other systems

Person lifecycle management

Onboarding, status changes, offboarding

YES, A TOOL... BUT THE DETAILS MATTER FOR IMPLEMENTATION

USE CASE	Research Project / VO	Primary Registry	Guest Registry
People and resource access	Manage people from diverse locations / different authentication; access to limited set of specific resources	Manage home population; sophisticated resource access	Manage a non-primary population (parents, library users, etc); usually no institutional sign in; access to limited resources
Aggregating person data	The same person may participate in multiple projects or hold multiple affiliations	Multiple sources of record for a single person (HR, Student system, affiliate system, etc)	Multiple personas – a guest may hold other roles w/your institution
Person information storage	A simple person registry may be enough	Want information stored in a separate, well-established location (like LDAP)	Want the information separate from primary database to avoid accidental co-mingling
Person lifecycle management	Managed by project rules	Might be handled by HR or student database & rules	
Common solution	Handled by a person registry; light group management & provisioning too	Specialized tools for each component; person registry may be a "helper"	Person registry for lifecycle management; more sophisticated tools too

COMANAGE HISTORY

- Open Source project
 - Project & Development lead: Spherical Cow Group
 - Community directed by the COmanage Program Steering Group (Community Working Group)
 - Code contributions made by the global community
 - Many enhancements are dedicated back to the open source project to benefit all
- Started in 2010 as a project funded by NSF and Internet2
- Goal to leverage FIM services to support collaborative organizations
- Includes a rich set of APIs and plug-ins that enable connections to other systems

COMANAGE IS USED FOR PERSON LIFECYCLE MANAGEMENT

min

Enrollment + Lifecycle Actions (changes, offboarding, ...) Enroll and manage individuals into your Identity and Access Management systems in diverse ways



Synthesis

Combine information about a person from different sources (Systems of Record) into a single, comprehensive record



Organization/group Modeling

Model your organization as broad "groups" and attaching this group information to identity records; transfer to LDAP



Basic Provisioning/De-provisioning

Provision information to directly manage access to systems or services, or to manage access via other tools like midPoint or Grouper



COMANAGE CAPABILITIES

What capabilities should you consider as you select (or build) a registry for your higher education or research organization? COmanage has the following capabilities.



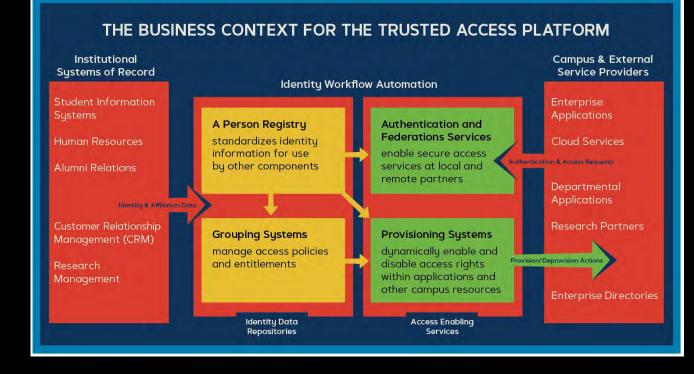




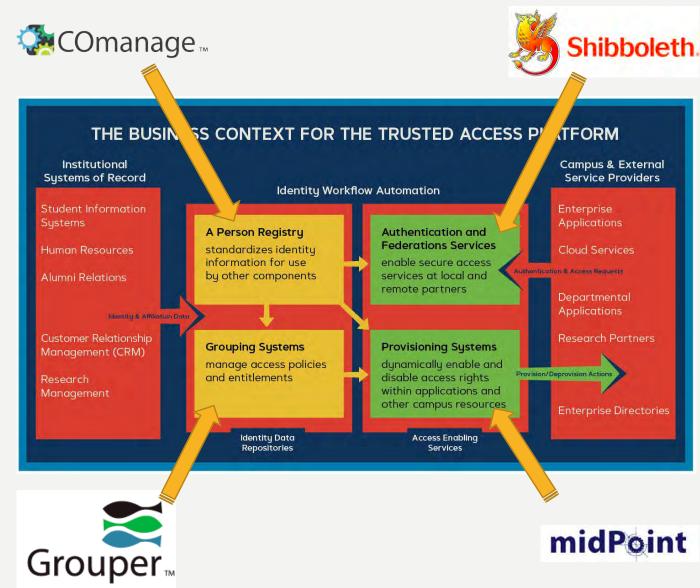
THE CAMPSITE

UNDERSTANDING THE COMANAGE ENVIRONMENT

T R U S T E D A C C E S S P L A T F O R M C O N T E X T

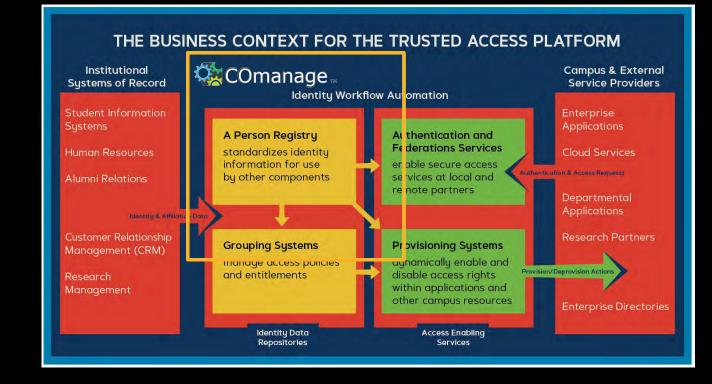


TAP SOFTWARE CENTERS



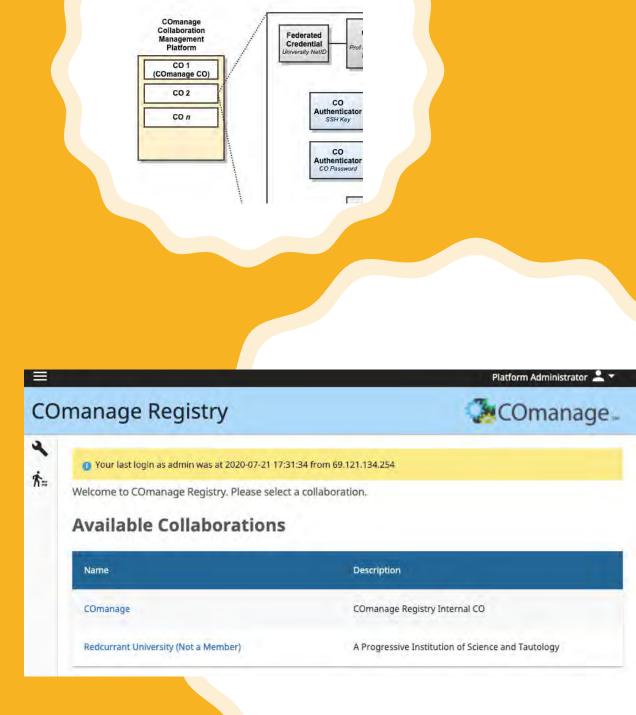
T R U S T E D A C C E S S P L A T F O R M C O N T E X T

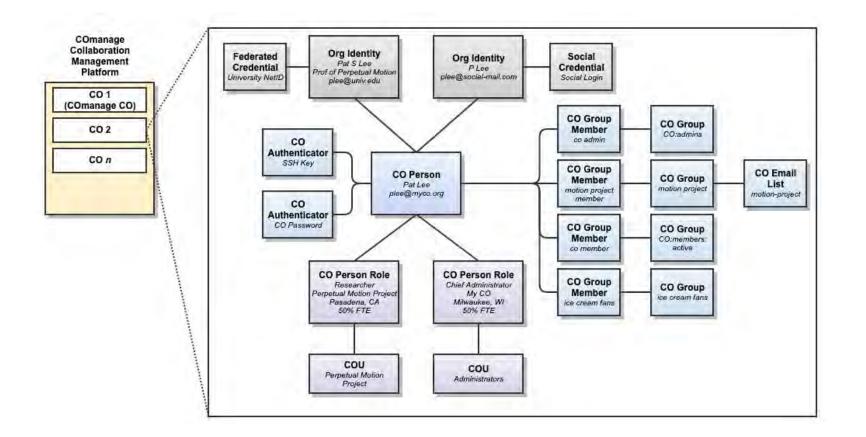
COMANAGE IS A PERSON REGISTRY... PLUS...



COLLABORATIVE ORGANIZATIONS

- Collaborative Organizations (CO): the main object of COmanage
- A CO is any formal or informal group of individuals working collaboratively in a digital setting
- For each installation of COmanage, one or more top—level Collaborative Organizations (tenants)





INSIDE A CO: THE COMANAGE ARCHITECTURE

SETTING UP THE TENT



CONFIGURING COMANAGE



PEOPLE

COmanage is a registry for people. People are modeled through the information stored about them from other systems, their roles in organization structures, their memberships in groups, and how they authenticate.



ORGANIZATIONS

How the people naturally fall into groups, perhaps by organizational unit, project team or the activities that a group of people can do. Comanage has several structures to model your Collaborative Organization.



EXTERNAL SYSTEM LINKS

COmanage is particularly good at linking stored people to their representations in other systems. These systems include "inbound systems" that provide information to Comanage, as well as "outbound systems" that enables provisioning this collected information.



ENROLLMENT FLOWS

Extremely powerful and flexible workflows to import, create, configure, and manage people in COmanage and share this information with other systems.

COMANAGE CONCEPTS



MODELING PEOPLE

CO Person

the representation of a person in COmanage

- **Identifiers** unique identifiers representing ٠ individuals in COmanage & elsewhere
- **CO Person Role** the roles the individual plays ٠ in the CO
- **Org Identity** stores attributes about the • person
 - Often from an external system (System of Record)
 - Includes attributes from Systems of Record
 - Can include an authenticator for sign in

Home > Redcurrant University > My Population > Chris Aaron

Edit Chris Aaron

Name	Sou	irce Organizat	ion Valid From (America/	n /New_York)	Valid Through (America/New_Yo	rk)	Login Identifiers	Actions	
Organi	zational Identi	ties					Carlo and a	4	0 1
	Students	Student	Student			Active	🧳 Edit	a Relink 🖸 D	elete
	Employees	Employee	Employee			Active	🥒 Edit	& Relink 🛛 🙆 D	elete
Order	COU	Title	Affiliation	Valid From	Valid Through	Status	Actions		
Role At	ttributes								O A
Person	Attributes								
Groups								Ser Manage Gro	up membersh
								Manage Gro	un Mamharch
URLs									0 4
Email A	Addresses								O A
sisH432	281 (SIS, System	of Record ID)							E? Vie
041-62-	-3236 (SIS, Natio	nal)							⊵ª Vie
9c88fbc	d6-808d-4485-89	fc-296ee8aef91	6 (SIS, Match Re	eference)					₽ [#] Vie
hrms43	3281 (HRMS, Syst	tem of Record II	D)						E ^a Vie
041-62-	-3236 (HRMS, Na	itional)							⊵? Vie
9c88fbc	d6-808d-4485-89	fc-296ee8aef91	6 (HRMS, Match	n Reference)					₽? Vie
041-62-	-3236 (National)							2 B	dit 🙆 Dele
	d6-808d-4485-89	fc-296ee8aef91	6 (Match Refere	ence)				1 B	dit 🙆 Dele
Identifi	iers								O A
Chris Aa	aron (SIS, Officia	al)							⊵ª Vie
Chris Aa	aron (HRMS, Off	îcial)							⊵ª Vie
Chris Aa	aron (Primary, C	official)							e Ec

MODELING ORGANIZATIONS

- CO Collaborative Organization
- COU CO Unit the structural sub-units of the CO
- CO Group flexible groups can be open or closed; can support distributed management

• CO Department –

store information useful for describing parts of the organization

Organization Objects Comparison Summary

	& CO	& COU	& CO Department	& CO Group
Belongs To	COmanage Platform	со	CO; COU	CO; COU (for automatic groups only)
Has Many	CO; CO Group	CO Person Roles; CO Departments		CO People (via CoGroupMember); CO Email List
Hierarchical	No	Yes	No	No
Object Type	Structural Object	Structural Object	Primary Registry Object	Primary Registry Objec
Supported Attributes	None	None	Addresses; Email Addresses; Identifiers; Telephone Numbers; URLs; Leadership Group; Administrative Group; Support Group	Open / Closed; Managers (via CoGroupMember); Email Addresses (via CoEmailList); Identifiers
			Group	COL

EXTERNAL SYSTEM LINKS





Incoming: Systems of Record

PROVIDE

- Attributes
- Identifiers
- ENABLE
- Sign in via other tools
- Identity matching & linking

Outgoing: Provisioned Services

PROVIDE

- Attributes to enable system use
- Managed provisioning & deprovisioning based on business rules
- Provisioning to Grouper and other systems for more sophisticated group management
 ENABLE
- Real-time checking of incoming system attributes
- Dashboard UI for quick access from COmanage

at.internet2.edu/registry/co_dashboards/dashboard/co:3 🔀 Wiki 🦉 System Dashboard ... 🛅 I2 Chrome 💘 TIER Program :: proj... 🚧 ADP 🔜 All files a. Ins ae > Internet2 Collaboration **Community Collaboration Dashboard** GLOBAL NOC OESS COMMUNITY COLLABORATION DASHBOARD WORKING GROUP ADMINS Welcome to the Community Self-Service Dashboard for Managing your Col **Community Collaboration Services** All Groups I can See InCommon Trusted My Collaboration Groups **Trusted Access Platform** All Groups Manage my Access Platform Libra Project Collaboration Groups Membe Member Announcement for Community Collaborations Working with the Dashboard "his User Interface is for Demonstration Only

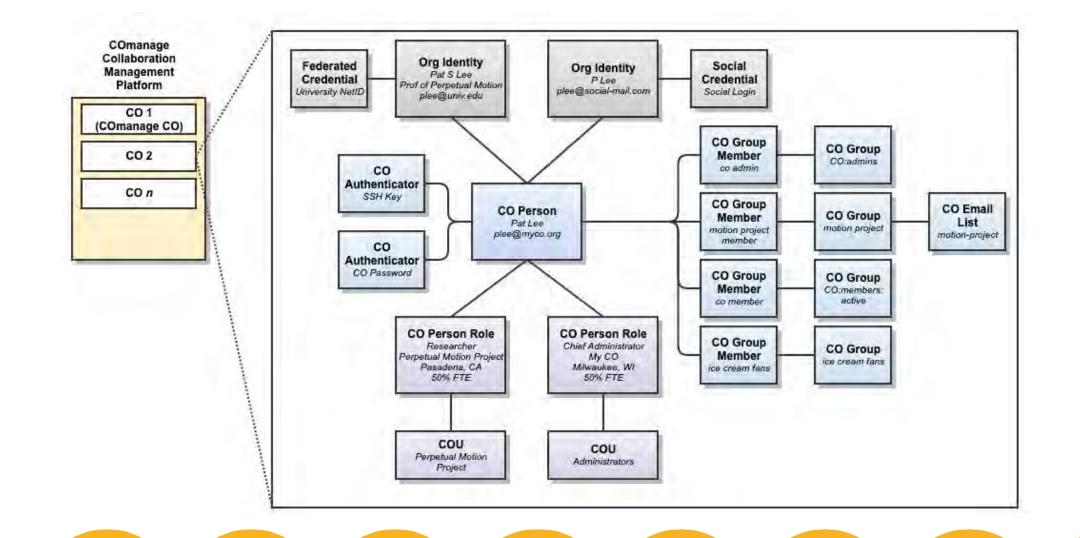
ENROLLMENT WORKFLOW FEATURES

Register	Register individuals to connect to digital tools and resources
Match	Perform identity matching to prevent duplicates
Add	Add individuals to COUs, and CO Groups
Approve	Trigger approval steps as needed
Link	Link to external sources, using attributes to pre-populate information about the individual
Identifiers	Associate internal and external identifiers with the person
Review	Have the individual authenticate to gain access to privileges, verify email addresses, accept terms and conditions
Provision	Provision access to tools, systems and resources
Communicate	Send communications to the individual and others about the enrollment



OTHER WORKFLOWS

- Add a role
- Identity linking
- Setting grace periods (for loss of privileges/access)
- Off boarding



INSIDE A CO: THE COMANAGE ARCHITECTURE

COMANAGE MATCH

- System for matching items
- Use directly in COmanage match people as they are registered
- API to integrate with other systems

	0.0				adr	nin 🚨 🕶
COmanage	Match			¢	COmana	ge
Matchgrid Settings	COmanage Match > tes	tgrid > Reconcile Unresolved Reque	est sis/553815121			
OT API Users	Reconci	le Unresolv	ed Requests			
Attributes			Reference ID			
Attribute Groups		173064d	173064d	New		
← Attribute Maps	Attributes	@ Assign This Reference ID	C Assign This Reference ID	27 Assign This Reference ID		
B Rules	id	43	45	62		
Systems of Record	sor	registry	registry2	sis		
Systems of Record	sorid	II160	JJ160	553815121		
	request_time	2019-07-28 12:16:32	2019-07-28 12:26:36	2019-10-27 12:43:55		
	resolution_time	2019-07-28 12:16:32	2019-07-28 12:26:36			
	dob	1991-11-22	1991-11-22	1991-11-22		
	lastname	Doyle	Doyle	Dayle		
	firstname	Tom	Thomas	Tommy		Г
	ssn	7107137986085	7107137986085	7107137986085		L
	netid					
				Powered E	w 🐎 cd	

- I. Define the attributes to be used for matching
- 2. Set up rules for matching (Canonical and Potential)
- 3. As items are evaluated, the rules are checked
 - Items matching canonical rules > matching Reference ID
 - 2. Items matching none > new Reference ID
 - 3. Items matching potential rules flagged for manual review
- 4. UI for resolving potential matches

dob	1991-11-22	1991-11-22	1991-11-22
lastname	Doyle	Doyle	Dayle
firstname	Tom	Thomas	Tommy
ssn	7107137986085	7107137986085	7107137986085



WHAT YOU CAN LOOK FORWARD TO

THE SUN IS SETTING, BUT THERE IS SO MUCH MORE...

- Offboarding workflows
- User Interface customization
- Fun with plugins!
- Duplicate management with COmanage Match
- Extending the COmanage data model



TO LEARN MORE



COmanage software page

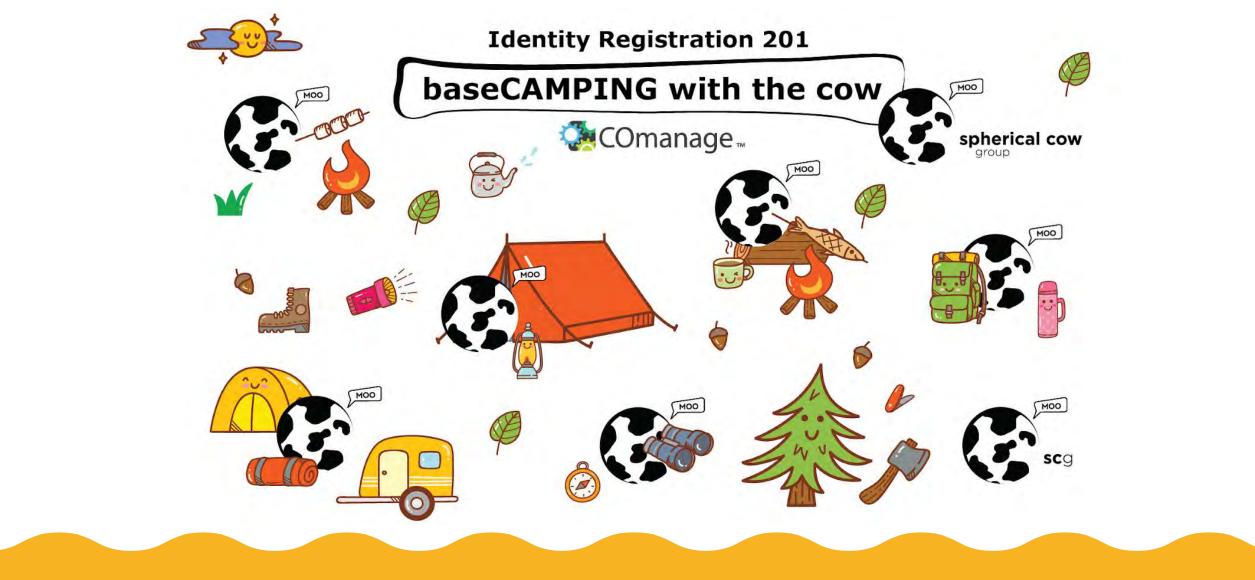
www.incommon.org/software/comanage/

COmanage training page

www.incommon.org/academy/comanage/

Video by <u>Vladimir Maric</u> from <u>Pixabay</u>

MOO



IDENTITY REGISTRATION 201

baseCAMPING WITH THE COW COMANAGE MATCH

BONUS SLIDES! COMANAGE NATCH

FEATURE SET IN SCREEN SHOTS

COMANAGE MATCH

- System for matching items
- Use directly in COmanage match people as they are registered
- API to integrate with other systems

					àdm	in 💄 🕶
COmanage	Match			Q	COmana	ge
Atchgrid Settings	COmanage Match > tes	stgrid > Reconcile Unresolved Reque	est sis/553815121			
OT API Users	Reconci	ile Unresolv	ed Requests			
Attributes			Reference ID			
Attribute Groups		173064d	173064d	New		
← Attribute Maps	Attributes	@ Assign This Reference ID	C Assign This Reference ID	${\mathbb Z}^{\mathbb Z}$ Assign This Reference ID		
Rules	id	43	45	62		
	sor	registry	registry2	sis		
Systems of Record	sorid	II160	JJ160	553815121		
	request_time	2019-07-28 12:16:32	2019-07-28 12:26:36	2019-10-27 12:43:55		
	resolution_time	2019-07-28 12:16:32	2019-07-28 12:26:36			
	dob	1991-11-22	1991-11-22	1991-11-22		
	lastname	Doyle	Doyle	Dayle		
	firstname	Tom	Thomas	Tommy		Г
	ssn	7107137986085	7107137986085	7107137986085	、	L
	netid				\setminus	
				Powered By	(Jaco)	

- I. Define the attributes to be used for matching
- 2. Set up rules for matching (Canonical and Potential)
- 3. As items are evaluated, the rules are checked
 - Items matching canonical rules > matching Reference ID
 - 2. Items matching none > new Reference ID
 - 3. Items matching potential rules flagged for manual review
- 4. UI for resolving potential matches

dob	1991-11-22	1991-11-22	1991-11-22
lastname	Doyle	Doyle	Dayle
firstname	Tom	Thomas	Tommy
ssn	7107137986085	7107137986085	7107137986085

SELECT & CONFIGURE THE ATTRIBUTES

- Doesn't have to be about people
- Define attributes that are of similar quality across your sources
- Configure attributes what constitutes a match?
 - How closely the need to match
 - Substring matches allowed?
 - Exact match required?
 - Attribute map to use...

COmanage	Match		19	COmanage
Atchgrid Settings	COmanage Match > testgrid	d > Attributes		
OT API Users	Attribute	es		S Add New Attribu
Attributes	Name	Attribute Group	Action	
Attribute Groups	dob		🧭 Edit 🛛 🕲 Delete	
← Attribute Maps	firstname	official	🖉 Edit 🛛 🕲 Delete	
Rules	lastname	official	🧨 Edit 🛛 😵 Delete	
Systems of Record	netid		🖉 Edit 🛛 🙆 Delete	
	ssn		🖌 Edit 🛛 😳 Delete	

\$

Ê

20

Matchgrid Settings	COmanage Match > testgrid > Attributes > Edit fir	rstname	
API Users	Edit firstname		
Attributes Attribute Groups	Name * Value must be a valid SQL identifier, as it will be used to construct the matchgrid column name	firstname	
Attribute Maps Rules	Description		
Systems of Record	API Name *	names:given	
	Alphanumeric		
	Case Sensitive		
	Null Equivalents	T	
	Required	Q	
	Search Distance	2	¢.
	Search Exact	0	
	Search Substring From	1	
	Search Substring For	3	9
	Attribute Map	Nicknames	•

ATTRIBUTE MAPS

- Maps of values that should be treated similarly
 - Nicknames
 - Updated names
 - Alternate names
- Different maps for different attributes

COmanage	Match			COmanage
Matchgrid Settings	COmanage Match > testgrid	> Attribute Maps > Nicknames > Attribute	tappings	
API Users	Attribute	Mappings	O Add New A	Attribute Mapping 🛛 🕸 Install English Nickname:
Attributes			Action	
Attribute Groups	andy	andrew	🖌 Edit 🛛 🕲 Delete	
+ Attribute Maps	andy	drew	🖉 Edit 🛛 Delete	
Rules	angel	angela	🖉 Edit 🔞 Delete	
Systems of Record	angel	angelica	🖉 Edit 🛛 🕲 Delete	
	angel	angelina	🖉 Edit 🙆 Delete	
	angel	angeline	🧭 Edit 🔞 Delete	
	angel	angie	🖌 Edit 🛛 😒 Delete	
	angel	jane	🖌 Edit 🛛 🕹 Delete	
	angela	angel	🖉 Edit 🙁 Delete	
	angela	angelica	🖉 Edit 🕴 Delete	
	angela	angelina	🖉 Edit 🙁 Delete	
	angela	angeline	🖌 Edit 🛛 🕲 Delete	
	angela	angie	🖉 Edit 😡 Delete	
	angela	jane	🖌 Edit 🔞 Delete	
	angelica	angel	🖌 Edit 🕴 Delete	
	angelica	angela	🖉 Edit 🔞 Delete	

CONFIGURE THE MATCHING RULES

- Create a set of rules
 - Canonical if all rules are met, the records are a match
 - Potential if at least one rule is met, the records are a potential match
 - None of the rules match? No match!
 A new record is needed.
- Decide the order the rules should be evaluated
- What attributes are considered?

COmanage Match					🔅 COmanage.	
Matchgrid Settings	COmanage Match > 1	testgrid > Rules	1.00	7.0		S Add New Rule
/ Attributes	Name	Confidence Mode	Order	Action		
Attribute Groups	Rule C1	Canonical	1	🥔 Edit	C Delete	
← Attribute Maps	Rule C2	Canonical	2	🧭 Edit	C Delete	
🛱 Rules	Rule P1	Potential	1	🥜 Edit	C Delete	
Systems of Record	Rule P2	Potential	2	/ Edit	(3) Delete	

			admin 💄	
COmanage Match			🥸 COmanage	
Matchgrid Settings	COmanage Match > testgrid > Rules > Edit Rule C1			
API Users	Edit Rule C1			
Attributes	Name *	Rule C1		
Attribute Groups	Description			
→ Attribute Maps	Confidence Mode *	Canonical	•	
Rules	Order *	1	8	
Systems of Record	Search Types			
	dob *	Exact	•	
	firstname *	Substring	•	
	lastname *	Exact		
	netid *	Skip	•	
	ssn *	Exact	•	
	* Denotes Required Field	SAVE		

EVALUATING THE RECORDS

- As evaluated, records are added to the "Matchgrid"
 - No ambiguity? Reference ID is assigned
 - Match ID is that of matching record
 - No Match New ID is assigned
 - Potential match? Reference ID is blank
- Reference IDs used by relying systems to prevent duplicates
- Potential matches are resolved manually

					admin 🚢
nanage	Match			⊘ ≥cc)manage.
chgrid Settings	COmanage Match > testgrid > M	fatchgrid Records			
Users	Matchgrid	Records		S Add N	ew Matchgrid Record
butes	System of Record	System of Record ID	Reference ID	Action	
bute Groups	guest	G10001	801d02d8-999d-4d30-9cd5-9331a95e6b4a	🧭 Edit	O Delete
bute Maps	guest	G10008	801d02d8-999d-4d30-9cd5-9331a95e6b4a	🖌 Edit	O Delete
s	guest	G10022	67732c03-5a7c-4f5a-9532-9d7f77544a93	🥜 Edit	C Delete
ems of Record	guest	G10033	ef6f1baa-9457-4d6e-a720-95828c87cbc0	🥔 Edit	C Delete
	guest	G19001	aa888af9-a3cc-4106-bb10-8e142cd075d9	🧭 Edit	🕲 Delete
	guest	G19002	ec97b73d-3241-4edb-af2e-d39d52a5b3ac	🧭 Edit	O Delete
	guest	G19003	7bc55abc-5767-4a1b-9a9d-508530181411	🖉 Edit	O Delete
	guest	G19004	7b44cc8e-8d92-4682-a2d5-c4c29975e74f	🥜 Edit	Ø Delete
	guest	G19005	81c4da3a-94e0-43bb-9366-9b5611e87bb6	🖉 Edit	O Delete
	guest	G19006	8511b0db-7d33-48a3-a29b-a817520d9871	🥜 Edit	2 Delete
	guest	G19007	aacd3e31-5698-4e50-b26a-f11acf77097c	🥔 Edit	O Delete
	guest	G19008		2 Edit	C Delete
	hrms	H327111716	9ca0e2be-4996-4d7e-b761-ca3663cf3d38	🧭 Edit	O Delete
	hrms	H808174420	7689341b-57dc-4839-baf8-a27fb6104cf7	🥔 Edit	O Delete
	hrms	H904292537	a5e81e3c-c4d5-471e-a9e1-8a9a4b84f5d9	🧭 Edit	C Delete
	hrms	H916706776	aacd3e31-5698-4e50-b26a-f11acf77097c	/ Edit	Delete

COm

🖍 Attribu

+ Attrib

Rules System

RESOLVING POTENTIAL MATCHES

- Interface for reconciling potential matches
 - See group of potential matches
 - Select the matching record, or create a new one
 - System assigns a Reference ID based on your choice
- Information available via the API for use in other systems

COmanage Match > testgrid > Reconcile	e Unresolved Requests (testgrid)	
	전 문화가 같은 것 같이 다 같이 봐.	(testgrid)
System of Record	System of Record ID	Request Time
sis	971194844	2019-03-21 00:32:33
sis	553815121	2019-10-27 12:43:55
guest	G19008	2020-02-16 10:07:46
	Reconcile Un 3 Pending Match System of Record Sis Sis	sis 971194844 sis 553815121

COmanage	Match			Qac(Omanage
Aatchgrid Settings	COmanage Match > tes	tgrid > Reconcile Unresolved Reque			
API Users	Reconci				
Attributes			Reference ID		
Attribute Groups		173064d	173064d	New	
→ Attribute Maps	Attributes	C Assign This Reference ID	🖙 Assign This Reference ID	27 Assign This Reference ID	
Rules	id	43	45	62	
Systems of Record	sor	registry	registry2	sis	
Systems of Record	sorid	Ш160	Ш160	553815121	
	request_time	2019-07-28 12:16:32	2019-07-28 12:26:36	2019-10-27 12:43:55	
	resolution_time	2019-07-28 12:16:32	2019-07-28 12:26:36		
	dob	1991-11-22	1991-11-22	1991-11-22	
	lastname	Doyle	Doyle	Dayle	
	firstname	Tom	Thomas	Tommy	
	ssn	7107137986085	7107137986085	7107137986085	
	netid				