Application Walk-Through: Portals and Enterprise Directory Integration

Notes from CAMP Directory Workshop
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Q: When do you start integration effort?
A: Schools should start working on integration efforts as soon as the discussion begins about a portal or other mw-enabled projects.

Q: What strategies do we use to make sure folks buy-in on the portal project team?
A: Include the critical and difficult personalities to make sure they buy-in to the project. However, don’t assume that folks understand middleware. Encourage them to work together and see the big picture.

Q: How do I get the word out about the portal?
A: Hold campus open forms and develop the pr message of how applications relate to the infrastructure.

Q: How do we develop a RFI or RFP?
A: The infrastructure team probably won’t lead the selection team, but make sure they are involved at this stage. Develop some boilerplate language for what directory integration means. Offer the vendors some guidance for acceptable practices/approaches. Ensure that your “must provide” requirements of your RFI/RFP are defensible. Also work with portal sponsors AND their customers to develop this.

Q: What does “LDAP Enabled” mean to vendors?
A: Whatever they want it to mean. You need to figure out if what they provide matches your requirements. Run the product in a test situation and analyze. Include the testing phase as a requirement of the purchasing process. University of WI-Madison has sample boilerplate for what LDAP-enabled means to them.

Q: What happens if the new populations are required to have portal access?
A: Beware that population definitions get really hard at the edge cases such as the lecturer who’s on campus for a week. At first, don’t add them to the directory. Work with the groups outside the portal team to learn about the new population needs. Be sure you are very clear about the groups the portal will be serving. A portal customer is a forever customer.

Q: Should there be enterprise definitions for roles?
A: There should be roles definitions for the main folks you’re serving through the portal. And portal itself will force this to happen due to its architecture. So make sure you
engage the source system folks to make sure there's institutional data to discern the affiliations/roles. Adding data to enterprise directory is a relatively slow process.

Q: What other additional data/information should we acquire?
A: Who should access it and why? What is the population size? Review the vendors. For example, uPortal want to scan whole directory for group membership. Try to find out as many problems on the data, application, and technology side in advance of implementation. User lifecycle within the portal is also important. For example, when do new students/applicants get portal access? Folks need to be credentialed before they can access the application. The other end of the lifecycle is service access and availability, but the transitions depend on institutional data. Ending access to service is not likely to be directly linked to institutional data events. And don’t mess with the institutional data to kludge it.

Q: What will portal applications need from the directory?
A: RegistryID from our localdomain object class. It will also need personalization information. Often vendors add this to a separate database. There are operational considerations of storing application information in enterprise directory. Remember the 90% read, 10% write guideline for directories. Can add application preferences too, but this will make the directory fat. The advantage is expediency. For example, since Sun iPlanet Message Server uses the directory for all its application data, it doesn't need its own data store. It’s also useful for portal preferences to be in directory for sharing with other applications. You could instead require a common look and feel.

Q: How do I prevent inappropriate sharing of information across portal channels?
A: You can implement hard vs. soft controls (tech. vs. policy). Remember that this choice is organizationally determined.

Q. What should I think about when planning an implementation?
A: Make a dev / test environment available, since as change happens, you’ll need to test. This includes functional testing such as the work done with the application project to get infrastructure testing into the project plan. Also include impact testing: the directory will be serving multiple applications and you need to isolate the production applications from impact of the new one. Lastly, do performance testing to ensure the new application won’t overwhelm your infrastructure. Most applications expect 100% availability of infrastructure. Ask application folks what happens with session failure.

Next, make sure you have an infrastructure liaison on application projects. Remember that it’s not usually the infrastructure group that drives schedule. Expect scheduling compromises.

For the portal roll-out day:
- Tell the help desk what they need to know to properly dispatch cases. Set up call tracking with email notification and have portal & directory folks both on list. Also have an off-infrastructure communication mode.
- Make sure you have enough directory servers
- Make sure you have good communications with the portal project team, since they may see problems with their applications and you will see the problems in the infrastructure. You will need to work together to get these solved as they come up.

On an upgrade day, make sure you have a fall-back plan. If you do fall-back, will that affect other applications? This depends, since a big data roll-back will affect directory performance.

Q: What are the ongoing responsibilities for directory folks?
A: Support the applications. Groom an ongoing partnership with portal team on upgrade planning and other things. Also, remember to monitor the infrastructure health, since as the application use and the customer population grows, the load on the directory will grow as well. Establish on-going capability assessments.