UH Groupings, a versatile tool for authorizations management, and much more

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Middleware, Identity and Access Management

UH Groupings

- ## What are we grouping?
  - People, members of the UH community.
    (A UH Number is a prerequisite.)

- ## Why are we grouping?
  - Groupings imply roles, imply entitlements.
  - ***Automation is available.*** Business rules can be used to help create and manage Groupings.

- ## How are Groupings created?
  - Automatically by UHIMS.
    (Thanks to connections with Banner, PeopleSoft HR, RCUH, SECE, etc.)
  - Manually, some things require the human touch.
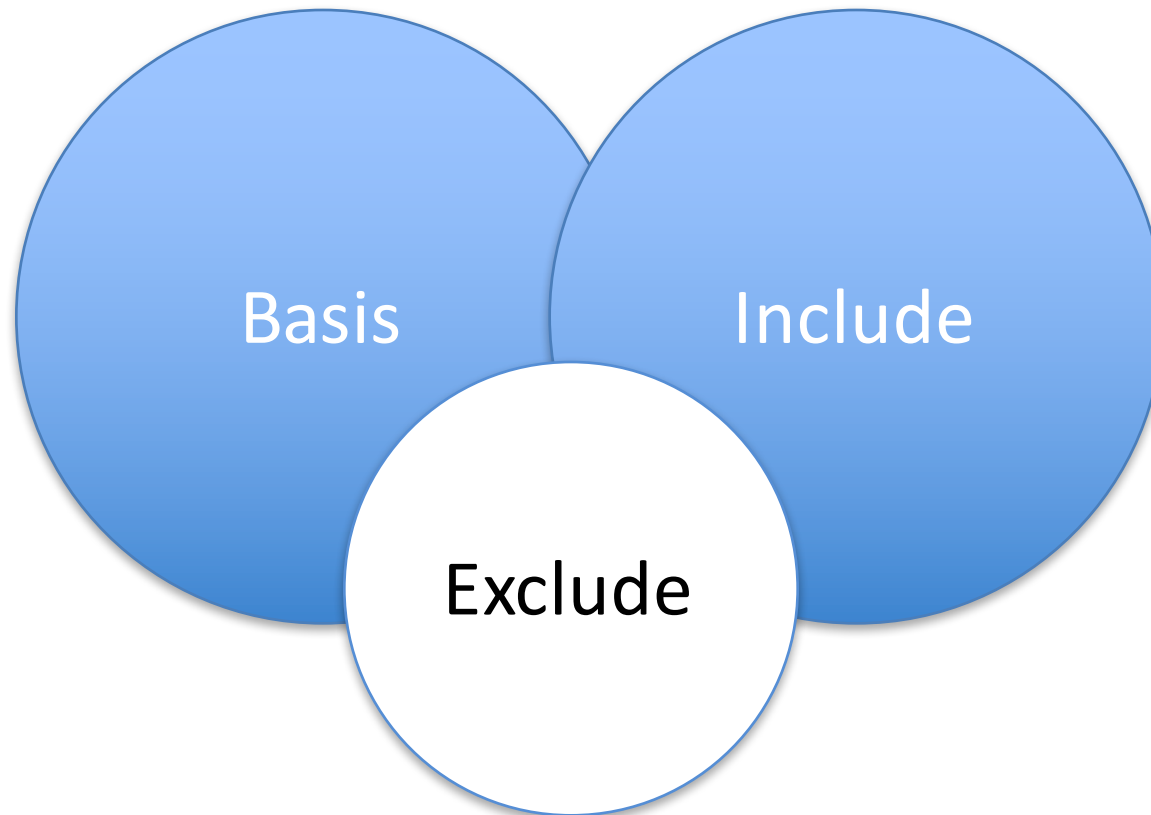
UH Groupings, Concepts

- A Grouping
  - Is a simple or complex expression of membership
  - Is composed of 3 groups, conceptually
    - Basis, Include, Exclude (more on this in a moment)
  - Has 1 or more Owners
  - Has properties that an Owner can configure
  - Is reusable, can serve multiple purposes
    - Application authorization (who can do what)
    - LISTSERV list publication (email notifications)

UH Groupings, Concepts

- A Grouping is composed of 3 groups, conceptually:
  - **Basis** group (e.g.: UHH Faculty) (may be empty)
    - Populated using automatically populated groups that reflect your core requirements.
  - **Include** group (may be empty)
    - Ensures member inclusion, regardless of the Basis.
    - Populated manually or via a campus application.
  - **Exclude** group (may be empty)
    - Ensures member exclusion, regardless of Basis/Include.
    - Populated manually or via a campus application.
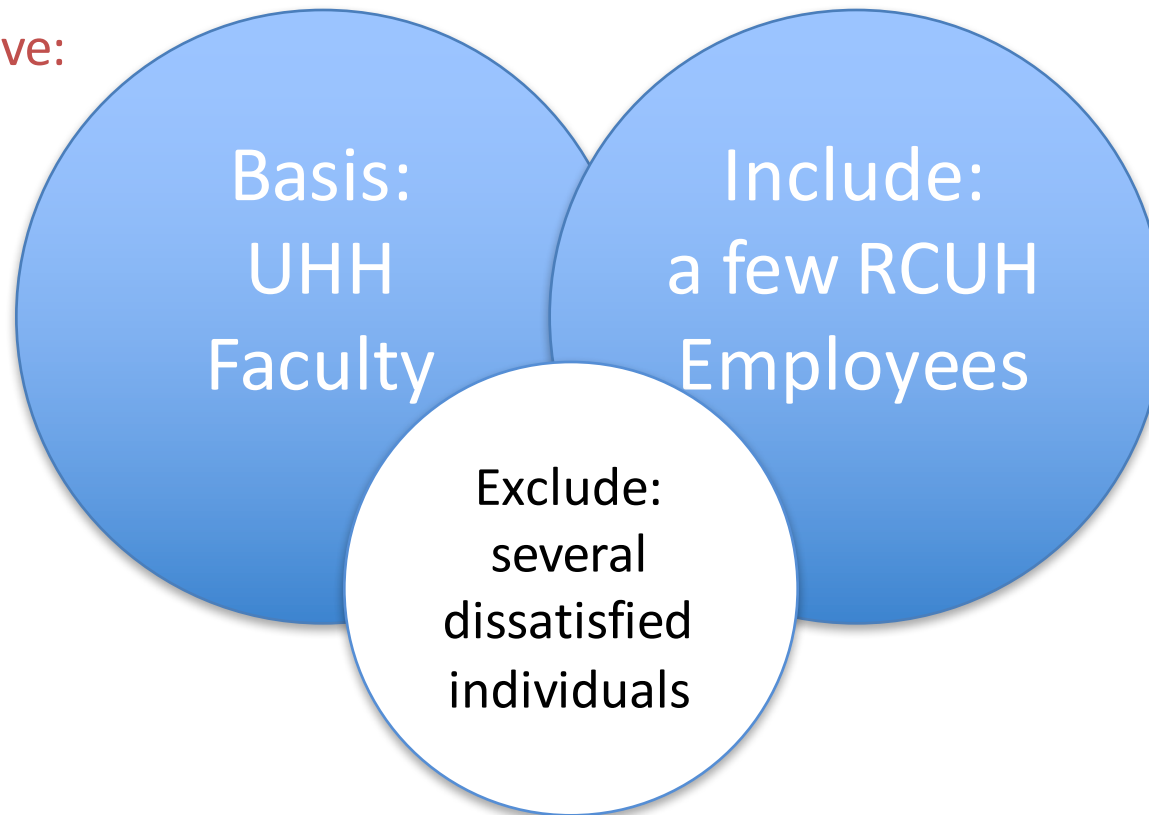 - In Set Theory: ((Basis U Include) \ Exclude)

UH Groupings, Concepts

(Basis U Include) \ Exclude

UH Groupings, Concepts

(Basis U Include) \ Exclude

Sample objective:

implement a campus mailing list

Basis: UHH Faculty

Include: a few RCUH Employees

Exclude: several dissatisfied individuals

This design maximizes flexibility and facilitates the implementation of an easily understood user interface.

UH Groupings

- Simple Basis Group examples:
  - UH Maui students, faculty, lecturers, staff, retirees
  - RCUH staff
  - UH Manoa faculty librarians
  - UH System civil service employees
  - KCC student employees, work study students
  - UH Manoa grad students in the law school
  - LCC students enrolled in IS 100 CRN 54588, Fall 2016
  - Hilo students seeking a Nursing BS
  - UH Manoa student seeking a JD

UH Groupings

- Compound Basis Group examples:
  - ITS civil service employees:

    Group: …hris.eac.2213460

    INTERSECT

    Group: …uhsystem::staff.civilService

  - ITS employees that are students (tuition waivers?):

    Group: …hris.eac.2213460

    INTERSECT

    Group: …sis.20143:enrolled

UH Groupings, Roles

- Owners
  - Successfully request a UH Grouping.
  - Manage the Grouping's list of owners.
  - Add/remove members from the Include group.
  - Add/remove members from the Exclude group.
  - Enable/disable members' Opt-Out Self-Service option.
  - Enable/disable members' Opt-In Self-Service option.
- Members
  - If allowed, may include/exclude themselves.
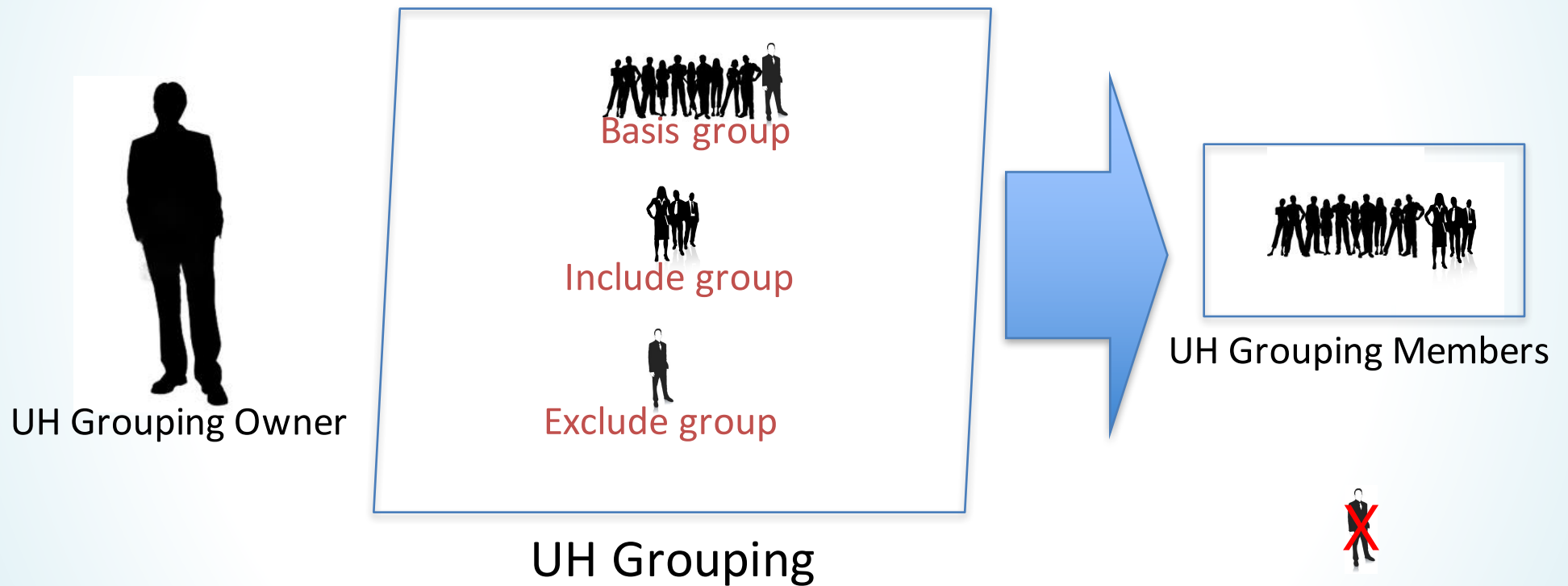 - Receive email, if the Grouping is published to a LISTSERV list.

UH Groupings

- Ideas recently discussed:
  - UH App Developers: discussion list
  - UH App Developers: CAS3, Special DNs, Groupings
  - UHH 'Ohana
  - UHM Executive-Managerial
  - Groupings for all UHIMS managed LISTSERV lists
  - ITC by floor mailing lists
  - UHIMC users (dual use: for authorization and email)

UH Groupings vs. Groups

- Grouper Groups vs. UH Groupings?
  - A Grouper group is a simple list of people.
  - A UH Grouping is a very flexible service.
    - User Interface for Owners and Members.
    - Automatic Groups for the Basis group
    - Membership tuning: Include/Exclude groups
    - Publication destinations: LISTSERV, CAS, …
    - LISTSERV namespace reservations, whether you publish or not.

UH Groupings, Summarized

UH Grouping Owner

Basis group

Include group

Exclude group

UH Grouping

UH Grouping Members

UH Groupings URLs

- UH Groupings online service:
  - https://www.hawaii.edu/its/uhgroupings
- Online documentation:
  - https://www.hawaii.edu/bwiki/display/UHIAM/UH+Groupings
- Requesting a Grouping, online form:
  - https://www.hawaii.edu/bwiki/display/UHIAM/UH+Grouping+Request+Form
- Developer documentation:
  - https://www.hawaii.edu/bwiki/display/UHIAM/UH+Groupings+Developer+Documentation

Questions?

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