

Request for Information No. III
RFP No. RFP No. 20/21-01 Identity Management Solution
October 5, 2020

Response to Proposers' Questions

3.1 **Question:** What is the target system that will need to be integrated and managed by the IDM solution?

Answer: Each Ed Tech JPA member will have their own specific needs related to target systems to integrate with the Solution. Some Ed Tech JPA members may want a full Single-Sign-On (SSO) application (with a large number of applications) and others may plan on using the system only to administer accounts in their primary authentication platforms (e.g., Active Directory, G-Suite, Open Directory).

IUSD plans to use the Solution primarily for account management in Active Directory, Office 365 and G-Suite. IUSD uses Active Directory, Office 365 and G-Suite for authentication to other programs and assigning permissions based on group/OU membership (this is a common setup for school districts, however Ed Tech JPA members may have different setups).

Please see RFI no. 2.9 for additional information.

3.2 **Question:** "3.5.8 Describe how the Solution automates user sign on sessions". (Q) Can you please provide more details as to what is being requested?

Answer: 3.5.8 is looking to see how the platform handles SSO for users. For example, does the platform use SAML token-based authentication? Or does the platform verify authentication against a directory or stored user database, via LDAP or similar.

3.3 **Question:** "3.4.18 Describe the process for managing group updates, such as a schedule and/or frequency." (Q) Can you please provide more details as to what is being requested?

Answer: Specification 3.4.18 requests information on how the Proposed Solution facilitates management of group memberships in directory programs and collaboration platforms (e.g., Active Directory, G-Suite). Vendors should describe how updates within the source databases, including an employee information system and/or student information system, are used to dynamically add and remove users from groups.

3.4 **Question:** "3.4.12 Describe how the Solution can add to established workflows, outside of automation (eg. Customized request forms)." (Q) Can you please provide more details as to what is being requested?

Answer: Specification 3.4.12 requests information on the capabilities of the system to trigger updates to group memberships, permissions, user account attributes, or other database fields based on

custom forms or workflows (in addition to changes in the source database). Examples of this could include:

- A custom form to request creation of an account for a non-employee (consultant, student teacher).
- A custom form for a user to request being added or removed from a distribution list.
- A custom form for a user to update their phone extension that writes to Active Directory.
- A custom form for a site administrator to request elevated permissions (or a group membership) for an individual where those permissions are not directly inherited from their job classification. For example, a teacher may be selected to receive a stipend to provide instructional technology support. These additional duties require elevated permissions to some systems so that they can best support other teachers. However, the HR system does not show this role as an additional job.

Please describe the Proposed Solution's ability to support custom forms and workflows to facilitate changes that are not directly triggered by changes in a student or HR system.

3.5 **Question:** "3.4.11 Describe how end-users can manage automated workflows and groups."
(Q) Can you please provide more details as to what is being requested?

Answer: Specification 3.4.11 requests information on how the system allows selected end users to manage group and distribution lists they "own." For example, school principals and administrative assistants may need to have the ability to manually add or remove users from the email distribution list groups at their sites. They would use this feature to add or remove individuals that have an account, but are not in the HR system (e.g., student teachers, consultants). If permissions to update/manage groups can be distributed to site/location designees, please include screenshots and details to showcase the usability of the system.

3.6 **Question:** **1.12.13**Vendor confirms that should the awarded Vendor be a new vendor, the Vendor shall coordinate with the previous vendor for implementation of the new Solution. Describe Vendor approach and services supporting customer transitions from incumbent identity management systems to ensure minimal interruption. (Q) Are you saying that the existing IDM Vendor will be used as an extension of the customer's team when deploying a new system or is there some different authoritative role the existing vendor plays?

Answer: The intent of this specification is to gather information on how the selected Vendor will support an effective transition from the Participating Associate Member's current platform. The RFP requires that Vendors work with the customer and the previous vendor (if needed) to assist with this transition. For example, if the Participating Associate Member has a solution in place, the Vendor would be expected to participate in conference calls and engage with technical support as needed to understand the Participating Associate Members' previous implementation in order to replicate the desired outcomes and parallel features in Vendor's Proposed Solution.

3.7 **Question:** What Student Information System are you working with now?

Answer: Each Ed Tech JPA member has a unique set up and may have various Student Information Systems.

IUSD's current Student Information System is Aeries Software Inc. dba Eagle Software.

3.8 **Question:** Do you know how many identities / targets / integrations will be involved with this project?

Answer: Each Ed Tech JPA member has different needs related to the number of identities involved.

IUSD currently has approximately 36,500 students and 4,500 staff (including 1,950 certificated staff) and does not require additional users for outside vendors and contractors. Please see RFI No 2.15 & 2.16 for additional information.

3.9 **Question:** How many environments are required? (Dev, test, prod)

Answer: Ed Tech JPA Members may have different expectations related to separate development, test and production systems. Consistent with best practices for design, a development, test and environment would be ideal. A test and production environment may be sufficient for most members. Vendors should be specific about the number and purpose of environments included in the base proposal, and any additional costs for test and development environments if applicable. If the Proposed Solution does not include dedicated development and/or testing systems, Vendors should provide additional detail as to how the system supports testing and change control to mitigate the risk of disruption when changes are made.

3.10 **Question:** What are the sources of Identity currently in the environment?

Answer: Please see RFI no. 2.3.

3.11 **Question:** Do you have any defined use cases you can provide/share?

Answer: Each Ed Tech JPA Member may have different needs for identity management in their organizations. Some use cases may include:

- Automating the creation of staff user accounts in Active Directory, Office 365/G-Suite and other third party platforms when a new employee is hired.
- Automating the suspension or deletion of user accounts upon separation or graduation of employees and students based on data entered in a human resources or student system.
- Assigning group membership or permissions to user accounts based on employee job or assigned work location or student school and grade level.
- Managing self-service password recovery and resets for users.

3.12 **Question:** Please describe your active directory environment and any other directory considerations when relating to the build of the proposed Identity Governance platform.

Answer: Ed Tech JPA Members may structure their directory environments differently. If the structure of the directory system affects the capabilities of the system or the cost of the proposals, Vendors must explicitly state their assumptions in the Proposal and document any variations that might affect the functionality of the solution and/or the price of the Proposal. Many Ed Tech JPA members will manage all accounts within a single domain in their directory system, with nested/hierarchically structured Organizational Units (OUs) or containers defined by characteristics like the type of user (student, staff, non-employee), the user's location, and the student's grade level.

3.13 **Question:** Please share a list of target applications and core components so as to better provide an estimate of time and effort to include in the project.

Answer: Please see RFI. no. 2.9.

3.14 **Question:** Please describe what workflows are desired (joiner, mover, leaver, rehire, etc.)

Answer: Specific workflow functions requested are embedded within section 3 Functional Requirements of the RFP. Minimally, the solution must be able to accommodate account management for newly hired employees, newly enrolled students, rehired employees, re-enrolled students, separation of employees, graduation or disenrollment of students, staff job or location changes, student grade level or school changes, and staff/student data changes that should be updated in directory attributes.

3.15 **Question:** Have roles been defined in the environment, is this something that needs to be developed as part of the project?

Answer: Ed Tech JPA Members may have different levels of defined roles and permissions. For IUSD, user roles have been defined within the current environment.

3.16 **Question:** Do you desire integrations with any other systems? (ticketing systems, Privileged Access Management Systems, SIEM solutions, etc.)

Answer: Ed Tech JPA Members may have different needs related to integration. IUSD's primary interest is to integrate with Active Directory, G-Suite, and Office 365. The ability to integrate with our current Help Desk system (Zendesk), Syslog Server (Kiwi Syslog) or future reporting systems would be a nice feature, but not required.