



## Enterprise Data Management Council

# **DECISION: OktaHub access to HRS/SFS/Workday, SIS and PersonHub Data**

**EDGC Decision Date: April 22, 2024**

### **What is the problem? Why is a decision needed?**

Okta is an Identity and Access management tool implemented at the Universities of Wisconsin. The tool combines Okta Spokes deployed at the University level in Phase 1 as an opt-in implementation with Okta Hub deployed at the enterprise level in Phase 2. Okta Hub requires information on all users (faculty, staff, students, POI, etc) who have or will have an active NetID associated with the person. The sources for the identity data needed for OktaHub come from the HR system for employees (HRS/Workday) and the University SIS for Students. OktaHub requires an efficient and effective way to integrate all identity related data across the Universities.

### **What decision is recommended?**

HRS/SFS, Workday, and SIS through PersonHub data feeds are recommended as the source for the identity data needed for OktaHub. The PersonHub data feeds combine HR system person data for employees (HRS/Workday) and the University SIS person data to provide two perspectives on the Person information. The first is PersonHub creates a common identifier across all Universities for a Person called PVI. The PVI provides a way to match a single person with their different identities across Universities (e.g. one person may be faculty at Whitewater, student at Stevens Point and employee at Platteville). The second perspective is information on the person as the University sees the person with their associated login, email and other personal information. Since each identity needs both the combined enterprise PVI and individual University identity to gain access to applications, the PersonHub data feed along with the data coming into PersonHub that retains the campuses identity is the best choice for the data in OktaHub.

A more detailed diagram is available in Appendix 1.

### **Who developed the recommendation?**

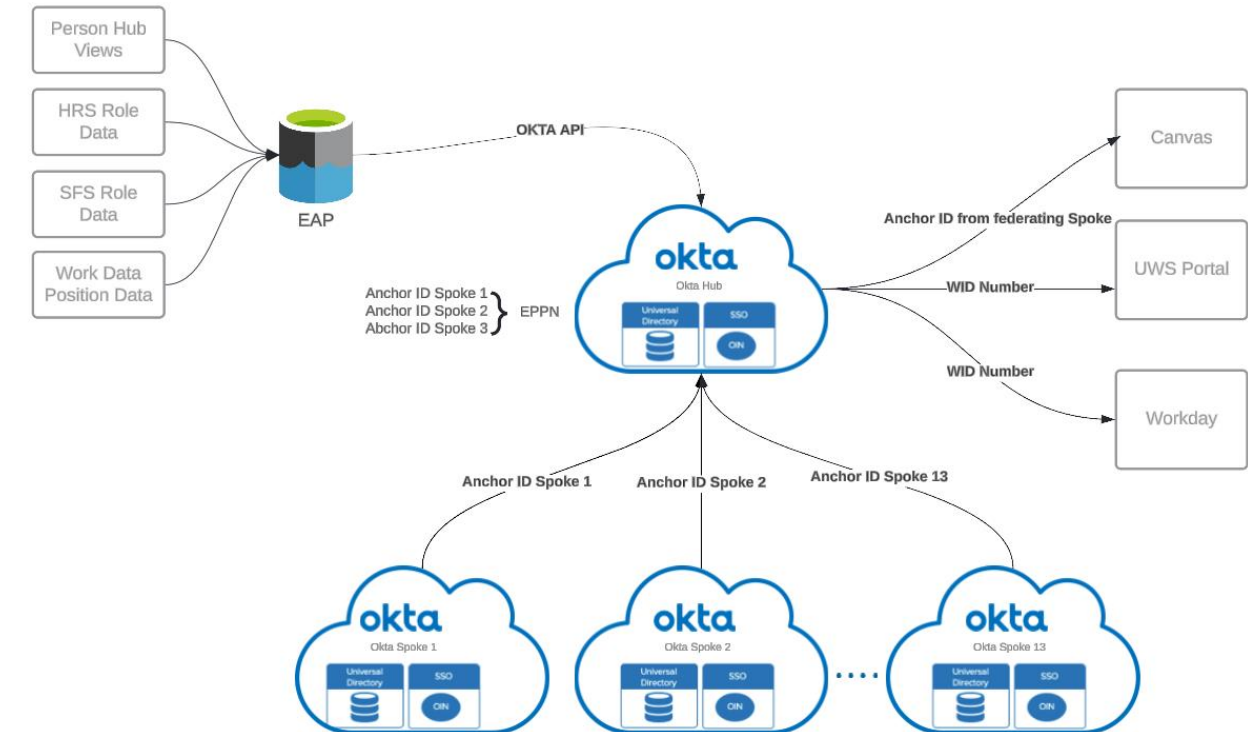
This recommendation was developed by the UW System's OktaHub team and Enterprise Architecture team.

## **Who was consulted in the development of the recommendation?**

Members of UW-Madison's PersonHub teams and UW System's Enterprise Analytics program reviewed and contributed to the recommendation document. Additionally, ATP functional and security teams were consulted on issues related to the use of OktaHub and security models for EAP.

## Appendix 1 – Technical Diagram

Data will be pushed to the OKTA hub utilizing Otka’s “Anything-as-a-Source (XaaS) api end points. As data changes it needs to be pushed to Okta in a near real time fashion. Okta will be in production prior to ATP go live and needs to support both Workday and HRS data. All user populations including Students are included in the OKTA feed. Okta will use campus provided [EPPN \(EduPersonPrincipleName\) as it anchor and primary identifier](#). Okta co-exists with existing federated IAM processes. OKTA will rely on Person Hub Master Data Management (MDM) services to maintain linkage between EPPN and PVI. The main principle for sourcing data for the hub is that we pull it as close as possible from the source systems. Because of the varied populations these data sources have an order of precedence. Employee data will be sourced from HRS, and then Workday post go-live. All other data will be sourced from the campus SIS that is providing it.



## Appendix 2 – Proposed List of Initial Use Cases OktaHub

<b>Use Case</b>	Allow access to datasets in EAP via Tableau or Redshift
<b>Description</b>	Tableau access to dashboards will be granted automatically based on the user access roles in Workday. Information integrated from Workday into OktaHub will be matched with PersonHub data to accomplish the automated access.
<b>Use Case</b>	Allow access to tools or applications related to a course
<b>Description</b>	Course level access to a tool can be provisioned and deprovisioned based on the student/course enrollment information stored in OktaHub

### Appendix 3 –Proposed List of Data Elements Required in OktaHub

Data Required in Okta		Source for Data		
Display Name	Variable Name	Person Hub (Best Match)	Person Hub (SIS aggregated data)	HRS / SFS / Workday
Username (EPPN)	login		Campus provided Login	
Preferred email	preferredemail	Used, when the domain of the email matches the EPPN domain	Used when best match does match login domain	
PVI	pvi	X		
Employee number	employeeNumber	X		
Student Number	studentNumber		X	
Library Card Number	cardidnumber		X	
Preferred First Name	preferredFirstName	Additional Source If other sources not available	Non-Worker Population	Worker Population (HRS / Worker)
Preferred Last Name	preferredLastName	Additional Source if other sources not available	Non-Worker Population	Worker Population (HRS / Worker)
Preferred Middle Name	preferredMiddleName	Additional Source if other sources not available	Non-Worker Population	Worker Population (HRS / Worker)
Pronouns	pronouns	Additional Source if other sources not available	Non-Work Population	Worker Population (HRS / Worker)
Legal First Name	legalfirstname	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Legal Last Name	legallastname	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Legal Middle Name	legalmiddlename	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Honorific suffix	honorificSuffix	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Title	title	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Display name	displayName	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Mobile phone	mobilePhone	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Primary phone	primaryPhone	Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Mailing Street Address		Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Mailing Street Address 2		Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Mailing City		Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Mailing State		Additional Source	Non-Worker Population	Worker Population (HRS / Worker)

Mailing Postal Address		Additional Source	Non-Worker Population	Worker Population (HRS / Worker)
Country code	countryCode			Worker Office Location (HRS / WD)
User type	userType		SIS	
Job Information	jobInfo			WorkDay Appointment Data
Job Info (Legacy HRS)	jobInfoLegacy			HRS Appointment Data
HRS Roles (Legacy)	hrsroles			HRS Admin User Roles
SFS Roles(Legacy)	sfsroles			SFS Admin User Roles
WD Roles/Domains	wdroles			Workday Admin User Roles/Domains

Data from crosswalk table in PersonHub used to match PVI with EPPN
PVI
EPPN

Need this data directly from the SIS feeds to PersonHub to derive the correct data in Okta
IAA_IFC.UW_IAA_STG_SOURCE_PERSON_TBL
SESSION_ID
SEQ_NUM
LOG_TYPE
SOURCE_CODE
GENDER
PRIVACY_FLAG
DECEASED_FLAG
ERROR_CODE
CREATE_DATETIME
INSERT_DATETIME
IAA_IFC.UW_IAA_STG_STUDENT_ROLES_TBL
SESSION_ID

SEQ_NUM
LOG_TYPE
SOURCE_KEY_VALUE
SOURCE_CODE
STUDENT_ROLE_ID
STATUS_BEGIN_DATETIME
STATUS_END_DATETIME
STATUS_CALENDAR_UNIT_DESCR
STUDENT_STATUS
FULL_PART_INDICATOR
STUDENT_MAJOR
STUDENT_CLASSIFICATION
STUDENT_COLLEGE
INSTITUTION_CDR_CODE
ERROR_CODE
CREATE_DATETIME
INSERT_DATETIME
IAA_IFC.UW_IAA_STG_CONTACT_TBL
SESSION_ID
SEQ_NUM
LOG_TYPE
SOURCE_KEY_VALUE
SOURCE_CODE
CONTACT_TYPE
CONTACT_ROLE_ID
SUPPLEMENTAL_SOURCE_CODE
EMAIL_ADDRESS
PHONE_NUM
PHONE_EXT
ADDR_LINE1
ADDR_LINE2

ADDR_LINE3
ADDR_LINE4
CITY
STATE
COUNTRY
ZIP
ERROR_CODE
CREATE_DATETIME
INSERT_DATETIME