### Why are we doing this?

**Problem Statement:**
The purpose of this project is to evaluate and select Identity Access Management (IAM) software and a professional services partner to assist with implementation.

**Impact Statement:**
The existing account provisioning system, Account Maintenance Automation (AMA), is a PeopleSoft customization designed and developed by SMU personnel in 2009. Due to its limited focus and PeopleSoft-centric foundation, it does not address many of the current and future objectives of the Identity and Access Management (IAM) program that is being developed.

### How do we judge success? Success Metrics

**KEY DELIVERABLES (WHAT, WHEN, AND HOW)**

- Reference Architecture Document
  - By: December 13, 2019
  - Core Project Team
- Concrete Architecture Document
  - By: March 27, 2020
  - Core Project Team
- Software Selection Report
  - By: April 17, 2020
  - Core Project Team
- Prioritized Roadmap
  - By: May 1, 2020
  - Core Project Team
- Discovery of Marketplace Capabilities Document
  - By: May 29, 2020
  - Core Project Team
- Services Vendor Selection Report
  - By: June 12, 2020
  - Core Project Team

### What are possible solutions?

**ACCEPTANCE CRITERIA FOR MILESTONES**

- PMO will approve the successful completion of Milestone 1 – Project Kick-off
- IAM Management will approve the successful completion of the following Milestones:
IT Management will approve the successful completion of the following Milestones:

- 2 – Reference Architecture Document
- 3 – Concrete Architecture Document
- 4 – Prioritized Roadmap
- 6 – Software Selection Report
- 8 – Services Vendor Selection Report

### High Level Timeline

<table>
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<tr>
<th>Milestone</th>
<th>Start Date</th>
<th>End Date</th>
<th>Group</th>
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<tr>
<td>Project Kick-off</td>
<td>October 28 – November 1, 2019</td>
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<td>PMO</td>
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<tr>
<td>Reference Architecture Document</td>
<td>October 28 – December 13, 2019</td>
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<tr>
<td>Concrete Architecture Document</td>
<td>December 16, 2019 – March 27, 2020</td>
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<td>Prioritized Roadmap</td>
<td>March 30 – April 30, 2020</td>
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<td>Software RFI Process</td>
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<td>Software Selection Report</td>
<td>March 31 – April 15, 2020</td>
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<td>Services RFP Process</td>
<td>April 1 – May 29, 2020</td>
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<td>Services Vendor Selection Report</td>
<td>June 1 – June 15, 2020</td>
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<td>Core Project Team</td>
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### Exclusions

**ITEMS OUT OF SCOPE**

- Implementation activities are out of scope for this project
| Issues Tracking | • Detailed planning for implementation is out of scope for this project |
| Stakeholder Impact |  |
| Who is the customer and how does this help them? |  |
| Why will the customer want this? |  |
| Scale and scope | During this project the following high-level activities will be performed.  
• Throughout the project, communication materials will periodically be prepared and presented or otherwise distributed to inform the various university-wide sponsors and stakeholders on the basis and progress of the project  
• A Request for Information (RFI) will be prepared and sent to a short-list of IAM package software vendors  
  ○ RFI responses will be reviewed and scored, with the scores feeding a quantitative evaluation scorecard  
• A SMU specific product demonstration will be executed by each vendor that achieves a qualifying score  
  ○ The software’s coverage of SMU requirements will be scored, with the scores feeding a quantitative evaluation scorecard  
• A final report containing summary findings from the RFI process and a justifiable software recommendation will be prepared and presented to finalize the software selection  
• A Request for Proposal (RFP) will be prepared and sent to the selected software vendor professional services group as well as professional services partners experienced in implementing the selected software.  
  ○ RFP responses will be reviewed and scored, with the scores feeding a quantitative evaluation scorecard  
• In-person professional services presentation will be conducted by each vendor that achieves a qualifying score enabling us to meet key vendor resources and hear / ask questions about their implementation approach, prior successes, etc.  
  ○ SMU participant qualitative responses will be gathered |
and factored

- A final report containing summary findings from the RFP process and a justifiable professional services vendor recommendation will be prepared and presented to finalize the professional services vendor selection.