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FOR CORPORATE'S SAKE:

Know Your Procedures for Global Systems Access

Sharon D. Richards

The lack of timely provisioning of system credentials to new project resources is one of the top causes for project delays and overruns

With the complex computing and outsourcing ecosystems of today's enterprises, IT organizations face a growing need for fast and seamless provisioning of user credentials to enterprise systems. Most companies have a unique maze of steps and procedures that users must navigate to gain access to a specific computer system or software application. Even companies that employ an identity and access management (IAM) team to implement corporate and security policies often find that the IAM team can be its own worst enemy. All too frequently, IAM teams require lengthy, complex processes and procedures. When the details or the documentation of these procedures are not in place, teams can experience chaos and a cascade of unwelcome problems. Global corporations are especially susceptible to mayhem because corporate policies may differ from one locale to the next due to regional laws or corporate mergers.

The lack of timely provisioning of system credentials to new project resources is one of the top causes for project delays and overruns, yet it is rarely recognized as such or considered as a risk during planning. Provisioning access to systems and applications is an almost universally underestimated issue. Project leaders either do not see the potential for negative impact or assume the project doesn't commence until system access has been granted and confirmed as functional to all necessary participants. In reality, local and global corporate and security policies to access corporate assets are full of overlooked unknowns. When one combines these complex policies with the idiosyncratic internal procedures and approvals required for each system, the result is an almost certain delay to a project schedule. Throw in the additional burden of the likely unfamiliar access requirements needed to pass through corporate firewalls, and it is easy to see how a project can quickly derail when faced with these issues.

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Challenges for Identity and Access Management Teams

Procedural dependencies play a key role in a project's schedule, and they should not be overlooked. It's prudent to know exactly what is required at each step in the process for provisioning user access to a corporate system or application. Knowing the dependencies involved makes it is easier to avoid any untimely discovery of new information and the subsequent negative impact of such a discovery. Figure 1, below, illustrates a simplified view of the multiple security accesses likely required to obtain user credentials in a targeted system.

Figure 1: A simplified view of the multiple security accesses likely required to obtain user credentials in a targeted system. Be sure to consider time and tasks required when provisioning user credentials to an application.

Internet Firewall

Internet Firewall

Target Application

Tasks

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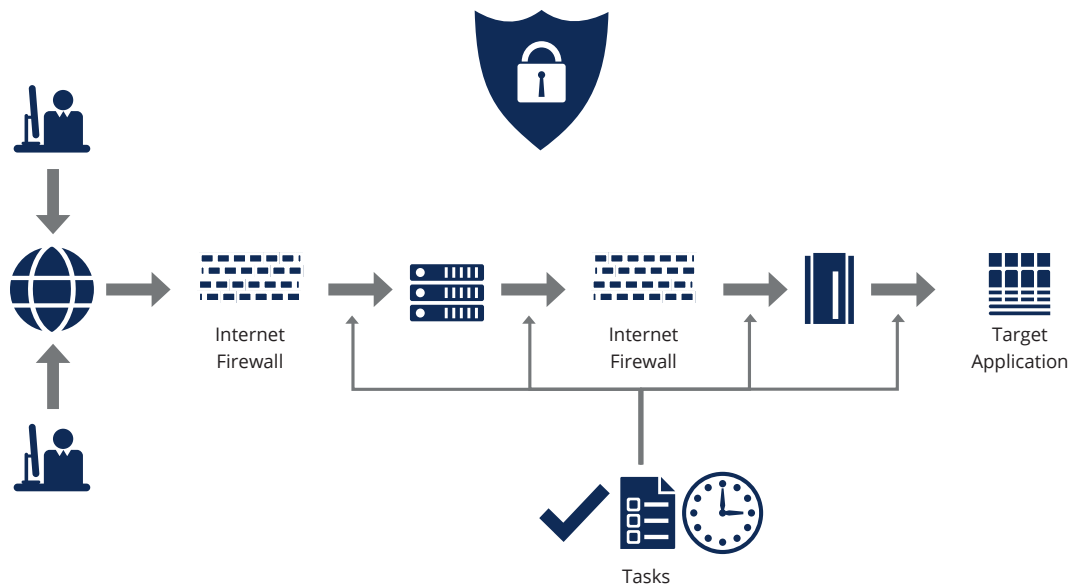
Picture a multibillion-dollar financial services company that has hired new resources to take on a project with a global scope. While working on granting user credentials on its global network to the new resources, the IAM team discovered additional requirements. Once it had addressed the additional firewall permissions, the team discovered it also needed to grant access to an intranet layer to get to the target application. By the time the new project resources were notified that their targeted system and firewall accesses had been configured and granted, their initial global network credentials had expired. Consequently, the request to grant access to the corporate global network had to be repeated, which further cascaded the necessity to request access to system and firewalls again. This truly vicious cycle could have been avoided had the organization known and understood the details of the user credentials provisioning for its global and local systems, planned in alignment with them and then acted. Instead, the project was halted and delayed by over a month, causing a major loss in revenue and death to the project schedule.

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Global corporations often have different onboarding and security policies for different regions in accordance with laws pertaining to each country of operation. A legal policy that is considered standard operating procedure in one country may be neither legal nor standard operating procedure in another country. Employees in one country are rarely fluent in the corporate policies or processes required to gain access to a system physically located in their own county, let alone another country. Unfortunately, when these differences are discovered only after a request for corporate network or system access is made, it is too late to plan strategically; the end result is frustration and lost time and revenue.

Solution

Many organizations don't realize that there is an effective, inexpensive and practical solution to timely provisioning of user credentials on corporate systems. First, thoroughly analyze, assess and document the finest details of the required procedures required to gain access to corporate systems. Document the human resources and the time required for the completion of each task. Populate a simple spreadsheet with all the systems and their associated access requirements to organize and centralize the information in one place. In the spreadsheet, add each system and team that has a role in the provisioning of new user credentials for a corporate system. Be sure to include the tasks required for internal corporate processes, approvals, firewalls, intranets, applications, organization(s) responsible, expected timelines, human resources required, task dependencies and any other additional pertinent and useful information, such as contact information for assistance, contingency plans or escalation procedures.

Identify system and task dependencies early. Document them within the context of the big picture. Streamline and automate any tasks and dependencies that can be automated. Fully understand and account for the amount of time it takes for individual networks and systems to grant access to a new user. Document any limitations, constraints and contingencies.

To fully understand the details and requirements for provisioning credentials to a system, create a questionnaire and distribute it to each organization to fill out. The questionnaire should contain requirements for access to an organization's networks, systems and applications. After you collect and analyze the response to the questionnaire, consolidate results into a master sheet that is maintained by an IAM or corporate security team. IAM or corporate security teams also should own and lead a system credentials steering committee with representatives from each organization. The system credentials steering committee should meet at least quarterly to discuss new systems, changes in corporate or security policies and impacts or updates to an existing credential provisioning process. Each representative on the system credentials steering committee should be responsible for providing current information to the master spreadsheet for the organization he or she represents.

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Benefits of Documenting System Access Requirements

The potential benefits of investing in an analysis and documentation of the procedures needed to gain access to a corporate network are enormous. Future projects will reap the benefits of this knowledge once it is in place, saving time, revenue and grief. Documenting the smallest details of the steps required and testing those steps for accuracy will eliminate surprises and provide quick and smooth user-credential provisioning without disrupting the project. A full documentation of system access steps puts a plan in place for every new user credential request. Therefore, projects can be planned with confidence, accuracy and the assurance that provisioning network and system accesses for new users will not be a hindrance or a show-stopper to the project. A project should never be interrupted – or worse, come to a complete halt – due to a lack of network access and system credentials.

One substantial benefit of creating a document detailing the steps needed to provision user credentials is that it facilitates identifying and remedying gaps or inefficiencies in the individual tasks or in the overall provisioning process. This further reduces the amount of time and cost spent on a project. Once the internal process is documented, future projects reap the benefits and avoid stumbling on surprise policies and requirements when attempting to gain access to a corporate system. Having the details that this spreadsheet provides at the onset of a project gives everyone a clear understanding of the credential provisioning process and supports project managers in providing more realistic and accurate project schedules.

Technical teams also will benefit from understanding the corporate policies and tasks involved in the credential provisioning process and their roles in executing those tasks. Generating metrics and sorting or exporting data from the spreadsheet can result in additional insights and benefits. In the end, a complex provisioning process has been simplified into smaller, more-manageable parts that are documented and made available for use. By providing valuable information at a glance, the spreadsheet also facilitates decision-making, such as determining what the impact of a proposed system change or migration would be, and resource planning.

CONCLUSION

Complex user credential provisioning problems can have a simple solution. The solution lies in identifying, understanding and documenting the details of the user credential provisioning process and all dependencies. Not doing so can be the difference between a project's successful sailing or prompt failure. This practical and powerful spreadsheet solution not only eliminates any surprises – such as additional tasks in any given step or process – it also exposes risks and gaps and gives insight into where a process can be improved.

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Sharon D. Richards manages robotic process automation (RPA) projects that lead to outstanding results for ISG clients. She has over 35 years of experience in software engineering and project management. Since joining ISG, Sharon has managed the automation of wellness claims and termination processes for the largest provider of supplemental insurance in the United States. She also has managed a global team in support of a multi-billion dollar financial services company in the automation of several financial processes. Sharon leverages her vast technical experience in areas such as RPA development and testing when needed.

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