

Case Study: Bank of America

Pinnacle transformed and customized CA SiteMinder from an all-or-nothing approach to a user-friendly design and solution to migrate, backup and rollover changes and to track the data that was imported and exported into a database

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“Due to limitations with SiteMinder, BOA had been forced to take an all-or-nothing approach to updates and the system could only be operated by technical staff trained in SiteMinder.”]

Overview

Bank of America (BOA) is a major US financial services company and one of the largest banking operations with more than 6000 locations in 30 states. It offers a range of financial products and services including consumer and small business accounts and loans, credit cards, asset management and retail brokerage services.

Situation

The ability to quickly and accurately provision BOA's busy 243,000 employees with email and application accounts is critical to its business operations—as it is for all large diverse services companies. Employees who lack access to their work applications can't do their job which undermines productivity—and, ultimately, the bottom line. However, given the hundreds of users who need new accounts, changes to their accounts or password resets every week, getting them all provisioned in a timely manner was a challenge.

BOA uses SiteMinder, an identity and access management program from Computer Associates. SiteMinder enables BOA to do several things:

- Have their employees access most work applications via a Web portal interface that contains a security plug-in which directs log-in requests to SiteMinder
- Allow administrators to make changes to employee account permissions via SiteMinder which stores the information in its own Oracle database
- Manages access to the bank's 620 major software programs

After an application owner has added, changed or deleted a user account or updated an access policy, those changes are backed up and migrated to the production database. In the case of an error, the application owner can roll back the changes to an earlier version.

Challenges

However, due to a limitation of SiteMinder, BOA had several challenges:

1. **Administrators were forced to take an all-or-nothing approach to updates.**

To make one change, the entire SiteMinder database had to be migrated, a process that could easily take half the day. Thus, it was not possible to do frequent small backups or migrations. Once a day was the limit. If an employee needed an account added on an afternoon after the daily processing had already been run, he or she would have to wait until the next day.

2. **SiteMinder 's command line interface was not user friendly and could only be operated by technical staff trained in SiteMinder.**

Nor could the system be configured to do automatic backups. The same was true of the SiteMinder XPS command line interface service which provides the capability to import/export specific changes from the SiteMinder Policy Store.

Solution

Pinnacle determined that the solution to BOA's challenges would be solved through Managed Migration for SiteMinder.

Managed Migration is a Java Web interface based on the Java Server Faces (JSF) framework. It is a Java-based Web application framework for creating user interfaces for Java EE applications. . AJAX (Asynchronous JavaScript and XML) was used for asynchronous calls and also on the client-side to make the application interactive. It uses the Hibernate, an object/relational persistence and query service and SiteMinder's XPS (eXtensible Policy Store) import/export services to communicate with the Oracle database on the backend. The XPS service was modified by CA to work with a Web interface.

Summary of Technologies Used:

CA Identity Manager, CA SiteMinder, SiteMinder Web interface, CA Extensible Policy Store, Oracle database, Java Server Faces, AJAX, Hibernate 3.2

Results

The new interface and integration layer now allows application owners to:

- take snapshots of their applications
- approve user requests for changes to their access privileges
- queue requests to create a sequential workflow of approvals
- allow semi-technical administrators to more easily navigate through a user-friendly customization
- automatically send the application owner an email alerting him or her when a user needs to change something

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The email alert includes a URL link to an approval page, enabling the administrator to “OK” a change without having to work through multiple screens. The interface not only speeds the provisioning process and enables users to get their accounts updated much more quickly, **but saves BOA IT administrators hours of work time** that would have had to be spent navigating archaic command line interfaces and waiting for backups to be completed.

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