

Global Financial Services Case Study

Migration from a Tivoli® TAM WebSEAL deployment to the Ping IAM Platform

Client Overview

- Business and Compliance requirements at a global Financial Services firm dictated the replacement of a heavily-customized, CIAM platform based on a non-supported version of TAM/WebSEAL. After three failed attempts, and millions in outlays, the approach of modifying legacy applications to work out-of-the-box with a CIAM vendor was deemed nonviable and too expensive. The client changed course and engaged CrossGEN, leveraging our collective Tivoli, WebSphere and ForgeRock (Ping) consulting experience, to assess an innovative approach. We proposed a Ping-based solution that provides *like-for-like authorization and external authentication capabilities* to satisfy business requirements -- with minimal application changes.
- Modules of Ping/ForgeRock deployed:
 - Access Manager Version 7.3.0 (PingAM)
 - Amster Version 7.3.0
 - Directory Server Version 7.5.0 (PingDS)
 - Identity Gateway Version 2023.9.0 (PingGateway)
- The legacy CIAM platform services Wealth Management applications supporting 5 million customers and is based upon the following Middleware:
 - Tivoli Access Manager / Tivoli Directory Server
 - WebSphere Application Server
 - IBM Business Process Manager
 - HCL Digital Experience (Portal, Content Manager)

How Our Consultants Helped

- Analysis and Solution Strategy
 - Analysis and codification of Baseline IAM Platform; solution architecture, components and capability map, integration patterns, application integration, user authentication models, session management, authorization models, and LDAP directory.
 - Proposed Phase 1 Target State Architecture.
- Capability Prototype
 - Created the *TAM WebSEAL → Ping Identity Transport*: IP and an abstraction layer to interface between Ping and Enterprise applications. Minimal changes were required of the legacy CIAM applications/middleware.
- Migration Roadmap
 - Deployment of Target State, Transition Steps, Migration Strategy for Re-Platforming Phase, De-Provision Legacy IAM Platform.
- Solution Delivery
 - Milestone-based contract spanning: Solution Design, Solution Development, Solution Testing, Solution Deployment, and Solution Transition Support phases.
- Deployment Environment
 - Ping products initially deployed through DevOps in Azure Kubernetes Service, using Istio, GitHub and Ping ForgeOps templates as the core of the configuration and deployment approach.
 - Client switched to Azure VM-based DevOps deployment, based on product roadmap shift.
- Knowledge Sharing
 - >30 documents spanning prototype result reports; solution, component design & functional specifications; DevOps deployment; security hardening & component tuning plans; functional test cases; migration plan; test strategy & skills transfer plans; artifact repository, comprehensive solution design documentation, etc.

Results

- Production Go-Live on July 15, 2024
- Ping's largest Tivoli migration
- Benefits of like-for-like approach:
 - Migration to Ping and sunsetting the TAM/WebSeal platform accelerated by 18 months
 - Annual Operations Savings of \$500k
 - ~\$2 million labor cost savings in project deployment: avoided hiring contractors to document / modify / redesign / test applications
 - Tivoli Operations team will be redeployed
- Successfully deployed Ping DevOps Build in DEV, TEST, QAT, and UAT environments:
 - Passed 4 rounds of Functional, Integration Testing
 - Passed all rounds of Performance / Load Testing
 - Passed Security / Pen Testing
 - Passed Failover / Business Continuity Testing
 - Passed Risk / Compliance Review
 - Passed Business Acceptance Testing
- The Ping CIAM deployment is integrated into client's systems management platform, spanning:
 - Backup
 - Configuration management
 - Serviceability log management
 - Audit log management
 - Monitoring and alerting
- Next Steps:
 - Initiate Phase 2 (Target State enhancements)