

Attachment B

Login ID & Display Name Standard

**COUNTY OF SANTA BARBARA
INFORMATION TECHNOLOGY STANDARD REQUEST**

| | | | |
|--------------|-----------------------------|----------------|-------------|
| SUBJECT: | LOGIN ID AND DISPLAY NAME | ADOPTION DATE: | 00/00/0000 |
| REQUESTER: | STANDARDS COMMITTEE | | |
| APPROVER(S): | COUNTY BOARD OF SUPERVISORS | | |
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I. Standard Overview

Standardized process for creating and managing Login ID's and Display Names; to reduce complications that can occur from conflicting user names across platforms by consistently defining unique Login ID's; defining standard procedures for Login ID exceptions in cases where the normal standard isn't allowed on given systems; defining standard procedures for addressing duplicate Login ID's; to define a standard Display Name naming convention.

II. Standard Origin

In support of Renew '22

1. RD-4.01 Countywide Information Technologies Standards Policy
 - i. This would implement a policy for standardizing technologies with the intent of reducing training, procurement and support costs, improve security, and share applications.

Countywide Technology Strategic Plan

Goal 1: Enable the delivery and consumption of quality IT services

Strategy B: Adhere to established IT governance policies and standards

Objective 1: Publish and communicate established standards and policies in a clear and concise manner

Goal 5: Effect an organizational realignment to enable the Countywide Technology Strategic Plan

Strategy C: Collaborate and share decision making

Objective 3: Leverage Communities of Interest (CoI) to provide a countywide perspective on initiatives to which they are focused.

III. Scope

1. All County departments
2. Applies to newly created accounts and/or current accounts when compliance is needed

IV. Definitions

1. Display name: The name seen displayed in the Outlook Address Book or in applications. For example, Jane Doe, or John Doe.
2. Preferred name: The name the employee would preferred to be known as; the HR-approved nickname
3. SAM Account Name: "Security Accounts Manager" name is often thought of as your Login ID, and is seen as the portion of the email address preceding the "@".
 - i. Jdoe, for example
4. Domain: How we are known to the world. For example, countyofsb.org, sbsheriff.org, etc.
5. Active Directory (AD): The database which contains user information

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6. Login ID: The name a user enters to log in to a system such as Windows. Login ID's can take different forms. The two most common examples are as follows:
 - i. Domain\SAMaccount, for example Co\Jdoe
 - ii. SAMaccount@Domain, for example Jdoe@countyofsb.org
7. User Principle Name, (UPN): The name of a system user in an email address format for example: jdoe@countyofsb.org.
8. Primary SMTP address: All sent mail will appear to come from your primary SMTP address, as well as all calendar invitations. Also, only your primary SMTP address will be listed in the search feature of Active Directory.
9. Proxy or Alias addresses: Other valid email addresses associated with the same mailbox for example: jdoe@co.santa-barbara.ca.us.
10. Non-Privileged User Accounts: This type of account does not have administrative rights and is typically used by staff to access email, Internet, and applications.
11. Privileged-User Accounts – This type of account allows a user or process to take administrator-level action, such as changing systems settings and permissions, adding users, and installing software. Also known as “elevated-privilege” accounts.

V. Standard Application

County Human Resources (HR) will provide information necessary to populate these fields as part of their on-boarding process.

1. First Name (AD attribute = Given-Name):
 - i. The First Name in Active Directory will be the HR provided preferred name
 - ii. Must use English alpha-numeric characters (no accents or special characters).
2. Last Name (AD attribute = Surname):
 - i. The Last Name is the HR provided last name
 - ii. Must use English alpha-numeric characters (no accents or special characters, except hyphens and spaces)
 - iii. Suffixes are allowed, but without periods (Jr, Sr, III, etc.)
3. Middle Name:
 - i. The Middle Name is the HR provided middle initial
 - ii. The Middle Initial may be used to delineate employees with the same first and last names
 - iii. Must use English alpha-numeric characters (no accents or special characters)
4. Display Name:
 - i. The Display Name will be the preferred name followed by Last Name
 - ii. The Display Name must use English alpha-numeric characters (no accents or special characters)
 - iii. In the case of duplicates, include department abbreviation per the Device Naming Convention Standard, Joe Smith (PW) for example to distinguish

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- Joe Smith at the Public Works department
 - iv. Optional preferred pronouns can be included, for example: Joe Smith (She/Her/Hers) (He/Him/His) (They/Them/Theirs)
 - 5. Login ID for non-privileged user accounts:
 - i. The Login ID will not exceed 16 characters
 - ii. First Initial of the AD First Name plus at least the first two letters of the AD Last Name
 - iii. Must use English alpha-numeric characters (no accents or special characters)
 - iv. If there is a duplicate, then utilize one of the following options:
 - 1. Include the middle initial after the First initial, or
 - 2. Use as many letters in the first name as needed to achieve uniqueness, or
 - 3. Append a number greater than "1"
 - 6. Login ID for privileged or service user accounts:
 - i. The Login ID will not exceed 16 characters
 - ii. First Initial of the AD First Name plus at least the first two letters of the AD Last Name plus special designator suffixes as follows:
 - 1. .ad (co.sbcgov.net admin account)
 - 2. .la (local administrator account)
 - 3. .op (on-premises account)
 - 4. .sb (sbcgov.net domain admin account)
 - 5. .svc (service account)
 - iii. Must use English alpha-numeric characters (no accents or special characters)
 - iv. If there is a duplicate, then
 - 1. Include the middle initial after the First initial, or
 - 2. Use as many letters in the first name as needed to achieve uniqueness, or
 - 3. Append a number greater than "1"
 - 7. In the case when the user requests an exception to the above rules, the user will get approval from their supervisor.

VI. Related Standards:

SBC Active Directory Attributes Standards
SBC Device Naming Convention Standard

VII. Referenced Documents:

- a. Renew '22 Initiatives: <http://sbchome.co.santa-barbara.ca.us/asset.c/1446>
- b. Countywide Technology Strategic Plan 2019-2023: <https://ceoweb.co.santa-barbara.ca.us/sites/home/InterestGroups/CountywideInformationTechnologyGovernance/CommunitiesofInterest/ActiveDirectoryDataStandards/Shared%20Documents/AD%20Attributes%20Standards.docx?Web=1>