



HARVARD UNIVERSITY
Information Technology

IAM Deep Dive Session 2: Persons of Interest

Apr. 7, 2016

Thursday

10:30 a.m.-11:45 a.m.

Lamont Library
Forum Room

Agenda

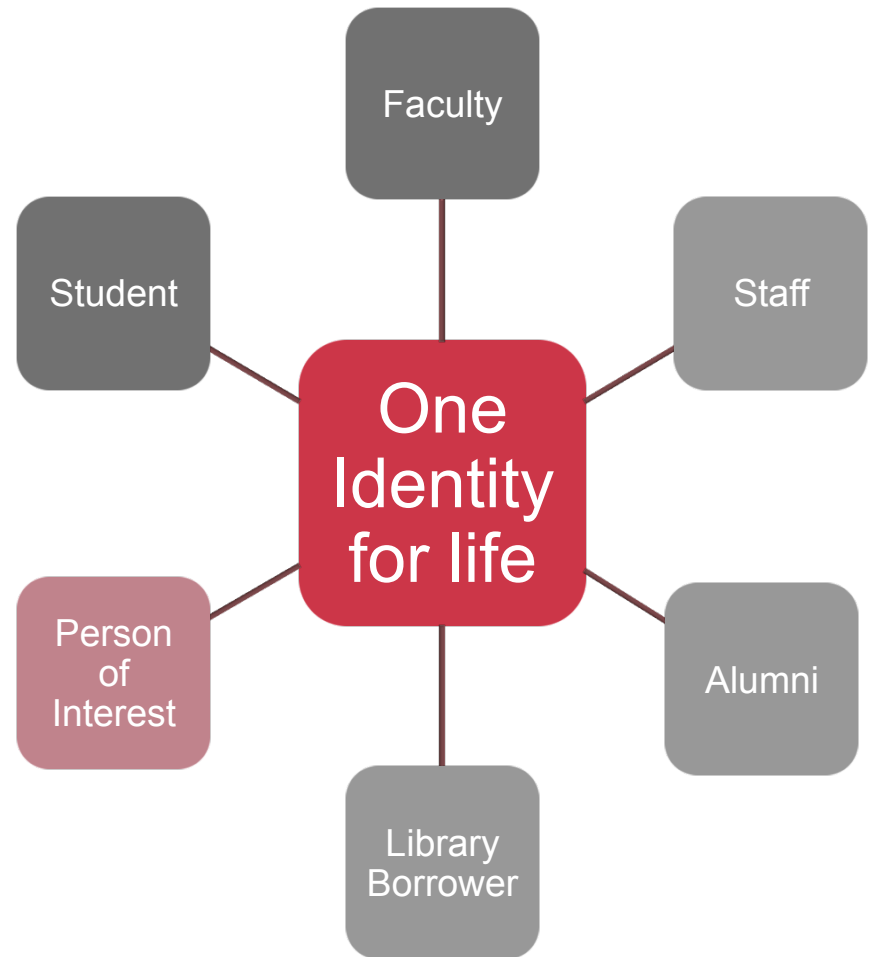
- Session Objectives
- One Identity for Life Paradigm
- POI Affiliations: Why Do We Care?
- Authorizer Rules and Regulations
- A View of POIs in MIDAS
- POI Processes
- New Notifications and Forms
- POI ID Card Eligibility and Provisioning
- Q & A

Session Objectives

- Explain POIs in context
- Demystify the POI process
- Introduce new roles, forms, notifications, reports, etc.
- Q&A
- Provide a great POI reference take-away (this presentation!)

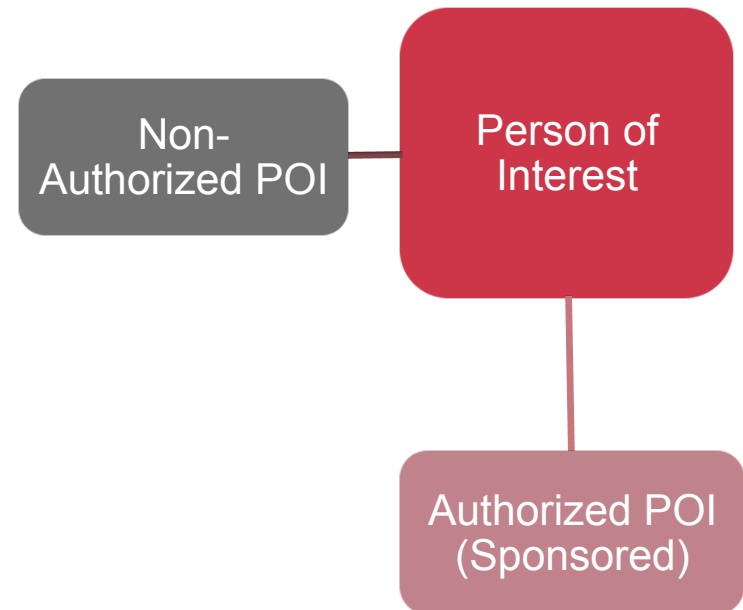
One Identity for Life

- One Harvard identity, with multiple roles throughout the Harvard lifecycle
- Roles define an individual's affiliations with Harvard
- POI roles include any affiliations that are *not* included in the others
- Most roles are associated to a School/unit, down to the department level
- Roles control access to a School/unit's resources



Non-Authorized POI Affiliations

- HMC Employee
- Overseer
- Retiree
- Retired Hospital Affiliate
- Spouse of Retiree
- Spouse of Retired Hospital Affiliate



These roles do not require an authorizer, and only Overseer requires an end date.

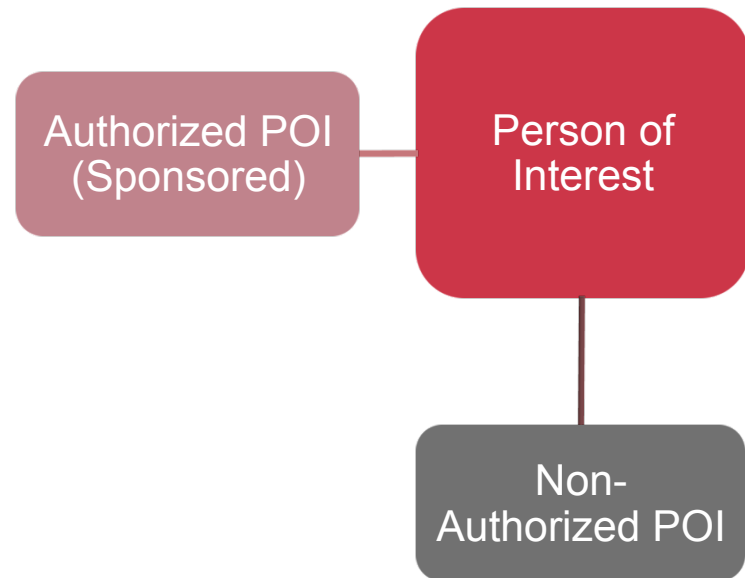
POI Non-Authorized Roles (6)

Overseer	Member of the Board of Overseers <i>For use by OGB only; end date required</i>
HMC Employee	Employee of Harvard Management Company <i>Optional end date</i>
Retiree	Retired Harvard employee <i>No end date</i>
Spouse of Deceased Retiree	Spouse of deceased retired Harvard employee <i>No end date</i>
Retired Hospital Affiliate	Retired employee who held a Harvard appointment at a Harvard-affiliated hospital <i>No end date</i>
Spouse of Deceased Hospital Affiliate	Spouse of deceased retired employee who held a Harvard appointment at a Harvard-affiliated hospital <i>No end date</i>

Authorized POI Affiliations: Why Do We Care?

Authorized (sponsored) affiliations allow Harvard faculty and staff to give individuals outside of their School or organization — or outside of Harvard itself — temporary access to resources.

- Most variation of uses
- Potential exists for misunderstanding and misuse
- Need to know the reason for the POI affiliation, know the person, and control their access
- Requires an authorizer and role end date
- Role type = reason (e.g. volunteer)



FAS Authorized POI's

A FAS authorized POI role is necessary for anyone other than a student, faculty, employee, Alumni or Library Borrower to gain access to FAS resources. The converse is also true!

- A FAS POI role on an identity in the HUIT IAM Identity Registry replaces the prior Wavset sponsored accounts.
- More information is required than previously in Waveset
 - Full name and DOB for identity matching and creation
 - Non-Harvard email (a.k.a onboard email) to claim a HarvardKey
 - HUID (if known) or last 4 of SSN if previously at Harvard
- A person can have multiple roles (affiliations) other than their FAS POI role.

Existing Authorized POI Roles (8)

Consultant	Person providing consulting services independently or through a firm <i>Example: Sole-proprietor technology consultant advising Harvard</i>
Contractor	Temporary agency or independent worker contracted to augment staff <i>Example: Temp from an agency such as Randstad</i>
Vendor	A company representative of a service provider to Harvard <i>Example: Copier repair or vending machine supply worker</i>
Security	A company representative of a security services provider <i>Example: Securitas employee working at Harvard</i>
Family Member	Harvard affiliate family member needing access to Harvard housing <i>Example: Spouse of a professor living in Harvard housing</i>
Tenant	Individuals needing physical access to property leased from Harvard <i>Example: Harvard Real Estate resident, HMS lab space lease employee</i>
Smithsonian Employee	Employee of the Smithsonian Astrophysical Observatory (SAO) <i>For use by SAO only</i>
Other	Any other Harvard-authorized affiliation not listed here <i>Using this role requires an explanation in the Comments field</i>

New Authorized POI Roles (8)

Academic Advisor	Non-appointed academic advisor to a Harvard student <i>Example: Thesis advisor</i>
Collaborator	Researcher or other type of academic or administrative collaborator <i>Example: Stanford researcher working with HKS on a joint project</i>
Field Ed Supervisor	Non-appointed supervisor of a student in a field education placement <i>Example: Church pastor overseeing an HDS student's in-field study</i>
Hospital Employee	Harvard-affiliated hospital employee needing access to Harvard resources <i>Example: MGH employee who administers grants for Harvard faculty</i>
Incoming Employee or Transfer	Individual with accepted job offer or interdepartmental transfer who needs access before their official start date <i>Example: Non-US citizen awaiting home country paperwork</i>
Inter-Affiliated Staff	Harvard staff member who needs access to resources in multiple Schools <i>Example: Central Admin employee who works at one of the Schools</i>
Guest or Visitor	Short-term guest or visitor to Harvard <i>Examples: Visiting lecturer, seminar attendee</i>
Volunteer	Unpaid worker supporting a Harvard department or School <i>Examples: Non-paid HLS clinical program worker, Aboretum volunteer</i>

New Alternative Process for Incoming Employees

Current: PeopleSoft allows for entry of future-effective-dated employees.

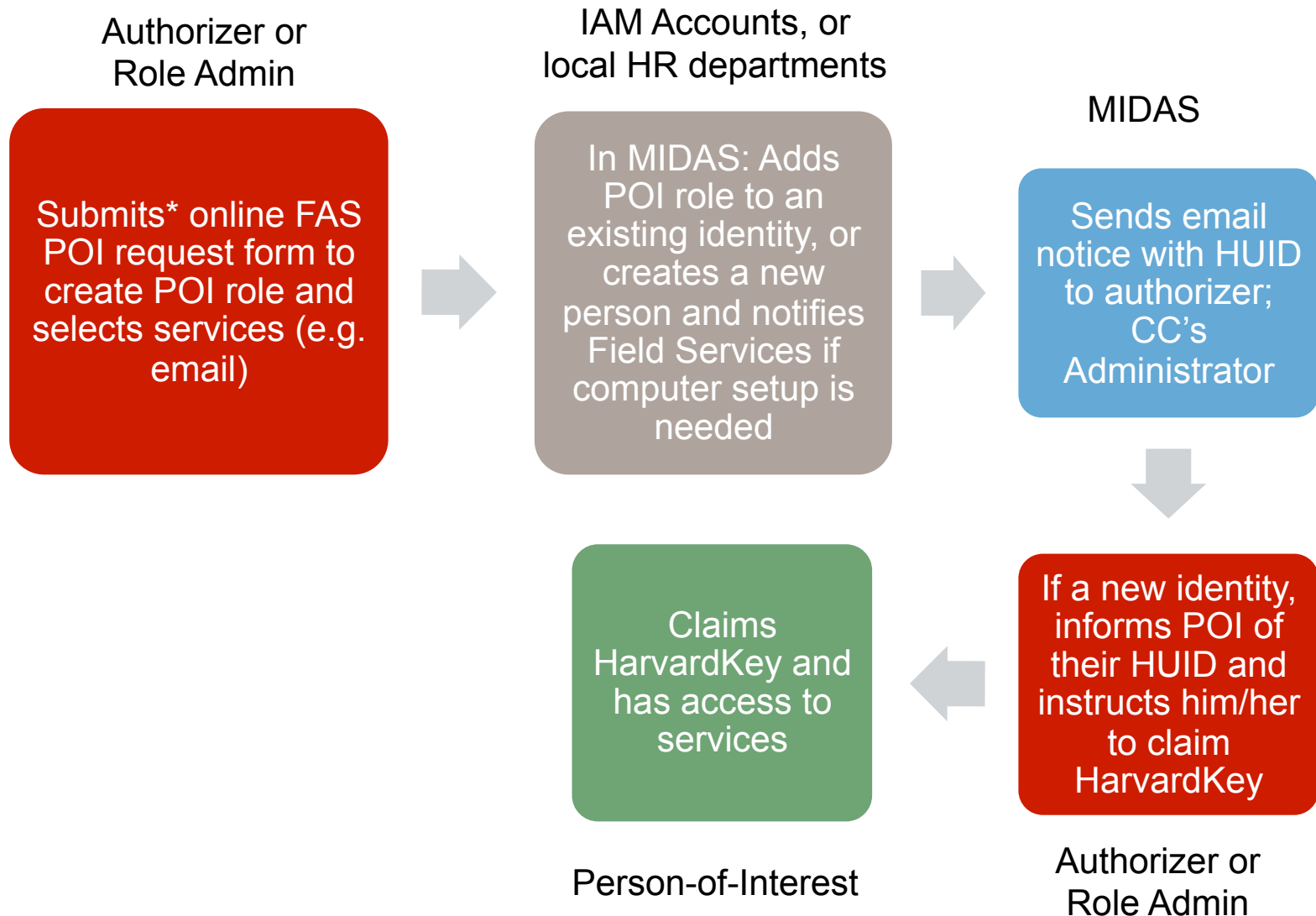
Example: Faculty appointment entered 4/3/15 with an effective date of 9/1/16 and a role start date of 9/1/16

- Data is fed from PeopleSoft to MIDAS as “Future Effective Dated Employee”; these users will be provisioned with accounts as “Incoming Employees” as soon as role is detected
- If early activation of email is needed, Accounts Team can set it up
- It is up to the department to inform the user of their HUID so he/she can claim a HarvardKey

Alternative: Authorize a POI role of ‘Incoming Employee’

- These individuals will also be provisioned with accounts as ‘Incoming Employees’
- Early activation of email can be requested
- End-date POI role in MIDAS once the employee data comes thru PS

FAS POI Creation Process



FAS POI Form *Formalities*

A FAS POI – Authorized Identity Request form is required for all new POI requests and prior Waveset renewals

- Form is filled out by Authorizer or Authorizer Admin
- Choose a POI role type that fits the purpose (e.g. contractor)
- Identify which services are desired
 - FAS Exchange Email, Office 365, Google Apps for Harvard, FAS Computer Lab/Domain Access
- Suggest a FAS username: Firstname_Lastname is the preferred convention.
- Identify an Authorizer and optional Authorizer Admin that meets the eligibility rules
- Email the form to accounts@fas.harvard.edu. Forms sent from an authorizer or administrator's email do not require a signature.

POI Forms

- FAS Person of Interest (POI) Authorized Identity Request Form

<http://iam.harvard.edu/resources/forms> OR

<http://huit.harvard.edu/pages/departmental-and-sponsored-email-account-form>

- Department form is now separate from sponsored email account form.
 - Sponsored email account form is replaced by FAS POI form.
- MIDAS Access Form to request MIDAS access or to add POI role types to existing access. <http://iam.harvard.edu/resources/forms>

Authorizer Rules and Regulations

POI authorizers are accountable for how the POI uses Harvard resources; they may delegate administration of the POI role, but not the responsibility (new feature!).

Authorizers must meet the following requirements (see MIDAS Help file for a rule-refresher):

Is a current and active employee of Harvard University **AND**

1. Has an official email address recorded in the identity registry **AND**
 - A. Is either Junior or Senior faculty **OR**
 - B. Is a paid employee of one of the following categories:
 - A* Admin & Professional
 - O* Other Faculty

Administrator Rules and Regulations

POI administrators manage the POI role on behalf of an authorizer, and must meet the following requirements:

Is a current and active employee of Harvard University **AND**

1. Has an official email address recorded in the identity registry **AND**

A. Is either Junior or Senior faculty **OR**

B. Is a paid employee of one of the following categories:

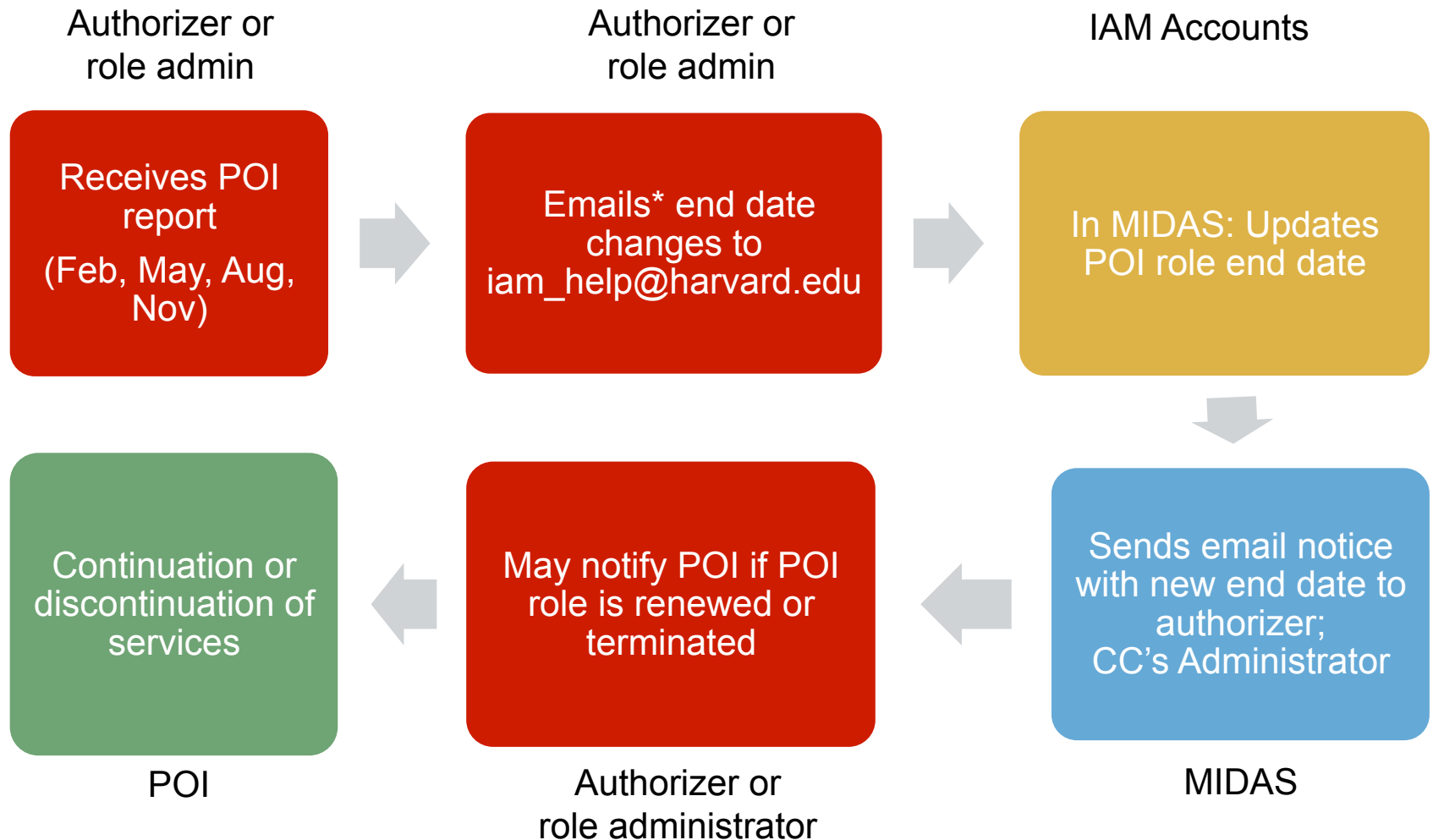
- A* Admin & Professional
- I* TAs, Other Staff
- O* Other Faculty
- Z* Ext Post Docs Harvard Research
- G* Graduate Students
- N* External Post Docs NHR
- Y* Internal Post Docs
- S* Support Staff

OR

1. Has an official email address recorded in the identity registry **AND**

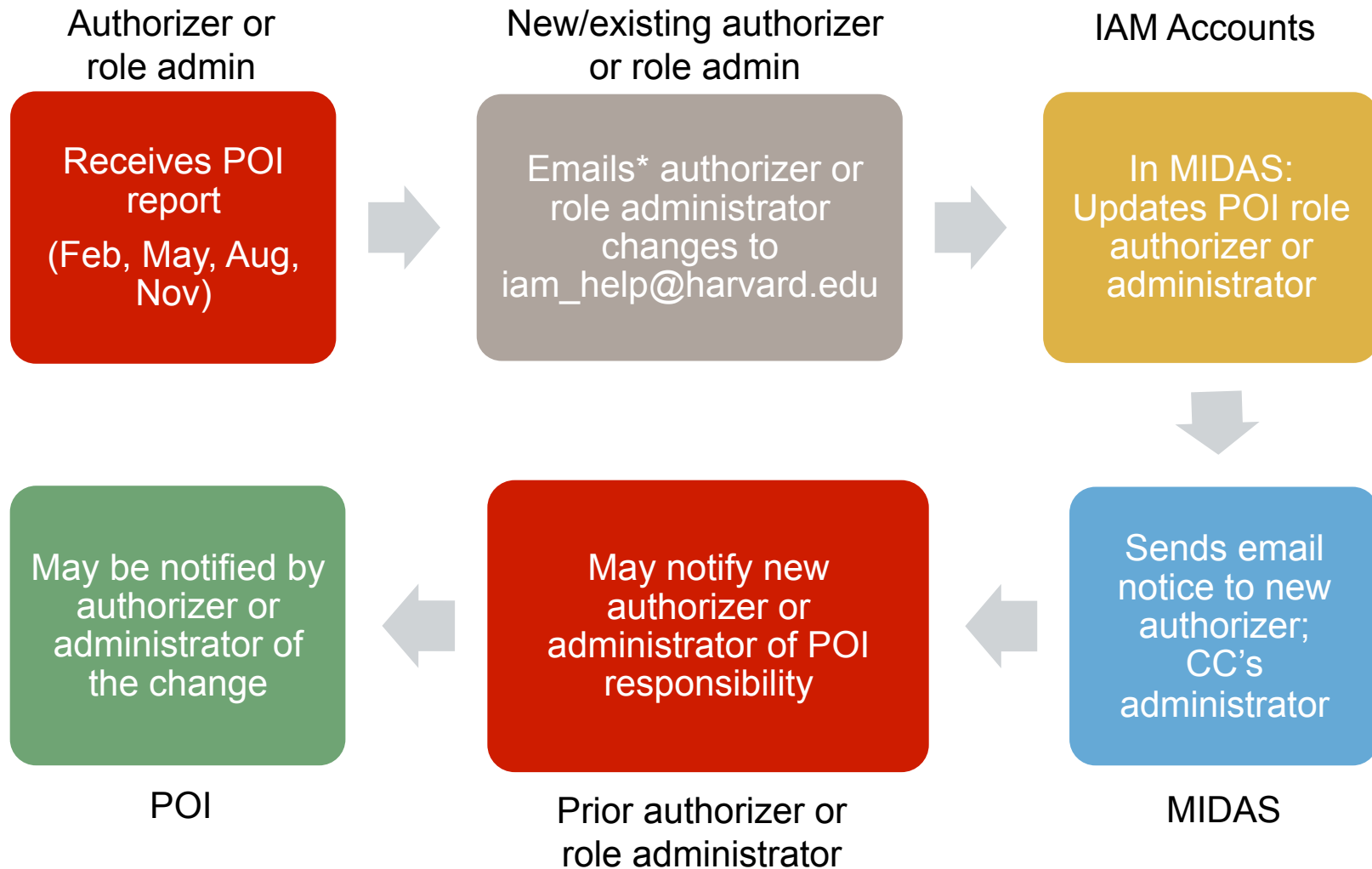
2. Has an active POI role of type “Contractor” or “Consultant”(avail in May)

POI Renewal or Termination Process



**Requests for renewal or termination from authorizer or administrator's email suffice as authorization.*

POI Authorizer or Administrator Change Process



**Change requests from existing or new authorizer or administrator's email suffice as authorization.*

FAS POI Administration Duties

- Request the authorized affiliation (FAS POI Request Form)
- Inform the user of his/her assigned HUID so he/she can visit key.harvard.edu and claim a HarvardKey
- Review their POI report every 3 mos.
- Notify IAM_help@harvard.edu or ithelp@harvard.edu when an authorized affiliations should be renewed or terminated



Applies to all **authorized** POI roles

- **School-Unit** (required)
- **Department:** choices limited to the School/Unit selected
- **Company:** if external
- **ID Line 1 & 2:** shown on ID card
- **Authorizer's HUID** (required)
- **Authorizer Admin's HUID:** role administrator
- **Start Date** (required): Defaults to the current date
- **End Date** (required): Defaults to one year after current date
- **Comments** (required for "Other" roles)

POI Role Details

Complete **Consultant**
Required fields are marked with *

School - Unit*:

Department:

Company:

ID Line 1: **Consultant**

ID Line 2:

Authorizer's HUID*:

Authorizer Admin's HUID:

Start Date*:
MM DD YYYY

End Date*:
MM DD YYYY

Comments:

A confirmation email will be sent to the Authorizer and the Authorizer's Administrator listed above.

Check out the updated MIDAS Help file — and please use the Feedback link!

MIDAS Notifications

- **POI Role End Date Change Notice:** Email to authorizer (CC'd to administrators) whenever the end date is changed in MIDAS
- **POI Role Authorizer Change Notice:** Email to new authorizers (CC'd to administrators) whenever a new POI role is created or authorizer changes; not sent to prior authorizer
- **Authorizer POI Report:** Email sent quarterly (Feb, May, Aug, Nov) to POI authorizers listing all their POIs; includes names, expiration dates, and administrator names
- **Administrator POI Report:** Email sent quarterly to POI administrators listing all their POIs; includes names, expiration dates, and authorizer names

POI ID Card Eligibility

Overseer HMC Employee Retiree Spouse of Deceased Retiree Retired Hospital Affiliate Spouse of Deceased Hospital Affiliate	<ul style="list-style-type: none">• Eligible for ID card
Field Education Supervisor Hospital Employee Inter-Affiliated Staff Guest Incoming Employee	<ul style="list-style-type: none">• Not eligible for ID card
Consultant Contractor Family Member Vendor Tenant Other	<ul style="list-style-type: none">• Eligible for temporary ID card
Academic Advisor Collaborator Volunteer	<ul style="list-style-type: none">• Not eligible now, but under discussion
Security	<ul style="list-style-type: none">• Security ID card
Smithsonian Employee	<ul style="list-style-type: none">• Smithsonian ID card

POI Provisioning: What Do They Get?

Retiree Spouse of Deceased Retiree Retired Hospital Affiliate Spouse of Deceased Hospital Affiliate Family Member	<ul style="list-style-type: none">• HarvardKey
POIs in CA, HBS, HKS, HLS, HMS, SDM, and SPH	<ul style="list-style-type: none">• HarvardKey• University Directory
POIs in EAS	<ul style="list-style-type: none">• HarvardKey• University Directory• Optional @g Google Account• Optional O365
POIs in FAS	<ul style="list-style-type: none">• HarvardKey• University Directory• FAS Active Directory and Unix• Optional FASMail• Optional @g Google Account

Notes: All POIs provide their HarvardKey login name when claiming.
Incoming Employee POIs are provisioned like employees.

Want More Info?

Looking for all the details?

<http://iam.harvard.edu/resources/hr-resources>

- Quick Guide to Creating a POI in MIDAS
- Quick Guide to POI Role Types
- MIDAS Release Notes (recent and prior releases)
- POI Authorized Affiliations Explained
- POI Town Hall (Similar to this presentation but not FAS-specific)
- FAS POI Training (... this presentation)

Need forms?

<http://iam.harvard.edu/resources/forms>

- Request for FAS POI Authorized Identity Request Form
- Request for MIDAS Access Form

Questions?

Visit iam.harvard.edu

Or contact directly:

Terry Connolly

Identity & Access Management

Contact for POIs and MIDAS

terry_connolly@harvard.edu

617-495-0480

Thank you!

