



HARVARD UNIVERSITY  
Information Technology

# Identity & Access Management: IAM Lifecycle Committee

May 8, 2015

Smith Center 561

# Agenda

- Welcome and general update
- Recap the last meeting – will there be any changes to PeopleSoft and I-9 processes in next few months?
- SIS Quick Update (Tom?)
  - Any significant people process flow changes coming?
- HarvardKey update
- Discussion: Onboarding changes required for HarvardKey

## Onboarding and the I-9 Process

- Any thoughts as people reflect on conversation we had at the last meeting with Amy Esposito and Joanne Jordan?

## SIS Topics?

- Quick update from SIS team?
- There was some thought that SIS might have some topics for this group – today or in future?

# HarvardKey Update

Learn more here:

<http://iam.harvard.edu/files/iam/files/fas-faculty-may15.pdf>

## Discussion: How to Change Onboarding Processes

- To support HarvardKey?
- HR Process envisioned:
  - Local department sends an email to a new employee
    - Email would direct employee to HarvardKey
    - Employee would need to know his/her HUID
    - If the data are not in PeopleSoft, HR can create a 'Incoming Employee POI'
- Think back to your onboarding – what was the sequence of events? What information did you need?
- How much can we rely on local HR? What if they don't support being involved?

# Discussion: How to Change Onboarding Processes

## Student Onboarding:

- Admitted Students
  - Registrar sends an email to a new student
    - Email would direct student to HarvardKey
    - Student would need to know his/her HUID
    - How do students find this information out today?
- What about applicants?
  - How many schools are really going to give all applicants an HUID?
  - Will these applicants need a HarvardKey?
  - Do we care if they claim a HarvardKey?

## Next Meeting?

**Discussion topics for the next meeting?**

# Onboarding Workflow



1. Dr. Pat Patricks accepts an offer for an assistant professorship. Pat's start date is Sept. 1.



2. Pat's department admin sponsors an account for Pat — even though it's only April. This includes details like birthdate, personal email, start/end dates, and affiliation type.



3. An identity for Pat — including a HUID — is created in the Harvard Identity Registry (IdDB).



4. HR sends Pat an email with an invitation to claim a new Harvard account.



5. Pat claims a account using name, date of birth, and the code from the email. Then, Pat chooses a username from a list of options, sets a strong password, and adds a recovery email in case a password reset is ever necessary.



6. Account Management flips Pat's status in SailPoint IIQ to "Claimed."



7. Accounts are provisioned for Pat in the appropriate targets for an Incoming Faculty role — in this case, HarvardKey LDAP, University AD, 0365, FAS AD, FAS LDAP, Kerberos, and Google.



8. By August, HR job data for Pat is fully complete in PeopleSoft, and PeopleSoft submits this data to IdDB.



9. A future-effective dated employee role update results in some provisioning to downstream systems.



10. On Sept. 1, when Pat's Incoming Employee role ends and the Employee role starts, additional attributes are updated in LDAP — Pat's data have "aged," and the passage of time automatically results in additional provisioning.



11. Pat comes to campus to start the new appointment! Pat already has access to all the apps and services needed for day-to-day life at Harvard — including the Athletic Office site, where Pat buys a pool sticker for a workout after a great first day on the job.

# Employee Lifecycle Topics: Special Challenges

- Transfers
  - Difficult to detect transfers in the HR data at times
  - Is automatically cancelling prior departmental access always right?
- Leaves
  - Related changes to HR department trigger deprovisioning of email and other resources because person appears to have lost departmental affiliation
- “Silent” organization affiliations
  - Individual’s HR data may say OPR, but the job is at HMS
- Emeritus ‘Active’ and Honorary Emeritus status
  - Library access is often desired, but licensing and other issues
- POI – Employee transitions (Employee to POI too)
  - Although the individual stays on the same HUID, there can be differences in what people are automatically eligible for

# Thank you!



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