

Meeting Agenda / Notes



Project Name	IAM Program – IAM Lifecycle Committee		
Meeting Date	May 21, 2014	Meeting Time	10:30 – 12:00
Location/ Conference #	Smith Campus Center 561	Meeting Host	Jane Hill

Invitees

Mike Burke	x
Teresa Butler	X
Julie Broad	x
Peggy Callinan	X
Ann-Marie Costa	X
Courtney Harwood	X
Michael Humphreys	X
Tom Mayhew	X

Isabelle Modiano	X
Susan Richelson	x
Susan Vomacka	x
Kwok Yu	X
Jennifer Ryan	
Gretchen Grozier	X

Agenda and Notes

Discussion of problematic Use Cases:

Agenda; “Early Access” and POIs

POI Process is broken.

- Unclear what the process is to get them in and get them email
- Form, Fax and Wait – black hole of where it is
- Notifications from the ID office if the ID has been extended (this is actually not really process that is defined)
- Paper certification is weak process and sometimes doesn't happen for a while
- People who have left who are not ended
- No notification that people are ended
- These are all the same issues for FAS Sponsored accounts
- Poorly filled out forms
- Not signed (copies of copies) so total lack of confidence in the fact that is a real sponsorship (lack of accountability)

Policy around when POI is it is an appropriate role or not is also not clear. POI is being used to fill access gaps for various access reasons. Lack of clarity around when a sponsored IT account vs POI is right answer. This should be discussed at next meeting. POIs are used for early access for VIPs due to get them email and calendar access (really for the calendar...)

POI to Employee transition today requires two different numbers. Today actually causing account transitions, new cards – actual access wrenching change for the end user. The process is slated to change in July and subsequently, POIs will be issued permanent HUIDs.

Legal issues were cited in the past:

"You should not be using a Harvard email address if you are not an employee."

Isabelle: Definition of "employee" – depending on what data are looked at there are different definitions. Pension, affordable care, license, etc. In some cases unpaid appointments are employees, and sometimes they are not. Post-docs are problems with regard to the employee definition. Kwok indicated that generally Post Docs don't need the early access. Sometimes faculty are hired and they need to bring their graduate students with them. The faculty coordinate a

student transfer or set-up as their post-docs and then they are incorporated as students and/or post-doc appointments. In this case, there is not really an "early" need.

Faculty need early access for the following reasons:

- Mass mailing lists want to include the individual in those preceding the term
- Registrar access
- Course web sites
- Signing up for University services
- Registrars can't add them to the course catalog unless they are in the Asperin (if not listed)
- Visa reasons (strict rules) can conflict with these early dates
- Unpaid appointments are being tacked on to the paid appointments in order to close the gap

Scenarios that exist include people in the chicken and egg situation of getting their HUID/PIN in order to go into sites to do updates. Sticking points including timing of I-9 documentation.

i-9 - If the I-9 done, there

- still may be an issue in hiring them early (e.g. visa)
- still may be a problem in seeing them in the data ecosystem (lack of an early start date)

SIS use cases for early access and current concerns center around early access by faculty:

It is sometime unclear what can be viewed as an appropriate source of these data on pre-faculty. Today, FAS is entering the unpaid appointments in FAS Asperin, then fed to PS, then into MIDAS. There is some concern that these appointments are awkward use of HR "jobs" to get a role that is needed for early access.

Incoming Faculty: Discussion as to where these people should be tracked was inconclusive. If we track these users in a new role "Incoming Faculty" or "Incoming Employee" with a status of Active or In active; how do we control who we allow to put people into this state of "incoming" on the employee side? The reality will continue to be that in some cases, as it is done now, early access will be facilitated by set up as unpaid appointments in HR system. And other areas would embrace a new process that would allow the creation of a new incoming faculty role. Note that incoming employee scenarios center around VIPs most of the time, and have some characteristics of faculty early access (e.g. white glove handling).

Approval Processes: Today, AR's HR Authorized Requestors are "approved" by HR leadership in school/department, and then trained before they are granted the access. Who should be creating these "Incoming" users? Who can we trust to have the right judgement? Conclusion: It should be a group of AR's who can do this.

Kwok sees it as a function best seated in the "AA/HR areas" not in the local departments. It has proven to be important to have a repeated "pinging" people to make sure these incoming roles are still needed.

Distributed Data Management: Teresa raised a long-standing concern: Authorized requestors need and want a report from MIDAS to see who is their school has access to MIDAS. Why is this so hard to do?

Need a similar process to what Teresa's team does for certifying the systems to exist for many more systems, including MIDAS.

Conclusions:

More standardized approach to requesting access and the roles that get attached to individuals that drive the access in various systems is needed. Must be more process friendly and include a better approval mechanism.

There needs to be a condoned "legal" process for set up of people in the state of "incoming faculty" for the SIS and global registration. Course planning is the business driver for these users. Other drivers are the calendar and administrative pre-set-up so first day is productive for that user. Employees do start working for Harvard early. Also, people continue to collaborate after they leave. Note, we should not include them in the phonebooks in their incoming state.

We do want to close "incoming" early access gap with something in the IAM system that will coexist peacefully with the unpaid appointments.

Student early access is stable today, but there are some changes coming. Some schools are thinking of getting HUIDS to for applicants. Their objective is to smooth the transition off the waitlist. ID exists, but the individual doesn't know about it yet. Implies the change in status flows through quickly, so provisioning is prompt.

Future Topic: Authorized Requestor Confusion

- FSS definition
- Support Services concept using the same words (but it is not for the same access)
- There is no process for keeping these people up to date (HUIT helpdesk?) FSS does have some process now.

Future Topic: Administrator Accountability

Addressing the problem of administrators not understanding the importance of timely renewals as it relates to access. Sometimes people are unpaid, but the lack of appointment results in service disruption. Post docs are typical cases of users who are blocked from access by late renewals or appointment not getting in to the system on time.

Future Topic: Training and Awareness Around What Services Exist and Who Is Eligible For Them?

- Even on the product ownership teams, there are gaps in understanding around who should be able to access.
- Resources that are commonly used should be documented (library, gym, m2 shuttle).
- Potentially too vast to "do it all: but there are heavily used/widely used resources of more interest.
- For ubiquitous access questions, what is right place to find the information?
- HUIT Support Services should be able to answer the questions?

Action Items

1. Work with Tom and SIS team on data and timing around student onboarding looking to new system
2. Work with Teresa and her team to do an Authorized Requester
3. Propose the solution for the Management of MIDAS users by schools and departments by the AR's so it gets tightened up

Next Meeting

1. More work on sponsored account and POI new process vision

Archived Document