



Project Name	IAM Program – IAM Lifecycle Committee		
Meeting Date	October 01, 2014	Meeting Time	11:00 – 1:00
Location/ Conference #	6 Story Street	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	
Kwok Yu	X
Jennifer Ryan	X
Gretchen Grozier	
Fairhall, Amy	X
Shoykhet, Masha	X

**Agenda and Notes**

October meeting opened at 11:05 a.m. and concluded at 1:00.

Agenda Items:

1. IAM Program News
  - a. Sailpoint Foundation release in August
  - b. InCommon Bronze certification just completed
    - i. Discussion of Externally Cross Registered students and how much of a help federation truly is. The group agreed it would help with Course Catalog, but that often there is a need to assign a Harvard identity to these users due to the recording keeping requirements.
  - c. FindPerson API; SIS is currently testing. SIS will be providing feedback.
2. Demonstration of the new print feature in Connections
  - a. No concerns about release to production
  - b. Group believes it would be wise to include guidance on how to adjust individual directory privacy before doing any marketing
  - c. Most are convinced that no one uses this application. Exception is the Law School
3. Review of the Alumni Data Model
  - a. Discussion of flows of data between SIS and Alumni and IAM
  - b. Agreement that meetings are necessary to drill deeper into some questions about fields like name to ensure that we don't overwrite data in the master data record with lower quality data from a system of record.
  - c. How should these data be kept in alignment across the SOR's? Need to hold additional discussion to resolve.
  - d. Discussion of how to issue Alumni identities in IDDB if they have no date of birth, or SSN information? Should we try to use Lexus Nexus or other resources?
    - i. Mike Burke indicated that FAS has records for 1955 to 1979 that could be a source of this information but someone would need to fund a project to literally have to dig through the files.
    - ii. Julie Broad indicated that people who are from before 1960 are likely not going to become users in time. Perhaps they should not be converted?
4. Discussion of UHS Dependents and their interest in having them in the IAM system so they can authenticate to UHS Portal.
  - a. Discussion of address issues for students as evidenced by difficulty during August to mail a student important information as they are often in transition and not living at any of the addresses we have.
5. Discussion of onboarding non-employees, non-students by doing data entry directly into SIS and feeding to IAM. This process would use an API that we would build.

- a. Use cases of concern for SIS are faculty advisors and early faculty access
  - b. Divinity schools BTI Denominational Counsellors are another category where historically there are no HUIDs. It will require getting more information from these individuals in order to process them for matching and identifier assignment.
6. Review the IAM roadmap and discussion of the specific projects and what they are going to mean in terms of change that users will see.
    - a. Integrating additional schools into the Sailpoint identity management system will be a huge change for schools and end users
    - b. Enthusiasm for change that would unite the PIN and the desktop (AD) login
  7. Quick overview of the categories of requirements for onboarding schools; Jane asks for feedback if there appear to be areas that are being overlooked.
  8. Briefly touched on the scenario discovered in last week of data quality issues with central data (HMS preferred name) resulting from data flows that were resulting in the higher quality data living locally, but not getting to the central directory services

#### Action Items

From October:

1. Alumni, SIS and HR (and DCE?) should meet and discuss the flow of the common data such as Name.
  - a. Specific use case to analyze: SIS changes a name after the student has left the University.
  - b. Summarize and document the rules that will be used to manage data updates
  - c. Prepare presentation so this can be discussed with other groups for feedback and acceptance
2. Work with SIS team to gather more information about the populations they intend to generate from SIS and their timeline.
3. Share the requirements template for onboarding schools when completed

From July:

1. Matrix of role types being considered for review (Jane)
2. Preliminary thinking around requirements for approval policies and rules for who can sponsor for review by the group (Jane)

#### Next Meeting

1. Review matrix of role types for sponsored accounts
2. Discussion around approval policies
3. More on role of self-registered guests

#### Archived Document