

**HARVARD UNIVERSITY**  
Information Technology

# **POI Town Hall: Persons of Interest**

Jan. 28, 2016

Thursday

10:30 a.m.-12:00 p.m.

Lamont Library

# Agenda

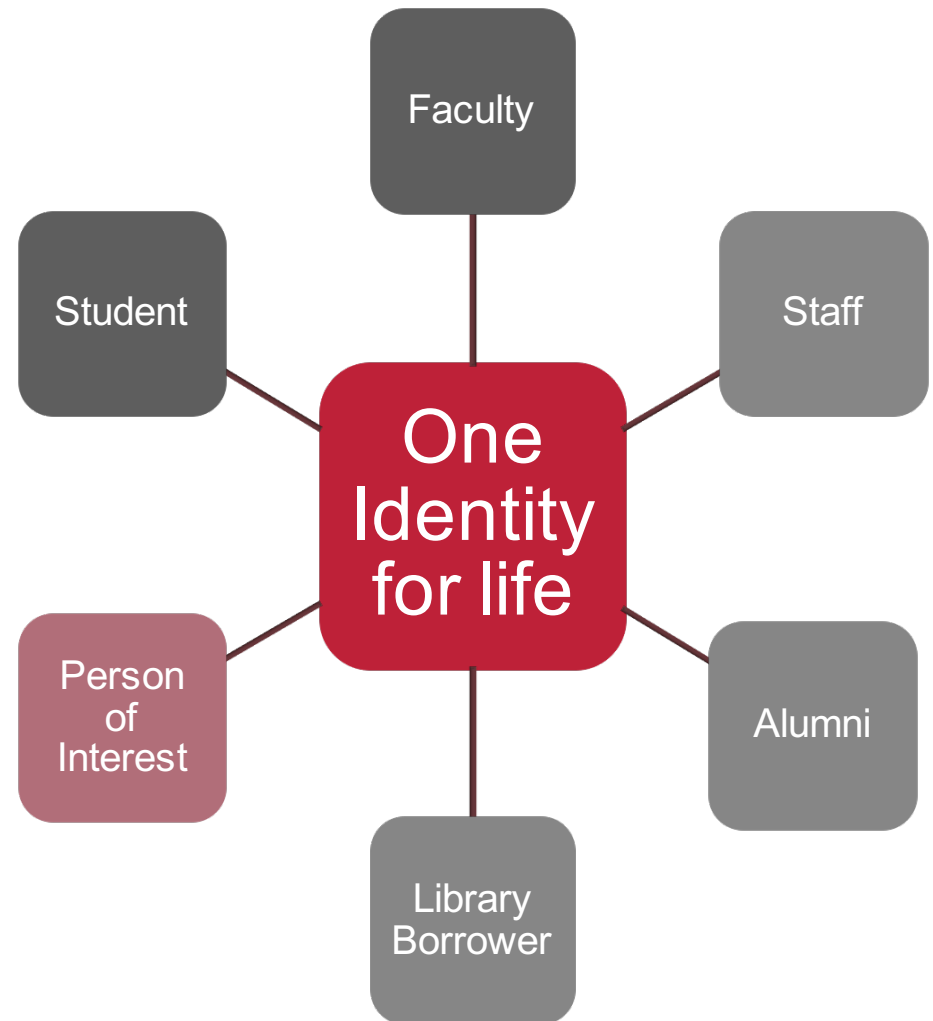
- POI Town Hall Objectives
- One Identity for Life Paradigm
- POI Affiliations: Why Do We Care?
- Authorizer Rules and Regulations
- A View of POIs in MIDAS
- POI Processes
- New Notifications and Forms
- POI ID Card Eligibility and Provisioning
- Q & A

# POI Town Hall Objectives

- Explain POIs in context
- Demystify the POI process
- Introduce new roles, forms, notifications, reports, etc.
- Create a platform for discussion and feedback
- Provide a great POI reference take-away (this presentation!)

# One Identity for Life

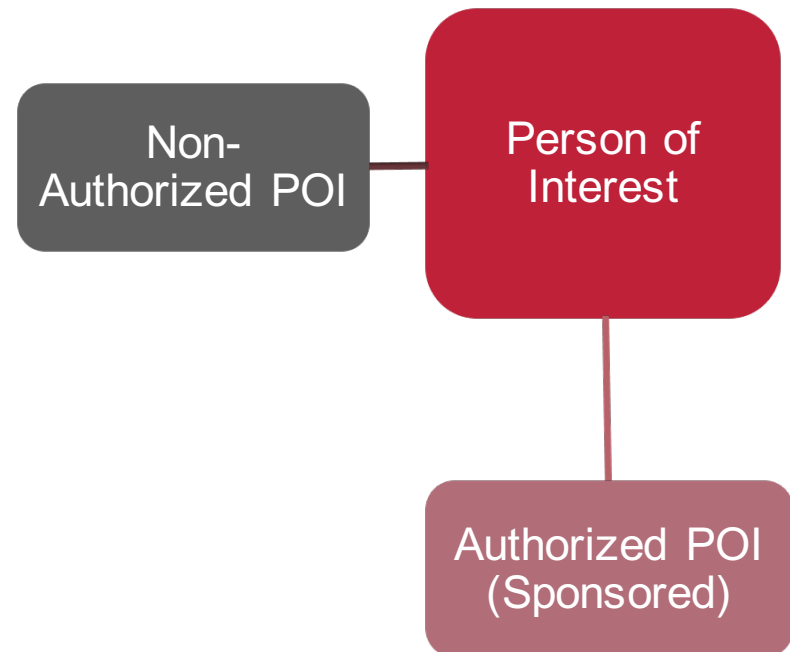
- One Harvard identity, with multiple roles throughout the Harvard lifecycle
- Roles define an individual's affiliations with Harvard
- POI roles include any affiliations that are *not* included in the others
- Most roles are associated to a School/unit, down to the department level
- Roles control access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



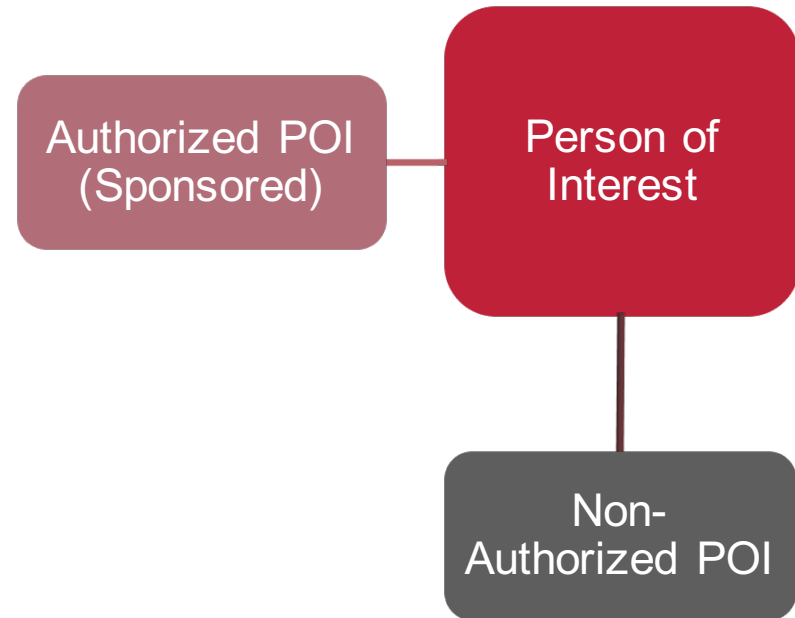
## POI Non-Authorized Roles (6)

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



## Existing Authorized POI Roles (8)

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



## New Authorized POI Roles (8)

<b>Academic Advisor</b>	Non-appointed academic advisor to a Harvard student <i>Example: Thesis advisor</i>
<b>Collaborator</b>	Researcher or other type of academic or administrative collaborator <i>Example: Stanford researcher working with HKS on a joint project</i>
<b>Field Ed Supervisor</b>	Non-appointed supervisor of a student in a field education placement <i>Example: Church pastor overseeing an HDS student's in-field study</i>
<b>Hospital Employee</b>	Harvard-affiliated hospital employee needing access to Harvard resources <i>Example: MGH employee who administers grants for Harvard faculty</i>
<b>Incoming Employee or Transfer</b>	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>
<b>Inter-Affiliated Staff</b>	Harvard staff member who needs access to resources in multiple Schools <i>Example: Central Admin employee who works at one of the Schools</i>
<b>Short-Term Guest/Visitor</b>	Short-term guest or visitor to Harvard <i>Examples: Visiting lecturer, seminar attendee</i>
<b>Volunteer</b>	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**

**PeopleSoft does allow 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 (April)
- If early activation of email is needed, Accounts Team can set 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

# Future Authorized POI Roles

**Delegate Student  
Account Payer**

Parents or others responsible for paying a student's bill

**Instructional Affiliate**

Individual instructing in another Harvard School who needs access to its resources

**Let's hear from you!**

# 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”



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\*: --Select A School - Unit--

Department: --Select A Department--

Company:

ID Line 1: **Consultant**

ID Line 2:

Authorizer's HUID\*:

Authorizer Admin's HUID:

Start Date\*:     
MM DD YYYY

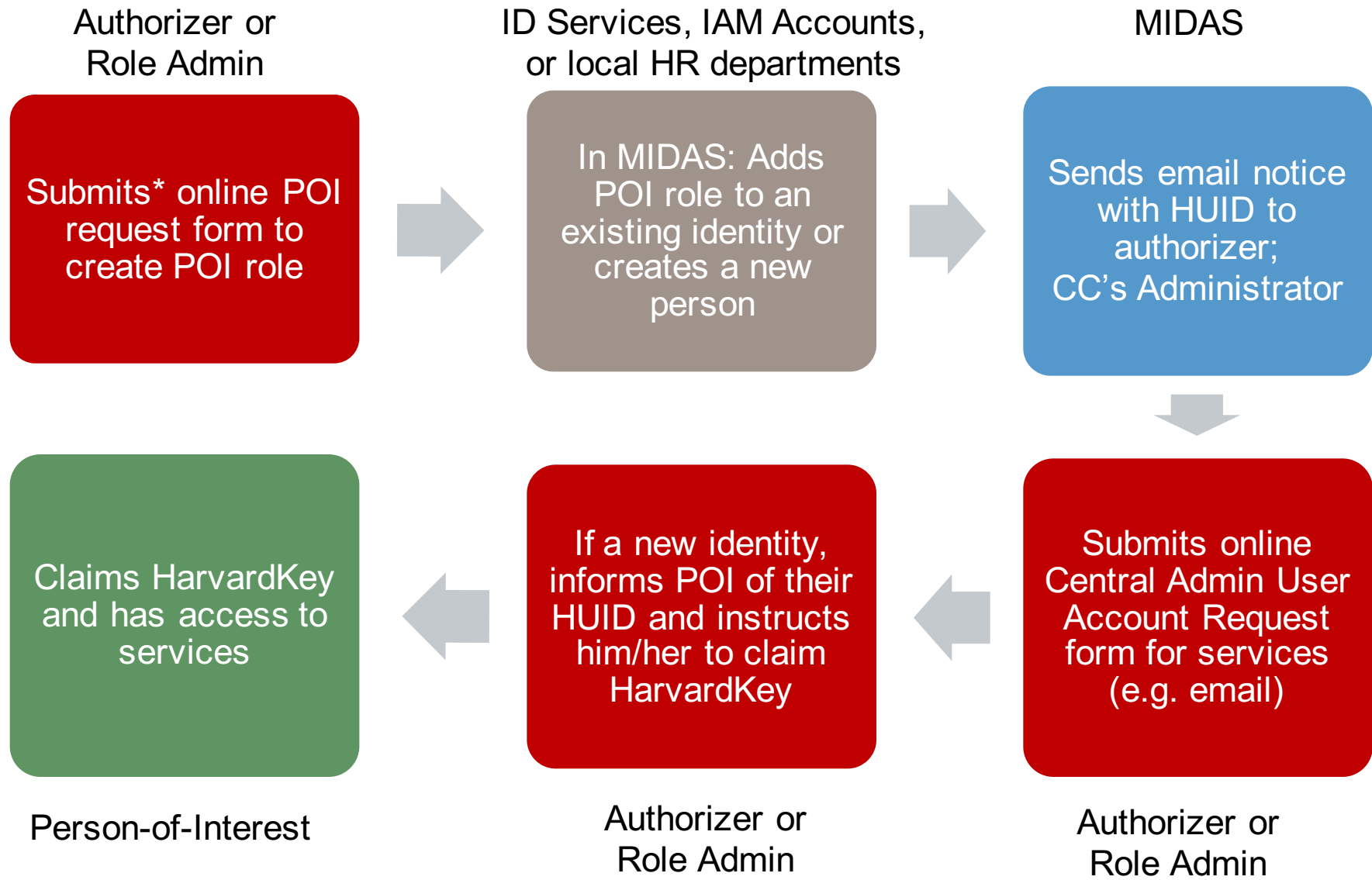
End Date\*:     
MM DD YYYY

Comments:

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

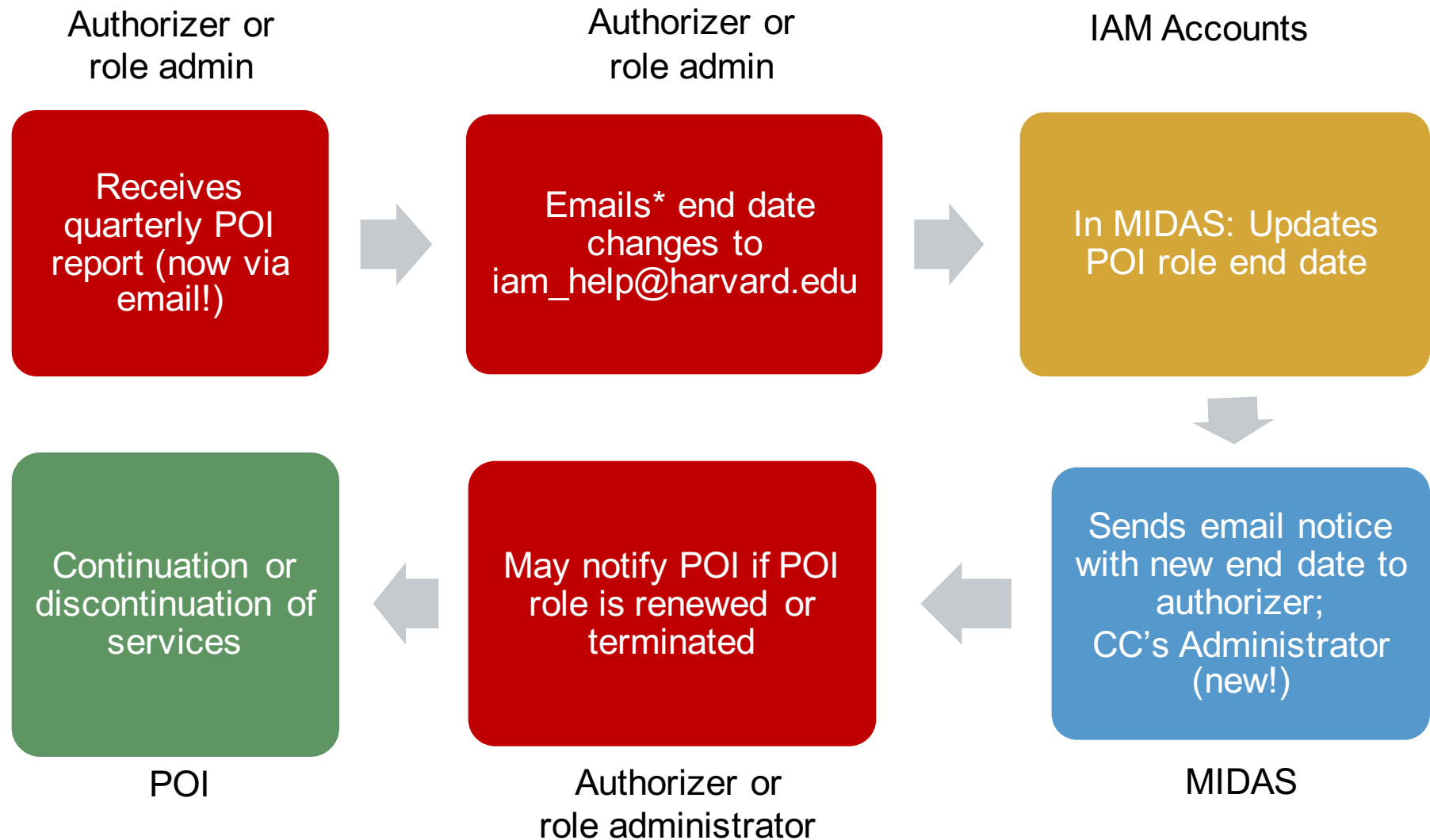
Check out the updated MIDAS Help file — and please use the Feedback link!

# POI Creation Process



*\*Forms sent from an authorizer or administrator's email do not require a signature.*

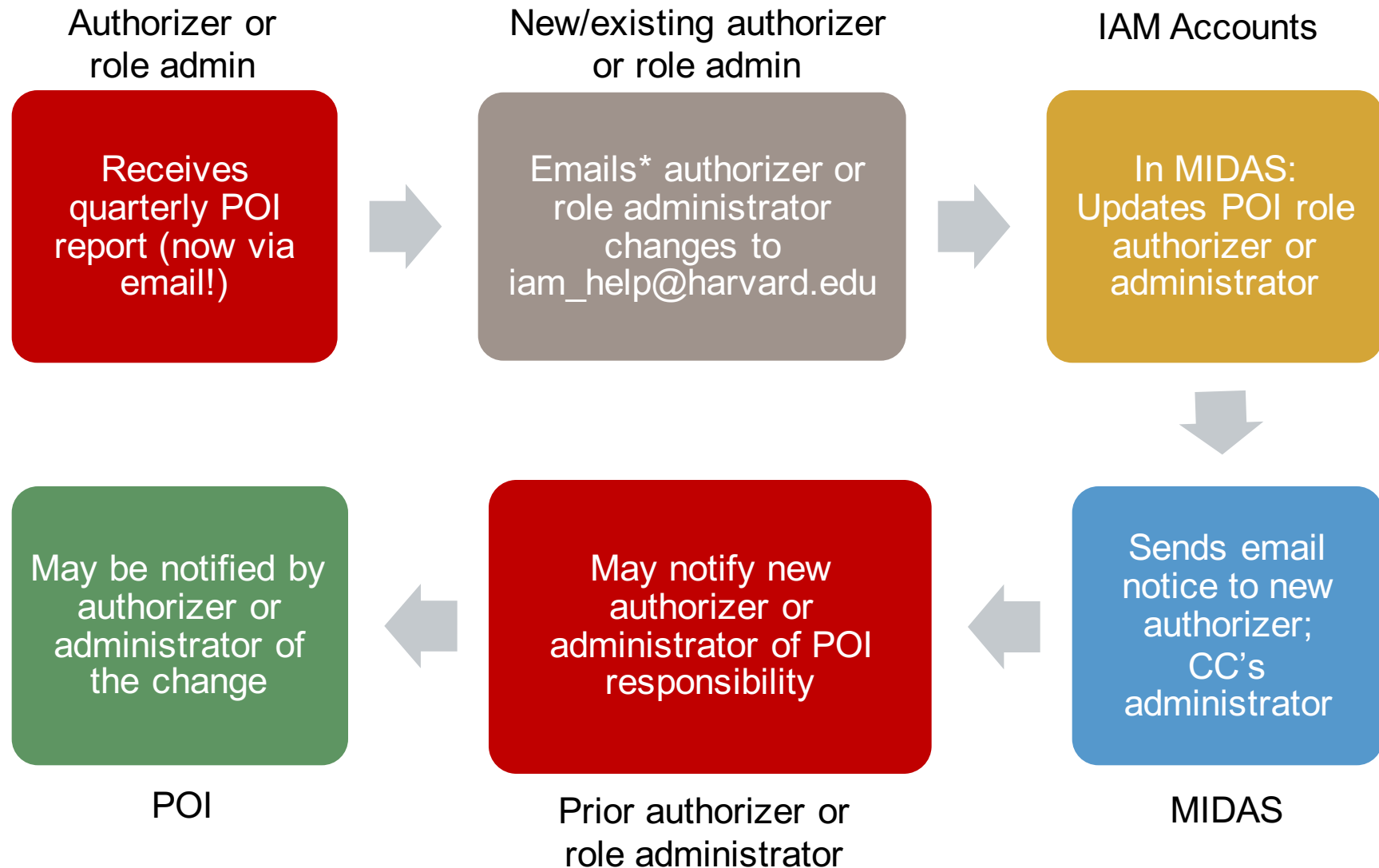
# POI Renewal or Termination Process



*\*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.*

## POI Administration Duties

- Request the authorized affiliation
- Inform the user of his/her assigned HUID so he/she can visit [key.harvard.edu](http://key.harvard.edu) and claim a HarvardKey
- Request services that are not automatically assigned (i.e. email); these requests are routed to the Accounts Team and they or a Field Support Technician closes the loop with the user
- Notify iam [iam\\_help@harvard.edu](mailto:iam_help@harvard.edu) or [ithelp@harvard.edu](mailto:ithelp@harvard.edu) when an authorized affiliation should be renewed or terminated

# POI Forms

## To request a POI

- Send the Person of Interest POI Authorized Identity Request Form to [id\\_services@harvard.edu](mailto:id_services@harvard.edu)  
<http://iam.harvard.edu/resources/forms>

## To request MIDAS access or to add POI role types to existing access

- Send the Request for MIDAS Access Form to [iam\\_help@harvard.edu](mailto:iam_help@harvard.edu)  
<http://iam.harvard.edu/resources/forms>

## To request services for non-FAS users

- Submit the existing Central Admin User Account Request online  
<http://services.huit.harvard.edu/central-administration-create-user-account-request-form>

## To request a FAS sponsored email account

- Send the FAS Sponsored Account Request Form to [accounts@fas.harvard.edu](mailto:accounts@fas.harvard.edu)  
<http://huit.harvard.edu/pages/departmental-and-sponsored-email-account-form>

## New 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 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 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

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

# POI Provisioning: What Do They Get?

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

**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
- And this presentation: POI Town Hall

### Need forms?

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

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

# Questions?

Visit [iam.harvard.edu](http://iam.harvard.edu)

Or contact directly:

**Terry Connolly**

Identity & Access Management

Contact for POIs and MIDAS

[terry\\_connolly@harvard.edu](mailto:terry_connolly@harvard.edu)

617-495-0480



# Thank you!



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