Identity & Access Management
CIO Council Review

| January 25, 2016 | Monday | 2:00-3:30 p.m. | 561 Smith Center |

Agenda

- Meeting Purposes and Intended Outcomes (5 min)

- HarvardKey Adoption Phases & Implementation Schedule (10 min)

- Current Status (10 min)

- Lessons Learned (30 min)

- Proposed Future Engagement Plan (5 min)

- Next Steps (10 min)

Meeting Purpose and Intended Outcomes

Purpose

To provide the CIO Council with an approach for the next phase of HarvardKey rollout

Intended Outcomes

- Up-to-date understanding of the objectives of the HarvardKey program

- Discussion of recommendations for addressing lessons learned

- Review and feedback on implementation approach

- Discussion of communications approach

- Understanding of common and school-specific HarvardKey challenges

- Review of upcoming meetings and communications deliverables

HarvardKey Adoption Phases

PIN replacement: Replacement of enterprise web authentication
- Approximately 1,200 web applications

Standard business processes: Definition and use of central processes for students, faculty, staff, alumni, and sponsored affiliates
- Onboarding
- Start and end dates, grace periods, deprovisioning
- Transitions

Onramp to O365 and Harvard Phone: Required login for new enterprise services such as Office 365, Enterprise SharePoint, and Harvard Phone

Application provisioning: Provisioning to School directories
- Same username and password at both University and Schools
- Active Directory, LDAP, applications
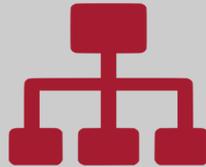
HarvardKey: Implementation Status

School	PIN Replacement	Standardize Business Proc	Harvard O365 Migrations	Application Provisioning
Alumni	In Progress		N/A	
DCE	In Progress	In Progress	In Progress	
HBS	Planning		N/A	
FAS	In Progress	In Progress	In Progress	In Progress
GSD	In Progress	In Progress	**Complete**	
GSE	In Progress	In Progress	**Complete**	
HKS	Planning			
HLS	Planning			
HSPH	In Progress	In Progress	**Complete**	
HDS	In Progress	In Progress	**Complete**	
SEAS	In Progress	In Progress	**Complete**	
HMS	In Progress	In Progress	In Progress	
Radcliffe	In Progress	In Progress	**Complete**	
CADM	In Progress	In Progress	**Complete**	In Progress

HarvardKey: Current Status

Since go-live on Nov. 11, 2015 ...

54,000+ HarvardKeys claimed	Claim is a process step for O365, Harvard Phone, HAA, security remediation	5,600 HarvardKey service desk tickets opened

This means ...

- Graduating class of 2016 will not need to claim another identity

- Improved mobile experience and overall accessibility

- Alumni access to library resources

- Duo multifactor authentication offers option for more secure login

- 100% Plan for security remediation underway

- Password resets implemented across identity lifecycle

HarvardKey: Lessons Learned

We have made a number of important observations to date, and have identified process improvements to remediate issues.

Observation	Remediation
Communication has not met the need for coordinating School implementations	Define a new approach that includes local implementation management
Missing or misaligned data is the primary reason a user cannot claim a HarvardKey	Data clean-up; we have also identified automation improvements for upcoming sprints
Users seeking help for HarvardKey identify additional support issues, resulting in prolonged call time for service desk	Target communications to user type and plan for personal field support for complex cases; expand Service Desk to handle additional call volume
Business process changes results in the need for additional change management: HR, finance, identity administration	Build partnership with school CIOs and provide overviews for these populations
Underestimated impact of manual processes on provisioning activities	Define manual processes with admin users across Schools; introduce additional automation as feasible

HarvardKey: Alumni Observations

We have made a number of important Alumni-specific observations to date, and are working to remediate issues that have become apparent.

Observation	Remediation
HAA focus on ACE rollout was decoupled from school implementation plans for HarvardKey, resulting in uncoordinated communication	Foster greater collaboration with HAA by discussing HarvardKey impact of accelerated schedule; raise awareness of School concerns
HAA rollout schedule introduced significant support impact and a large volume of tickets	Increase Service Desk personnel to account for dedicated Alumni support needs
Alumni were missing essential attributes in their legacy data	Proactive clean-up of Alumni user data; Alumni has agreed to complete by Feb. 22 with IAM assistance
HAA impact on Schools; multiple roles	Notify Schools when their users have multiple affiliations for School review; work with affected Schools to define a clear process for resolution; automate when possible

Proposed Future Engagement Plan

The IAM team will work with school CIOs to identify local implementation managers (LIMs) to partner with IAM to assist us in defining implementation plans

- Develop milestones for PIN replacement, provisioning, communications, and outreach
- Identify high-priority issues and concerns

IAM Summit

- Discuss common themes from local implementation session meetings
- Brainstorm and develop shared vision and opportunities for improvement
- Identify areas where additional technical "deep dives" are needed

Weekly meetings of for all School LIMs

- Address common needs and challenges: business processes, login names, dual roles, transfers, name changes, etc.
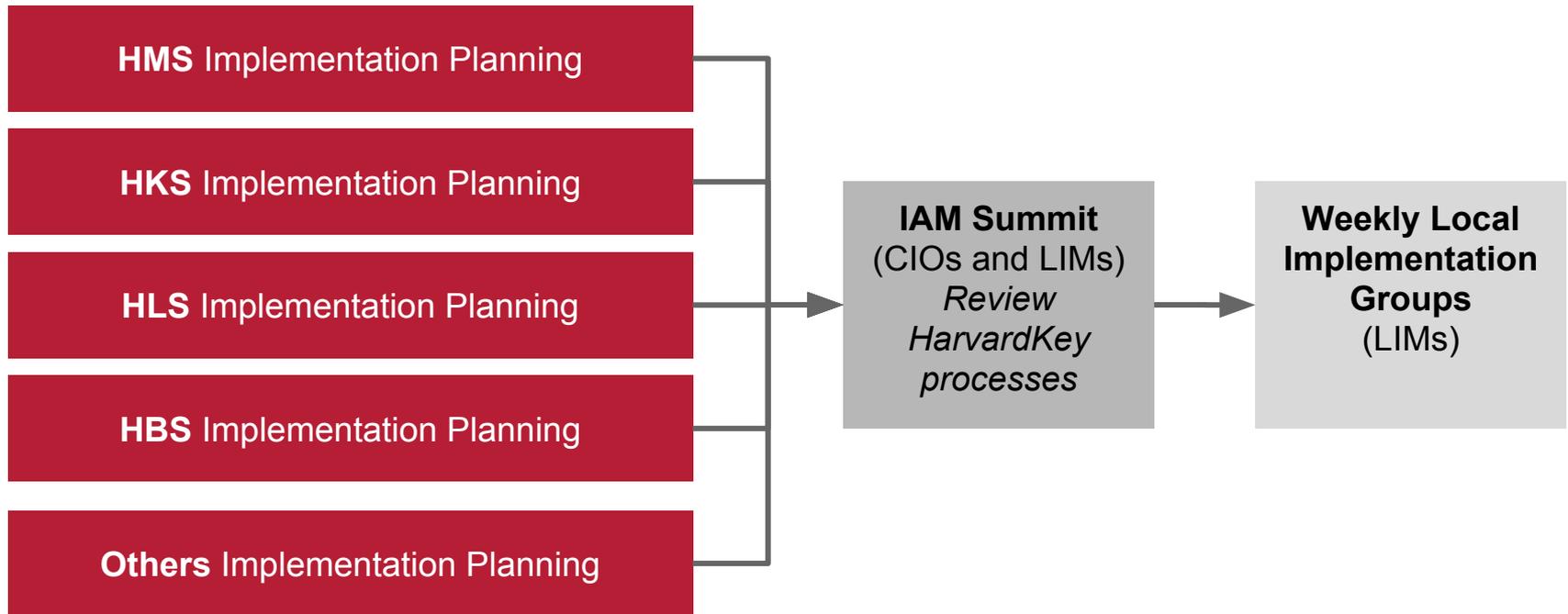
Overall objective: Simplify the business processes and implementation of identity management across all schools using a common approach.

Proposed HarvardKey processes to discuss

- Onboard faculty and staff

- Onboard students

- Onboard sponsored affiliates

- Employee transfer

- Multiple role overviews

- Employee termination

- Student graduation

- Authentication

Are there others to consider?

Proposed Future Engagement Plan

HMS Implementation Planning			
HKS Implementation Planning		**IAM Summit** (CIOs and LIMs) *Review HarvardKey processes*	**Weekly Local Implementation Groups** (LIMs)
HLS Implementation Planning	→		→
HBS Implementation Planning			
Others Implementation Planning			

Output	**School implementation plans** **School communication plans**	**Shared business processes** **Simplified user experiences**
Frequency	As necessary	Weekly

Next Steps

- Identify LIM contacts for each school

- Schedule weekly meetings with school LIMs

- Establish material and approach with HPAC communications

- Implement automated data remediation

- Document all core business processes

- Feb. 12: IAM Summit

Questions?

Thank you!