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)
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

<table>
<thead>
<tr>
<th>School</th>
<th>PIN Replacement</th>
<th>Standardize Business Proc</th>
<th>Harvard O365 Migrations</th>
<th>Application Provisioning</th>
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</thead>
<tbody>
<tr>
<td>Alumni</td>
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<td>In Progress</td>
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<tr>
<td>GSD</td>
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<tr>
<td>GSE</td>
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<tr>
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<td>Radcliffe</td>
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<tr>
<td>CADM</td>
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<td>In Progress</td>
<td>Complete</td>
<td>In Progress</td>
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Claim is a process step for O365, Harvard Phone, HAA, security remediation

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.

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

<table>
<thead>
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<th>Observation</th>
<th>Remediation</th>
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</thead>
<tbody>
<tr>
<td>HAA focus on ACE rollout was decoupled from school implementation plans for HarvardKey, resulting in uncoordinated communication</td>
<td>Foster greater collaboration with HAA by discussing HarvardKey impact of accelerated schedule; raise awareness of School concerns</td>
</tr>
<tr>
<td>HAA rollout schedule introduced significant support impact and a large volume of tickets</td>
<td>Increase Service Desk personnel to account for dedicated Alumni support needs</td>
</tr>
<tr>
<td>Alumni were missing essential attributes in their legacy data</td>
<td>Proactive clean-up of Alumni user data; Alumni has agreed to complete by Feb. 22 with IAM assistance</td>
</tr>
<tr>
<td>HAA impact on Schools; multiple roles</td>
<td>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</td>
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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

Output

<table>
<thead>
<tr>
<th>School implementation plans</th>
<th>Shared business processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>School communication plans</td>
<td>Simplified user experiences</td>
</tr>
</tbody>
</table>

Frequency

| As necessary | Weekly |

**HMS** Implementation Planning

**HKS** Implementation Planning

**HLS** Implementation Planning

**HBS** Implementation Planning

**Others** Implementation Planning

IAM Summit (CIOs and LIMs) Review HarvardKey processes

Weekly Local Implementation Groups (LIMs)
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!