



Sponsored Identities

December, 2016

Today's Objectives

- What is a Sponsored Identity?
- Overview of the New Sponsored Identity process
- Discuss SI Requirements
- Demo of the New Sponsored Identity Process
- Important things to remember
- Sponsored Identity System & Process Resources

A photograph of a modern building's interior, featuring large glass windows and blue columns. The view outside shows a city skyline with various skyscrapers. The text "What is a Sponsored Identity?" is overlaid in white on a dark blue background.

What is a Sponsored Identity?

Sponsored Identities

A Sponsored Identity is a unpaid, non-Yale individual that does not meet the criteria of being a Student, Employee, or Contingent Worker and needs:

- physical access (*ID Card*) and/or
- electronic access (*VPN, email, system access*)

Eligible Users - Sponsored Identities

Sponsored Identity Types

- ☐ Chaplains Office Religious Affiliates
- ☐ Clinical Practice Staff (Non-Yale)
- ☐ Clinical Research Affiliates (*Study staff, participants, data entry*)
- ☐ Consultants
- ☐ Contractors
- ☐ Daycare Staff
- ☐ Deans/Directors/Head of Colleges
Residents and Family Members
- ☐ Research/Educational Collaborators
- ☐ Residential College Associate Fellows
- ☐ Testing/Training IDs
- ☐ University Committee Members
- ☐ Vendor
- ☐ Visiting Student
- ☐ Visitor
- ☐ Volunteer Athletic Coaches
- ☐ Volunteers
- ☐ Yale Agency Affiliates
- ☐ Yale Alumni Development Volunteers
- ☐ Yale Press London

Ineligible Users:

Who is never a Sponsored Identity

- Anyone Paid on a Yale Payroll
- Any YNHH employee that is a medical provider
- VA Employees
- HHMI Employees
- Pierce Laboratory Employees
- Visiting Faculty that should be going through the Provost Office
- Visiting Fellows
- Visiting Students that go through approval processes—Ex: VSR Visiting Students in Research
- Minors in the Lab
- An incoming faculty member, employee or student
- Anyone that needs access to the Workday system

Sponsored Identities

Somethings to understand about Sponsored Identities:

- SI's do not automatically receive VPN Access.
 - Use VPN Exception form on ITS Website to request if needed.
- SI's are NEVER entitled to VPN access to the Library
- PIN numbers are not automatically generated for SI's
- SI's cannot have access to Workday
- SI's do not appear in Workday



The Sponsored Identity Process

What to do Differently and When



Stop Doing

Requesting Sponsored Identity via manual form

Requesting PIN via START



Start Doing

Enter Sponsored Identity requests via SI application at <http://your.yale.edu/all-yale-links>

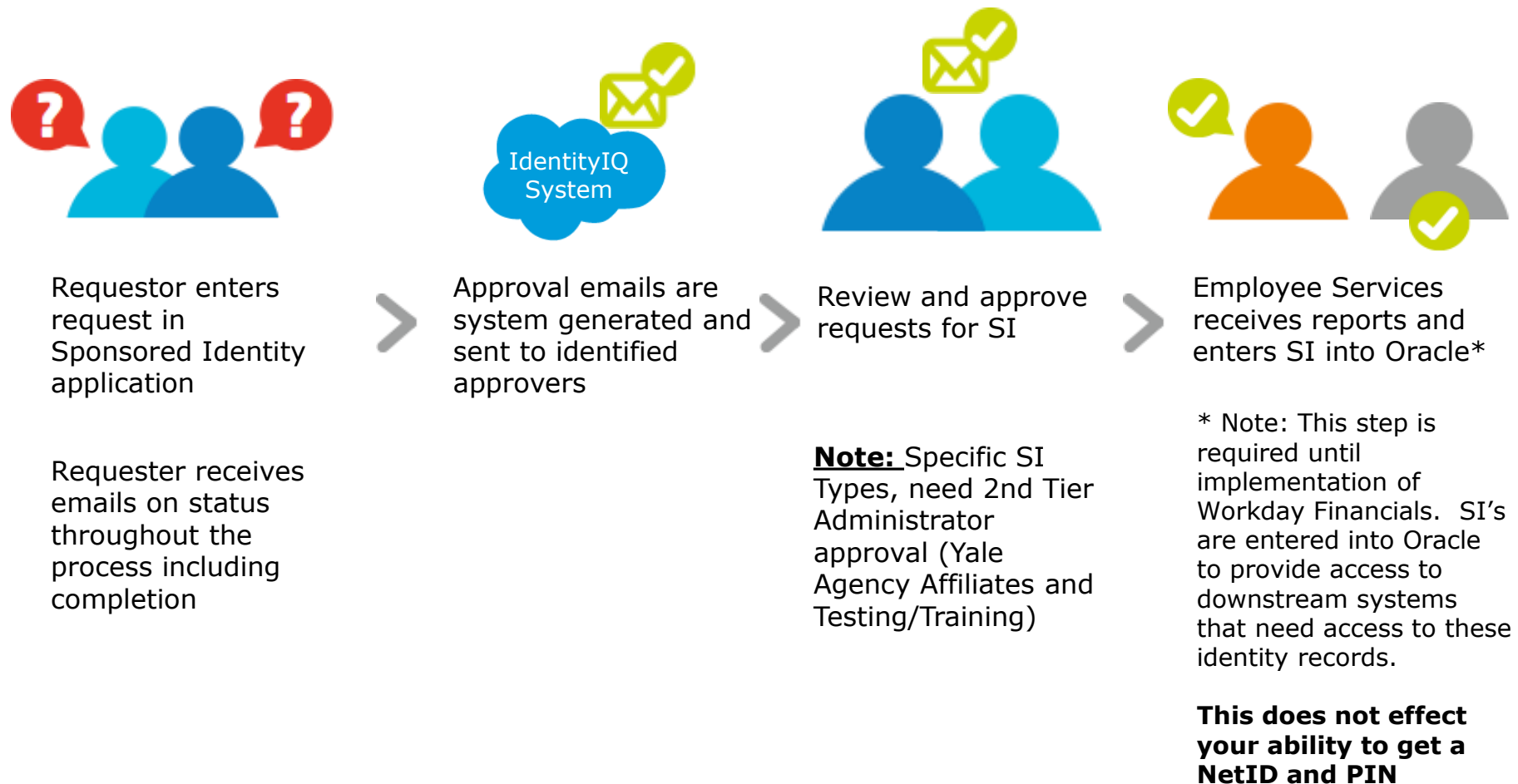
Request PIN from ITS Helpdesk at helpdesk@yale.edu
You can forward your confirmation email to make the request



Continue Doing

Request IDCards, VPN access, email and other physical system access as you do now

Who is involved in the Sponsored Identity process?



Sponsored Identities

Process for creating Sponsored Identities (SI)

- 1) Enter request into SI application.
- 2) Notifications will be sent to the Requestor and Approver.
- 3) System will check for duplicate identities and requestors and approvers will be informed.
- 4) NetID's are generated 4-8 hours after approval. Send a copy of your confirmation email to HelpDesk@yale.edu to request a PIN.

A photograph of a modern interior space with large glass windows and two thick blue columns. The view outside shows a city skyline with various skyscrapers. The floor is polished and reflects the interior and exterior. Two long, low wooden benches are positioned in the foreground.

Sponsored Identity Request Requirements

Sponsored Identity Roles

Who is the Requestor?

The requestor is the Yale employee responsible for getting the communication that the NetID is ready, and who will facilitate getting the PIN, email, VPN Exception (*if required*) and provide this information to the Sponsored Identity.

Who is the Approver?

The system will automatically route the request to the Strategic Business Partner/Business Partner of the Workday Supervisory Organization on the SI's record.

Sponsored Identities

What is a Sponsoring Department?

A Sponsoring Department is the department that oversees the Sponsored Identity record. They attest to the business need and are responsible for ensuring that when there is no longer a business need the Identity and all associated access is terminated.

How is the Sponsored Department Identified?

A Workday Supervisory Organization number is assigned to the Identity Record. Departments determine if they will use one main number or various SO numbers.

Additionally, until Workday goes live in July, we also require a Oracle Home Organization number as the identity is entered into Oracle to feed downstream systems.

What is a Sponsor?

A Sponsor is a Yale employee linked to this identity so that if the Sponsor should leave Yale, the Sponsored Identity record should also be terminated or transferred to another person. It can be beneficial to use a Sponsor however, is not required.

Examples include:

- 1) A faculty member may need a research collaborator to be a Sponsored Identity to access their research database. If that faculty member leaves Yale, the (SI) would no longer have a business need for access and should be terminated.
- 2) The spouse of a Yale Dean or Head of College may need building access. If the Yale employee leaves the spouse no longer has a business need for access and should be terminated.

What are the Request Types?

Use **“Create”** to request a SI for someone who has never been at Yale.

Use **“Modify”** to change an existing record.

Use **“Activate”** to reactivate a terminated SI.

Use **“DeActivate”** to terminate the SI.

If you determine an individual was previously at Yale, and they are not in SI system, use Create.

Why do I need to provide Effective Start and End Dates?

All Sponsored Identities must have an effective start and end date. In most cases, the end date can be no more than 2 years from the start date with a few exceptions:

- Residential College Associate Fellows can have 5 years
- Visitors are limited to 3 months

Sponsored Identities

Chaplains Office Religious Affiliates	2 - Years
Clinical Practice Staff	2 - Years
Clinical Research Affiliates	2 - Years
Consultants	2 - Years
Contractors	1 - Years
Daycare Staff	2- Years
Deans/Directors/Head of Colleges Residents and Family Members	4- Years
Research Affiliates	2- Years
Residential College Associate Fellows	5 - Years
Spouses: Student	4- Years
Spouses: Faculty/Employee	4- Years
Testing/Training IDs	unlimited
University Committee Members	2-years
Vendor	1- Years
Visiting Student	3 months
Visitor	3 months
Volunteer Athletic Coaches	1 - Years
Volunteers	6 months
Yale Agency Affiliates	4 - Years
Yale Alumni Development Volunteers	2- Years
Yale Press London	4 - Years

Sponsored Identities

US Address Required

Regular Demographic information (Name, Address, Gender). The address must be a US Address. If the individual does not have a US Address use the departments main business office address.

Date of Birth and Optional Social Security Number

Needed to correlate all identities within all the systems to prevent creation of duplicate identities.

If an individual does not have a Social Security Number or does not provide one, you can request a Dummy # by emailing employee.services@yale.edu. This is required when a request is made in the Sponsored Identity application.

Sponsored Identities

All requests require a business reason as to why the individual needs access. Valid examples include:

- Needs access to research database in Smith lab for collaboration
- Needs access to OnCore for clinical research
- Resident of Yale College needs ID and Access to building
- Vendor needs access to systems to monitor HVAC units in building
- Consultant needs access to system to perform work

Sponsored Identities

Sponsored Identities may be eligible for ID Cards or to appear in the Directory.

If eligible, you will be able to indicate if they should have an ID Card and if they should appear in the directory.

If directory eligible, you will be able to provide a title for the Identity.

The background image shows a spacious, modern interior with large glass windows and two prominent blue columns. The floor is a light-colored, polished material that reflects the surrounding environment. Two long, low wooden benches are positioned on the floor. Outside the windows, a dense urban skyline is visible, featuring various high-rise buildings and greenery. The overall color palette is dominated by blues and greys, with a bright, airy feel due to the large windows.

Sponsored Identity Application

Sponsored Identity System



<https://sgi.its.yale.edu/sponsoredidentity>



How to approve or reject a request via email



Request Overview
Sponsored Identity Request #: REQ21
Request Type: Create
Sponsored Identity Type: Consultants
Start Date: 28-Nov-2016
End Date: 01-Mar-2017
First Name: Horace
Last Name: Silver
Sponsoring Department: Investments office (SO34535)
Business Reason: 28-Nov-2016 - UAT Testing for Brad on Nov 28, 16

How to Approve or Reject Sponsored Identity Request

- Click on the following link: [Sponsored Identity Request](#)
- Review the request details
- Click Approve or Reject button as appropriate
- Click COMPLETE button

Timeframe
If no action is taken within 4 days, a reminder will be sent.
If no action is taken within 8 days, the request will be automatically canceled.

Questions:
For technical questions on using the Sponsored Identity application, please contact ITS Help Desk at (203) 432-9000 or HelpDesk@yale.edu.
For questions on whether someone is a candidate for Sponsored Identity or Workday, please contact the Employee Service Center (ESC) at 203-432-5552 or employee.services@yale.edu.

Approvers use the email link to access the request in IAM application.

<https://identity-test.yale.edu:9443/identityiq>

- Emails are sent at every stage of process to requester and approver.
- Reminders are sent to approvers at 4th and 8th days.
- If no response, is received after 8 days the request is cancelled. And must be reentered if need be.

How to approve or reject a request in IAM

Yale Information Technology Services

Dashboard Analyze Manage

Account Update Approval

Summary

Work Item ID : 1284
Access Request ID : 347
Requester : Vankayala, Ravi K
Owner : WGA_nls4_bh364
Description : First Level Approval - Request ID : REQ24
Created : Nov 28, 2016 12:57:53 PM
Next Event Date : Dec 2, 2016 12:57:53 PM
History : None

Send Comment to Owner

None

[Add Comment](#)

Details

Approval Items pending for REQ24

Search: [Filter by Decision](#)

Decision	Application	Account Name	Operation	Value(s)	Completion Comments
<input checked="" type="checkbox"/>	Sponsored Guest Identities	REQ24	Create	Request Type = Create Sponsored Identity Type = Consultants Display Name = LaFaro, Scott Start Date = 28-Nov-2016 End Date = 01-Mar-2017 Business Reason = 28-Nov-2016 - UAT Testing for Brad on Nov 28, 16 Home Org = 831100 - HSCSS Specialty Services Sponsoring Department = Investments office (SO34535)	

Page 1 of 1

Select Bulk Action --

INBOX

Inbox				
Filter by Item Name or ID		Advanced Search	Show All Items	
Name	Type	Requester	Created	Expiration
First Level Approval - Request ID : REQ21	Approval	Vankayala, Ravi K	11/28/16	
First Level Approval - Request ID : REQ22	Approval	Vankayala, Ravi K	11/28/16	
First Level Approval - Request ID : REQ23	Approval	Vankayala, Ravi K	11/28/16	
First Level Approval - Request ID : REQ24	Approval	Vankayala, Ravi K	11/28/16	
Page 1 of 1				
Displaying 1 - 4 of 4				

Approval

A photograph of a modern interior space, likely a museum or gallery, featuring large glass windows and columns. The view outside shows a city skyline with various buildings. The text "Important things to remember" is overlaid in white on a dark blue background.

Important things to remember

Sponsored Identities

- If an individual already has an active record you will not be able to create a new one
- Only active Sponsored Identity records are being converted—if an individual did not have an active record at conversion time please use create new identity
- The Financial Management Review Checklist and Guide have been modified for the review of Non-Yale Identities to reference Sponsored Identities and Sponsored Identity Tool.

A photograph of a modern building interior with large glass windows and blue columns. The view outside shows a city skyline with various skyscrapers. The text "Resources for Sponsored Identity" is overlaid in white on a dark blue background.

Resources for Sponsored Identity

Resources for Sponsored Identity

Sponsored Identity Process

- For questions on whether an individual belongs in Sponsored Identity, view the following resources at:
<http://its.yale.edu/secure-computing/identity-and-access-management/accounts-and-access/sponsored-identity>
 - Sponsored Identity Procedure
 - Who's In and Out of Workday
 - IAM Decision Tree
- If questions still remain contact Employee Service Center:
 - Email Employee.Services@yale.edu
 - Phone: 203-432-5552

Sponsored Identity Application

- Search for Sponsored Identity at <http://your.yale.edu/all-yale-links>
- How to Guides are available at <http://its.yale.edu/secure-computing/identity-and-access-management/accounts-and-access/sponsored-identity>
- For questions on accessing or using the Sponsored Identity application, contact ITS Helpdesk:
 - Email helpesk@yale.edu
 - Phone: 203-432-9000

Questions?



Thanks for your time!