



Sponsored Identities

April 2017

Today's Objectives

- What is a Sponsored Identity?
- The Sponsored Identity process
- Sponsored Identity Request Requirements
- Sponsored Identity System Demo
- Sponsored Identity System Resources



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 (includes Vendors)

Daycare Staff

Deans/Directors/Head of Colleges Residents and Family Members

Minor Student Non Research/Clinical

Minor Student Research/Clinical

Research/Educational Collaborators

Residential College Associate Fellows

Spouses

Testing/Training IDs

University Committee Members

Vendor

Visiting Undergrad Non-Research/Clinical

Visiting Undergrad Research/Clinical

Visitors

Volunteer Athletic Coaches

Volunteers

Yale Agency Affiliates

Yale Alumni Development Volunteers

Yale Press London

Yale Tenant

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 Graduate Students that should be processed through the Post Doc Office
- An incoming faculty member, employee or student
- Anyone that needs access to the Workday system

Sponsored Identities

Some things 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



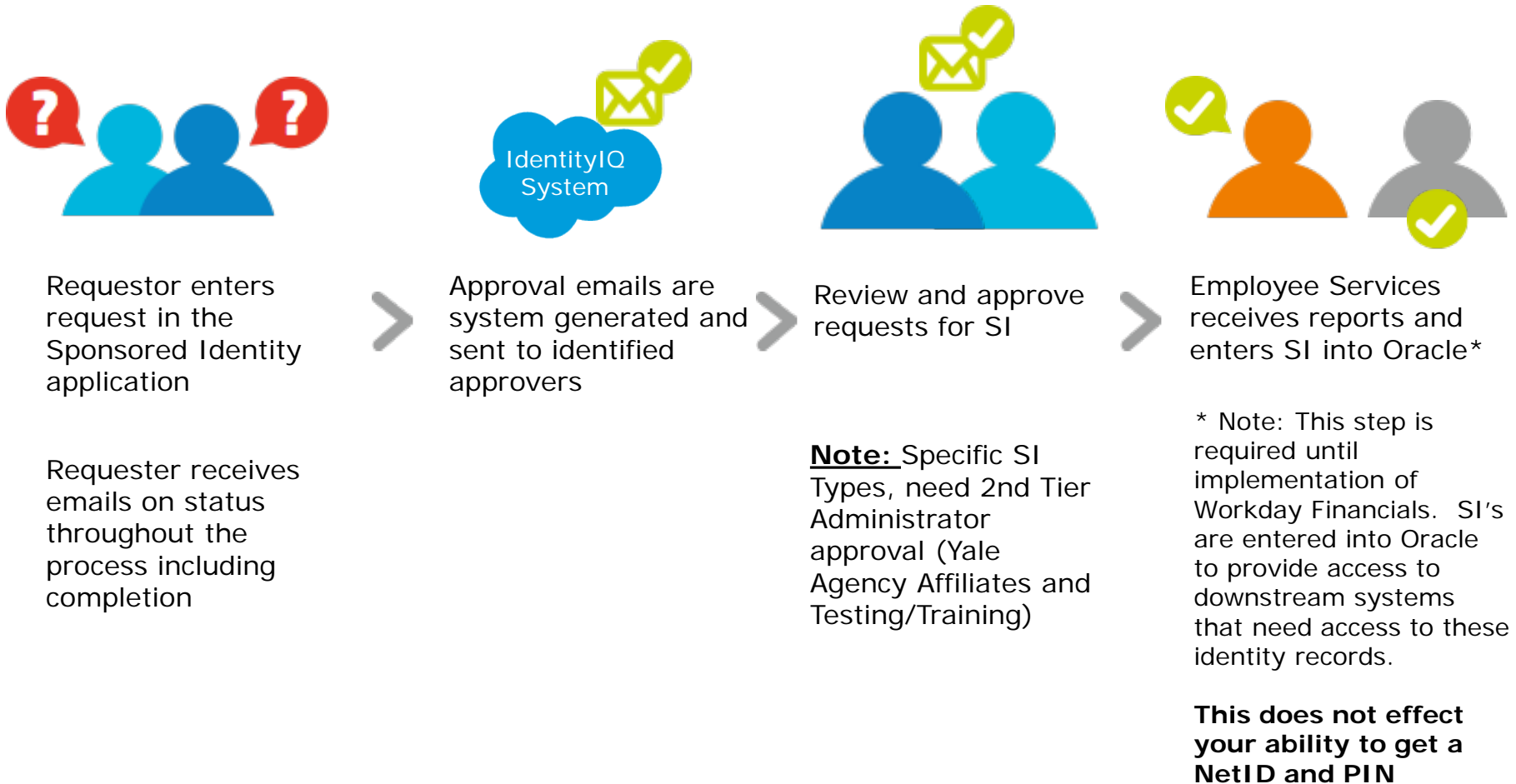
The Sponsored Identity Process

Sponsored Identities

Process for creating Sponsored Identities (SI)

- 1) Ensure individual does not have an active Banner or Workday record or existing SI record. This will help prevent duplicate identities being entered.
- 2) Enter request into SI application.
- 3) Notifications will be sent to the Requestor and Approver.
- 4) System will check for duplicate identities, after the request is submitted, and requestors and approvers will be informed.
- 5) NetID's are generated 4-8 hours after approval. Send an email to HelpDesk@yale.edu to request a PIN.

Who is involved in the Sponsored Identity process?





Sponsored Identity Request Requirements

Sponsored Identity Roles

Who is the Requestor?

The requestor is the Yale employee (active faculty/staff) 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.

Sponsored Identities

What are the Request Types?

Use **“Create”** to request a SI for someone who does not already have a record in the SI System.

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. Remember you must use the same First Name/Last Name, Date of Birth and Social Security# for the record to link and associate an existing NetID.

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 6 months
- Limits are built into the system.

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.

Business Reason or Additional Information fields

- To be used for business office reference or approver notes only. IAM System process is automatic—do not put messages to the IAM Administrator in these fields.



Sponsored Identity Application

Sponsored Identity System Demo



<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

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

- 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 IdentityIQ

INBOX

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

Approve Reject

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)	

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Select Bulk Action

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	

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Approval



Resources for Sponsored Identity

Resources for Sponsored Identity

Visit the following links for additional information

[Sponsored Identity System Website](#)

- [Sponsored Identity Procedure 1601 PR.08](#)
- [Sponsored Identity Application](#)
 - Search for [Sponsored Identity](#) on *Its Your Yale Links Page*
- [Quick Guide](#)
- [“What you Need to know about Sponsored Identities” Presentation](#)
- [Sponsored Identity Approval Guide](#)

Additional Support:

- For technical issues with the Sponsored Identity application, contact the ITS Helpdesk at helpdesk@yale.edu or call 203-432-9000
- For on questions on whether this person belongs in Workday or in Sponsored Identity, contact the Employee Service Center:
 - [Identity Management Decision Tree](#)
 - Email: Employee.Services@yale.edu Phone: 203-432-5552

Questions?



Thanks for your time!