Overview for the
Delegated Identity Administration Application
User Guide Version 5.1

There are two categories of changes; application changes are new additions to DIA and manual/application clarifications are additional information on pre-existing functionality.

Application Changes:

► Page 19-20 – Additions to chapter 4 section C
  o New procedure for adding a brand new individual to the system/database.
  o Upon a submission of a new person the application will now check to verify that the information submitted (SSN, or a combination of Name and Birthday) does not conflict with anyone else in the database.

► Page 16 – Additional notes to chapter 4 section B
  o Directory Release Flag will now be automatically set to “NO” for the Sub-Affiliations: Guest (electronic), Service Technician, University Affiliate, Visitor (physical), Library Member, and DFC Member.

► Page 13 – New sub-affiliation “Student Officer” is selectable in DIA
  o Updates to: Table 1 (p.4-5), Table 2 (p.5), Table 4 (p.21), Table 5 and 6 (p.28), and additional notes to chapter 4 section A.

Manual and Application Clarifications:

► Page 5 – Provisioning of the Sub-Affiliations Table
  o This shows which sub-affiliations receive e-mail, library borrowing, Web secure sign in, and an ID card.

► Page 13 – Additional notes to chapter 4 section A
  o Regarding why SSN is needed and what End Dates mean to PAC employees.
Delegated Identity Administration Application

User Guide

December 2007
Version 5.1
<table>
<thead>
<tr>
<th>CHAPTER 1: GETTING STARTED</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. INTRODUCTION</td>
<td>4</td>
</tr>
<tr>
<td>B. BASIC BACKGROUND</td>
<td>4</td>
</tr>
<tr>
<td>C. KEY TERMS</td>
<td>6</td>
</tr>
<tr>
<td>D. DIA DAILY SCHEDULE</td>
<td>6</td>
</tr>
<tr>
<td>E. CONTACT INFORMATION</td>
<td>6</td>
</tr>
<tr>
<td><strong>CHAPTER 2: LAUNCHING DIA AND LOGGING IN</strong></td>
<td>7</td>
</tr>
<tr>
<td>A. LAUNCHING DIA</td>
<td>7</td>
</tr>
<tr>
<td><strong>CHAPTER 3: PERSON SEARCH</strong></td>
<td>9</td>
</tr>
<tr>
<td>A. INTRODUCTION</td>
<td>9</td>
</tr>
<tr>
<td>B. SEARCH SCREEN OVERVIEW</td>
<td>9</td>
</tr>
<tr>
<td>C. SEARCH PROCEDURE</td>
<td>9</td>
</tr>
<tr>
<td>D. SEARCH TIPS</td>
<td>11</td>
</tr>
<tr>
<td><strong>CHAPTER 4: ADD PERSON</strong></td>
<td>12</td>
</tr>
<tr>
<td>A. INTRODUCTION</td>
<td>12</td>
</tr>
<tr>
<td>B. ADD EXISTING PERSON PROCEDURE</td>
<td>14</td>
</tr>
<tr>
<td>C. ADD NEW PERSON PROCEDURE</td>
<td>17</td>
</tr>
<tr>
<td>D. MAXIMUM EFFECTIVE PERIODS</td>
<td>20</td>
</tr>
<tr>
<td><strong>CHAPTER 5: EDIT POPULATION</strong></td>
<td>21</td>
</tr>
<tr>
<td>A. EDIT RECORD PROCEDURE</td>
<td>21</td>
</tr>
</tbody>
</table>
CHAPTER 6: MANAGE POPULATION

A. INTRODUCTION .......................................................................................................... 23
B. MANAGE/EDIT POPULATION OVERVIEW ................................................................ 24
C. MANAGE/EDIT POPULATION PROCEDURE .............................................................. 24
D. EDIT RECORD PROCEDURE ...................................................................................... 25
E. DELETING RECORDS ................................................................................................. 27

CHAPTER 7: HELPFUL INFORMATION

A. RECONCILIATION OF DATA ENTERED INTO PEOPLESOFT WITH DATA ENTERED INTO DIA ......................................................................................................... 27
B. PERMISSION PROVISIONING: FROM DIA TO IDM AND ID CARD ......................... 28

CHAPTER 8: SCENARIOS .............................................................................................. 29

A. NEW HIRE ..................................................................................................................... 29
B. REHIRE .......................................................................................................................... 29
C. LOOKUP A UNIQUE PERSON NUMBER (UPN) FOR A PERSON IN YOUR POPULATION .................................................................................................................. 30
D. EXTEND OR EXPIRE PRIVILEGES FOR A POPULATION MEMBER .................. 30

Delegated Identity Administration Guide
December 2007, Version 5.1

Copyright © 2007 by Columbia University

All rights reserved. This document may be reproduced or reprinted, in whole or in part, without permission as long as the above copyright statement and source are clearly acknowledged.

This publication or any reproductions may not be sold. Copyrights, trademarks, and service marks referred to in this documentation are the property of their respective owners.
Chapter 1: Getting Started

A. INTRODUCTION

As a Manager of Self Service, you are responsible for registering new employees and departmental associates. Delegated Identity Administration (DIA) makes this task easier by allowing you to quickly perform the following actions for new members of your department’s population:

- Generate UNIs and UPNs
- Grant access to selected network services
- Authorize ID card issuance
- Publish online directory entries

B. BASIC BACKGROUND

Who Can Use DIA?

PAC Manager Self Service (MSS) users are the only individuals who may be authorized to use DIA. In order to receive authorization, a MSS user must first attend a DIA training session. Any MSS user who does not attend a training session will need to download this DIA user guide and complete the online DIA quiz. Upon passing the quiz, DIA access will be granted. The quiz may be taken as many times as necessary in order to pass.

Populations Provisioned by DIA

<table>
<thead>
<tr>
<th>DIA Sub-Affiliation</th>
<th>Population Description</th>
<th>ID Card Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator*</td>
<td>永久,非正式,或零收入的雇员</td>
<td>CU Employee</td>
</tr>
<tr>
<td>Instructor*</td>
<td>永久,非正式,或零收入的雇员</td>
<td>CU Employee</td>
</tr>
<tr>
<td>Librarian*</td>
<td>永久,非正式,或零收入的雇员</td>
<td>CU Employee</td>
</tr>
<tr>
<td>Researcher*</td>
<td>永久,非正式,或零收入的雇员</td>
<td>CU Employee</td>
</tr>
<tr>
<td>Support Staff*</td>
<td>永久,非正式,或零收入的雇员</td>
<td>CU Employee</td>
</tr>
<tr>
<td>Casual*</td>
<td>永久,非正式,或零收入的雇员</td>
<td>CU Employee</td>
</tr>
<tr>
<td>Contractor</td>
<td>合同,顾问,或临时雇员</td>
<td>CU Contractor</td>
</tr>
<tr>
<td>Service Technician</td>
<td>服务供应商</td>
<td>CU Service Technician</td>
</tr>
<tr>
<td>Student Officer*</td>
<td>学生正式任命</td>
<td>None</td>
</tr>
<tr>
<td>University Affiliate</td>
<td>Unofficial member of the campus community who is neither a student nor an employee. Ex: Seminar Associate, Family-in-Residence member</td>
<td>CU University Affiliate</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Visitor</td>
<td>A short-term campus visitor who is neither an employee nor a student, and is not performing a contractual service. Ex: Days on Campus, Conference Intern, Visiting Scholar, Double Discovery Participant.</td>
<td>CU Visitor</td>
</tr>
<tr>
<td>Guest (electronic only)</td>
<td>Campus guest who needs access to online services only.</td>
<td>None</td>
</tr>
</tbody>
</table>

*These sub-affiliations will have their PAC record take presence over a corresponding DIA record.*

Table 1: Populations Provisioned by Delegated Identity Administration

- Students are not provisioned by DIA

Provisioning of the Sub-Affiliations

<table>
<thead>
<tr>
<th>DIA Sub-Affiliation</th>
<th>Email Account</th>
<th>Secure Web Sign On</th>
<th>Library Borrowing</th>
<th>ID Card</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>Yes/Permissions run nightly</td>
<td>Yes</td>
</tr>
<tr>
<td>Instructor</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>Yes/Permissions run nightly</td>
<td>Yes</td>
</tr>
<tr>
<td>Librarian</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>Yes/Permissions run nightly</td>
<td>Yes</td>
</tr>
<tr>
<td>Researcher</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>Yes/Permissions run nightly</td>
<td>Yes</td>
</tr>
<tr>
<td>Support Staff</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>Yes/Permissions run nightly</td>
<td>Yes</td>
</tr>
<tr>
<td>Casual</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Contractor</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Technician</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Student Officer</td>
<td>Yes/Eligibility updated every 2 hours</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>University Affiliate</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Visitor</td>
<td>No unless a Visiting Scholar</td>
<td>Yes</td>
<td>No unless a Visiting Scholar</td>
<td>Yes</td>
</tr>
<tr>
<td>Guest (electronic only)</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Table 2: Provisioning Sub-Affiliations
C. Key Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identity Management System (IdM)</td>
<td>A central data repository of person and campus affiliation data for all members of the greater Columbia University campus community.</td>
</tr>
<tr>
<td>Population</td>
<td>Employees and associates of a campus department who need access to various campus services.</td>
</tr>
<tr>
<td>Unique Person Number (UPN)</td>
<td>A unique 9-digit identifier used to identify individuals across all campus systems.</td>
</tr>
<tr>
<td>University Network Identifier (UNI)</td>
<td>A unique alphanumeric identifier used to access network services, including email. Usually 7 or 8 characters in length.</td>
</tr>
<tr>
<td>Unique Card Number (UCN)</td>
<td>A unique 9-digit number assigned to an individual ID card.</td>
</tr>
<tr>
<td>ID Card</td>
<td>ID cards issued by Columbia University, Barnard College, Teachers College and Union Theological Seminary used for building access and ID card related services (Dining Dollars, Meals and Flex)</td>
</tr>
<tr>
<td>ID Card Role</td>
<td>Role printed on the back of the ID card.</td>
</tr>
<tr>
<td>ID Card Type</td>
<td>The type of card design printed on the face of an ID card. The five designs are Columbia University, Columbia University Medical Center, Barnard College, Teachers College and Union Theological Seminary.</td>
</tr>
</tbody>
</table>

Table 3: Key Terms

D. DIA Daily Schedule

DIA is available for MSS use between 9:00 am and 7:00 pm each day. DIA may still be used after 7:00 pm, but you may experience the following errors due to nightly system maintenance.

- Response delays in searching.
- HTTP 500 error message during searches.

E. Contact Information

Have a question about DIA or a suggestion on how to make it even better? Send us an email to dia-support@columbia.edu and we will respond within 24 hours.
Chapter 2: Launching DIA and Logging In

A. LAUNCHING DIA

- To start DIA, open a web browser to the My Columbia portal at http://my.columbia.edu.

Diagram 1: My Columbia – Home

- Select the Administration tab at the top of the page. The Administration screen launches.

Diagram 2: My Columbia - Administration
Under Tools, click on DIA – Delegated Identity Administration.

Diagram 3: My Columbia – Administration (DIA)

- Click on DIA – Application.
- The DIA Login screen launches.

B. logging in to dia

Diagram 4: Login

- To login, enter your UNI and UNI password and click on Log In.
- This will launch the Main Menu of the DIA application (see Diagram 5 below).
Chapter 3: Person Search

A. Introduction

You can use the Search feature to quickly lookup and update records for individuals in your population. You can also use this feature to add new, current or former campus members to your population.

B. Search Screen Overview

- You can search for records using the following search criteria:
  - First Name
  - Surname Name
  - Middle Name
  - Unique Network Identifier (UNI)
  - Unique Person Number (UPN)
  - Social Security Number (SSN)
  - Date of Birth (DOB)
- All records matching the specified criteria will be returned.
- Viewable information includes:
  - Name
  - UNI
  - Department
  - Title
  - UPN
  - Birth month and birth date
  - Role Expiration

C. Search Procedure

- Select Search for Person Record from Main Menu.
Diagram 6: Main Menu – Search

- Enter search criteria in the search text boxes (see Diagram 7 below).

Diagram 7: Person Search

- Click Submit.
- Matching records will be returned.
Diagram 8: Search Results

D. SEARCH TIPS

- Less is more. Searching by just UNI or UPN or SSN or by Full Name will produce more matches (hits/results) than searching with a combination of identifiers and is therefore the recommended method of searching.

- Name search is not case sensitive and you do not have to write the full name. For example:
Chapter 4: Add Person

A. INTRODUCTION

The Add Person feature can be used to add individuals to your population who need access to campus services that require either a UNI or an ID card. A person may be added under any of the following scenarios:

- A new permanent, zero salary or casual employee of the University requires immediate provisioning of network services and access to campus buildings prior to his entry in PeopleSoft.
- A new campus employee who will never be entered into PeopleSoft (contractor, temp, or consultant) requires provisioning of network services and access to campus buildings.
- A service technician authorized by your department requires access to secure campus buildings.
- A temporary campus visitor or guest of your department requires temporary access to campus buildings or University network services.
- An individual who is neither a staff member nor an employee needs long-term access to campus buildings or University network services.
Notes:

- **ID Card Issuance for PAC Employees:** If a Columbia employee has already been entered into PeopleSoft, it is not necessary to add the employee into DIA in order to authorize issuance of an ID card. Upon entry into PeopleSoft, an employee will be automatically authorized to receive an ID card.

- **Name changes:** If a person to be added to a population currently exists in the IdM system under a former legal name (e.g. maiden name), she must be added to a population using her former name as this is her official name of record at the University.

- **SSN:** Social Security Number is used as a one of the primary identifiers for individuals throughout Columbia University and its affiliate Campuses. If the person does not have a SSN then a request for a temporary identifier should be made to Human Resources.

- **Regarding Student Officers:** A student officer is a student formally appointed through Columbia University HR to perform instructional or research related duties. If the student officer is entered into PAC as a casual then he or she **cannot** be added to DIA as a student officer.

- **End Dates for PAC Employees:** The default *End Date* is designed to overlap with the processing period for a new PeopleSoft entry. Once a person is entered into PeopleSoft the PAC entry will invalidate the DIA entry by setting the *End Date* to a date in the past. There is no need to continually renew the *End Date* in DIA for a PAC employee.

- **End Dates:** Upon choosing a sub-affiliation the *End Date* will automatically be set to the maximum available date. However, if an *End Date* earlier than the maximum date is desired a manual setting of the *End Date* is allowed.
B. ADD EXISTING PERSON PROCEDURE

Diagram 11: Search Results (Record Found)

- After the search a list of possible matches will appear. This list represents people who already have or had an affiliation with Columbia University. To add one of the matches to your population select the desired department in the drop-down menu directly underneath the correct match (see Diagram 11 above) and click Add.
- After you click Add, the Add Person screen will launch with the fields from the entry you selected highlighted in grey. These may not be modified. See Diagram 10 below.
Diagram 12: Add Existing Person

- Complete the fields in the form. (Fields marked with asterisk are required)
- **Note on Office Address:** If you create a record with a home address you **MUST** select “NO” for Directory Release.

A maximum End Date has been automatically chosen based on the Sub-Affiliation.
- **Directory Release** refers to whether or not an individual’s information will be available for lookup in the online directory. For the following sub-affiliations the directory release will be automatically set to “NO”: Guest (electronic), Service Technician, University Affiliate, Visitor (physical), Library Member, and DFC Member.

For all other Sub-Affiliations the directory release flag must be selected “Yes”, unless the address is a home address or if Central Human Resources has approved directory suppression for the individual.

- Click *Submit*.
- Upon a successful *Submit* a confirmation message will appear to confirm the addition to your population (see Diagram 13 below).

CUIT > DIA > Main Menu.

You have successfully added a new person to the Orthopedic Pathology population:

UNIT: wc2418
Name: Campbell, Wayne
UPN: 402620738

- Search for Person
- Manage Population

**Diagram 13: Add Existing Person Confirmation**
C. ADD NEW PERSON PROCEDURE

Diagram 14: Search Results (Record Found)

If the persons displayed after your search does not match the person you would like to add to your population (see Diagram 14 above) or if no matching records are returned (see Diagram 15 above), you may enter a brand new person to your population and Columbia University by following these steps:

- Select *Add New Person*.
- The *Add Person* screen launches (see Diagram 16 on the following page).
Diagram 16: Add New Person

- Complete the fields in the form. Note: fields marked with asterisk are required.
- Click Submit.
A successful Submit will display a confirmation message (page 16) confirming the new addition to your population, however, if the information you added (specifically a combination of Name and DOB or SSN) collides with another person’s record, then one of three additional screens will be displayed (See Diagram 17).

Diagram 17: Name and DOB Match

- **Possible Match 1:** In this scenario a match was found because a combination of Name and DOB matched another record. There are three possible options:
  - [Edit] – will edit the information for the associated entry.
  - [Add role to (UNI)] – will add the information in the previous screen to the existing person.
  - [Add New Person] – will create a new record, new UNI, and new UPN.

- **Possible Match 2:** If the person’s Name and SSN entered exactly match another record, then the following screen will launch in place of the screen shown in Diagram 17. (See Diagram 18 below)
Diagram 18: Name and SSN Match

- NOTE: In this case the button, Add New Person button is removed to avoid duplicate SSN creation in the system. If you believe this message is in error please contact dia-support@columbia.edu

- Possible Match 3: If only the SSN exactly matches a different record then both the buttons Add New Person and Add role to [UNI] will be removed.

Diagram 19: Only SSN Match
D. Maximum Effective Periods

Each sub-affiliation has a maximum length for its effective period (see table below). The End Date is automatically set to the maximum End Date for the sub-affiliation selected.

<table>
<thead>
<tr>
<th>Sub-affiliation</th>
<th>Maximum Effective Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>2 months *</td>
</tr>
<tr>
<td>Instructor</td>
<td>6 months *</td>
</tr>
<tr>
<td>Librarian</td>
<td>2 months *</td>
</tr>
<tr>
<td>Researcher</td>
<td>2 months *</td>
</tr>
<tr>
<td>Support Staff</td>
<td>2 months *</td>
</tr>
<tr>
<td>Casual</td>
<td>4 months *</td>
</tr>
<tr>
<td>Consultant</td>
<td>1 year</td>
</tr>
<tr>
<td>Service Technician</td>
<td>1 year</td>
</tr>
<tr>
<td>Student Officer</td>
<td>2 months *</td>
</tr>
<tr>
<td>University Affiliate</td>
<td>3 years</td>
</tr>
<tr>
<td>Visitor</td>
<td>1 year</td>
</tr>
<tr>
<td>Guest (electronic only)</td>
<td>1 year</td>
</tr>
</tbody>
</table>

* Later overwritten by PeopleSoft data

Table 4: Maximum Effective Periods

Chapter 5: Edit Population

A. Edit Record Procedure

Your search returned 1 result. You may:
- Perform another search with more information to narrow the results, or less information to broaden the results.
- Add a new person to the 552000 - Orthopedic Pathology population with the search information you provided. [Add New Person]

Diagram 20: Search Results (Edit Record)
You can edit a record for a person enrolled in your population by clicking **Edit** (see Diagram 20 above).

The **Edit Record** screen will launch.

Diagram 21: Edit Record

- Edit the fields you wish to modify. Fields in grey are not modifiable.
- Click **Update Entry**.
- **Manage Population** screen launches displaying updated entries for all members of your population (see Diagram 22 below).
- DIA and PAC PeopleSoft entries are both listed with the source indicated in the Source column.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Sub-Affiliation</th>
<th>Department</th>
<th>Phone</th>
<th>UNI</th>
<th>UPN</th>
<th>UCN</th>
<th>End Date</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aero, Tyler</td>
<td>Instructor</td>
<td>Instructor</td>
<td>Music</td>
<td>212-654-3925</td>
<td>ra11</td>
<td>35617042</td>
<td>11/10/2005</td>
<td>DIA</td>
<td></td>
</tr>
<tr>
<td>Algar, Garth</td>
<td>Drummer</td>
<td></td>
<td>Music</td>
<td>qa2320</td>
<td>30859994</td>
<td>10/31/2009</td>
<td>DIA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annsdani, Madelina</td>
<td>Teaching Fellow</td>
<td></td>
<td>Music</td>
<td>212-654-3826</td>
<td>cdb210</td>
<td>52031241</td>
<td>09/20/2007</td>
<td>DIA</td>
<td></td>
</tr>
<tr>
<td>Ant, Perry</td>
<td>Music Associate</td>
<td>Instructor</td>
<td>Music</td>
<td>212-654-3826</td>
<td>ma22</td>
<td>90647272</td>
<td>06/19/2004</td>
<td>DIA</td>
<td></td>
</tr>
<tr>
<td>Apple, Victor</td>
<td>Teaching Fellow</td>
<td></td>
<td>Music</td>
<td>212-654-3925</td>
<td>vqa21</td>
<td>35476324</td>
<td>08/24/2007</td>
<td>DIA</td>
<td></td>
</tr>
<tr>
<td>Artman, Phil</td>
<td>Music Associate</td>
<td>Student Officer</td>
<td>Music</td>
<td>212-654-3925</td>
<td>pk21</td>
<td>61472603</td>
<td>11/20/2009</td>
<td>PAC</td>
<td></td>
</tr>
<tr>
<td>Campbell, Wayne</td>
<td>Named Professor</td>
<td>Instructor</td>
<td>Music</td>
<td>212-851-9999</td>
<td>wc2418</td>
<td>40262073</td>
<td>04/30/2008</td>
<td>DIA</td>
<td></td>
</tr>
</tbody>
</table>

Diagram 22: Department Population Roster

# Chapter 6: Manage Population

## A. Introduction

Delegated Identity Administration also offers the ability to manage permissions and update person data for current members of your population.

- You may sort your population by Name, Title, Sub-Affiliation, Dept, UNI, UPN, or End Date.
- Records with highlighted End Dates indicate expired effective dates.
- You may only edit records entered by yourself and other MSS users in your department; PeopleSoft entries may not be modified.
- You do not have the ability to delete a UNI or a Record in DIA. Please contact dia-support@columbia.edu if this operation is needed.
B. MANAGE/EDIT POPULATION OVERVIEW

The records in a departmental population include both current department employees with active records in PeopleSoft and individuals who have been manually added into DIA.

PeopleSoft and DIA records are listed together in the same table with the source indicated in the Source column. Only current PAC entries are displayed. In contrast, all DIA records are displayed for both current and expired employees. As PAC employees are typically entered into DIA prior to being entered into PeopleSoft, many employees will have both DIA and PAC entries. For such employees, ignore their DIA entries as their PeopleSoft entries are their official entries of record. Any modifications to these employee’s records should be made directly in PeopleSoft and not in DIA.

You can only edit records you have manually entered into DIA; PeopleSoft entries may not be modified.

C. MANAGE/EDIT POPULATION PROCEDURE

Diagram 23: Main Menu (Manage/Edit Population)

- Select Manage/Edit Population from Main Menu (see Diagram 23 above).
- If you are responsible for managing more than one Population, you will be presented with a drop-down list of your populations from which you must select one. Otherwise, the Department Populations screen will launch directly.
**Diagram 24: Department Populations**

**D. EDIT RECORD PROCEDURE**

- Select the non-PAC entry you would like to edit from the records listed in your population.

**Diagram 25: Department Population Roster**

- Note: The Peach color in the End Date Field is a visual indication that the DIA entry has expired and all sub-affiliations or privileges associated with this entry have all also expired, unless the person also has an active PeopleSoft entry.
The **Edit Record** screen launches (see Diagram 26 below).

![Edit Person Data for wc2291 in population 3060000 - Economics](image)

**Diagram 26: Edit Record**

- Update the fields to be modified.
- To reactivate network and building access privileges, set the End Date to a future date.
Select *Update Entry*. Record is updated.

- **Manage Population** screen launches displaying updated entries for all members of your population.

### E. DELETING RECORDS

You may not delete records stored in your populations. If you wish to expire a person’s sub-affiliation, you must set the End Date in the person’s record to a prior date.

### Chapter 7: Helpful Information

#### A. RECONCILIATION OF DATA ENTERED INTO PEOPLESOF T WITH DATA ENTERED INTO DIA

DIA population members who are also entered into Columbia’s PAC PeopleSoft payroll system will have their person records in IdM-related campus systems updated by data entered into their PeopleSoft records. What does this mean? Three things:

1. If a Columbia employee maintains active employee status in PeopleSoft, he will continue to be considered an active University employee in the security system with the same access privileges even if the *End Date* originally determined in his DIA entry has expired.
2. When populating the Columbia Online Directory and Lenel OnGuard security system, data entered into a person’s record in PeopleSoft will overwrite any like data entered into the same person’s record in DIA.
3. Population members entered only in DIA will not have their person data updated by PeopleSoft.
A complete list of populations whose records may be updated by PeopleSoft data is listed below:

<table>
<thead>
<tr>
<th>Population</th>
<th>Card Role</th>
<th>Data updated by data from PeopleSoft?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>CU Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>Instructor</td>
<td>CU Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>Librarian</td>
<td>CU Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>Researcher</td>
<td>CU Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>Support Staff</td>
<td>CU Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>Casual</td>
<td>CU Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>Consultant</td>
<td>CU Contractor</td>
<td>No</td>
</tr>
<tr>
<td>Service Technician</td>
<td>CU Service Technician</td>
<td>No</td>
</tr>
<tr>
<td>Student Officer</td>
<td>None</td>
<td>Yes</td>
</tr>
<tr>
<td>Visitor</td>
<td>CU Visitor</td>
<td>No</td>
</tr>
<tr>
<td>University Affiliate</td>
<td>CU University Affiliate</td>
<td>No</td>
</tr>
<tr>
<td>Trustee</td>
<td>Trustee</td>
<td>No</td>
</tr>
<tr>
<td>Guest</td>
<td>None</td>
<td>No</td>
</tr>
</tbody>
</table>

Table 5: Population Card Role

B. PERMISSION PROVISIONING: FROM DIA TO IDM AND ID CARD

<table>
<thead>
<tr>
<th>Sub-affiliation</th>
<th>End Date Max</th>
<th>Card Affiliation</th>
<th>Cause of Affiliation Expiration</th>
<th>Card Expiration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>2 months</td>
<td>CU Employee</td>
<td>Dropped from PAC feed</td>
<td>5 years</td>
</tr>
<tr>
<td>Instructor</td>
<td>6 months</td>
<td>CU Employee</td>
<td>Dropped from PAC feed</td>
<td>5 years</td>
</tr>
<tr>
<td>Librarian</td>
<td>2 months</td>
<td>CU Employee</td>
<td>Dropped from PAC feed</td>
<td>5 years</td>
</tr>
<tr>
<td>Researcher</td>
<td>2 months</td>
<td>CU Employee</td>
<td>Dropped from PAC feed</td>
<td>5 years</td>
</tr>
<tr>
<td>Support Staff</td>
<td>2 months</td>
<td>CU Employee</td>
<td>Dropped from PAC feed</td>
<td>5 years</td>
</tr>
<tr>
<td>Casual</td>
<td>4 months</td>
<td>CU Employee</td>
<td>Dropped from PAC feed</td>
<td>Employment term up to 1 year max</td>
</tr>
<tr>
<td>Consultant</td>
<td>1 year</td>
<td>CU Contractor</td>
<td>Campus End Date expires</td>
<td>Employment term up to 1 year max</td>
</tr>
<tr>
<td>Service Technician</td>
<td>1 year</td>
<td>CU Service Technician</td>
<td>Campus End Date expires</td>
<td>Employment term up to 1 year max</td>
</tr>
<tr>
<td>Student Officer</td>
<td>2 months</td>
<td>None</td>
<td>Dropped from PAC feed</td>
<td>Dependent on student status</td>
</tr>
<tr>
<td>University Affiliate</td>
<td>3 years</td>
<td>CU University Affiliate</td>
<td>Campus End Date expires</td>
<td>Campus term up to 2 years max</td>
</tr>
<tr>
<td>Visitor</td>
<td>1 year</td>
<td>CU Visitor</td>
<td>Campus End Date expires</td>
<td>Campus term up to 1 year max</td>
</tr>
</tbody>
</table>

Table 6: Data Flow from DIA to IdM and ID Card
Chapter 8: Scenarios

A. NEW HIRE

Upon hiring a new employee, you will want to ensure that she is assigned a UNI and UPN as soon possible to ensure that she is granted access to the appropriate campus services. To do so, you must first determine whether the new employee currently exists in the Identity Management System (IdM). If she has previously been a student or employee at Columbia University or any of its affiliate institutions (Barnard College, Teachers College or Union Theological Seminary), it is likely that she already exists in IdM.

Steps:
1. Select Search for Person from the Main Menu.
2. Enter your search criteria and then click Submit.
3. If you find the person you are looking for, you can then add them to your population by selecting the desired population and then clicking Add.
4. If you are unsure which person to select, refine your search by returning to the Search screen and entering additional search criteria.
5. If no records are returned, broaden your search by returning to the Search screen and entering less search criteria.
6. If you are sure that none of the records returned matches the desired person you can create a new person record by selecting Add New Person.

B. REHIRE

If you decide to rehire an employee (casual or otherwise) who has worked for you in the past, there is no need to create a new identity record for this person, but you will want to reauthorize his network and building access privileges.

Steps:
1. Select Search for Person from the Main Menu.
2. Enter your search criteria and then click Submit.
3. Select the person and then add them to your population by clicking the Add button.
C. LOOKUP A UNIQUE PERSON NUMBER (UPN) FOR A PERSON IN YOUR POPULATION

Unique Person Number (UPN) is the new identifier used to identify individuals across campus systems. On occasion, you may want to look up a UPN for a member of your population. There are two methods to accomplish this.

First method:

Steps:

1. Select Search for Person from Main Menu.
2. Enter your search criteria and then click Submit. The desired record will be returned displaying the person’s UNI and UPN.

Second method:

Steps:

1. Select Manage/Edit Population from Main Menu
2. Select the population in which the person is enrolled.
3. Scroll down to view the information for the person in question.

D. EXTEND OR EXPIRE PRIVILEGES FOR A POPULATION MEMBER

PAC Employee Population Members
To extend an employment period for a PAC employee who has been entered into PeopleSoft with a fixed employment period, you will need to update the employee’s stop date in PeopleSoft. The End Date does not need to be changed in DIA.

To expire a PAC employee, you should both terminate the employee in PeopleSoft and also update the employee’s End Date in DIA.

Note: most permanent employees do not have expiration dates associated with their positions and therefore do not ever need to be extended.

Population Members Not in PeopleSoft
You can extend or expire the End Date for non-PAC members in your DIA populations. Non-PAC members include Contractors, Service Technicians, Visitors, University Affiliates, and Guests. There are two methods to extend or expire these types of members:
First method:

Steps:
1. Select *Search for Person* from **Main Menu**.
2. Enter your search criteria and then click *Submit*. The desired record will be returned displaying the person’s UNI and UPN.
3. Select the person in your population by clicking *Edit* next to the person’s name.
4. To extend privileges, change the End Date to a future date. To expire privileges, change the End Date to a previous date.
5. Click *Update Entry*

Second method:

Steps:
1. Select *Manage/Edit Population* from **Main Menu**.
2. Select the population in which the person is enrolled.
3. Scroll down to the person in question and click on the person’s name.
4. To extend privileges, change the End Date to a future date. To expire privileges, change the End Date to a previous date.
5. Click Update Entry.