

Providing Access to the Harvard Training Portal

Introduction

To access the Harvard Training Portal, a user must have a **HarvardKey**¹. This document outlines the steps for setting the user up as Person of Interest (POI) in MIDAS. Creating a user as a POI will provision a Harvard University ID Number and allow the user to claim their HarvardKey to access the system. **You should complete this process 3-days prior to when the user needs to have access to the system.**

Steps – Completing the POI Form

1. Using **Internet Explorer**, download the POI form at the Identity & Access Management website: <http://iam.harvard.edu/files/iam/files/authorized-identity-request-form.pdf>.
 - a. If FAS – complete this version: <http://iam.harvard.edu/files/iam/files/fas-authorized-identity-request-form.pdf>
2. Complete the form as shown below²:
 - Complete the **POI** information for the highlighted fields
 - Complete the **Authorizer** information for the highlighted field – if you are requesting the POI access the system, **this is your information**, if someone else is (and you are just filling out the form) enter that person's information. To be an Authorizer you must be a Harvard employee – either Faculty or Admin Professional Staff.

Individual Being Authorized

Last name* Smith	First name* Sally	Middle name*	Date of birth (MM/DD/YYYY)* 06/15/1972
Residential address:			
Has he/she been at Harvard before? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown			
Non-Harvard email* ssmith@yahoo.com			
Last 4 digits of SSN: Previous HUID, if known: Previous name, if different:			
Please choose one role for the person being authorized.* See the back of this form for more information on available role types.			
<input type="checkbox"/> Academic Advisor <input type="checkbox"/> Collaborator <input type="checkbox"/> Consultant <input type="checkbox"/> Contractor <input type="checkbox"/> Family Member <input type="checkbox"/> Field Education Supv <input type="checkbox"/> Hospital Emp <input type="checkbox"/> Incoming Emp/Trans <input type="checkbox"/> Inter-School Aff Staff <input type="checkbox"/> Security <input checked="" type="checkbox"/> Guest or Visitor <input type="checkbox"/> Tenant <input type="checkbox"/> Vendor <input type="checkbox"/> Volunteer <input type="checkbox"/> Other (explain):			
School or business unit* HBS		Department	
Company name (if external)			
Start date* 06/01/2016		End date (recommended not more than 12 months from start date)* 07/01/2016	
Harvard ID card needed? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Authorizer Information

Must be current faculty member or non-temporary, exempt employee. See the back of this form for eligibility details.

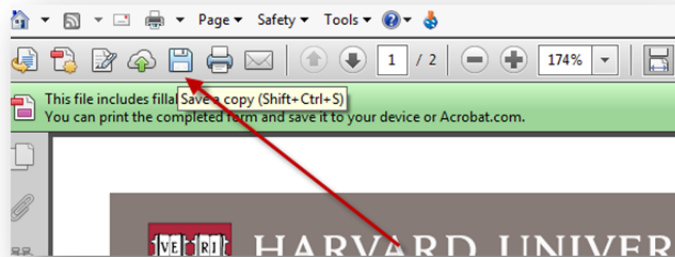
Last name* Harvard	First name* John	Harvard ID (HUID)* 30677221
School or business unit* HBS		Department
Harvard email* j_harvard@harvard.edu		Harvard phone

¹ Both Eureka and TMS supported XID access. Based on [University guidelines](#) governing access to University systems, the XID credentialing system does not meet the standards of collecting basic information about the user.

² If the user will have requirements such as an ID Card (e.g., in the case of a consultant), **the form should be completed based on those setup guidelines, not the example shown here.**

Steps – Saving and Sending the Form(s)

1. After completing the form, save the file using the naming convention of POI_name.pdf (e.g., POI_smith.pdf). **Note: if you did not use Internet Explorer, you must print your PDF as PDF to retain and save your form data.**



2. Attach the PDF(s) in an e-mail and add the subject line of **“POI Authorized Identity Request Form.”** You can attach more than one PDF form if submitting multiple POI requests.
 - a. NOTE: If you are not listed as the Authorizer, e-mail the completed POI PDFs to the **person listed as the Authorizer** and request he/she FORWARD the e-mail to the address in step 3.
3. E-mail the forms to id_services@harvard.edu
 - a. If **FAS** – e-mail to: accounts@fas.harvard.edu

Upon receiving the e-mail, HUIT IAM will create the POI in the system – this process is typically a 1-day turn around (please allow extra time if sending in a large number of forms). When the POI role has been setup in the central identity registry, the person listed as the Authorizer will receive an e-mail:

Dear John Harvard,

You are receiving this email because the Harvard University Information Technology service desk recently named you as the authorizer of a new or updated Harvard affiliation for the person listed below. Please note that, as an authorizer, you may be held accountable for how this person uses Harvard resources.

Person: Sally Smith
HUID:12345678
Role Type: Guest / Visitor
Role End Date: 2016-07-01

Steps – E-mail User to Claim HarvardKey and Access Training

1. Upon receiving the setup confirmation, e-mail the POI and inform him/her to claim a HarvardKey at this URL: <https://key.harvard.edu/select-user-type> (Please provide them their HUID as they need to know it to claim their HarvardKey)
2. Provide the Harvard Training Portal URL: trainingportal.harvard.edu
 - a. You can also include a deeplink to the course or courses the POI needs to complete.