

Delegated Identity Administration Application

User Guide

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Version 5.7

Table of Contents

CHAPTER 1: GETTING STARTED	3
A. RECENT FEATURES/NOTES	3
B. INTRODUCTION	3
C. BASIC BACKGROUND	3
D. KEY TERMS.....	6
E. DIA DAILY SCHEDULE	7
F. CONTACT INFORMATION	7
CHAPTER 2: LAUNCHING DIA AND LOGGING IN	7
A. LAUNCHING DIA	7
B. LOGGING IN TO DIA.....	11
CHAPTER 3: PERSON SEARCH	11
A. INTRODUCTION	11
B. SEARCH SCREEN OVERVIEW	12
C. SEARCH PROCEDURE.....	12
D. SEARCH TIPS	14
CHAPTER 4: ADD PERSON	15
A. INTRODUCTION	15
B. ADD ROLE TO AN EXISTING PERSON PROCEDURE.....	17
C. ADD NEW PERSON PROCEDURE.....	20
D. MAXIMUM EFFECTIVE PERIODS	23

CHAPTER 5: EDIT POPULATION	24
A. EDIT RECORD PROCEDURE	24
B. DELETING A RECORD.....	25
CHAPTER 6: MANAGE POPULATION	28
A. INTRODUCTION.....	28
B. MANAGE/EDIT POPULATION OVERVIEW	28
C. MANAGE/EDIT POPULATION PROCEDURE.....	29
D. EDIT RECORD PROCEDURE	30
E. DELETING RECORDS	31
CHAPTER 7: HELPFUL INFORMATION	31
A. RECONCILIATION OF DATA ENTERED INTO PEOPLESOFT WITH DATA ENTERED INTO DIA	31
B. PERMISSION PROVISIONING: FROM DIA TO IDM AND ID CARD.....	33
C. RETURNING EMPLOYEE/REACTIVATING EMAIL.....	33
CHAPTER 8: SCENARIOS	343
A. NEW HIRE.....	343
B. REHIRE.....	354
C. LOOKUP A UNIQUE PERSON NUMBER (UPN) FOR A PERSON IN YOUR POPULATION.....	354
D. EXTEND OR EXPIRE PRIVILEGES FOR A POPULATION MEMBER.....	365

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Chapter 1: Getting Started

A. RECENT FEATURES/NOTES

- ▶ “Delete Entry” feature added to remove DIA record from population.
- ▶ Information has been added in Table 2 (“Permissions Granted to Each Sub-Affiliation”) that specifies the necessary roles (or “sub-affiliations”) for VPN and Rascal Services.

B. INTRODUCTION

As a Manager of Self Service, you are responsible for registering new employees and departmental associate transfers and changes. 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

C. 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

DIA Sub-Affiliation	Population Description	ID Card Affiliation
Administrator*	Permanent, casual or zero salary employee of the University who will be added into PeopleSoft. (Does not include work-study students or student officers.)	CU Officer
Instructor*		
Librarian*		
Researcher*		
Support Staff*		
Casual**		
Contractor	Consultant, contractor or temporary person working at Columbia but not on official Columbia payroll.	CU Contractor
Service Technician	Vendor who performs regular campus service such as bottled water delivery.	CU Service Technician
Student Officer*	A student formally appointed (not as a casual employee) through Columbia University HR to perform instructional or research-related duties.	None/ ID will have a Student Role
University Affiliate	Unofficial member of the campus community who is neither a student nor an employee. Ex: Seminar Associate, Family-in-Residence member, non-University building tenant.	CU University Affiliate
Visitor***	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.	CU Visitor
Guest (electronic only)	Campus guest who needs access to online services only.	None
Service Corp	Medical Center Service Corp employees	CU Contractor
Global Academic	An individual associated with a CU-affiliated Overseas Entity who has academic or research-related responsibilities. Limited to special DIA populations.	None
Global Administrative	An individual associated with a CU-affiliated Overseas Entity who has administrative or business-related responsibilities. Limited to special DIA populations.	None

Table 1: Populations Provisioned by Delegated Identity Administration

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

** Casual employee roles are only populated in Lenel for non-student casual employees.

***If you are adding a "Visiting Scholar" into DIA, they must be processed and sent to IDM through ISSO (International Student/ Scholar Organization).

- ▶ Students are not provisioned by DIA

Permissions Granted to Each Sub-Affiliation

DIA Sub-Affiliation	Email Account ⁴	UNI Web Sign-On ₁	Library Borrowing & Online Privileges ₂	ID Card	Rascal Access	VPN Access ⁵
Administrator	Yes	Yes	Yes/Borrowing updated nightly	Yes	Yes	Yes
Instructor	Yes	Yes	Yes/Borrowing updated nightly	Yes	Yes	Yes
Librarian	Yes	Yes	Yes/Borrowing updated nightly	Yes	Yes	Yes
Researcher	Yes	Yes	Yes/Borrowing updated nightly	Yes	Yes	Yes
Support Staff	Yes	Yes	Yes/Borrowing updated nightly	Yes	Yes	Yes
Casual	Yes	Yes	No	Yes	Yes	Yes
Contractor	Yes/	Yes	No	Yes	Yes	Yes
Service Technician	No	Yes	No	Yes	No	No
Student Officer ⁶	Yes	Yes	Yes	No	No	Yes
University Affiliate	No	Yes	No/ Physical Access Only	Yes	No	No
Visitor ³	No	Yes	No	Yes	No	No
Guest (electronic only)	No	Yes	No	No	Yes	No
Service Corp	Yes	Yes	No	Yes	Yes	Yes
Global Academic ⁷	Yes (Except ICAP)	Yes	Yes (Online Only)	No	Yes	No
Global Administrative ⁷	Yes (Except ICAP)	Yes	No	No	No	No

Table 2: Permissions Granted to Each Sub-Affiliation

¹ UNI Web Sign-On: guests can sign into services for which they also have authorization, or into services that allow any valid UNI (ex: uni.columbia.edu).

² Library Online Resources are available immediately.

³ Visiting Scholars should not be added to DIA populations. Rather, they must be processed and sent to CUIT through ISSO (International Student/ Scholar Organization)

⁴ LionMail for most Morningside departments; Email forwarding ONLY for all CUMC and medical departments, Facilities, Campus Services, Health Service, Audit, Risk Management, Research Administration, and Office of General Counsel

⁵ CUMC VPN is available to all CUMC students, faculty, employees, contractors, Service-Corp and Morningside Officers; Morningside VPN is not available to CUMC students.

⁶ Student Officers get Rascal access by virtue of being a student.

⁷ Global Affiliates are individuals associated with CU-affiliated Overseas Entity who has Academic, Research, administrative or business-related responsibilities.

Library Privileges:

There are types of Library privileges:

- Physical/Reading
- Borrowing
- Online Resources

For individuals without a formal student or employee role who are working closely with a department (e.g. intern, research associate, etc.), the University Affiliate role may be an appropriate way to provide Physical/Reading access to the Libraries.

Borrowing and Online privileges are available to select affiliations and are indicated in the table on the left. The only individuals who should be assigned these privileges through DIA are current faculty and non-casual CU employees. Information on borrowing privileges is available at

<http://library.columbia.edu/services/borrowing.html>

For any questions or special access requests concerning Physical/Reading, Borrowing or Online privileges; please reach out to the Library Information Office at lio@columbia.edu

At no time should an inappropriate affiliation be assigned to a user to circumvent contacting the Library Information Office.

D. KEY TERMS

Term	Definition
Identity Management System (IdM)	A central data repository of person and campus affiliation data for all members of the greater Columbia University campus community.
Population	Employees and associates of a campus department who need access to various campus services.
Unique Person Number (UPN)	A unique 9-digit identifier used to identify individuals across all campus systems.
University Network Identifier (UNI)	A unique alphanumeric identifier used to access network services, including email. Usually 7 or 8 characters in length.
Unique Card Number (UCN)	A unique 9-digit number assigned to an individual ID card.

ID Card	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)
ID Card Role	Role printed on the back of the ID card.
ID Card Type	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.

Table 3: Key Terms

E. 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.

F. CONTACT INFORMATION

Have a question about DIA or a suggestion on how to make it even better? Send us an email to askcuit@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>.

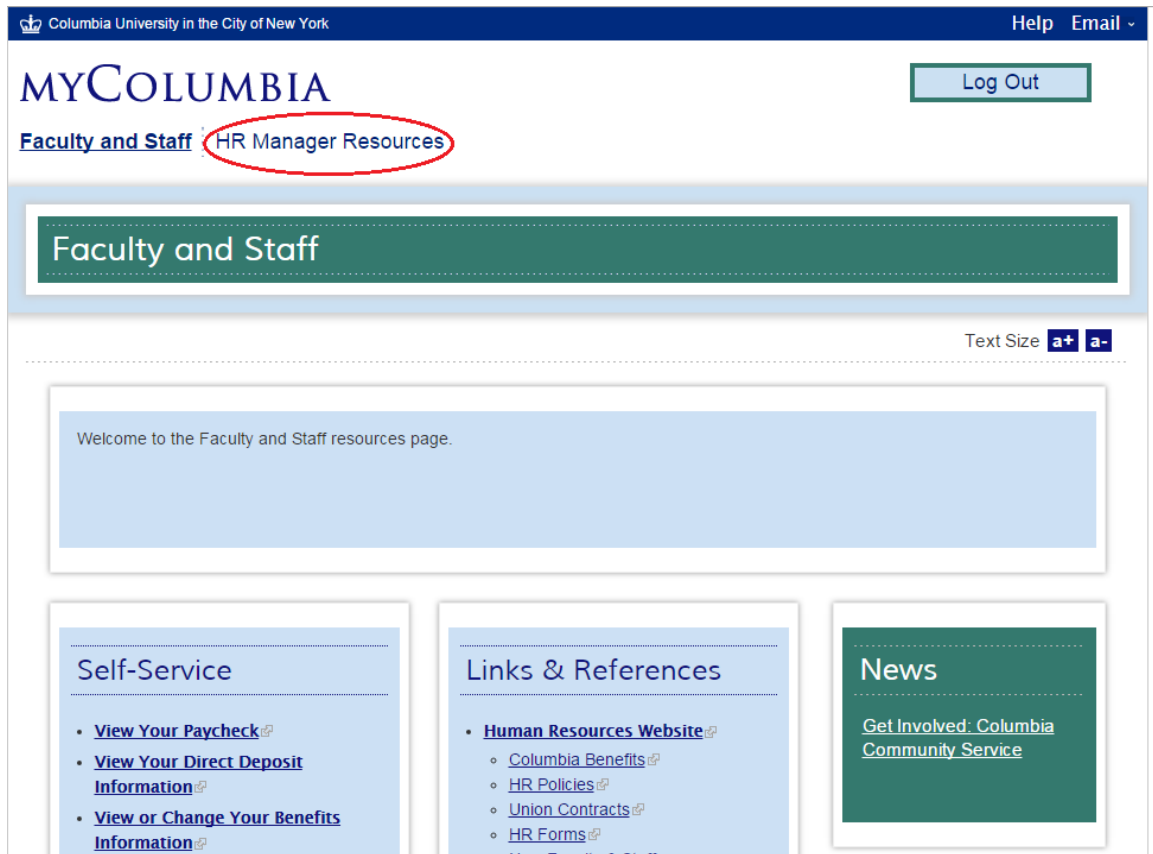


Diagram 1: My Columbia – Home

- ▶ Select the *HR Manager Resources* tab at the top of the page. The **HR Manager Resources** screen launches.

Columbia University in the City of New York Help Email

MYCOLUMBIA Log Out

Faculty and Staff | [HR Manager Resources](#)

HR Manager Resources

Text Size a+ a-

Welcome to the HR Manager Resources Portal

This is your point of access to People at Columbia (PAC) as well as Labor Accounting and Payroll Reports. For Tools or Training, please navigate to the bottom of this page.

PAC Notices This Week

[Questions? Contact the HR Service Center](#)

[Active issues from prior weeks](#)

People @ Columbia

- [Go to PAC](#)
- [Go to PAC Central Administration](#)

Reports

- [People @ Columbia Manager Self-Service Reports](#)
(Generate Personnel Action Report: Department Earnings)

News

[Payroll Assistance Available](#)

[Get Involved: Columbia Community Service](#)

Diagram 2: My Columbia – HR Manager Resources

- ▶ Scroll down and to “Tools” to find the DIA tools

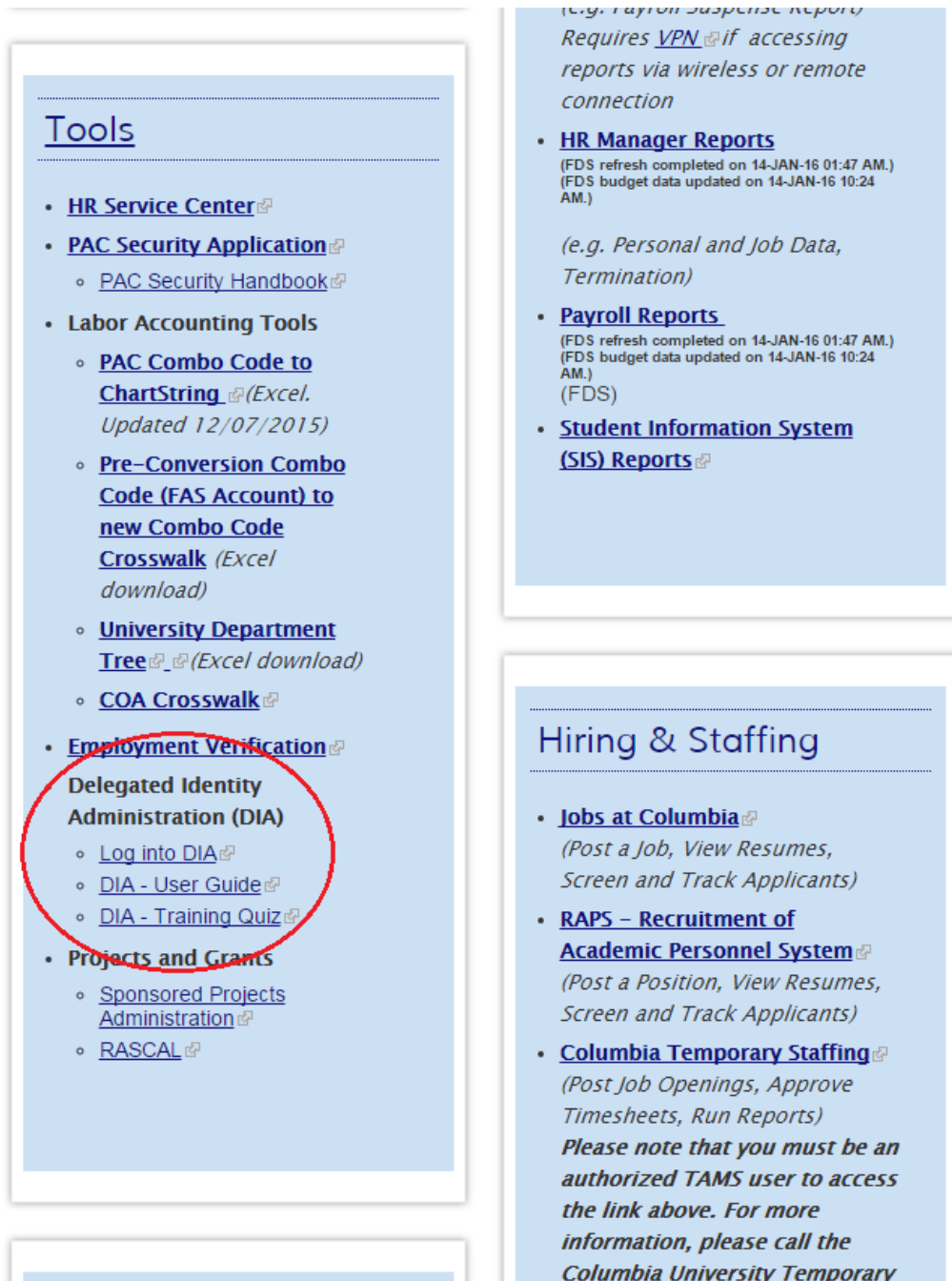


Diagram 3: My Columbia – Administration (DIA)

- ▶ Click on one of the three DIA options.
 - ▶ Log into DIA- Launches DIA application
 - ▶ DIA- User Guide- opens DIA Reference Manual
 - ▶ DIA- Training Quiz- opens DIA quiz
- ▶ The **DIA Login** screen launches.

B. LOGGING IN TO DIA

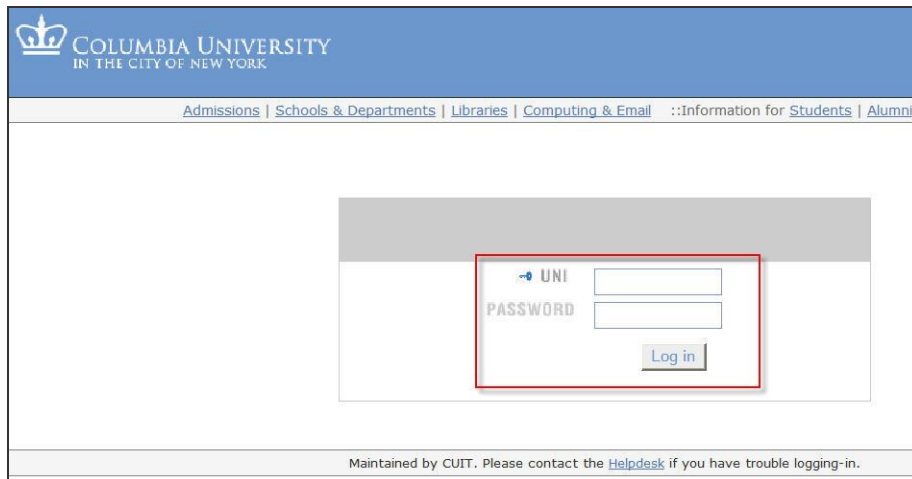


Diagram 4: Login

- ▶ 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).



Diagram 5: Main Menu

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)
 - 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).

[CUIT](#) > [DIA](#) > **Person Search**

Please enter search criteria.

UNI*

First Name*

Middlename

Surname*

Date of Birth

UPN*

*** - at least one of these fields is required.**

[DIA Manual](#)

Diagram 7: Person Search

- ▶ Click *Submit*.
- ▶ Matching records will be returned.

Your search returned 1 result

- Before creating a new UNI make sure the person you are adding doesn't already have a UNI. See the list of current and former campus members below.
- If you don't find the person you are adding in the results below, you may:
 - Create a UNI for this person and add them to the population with the search information you provided:
 - [Perform another search](#) with more information to narrow the results, or less information to broaden the results

Person Information	
UNI	sd3018
Name	Doo, Scrappy
Date of Birth	08/13/1915
UPN	558437737
UCN	838254747

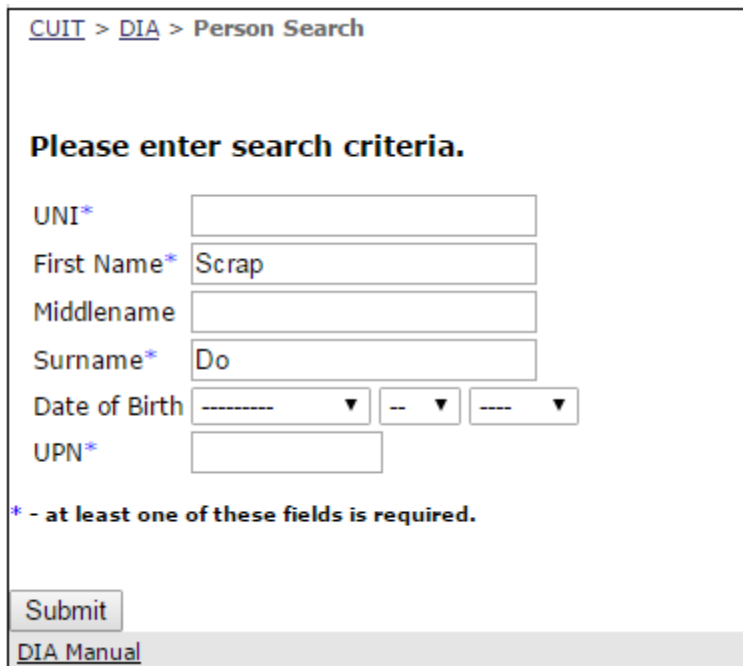
Population Entry Information				
Department	Title	Sub-Affiliation	Expiration	Source
Test Feed	Scare Tactician	Officer of Instruction	04/01/2016	<input type="button" value="Edit"/>

Select department

Diagram 8: Search Results

D. SEARCH TIPS

- ▶ Less is more. Searching by complete UNI or UPN will provide a one to one match and this should be the person you are searching. Or by Full Name and this 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:



CUIT > [DIA](#) > Person Search

Please enter search criteria.

UNI*

First Name*

Middlename

Surname*

Date of Birth

UPN*

* - at least one of these fields is required.

[DIA Manual](#)

Diagram 9: Person Search (2)

- ▶ Inserting information like in Diagram 9 will produce the results.

Your search returned 1 result

- Before creating a new UNI make sure the person you are adding doesn't already have a UNI. See the list of current and former campus members below.
- If you don't find the person you are adding in the results below, you may:
 - Create a UNI for this person and add them to the population with the search information you provided:
 - [Perform another search](#) with more information to narrow the results, or less information to broaden the results

Person Information	
UNI	sd3018
Name	Doo, Scrappy
Date of Birth	08/13/1915
UPN	558437737
UCN	838254747

Population Entry Information				
Department	Title	Sub-Affiliation	Expiration	Source
Test Feed	Scare Tactician	Officer of Instruction	04/01/2016	<input type="button" value="Edit"/>

Select department

Diagram 10: Search Results (2)

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 Officer, Support Staff, 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.

- ▶ The following roles are only to be used for individuals who are imminently being assigned an employee appointment through the standard CU HR processes:
 - Officers of Administration, Research, Libraries, and Instruction
 - Support Staff
 - Casual employees

One primary motivation for DIA is to provide access to these individuals beginning on their official start date, given that there are sometimes short delays in finalizing the employee record in PAC.

Any other individuals who are not currently employees or for which there is more than a week before their appointment starts should receive a different classification, such as Visitor or Contractor.

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.
- ▶ **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 (Officers and Support Staff):** The default *End Date* is designed to overlap with the processing period for a new PeopleSoft entry. The PAC entry will supersede DIA and the DIA entry will expire, extending the DIA end date should not be done.
- ▶ **Officer and Support Staff:** The officer (administration, instruction, libraries, and research) and support staff affiliations should only be used for PERMANENT employees. You should not assign these affiliations to contractors, temps or informal affiliates.
- ▶ **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.

- ▶ **Search for an Existing Record by Name:** When entering anyone into DIA you should use First Name and Last Name to search and see if the person is already in system. Make sure you inquire with the person as to whether they could have been at Columbia University (in any fashion) under another name, i.e. the user has a maiden name.
- ▶ **Search for an Existing Record by UNI:** When adding someone into DIA ask if they happen to have a UNI from any prior affiliation with Columbia University.

B. ADD A ROLE TO AN EXISTING PERSON PROCEDURE

CUIT > DIA > Person Search > Search Results

Your search returned 1 result

- Before creating a new UNI make sure the person you are adding doesn't already have a UNI. See the list of current and former campus members below.
- If you don't find the person you are adding in the results below, you may:
 - Create a UNI for this person and add them to the population with the search information you provided:
 - [Perform another search](#) with more information to narrow the results, or less information to broaden the results

Person Information	
UNI	sd3018
Name	Doo, Scrappy
Date of Birth	08/13/1915
UPN	558437737
UCN	838254747

Population Entry Information				
Department	Title	Sub-Affiliation	Expiration	Source
Test Feed	Scare Tactician	Officer of Instruction	04/01/2016	<input type="button" value="Edit"/>

Select department:

Diagram 11: Search Results (Record Found)

1. After logging in to the DIA application, select **Search for Person** and search by full, legal, First Name and Last Name. Confirm with the user that they have not

- been part of the Columbia University population under any other name (if they have, use that name to search in DIA).
2. 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 role to 'UNI'*.
 3. After you click *Add role to 'UNI'*, 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.

CUIT > DIA > Person Search > Search Results > Add Role to sd3018

Add Role to sd3018 in population IDM0040 - Test Feed

UNI	<input type="text" value="sd3018"/>
First Name*	<input type="text" value="Scrappy"/>
Middlename	<input type="text"/>
Surname*	<input type="text" value="Doo"/>
Suffix (Jr, Sr, II, III, IV, V)	<input type="text"/>
Date of Birth*	August ▼ 13 ▼ 1915 ▼
Sub-Affiliation*	Officer of Administration ▼ ⓘ
Title*	<input type="text" value="Business Analyst"/>
Department*	<input type="text" value="Test Feed"/>
Phone (e.g. 2128541754)	<input type="text"/>
AltPhone	<input type="text"/>
Fax	<input type="text"/>
Directory Release*	Yes <input type="radio"/> No <input checked="" type="radio"/>
Gender	Male <input checked="" type="radio"/> Female <input type="radio"/>
Full Time/Part Time*	Full Time <input checked="" type="radio"/> Part Time <input type="radio"/>
Office Address if none, Residence*	<input type="text" value="615 W 131st St"/>
Address (line 2)	<input type="text"/>
Address (line 3)	<input type="text"/>
City*	<input type="text" value="New York"/>
State (e.g. NY, NJ) required for USA & Canada	<input type="text" value="NY"/>
Postal code*	<input type="text" value="10027"/>
Country*	<input type="text" value="USA"/>
End Date*	March ▼ 01 ▼ 2016 ▼ ⓘ

End Date has been selected based on the Sub-Affiliation

* required field

Diagram 12: Add Existing Person

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

6. **Directory Release** refers to whether or not an individual's information will be available for lookup in the online directory located on the Columbia University website. 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 (including contractors) the directory release flag is optional and can be selected "Yes" or "No", however Officers and Support Staff will be published to the Online Directory once their paperwork has been finalized and processed by Central HR and Directory suppression must be approved by Central HR.

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



Diagram 13: Add Existing Person Confirmation

C. ADD NEW PERSON PROCEDURE

(THIS PROCEDURE IS TO BE USED IF NO MATCH IS FOUND)

CUIT > DIA > Person Search > Search Results

Your search returned 1 result

- Before creating a new UNI make sure the person you are adding doesn't already have a UNI. See the list of current and former campus members below.
- If you don't find the person you are adding in the results below, you may:
 - Create a UNI for this person and add them to the population with the search information you provided: **Create new UNI**
 - [Perform another search](#) with more information to narrow the results, or less information to broaden the results

Person Information	
UNI	sd3018
Name	Doo, Scrappy
Date of Birth	08/13/1915
UPN	558437737
UCN	838254747

Population Entry Information				
Department	Title	Sub-Affiliation	Expiration	Source
Test Feed	Business Analyst	Officer of Administration	02/29/2016	Edit
Test Feed	Scare Tactician	Officer of Instruction	04/01/2016	Edit

Select department

Diagram 14: Search Results (Record Found)

CUIT > DIA > Person Search > Search Results

No results found. You may:

- [Perform another search](#) with less information to broaden the results
- Return to the [Delegated Admin Main Menu](#)
- Create a UNI for this person and add them to the population with the search information you provided: **Create new UNI**

Diagram 15: Search Results (No 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:

9. Select *Create new UNI*.
10. The **Add Person** screen launches (see Diagram 16 on the following page).

[CUIT](#) > [DIA](#) > [Person Search](#) > [Search Results](#) > [Add Role to new UNI](#)

Add Role to new UNI in population IDM0040 - Test Feed



UNI	<input type="text"/>
First Name*	<input type="text" value="Shaggy"/>
Middlename	<input type="text"/>
Surname*	<input type="text" value="Doo"/>
Suffix (Jr, Sr, II, III, IV, V)	<input type="text"/>
Date of Birth*	January ▾ 01 ▾ 1915 ▾
Sub-Affiliation*	Contractor ▾ 
Title*	<input type="text" value="Analyst"/>
Department*	<input type="text" value="Test Feed"/>
Phone (e.g. 2128541754)	<input type="text"/>
AltPhone	<input type="text"/>
Fax	<input type="text"/>
Directory Release*	Yes <input type="radio"/> No <input checked="" type="radio"/>
Gender	Male <input checked="" type="radio"/> Female <input type="radio"/>
Full Time/Part Time*	Full Time <input checked="" type="radio"/> Part Time <input type="radio"/>
Office Address if none, Residence*	<input type="text" value="615 W 131st St"/>
Address (line 2)	<input type="text"/>
Address (line 3)	<input type="text"/>
City*	<input type="text" value="New York"/>
State (e.g. NY, NJ) required for USA & Canada	<input type="text" value="NY"/>
Postal code*	<input type="text" value="10027"/>
Country*	<input type="text" value="USA"/>
End Date*	December ▾ 30 ▾ 2016 ▾ 
End Date has been selected based on the Sub-Affiliation	
* - required field	
<input type="button" value="Submit"/>	

Diagram 16: Add New Person

11. Complete the fields in the form. Note: fields marked with asterisk are required.
12. Click Submit.

13. 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) collides with another person's record, then one of three additional screens will be displayed (See Diagram 17).

CUIT > DIA > Person Search > Search Results > Add Person > Resolve Matches

The following people have information that closely matches the data you entered. If the person you would like to add to your population **is not on this list** please click the "Add New Person" button.

Person Information	
UNI:	sd3055
Name:	Doo, Shaggy
Population Entry Information	
Department: Test Feed	Title: Financial Analyst <input type="button" value="Edit"/>

Diagram 17: Name and DOB Match

- ▶ **Possible Match:** 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.

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.

Sub-affiliation	Maximum Effective Period
Administrator	2 months *
Instructor	6 months *
Librarian	2 months *
Researcher	2 months *
Support Staff	2 months *
Casual	4 months *
Consultant	1 year
Service Technician	1 year
Student Officer	2 months *
University Affiliate	3 years

Visitor	1 year
Guest (electronic only)	1 year
Service Corp	1 year
Global Academic	1 year
Global Administrative	1 year

Table 4: Maximum Effective Periods

* Later overwritten by PeopleSoft data

Chapter 5: Edit Population

A. EDIT RECORD PROCEDURE

[CUIT](#) > [DIA](#) > [Person Search](#) > Search Results

Your search returned 1 result

- Before creating a new UNI make sure the person you are adding doesn't already have a UNI. See the list of current and former campus members below.
- If you don't find the person you are adding in the results below, you may:
 - Create a UNI for this person and add them to the population with the search information you provided:
 - [Perform another search](#) with more information to narrow the results, or less information to broaden the results

Person Information	
UNI	sd3055
Name	Doo, Shaggy
Date of Birth	01/01/1915
UPN	424753017
UCN	



Population Entry Information				
Department	Title	Sub-Affiliation	Expiration	Source
Test Feed	Financial Analyst	Contractor	12/30/2016	Edit

Select department

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.

Edit Person Data for sd3055 in population IDM0040 - Test Feed

UNI	<input type="text" value="sd3055"/>
UCN	<input type="text"/>
First Name*	<input type="text" value="Shaggy"/>
Middlename	<input type="text"/>
Surname*	<input type="text" value="Doo"/>
Suffix (Jr, Sr, II, III, IV, V)	<input type="text"/>
Date of Birth*	January ▼ 01 ▼ 1915 ▼
Sub-Affiliation*	Contractor ▼ 
Title*	<input type="text" value="Financial Analyst"/>
Department*	<input type="text" value="Test Feed"/>
Phone (e.g. 2128541754)	<input type="text"/>
AltPhone	<input type="text"/>
Fax	<input type="text"/>
Directory Release*	Yes <input type="radio"/> No <input checked="" type="radio"/>
Gender	Male <input checked="" type="radio"/> Female <input type="radio"/>
Full Time/Part Time*	Full Time <input checked="" type="radio"/> Part Time <input type="radio"/>
Office Address if none, Residence*	<input type="text" value="615 W 131st St"/>
Address (line 2)	<input type="text"/>
Address (line 3)	<input type="text"/>
City*	<input type="text" value="New York"/>
State (e.g. NY, NJ) required for USA & Canada	<input type="text" value="NY"/>
Postal code*	<input type="text" value="10027"/>
Country*	<input type="text" value="USA"/>
End Date*	December ▼ 30 ▼ 2016 ▼ 

* - required field

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.

CUIT > DIA > Manage Populations > 3480000 - Music Population

Edit a DIA entry or view a PAC entry by clicking on the name.

Name	Title	Sub-Affiliation	Department	Phone	UNI	UPN	UCN	End Date	Source
Aero, Tyler	Instructor	Instructor	Music	212-854-3825	ra11	35617042		11/10/2005	DIA
Algar, Garth	Drummer		Music		ga2320	30859894		10/01/2008	DIA
Amp, Michelle	Departmental Administrator	Administrator	Music Department	212-854-3825	m1a23	96141934		11/23/2007	DIA
Annodam, Madonna	Teaching Fellow	Instructor	Music	212-854-3825	cdb210	52031241		03/20/2007	DIA
Ant, Perry	Music Associate	Instructor	Music	212-854-3825	ma22	90647272		06/19/2004	DIA
Apple, Victor	Teaching Fellow	Instructor	Music	212-854-3825	vga21	35478324		02/24/2007	DIA
Artman, Phil	Music Associates	Student Officer	Music	212-854-3825	pb21	61472603		11/20/9999	PAC
Campbell, Wayne	Named Professor	Instructor	Music	212-851-9999	wc2418	40262073		04/30/2008	DIA

Diagram 22: Department Population Roster

B. DELETING A RECORD

- ▶ From the edit record screen you can remove a DIA entry by hitting the “Delete Entry” button located at the bottom of the screen (this is a fairly new feature).

Edit Person Data for sd3040 in population IDM0040 - Test Feed

UNI: sd3040

UCN: [Empty]

First Name*: Scooby

Middlename: [Empty]

Surname*: Doo

Suffix (Jr, Sr, II, III, IV, V): [Empty]

Date of Birth*: August 31 1915

Sub-Affiliation*: Service Technician

Title*: The Ghost

Department*: Test Feed

Phone (e.g. 2128541754): [Empty]

AltPhone: [Empty]

Fax: [Empty]

Directory Release*: Yes No

Gender: Male Female

Full Time/Part Time*: Full Time Part Time

Office Address if none, Residence*: asdfasdf

Address (line 2): [Empty]

Address (line 3): [Empty]

City*: asdfasdf

State (e.g. NY, NJ) required for USA & Canada: as

Postal code*: 00000

Country*: USA

End Date*: September 30 2016

* - required field

Update Entry

Delete Entry

- ▶ When deleting a record you get rid of the affiliation but the UNI does not disappear, please notify the Identity Access Management Team if a duplicate UNI is created.
- ▶ After the record is deleted you will see a screen similar to the below when you search the user again.

Your search returned 1 result

- [Perform another search](#) with more information to narrow the results, or less information to broaden the results

Person Information				
UNI	sd3040			
Name	Doo, Scooby			
Date of Birth	08/31/####			
UPN	379907320			
UCN	[Empty]			
Department	Title	Sub-Affiliation	Expiration	Source

Select department: [Dropdown] ---Choose a population---

Add role to sd3040

- ▶ As you can see the Record disappears completely but leaves the Person information. This is also where you will add a role to this user and give them an affiliation and a new Record.

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 askcuit@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 list of your populations (see diagram 24) from which you must select one. Otherwise, a list of the individuals in your single population will launch directly.

The screenshot shows a navigation path at the top: CUIT > DIA > Manage Populations. Below this is the heading **Department Populations** and the instruction "Click on an Population Code to Select Population". A table with two columns, "Population Code" and "Department Name", lists various departments. The codes are underlined and appear to be clickable.

Population Code	Department Name
ACIS	Acad Info Svc Gp-Lib
ADAC	Central Admin Accts
AHAR	Art Hist & Archaeol
AIS	Ais Computing
AISC	Ais Communications
ALP	Amer Language Pgm
AMAS	American Assembly
AMCS	Amer Culture Studies
AMER	American Studies
ANCL	Anatomy & Cell Biol
ANES	Anesthesiology
ANTH	Anthropology
APAM	App Physc & App Math

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.

CUIT > DIA > Manage Populations > 3480000 - Music Population



Edit a DIA entry or view a PAC entry by clicking on the name.

Name	Title	Sub-Affiliation	Department	Phone	UNI	UPN	UCN	End Date	Source
Aero, Tyler	Instructor	Instructor	Music	212-854-3825	ra11	35617042		11/10/2005	DIA
Algar, Garth	Drummer		Music		ga2320	30859894		10/01/2008	DIA
Amp, Michelle	Departmental Administrator	Administrator	Music Department	212-854-3825	mla23	96141934		11/23/2007	DIA
Annodam, Madonna	Teaching Fellow	Instructor	Music	212-854-3825	cdb210	52031241		03/20/2007	DIA
Ant, Perry	Music Associate	Instructor	Music	212-854-3825	ma22	90647272		06/19/2004	DIA
Apple, Victor	Teaching Fellow	Instructor	Music	212-854-3825	vga21	35478324		02/24/2007	DIA
Artman, Phil	Music Associates	Student Officer	Music	212-854-3825	pb21	61472603		11/20/9999	PAC
Campbell, Wayne	Named Professor	Instructor	Music	212-851-9999	wc2418	40262073		04/30/2008	DIA

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 sd3055 in population IDM0040 - Test Feed

UNI	<input type="text" value="sd3055"/>
UCN	<input type="text"/>
First Name*	<input type="text" value="Shaggy"/>
Middlename	<input type="text"/>
Surname*	<input type="text" value="Doo"/>
Suffix (Jr, Sr, II, III, IV, V)	<input type="text"/>
Date of Birth*	January ▼ 01 ▼ 1915 ▼
Sub-Affiliation*	Contractor ▼ 
Title*	<input type="text" value="Financial Analyst"/>
Department*	<input type="text" value="Test Feed"/>
Phone (e.g. 2128541754)	<input type="text"/>
AltPhone	<input type="text"/>
Fax	<input type="text"/>
Directory Release*	Yes <input type="radio"/> No <input checked="" type="radio"/>
Gender	Male <input checked="" type="radio"/> Female <input type="radio"/>
Full Time/Part Time*	Full Time <input checked="" type="radio"/> Part Time <input type="radio"/>
Office Address if none, Residence*	<input type="text" value="615 W 131st St"/>
Address (line 2)	<input type="text"/>
Address (line 3)	<input type="text"/>
City*	<input type="text" value="New York"/>
State (e.g. NY, NJ) required for USA & Canada	<input type="text" value="NY"/>
Postal code*	<input type="text" value="10027"/>
Country*	<input type="text" value="USA"/>
End Date*	December ▼ 30 ▼ 2016 ▼ 

* - required field

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

A new button has been added to the **Edit Record** screen to allow the deletion of DIA records (please see Ch. 5 section B. for more information). Again note that deleting the DIA record **DOES NOT** delete the UNI.

Chapter 7: Helpful Information

A. RECONCILIATION OF DATA ENTERED INTO PEOPLESOFT 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:

Population	Card Role	Data updated by data from PeopleSoft?
Administrator	CU Officer	Yes
Instructor	CU Officer	Yes
Librarian	CU Officer	Yes
Researcher	CU Officer	Yes
Support Staff	CU Employee	Yes
Casual	CU Employee	Yes
Consultant	CU Contractor	No
Service Technician	CU Service Technician	No
Student Officer	None	Yes
Visitor	CU Visitor	No
University Affiliate	CU University Affiliate	No
Trustee	Trustee	No
Guest	None	No
Service Corp	CU Contractor	No

Table 5: Population Card Role

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

Sub-affiliation	End Date Max	Card Affiliation	Cause of Affiliation Expiration	Card Expiration
Administrator	2 months	CU Officer	Dropped from PAC feed	10 years
Instructor	6 months	CU Officer	Dropped from PAC feed	10 years
Librarian	2 months	CU Officer	Dropped from PAC feed	10 years
Researcher	2 months	CU Officer	Dropped from PAC feed	10 years
Support Staff	2 months	CU Employee	Dropped from PAC feed	10 years
Casual	4 months	CU Employee	Dropped from PAC feed	1 year
Consultant	1 year	CU Contractor	Campus End Date expires	1 year
Service Technician	1 year	CU Service Technician	Campus End Date expires	1 year
Student Officer	2 months	None	Dropped from PAC feed	Dependent on student status
University Affiliate	3 years	CU University Affiliate	Campus End Date expires	3 years

Visitor	1 year	CU Visitor	Campus End Date expires	1 year
Service Corp	1 year	CU Contractor	Campus End Date expires	1 year

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

C. RETURNING EMPLOYEE/REACTIVATING EMAIL

When an employee is returning to the University or has had even a short gap in their appointment, their Email account will quite possibly be deactivated. In order to restore LionMail access, first update or create a record in DIA, and then follow the steps below:

- Go to uni.columbia.edu
- Click on “Activate UNI or Email” link
- Proceed with activation process

After the user completes the activation process they will have access to LionMail and can log in normally using their UNI and password.

For CUMC employees, the department must contact CUMC IT to reactivate Email provided a valid DIA or PAC record exists.

If the user doesn’t remember their password, they will need to use the “Forgot Password” option at uni.columbia.edu. If necessary, please contact the CUIT Service Desk for assistance in resetting their password.

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 the First and Last Name of the person you are searching for, make sure you are using their legal names 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 role toUNI*".
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. From the results you will identify the correct record and click the *Edit* button under "Source".
4. The next page will be the user's DIA feed entry, here you will change the "End Date" section to a date in the future and click *Update Entry*.

C. LOOKUP A UNIQUE PERSON NUMBER (UPN) FOR A PERSON IN YOUR POPULATION

Unique Person Number (UPN) is an identifier that can be 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 an employee's privileges, you should both terminate the employee in PeopleSoft and also update the employee's End Date in DIA, if their DIA role is still active.

Note: most permanent employees, in PAC, do not have expiration dates associated with their positions and therefore do not 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.