# Appendix B: Detailed Procedures for Managing Access to Harvard's Financial Systems

## REQUESTING ACCESS

<table>
<thead>
<tr>
<th>User Category</th>
<th>Oracle and CREW</th>
<th>HUBS</th>
<th>GMAS</th>
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| **Harvard Employee**                   | • Tub AR submits request via the Oracle user security request online form to FSS Client Services.  
• FSS reviews the request and grants systems access accordingly.  
• If the request requires additional approvals (i.e. University wide access), FSS will process the request upon receipt of approval. | • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu.  
• See HUBS user security form in Appendix C | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details:  
   o Schools who own their standing teams submit the following:  
      ▪ User name  
      ▪ HUID  
      ▪ Action required (either set GMAS user flag to Yes or No)  
   o Schools who do not own their standing teams submit the following:  
      ▪ User name  
      ▪ HUID  
      ▪ Action required (either set GMAS user flag to Yes or No)  
      ▪ Standing team to which user needs to be added/removed |
| **Temporary Harvard Employee** (including students with jobs)** | • Tub AR submits request via the Oracle user security request online form to FSS Client Services.  
• The Form must specify the temporary employee's expected termination date.  
• FSS reviews the request and grants systems access accordingly.  
• If the request requires additional approvals (i.e. University wide access), FSS will process the request upon receipt of approval. | • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu.  
• See HUBS user security form in Appendix C | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details:  
   o Schools who own their standing teams submit the following:  
      ▪ User name  
      ▪ HUID  
      ▪ Action required (either set GMAS user flag to Yes or No)  
   o Schools who do not own their standing teams submit the following:  
      ▪ User name  
      ▪ HUID  
      ▪ Action required (either set GMAS user flag to Yes or No)  
      ▪ Standing team to which user needs to be added/removed |
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| **Affiliated Hospital Employee** | • The Form must specify the affiliated hospital employee’s expected termination date (not to exceed January 31st of the following year).  
  • FSS reviews the request and grants systems access accordingly.  
  • If the request requires additional approvals (i.e. University wide access), FSS will process the request upon receipt of approval. | • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu.  
  • See HUBS user security form in Appendix C | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details:  
  o Schools who own their standing teams submit the following:  
    ▪ User name  
    ▪ HUID  
    ▪ Action required (either set GMAS user flag to Yes or No)  
  o Schools who do not own their standing teams submit the following:  
    ▪ User name  
    ▪ HUID  
    ▪ Action required (either set GMAS user flag to Yes or No)  
    ▪ Standing team to which user needs to be added/removed |
| **Consultant/Agency Employee**   | • **Tub AR must first email FSS to set user up in Oracle before access to specific systems can be granted.**  
  • Tub AR submits request via the Oracle user security request online form to FSS Client Services.  
  • The Form must specify the consultant/agency employee’s expected termination date (not to exceed one-year term).  
  • FSS reviews the request and grants systems access accordingly.  
  • If the request requires additional approvals (i.e. University wide access), FSS will process the request upon receipt of approval. | • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu.  
  • See HUBS user security form in Appendix C | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details:  
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| Harvard Employee      | • A terminated Harvard employee will automatically be disabled as a financial-systems user when that employee terminates from all jobs according to PeopleSoft.  
• In emergencies, an employee's access can be immediately disabled via phone call to Client Services; requestors must follow up with documentation/ written request for tracking purposes.  
• FSS regularly runs PeopleSoft reports to identify employee transfers. If a Harvard employee transfers to another position within the University, FSS notifies the tub’s AR that the transferred employee’s financial-systems access will be terminated unless the tub’s AR requests otherwise. | • ARs email termination/extension request to hubssecurity@harvard.edu | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu |
| Temporary Harvard Employee | • FSS will terminate a temporary employee’s access on the specified termination date or when the employee terminates from all jobs according to PeopleSoft, if sooner.  
• If a temporary employee transfers to another position within the University, FSS notifies the tub’s AR that the transferred temporary employee’s financial-systems access will be terminated unless the tub’s AR requests otherwise.  
• If a temporary employee terminates employment before his or her expected termination date, the tub’s AR must notify FSS.  
• In emergencies, a temporary employee’s access can be immediately disabled via phone call to Client Services; requestors must follow up with documentation/ written request for tracking purposes. | • ARs email termination/extension request to hubssecurity@harvard.edu | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu |
### Terminating/Extending Access and Employee Transfers

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| **Affiliated Hospital Employee** | • FSS will terminate an affiliated hospital employee’s access on the specified expected termination date or on January 31st of the following year, whichever date occurs first.  
• If the affiliated hospital employee needs continued access, the tub’s AR must request an extension from FSS; the extension must not exceed January 31st of the following year.  
• If an affiliated hospital employee terminates employment before his or her expected termination date, the tub’s AR must notify FSS.  
• In emergencies, an affiliated hospital employee’s access can be immediately disabled via phone call to Client Services; requestors must follow up with documentation/ written request for tracking purposes.  
• ARs email termination/extension request to hubssecurity@harvard.edu | • ARs email termination/extension request to hubssecurity@harvard.edu | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu |
| **Consultant/Agency Employee**   | • FSS will terminate a consultant or agency employee’s access on the specified expected termination date.  
• If the consultant or agency employee needs continued access, the tub’s AR must request an extension from FSS; the extension must not exceed one year.  
• If a consultant/agency employee terminates employment before his or her expected termination date, the tub’s AR must notify FSS.  
• In emergencies, a consultant/agency employee’s access can be immediately disabled via phone call to Client Services; requestors must follow up with documentation/ written request for tracking purposes.  
• ARs email termination/extension request to hubssecurity@harvard.edu | • ARs email termination/extension request to hubssecurity@harvard.edu | • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu |