

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

REQUESTING ACCESS			
User Category	Oracle and CREW	HUBS	GMAS
Harvard Employee	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu. • See HUBS user security form in Appendix C 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details: <ul style="list-style-type: none"> ○ Schools who own their standing teams submit the following: <ul style="list-style-type: none"> ▪ User name ▪ HUID ▪ Action required (either set GMAS user flag to Yes or No) ○ Schools who do not own their standing teams submit the following: <ul style="list-style-type: none"> ▪ 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)	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu. • See HUBS user security form in Appendix C 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details: <ul style="list-style-type: none"> ○ Schools who own their standing teams submit the following: <ul style="list-style-type: none"> ▪ User name ▪ HUID ▪ Action required (either set GMAS user flag to Yes or No) ○ Schools who do not own their standing teams submit the following: <ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu. • See HUBS user security form in Appendix C 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details: <ul style="list-style-type: none"> ○ Schools who own their standing teams submit the following: <ul style="list-style-type: none"> ▪ User name ▪ HUID ▪ Action required (either set GMAS user flag to Yes or No) ○ Schools who do not own their standing teams submit the following: <ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> • <i>Tub AR must first email FSS to set user up in Oracle before access to specific systems can be granted.</i> • 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. 	<ul style="list-style-type: none"> • ARs submit a completed HUBS user security form via email to hubssecurity@harvard.edu. • See HUBS user security form in Appendix C 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu and include the following details: <ul style="list-style-type: none"> ○ Schools who own their standing teams submit the following: <ul style="list-style-type: none"> ▪ User name ▪ HUID ▪ Action required (either set GMAS user flag to Yes or No) ○ Schools who do not own their standing teams submit the following: <ul style="list-style-type: none"> ▪ 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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TERMINATING/EXTENDING ACCESS AND EMPLOYEE TRANSFERS			
User Category	Oracle and CREW	HUBS	GMAS
Harvard Employee	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs email termination/extension request to hubssecurity@harvard.edu 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu
Temporary Harvard Employee	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs email termination/extension request to hubssecurity@harvard.edu 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu

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User Category	Oracle and CREW	HUBS	GMAS
Affiliated Hospital Employee	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs email termination/extension request to hubssecurity@harvard.edu 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu
Consultant/Agency Employee	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • ARs email termination/extension request to hubssecurity@harvard.edu 	<ul style="list-style-type: none"> • GMAS ARs submit requests in body of an email to gmassecurity@camail.harvard.edu