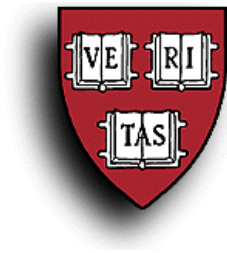


Information Technology – Infrastructure Services



IdM XML Export Data Users Guide

Version 1.3

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Title: **IdM XML Export Data Users Guide**

Synopsis: This document details the how to use the data found in the identity data database (IdDB).

Status: APPROVED



Amendment History

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June 20, 2007	1.2	Added 2.1.7 Codes Tables, 2.1.8(14) – Effective Date as a record key, 3.1.4(15) – appointment end date, 3.1.4(16) – Longwood quad, 3.2.3(12) – HUID's school_2, 3.2.3(13) – 2 roles in the same school, 3.2.3(14) – MIT/HST students, 4.3.1(5) – address to role relationship, 4.3.1(6) – Mail Realm Revised 2.1.8(3) – Delete Action Code for person, 2.1.8(9) – birth date and gender inclusion, 3.2.3(6) – student primary role indicator (no logic change, description updated).	Hope Joslyn
December 7, 2007	1.3	Updated 2.1.8 – FAQs for the person object, question #3	Hope Joslyn



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1 INTRODUCTION

The following document was developed in an effort to assist IdDB XML export customers in becoming familiar with IdDB data. It was accumulated from actual customer questions and answered by the Directory Services product team in conjunction with the ITIS Technical team. Should you have any questions or concerns, feel free to e-mail the Directory Services team (directory_services@harvard.edu).

2 BASICS

The IdDB is an effective dated database. HUID was not. The business benefit of effective dating is the ability to handle future dated data as well as a more detailed transaction history.

2.1.1 Effective Status

The Effective Status will be either 'A' for Active and 'I' for Inactive. An inactive object from the business sense is a 'delete' of the given piece of data.

2.1.2 Action Codes

Action codes denote how the information should be treated by the recipient. Two options are available for the action tag:

- 'update' - signifies an update or an addition
- 'delete' - signifies a deletion.

When an attribute of one or more objects is needed to be updated, the entire object in which the attribute is located is provided with all other attributes completed as necessary.

2.1.3 Mandatory / Optional Attributes

The XML schema defines some attributes as mandatory. Some mandatory attributes are needed in order to process the file. For example, database record keys are defined as mandatory. Other mandatory attributes are what the business considers critical attributes to the object definition. All exports will receive a minimum of the mandatory attributes plus the optional attributes requested.

2.1.4 Person Object

The person object will be included regardless of the data requested. The person object serves as a wrapper for the secondary objects as well as carrying some person-level information.

2.1.5 Nuances in reading the XML

- 'pd:' tag - this is pointer to the people data schema
- `xsi:nil="true"` - XML Schema does not allow null integer, date, date time, and boolean values to be identified solely through empty tags. A null value is represented with `xsi:nil="true"` in the attribute tag.

2.1.6 Roles

A role is an indication of the person's affiliation(s) with the University. There are currently 4 general categories of roles: Employees (job object), Students (student object), Library Borrowers



(libraryBorrower object) and Persons of Interest (poi object). Further sub-definition of affiliation is derived from detailing the role. Highest level of sub-definition is found in the roleType.

Object Category	RoleType Code	roleType Description
employee	EMPLOYEE	Employee
libraryBorrower	WIDENER	Widener special borrower
libraryBorrower	LOEB	Loeb special borrower
libraryBorrower	COUNTWAY	Countway special borrower
poi	FAMILY	Family member
poi	CONSULT	Consultant
poi	CONTRACT	Contractor
poi	VENDOR	Vendor
poi	SECURITY	Security
poi	OTHER	Other
poi	RETIREE	Retiree
poi	SPOUSE	Spouse of deceased retiree
poi	HOSPRET	Retired hospital affiliate
poi	HOSPSPOU	Spouse of deceased hosp affil
poi	OVERSEER	Overseer
poi	SAOAFIL	Smithsonian Astro Observ affil
poi	HMCEMP	Harvard Management Co Employee
poi	ICOMMONS	iCommons affiliate
student	STUDENT	Student
student	CLASPART	Class Participant

2.1.7 Codes tables

The IdM data contains codes. Daily IdM loads all codes tables to <http://xml.cadm.harvard.edu/idm-xml/>. This site should be referenced to find the description of a corresponding code contained within a person’s data.

2.1.8 FAQ’s

1. What is the difference between the update date & the effective date?
 - The update is when IdDB received the given change where the effective date is the date when the record takes effect. Some records, especially job object, may have a future effective date. From the business perspective a future effective job record indicates that a person will begin a job on a future date. In contrast HUID was only aware of new employees on the first day of the job.

2. Will I see future effective dates?
 - Yes, it is possible that there will be future effective dated records. It should be noted that most customer have requested to receive only what is considered current; this will in effect remove the possibility of the future effective dated records to these customers.

3. Will I see a Delete Action code for a person? Role?



- Yes, when a person previously qualified for inclusion in an export but ceases to qualify AND a change has been made to the person's record (an effective date or update date is within the time frame the export is looking for changes), a delete action will be received with the date & time of the file processing used for the person.effectiveDate and person.updateDate. Similarly, if a person has multiple roles and a particular role falls into a state where it no longer qualifies for inclusion AND a change has been made to the person's record (an effective date or update date is within the time frame the export is looking for changes), a delete action for the given role will be received with the <role>.effectiveDate and <role>.updateDate reflecting the date and time received by the source updating the role.
 - It is important to note that for feeds that rely on role dates to determine qualification for inclusion (most incremental feeds), once a person's role(s) has aged out that there is no notification within the export. As the IdM code relies on a change being made to the person's record (an effective date or update date is within the time frame the export is looking for changes) the passage of time will not prompt a transaction to be included within the feed. For example, a POI is set up with a role end date of 12/1. The feed runs on 12/2. Nothing at this time is sent. On 12/25 there is a change to the person's email address. At this time the delete transaction is sent as the IdM code has received a change and prompted it to determine whether the person qualifies for inclusion.
4. What if I don't need a mandatory object for my local process?
- Simply ignore the attribute when consuming the object.
5. What is the minimum amount of data about a person I can expect to see?
- IdM expects to receive a minimum of a Last Name, Date of Birth & one role object in order to define a person. Note that some persons will have an inaccurate year of birth as there is business policy that restricts us from collecting the year of birth from some individuals. Currently this only occurs on Smithsonian Affiliates where you will see the year of birth as either 1900 or 2000.
6. What is a prime role indicator and will it tell me the person's prime affiliation with the University?
- The prime role indicator (<roleObject>.primeRoleIndicator) is a representation the person's primary affiliation per role category. It is not a representation of the person's prime affiliation with the University. For example, there is no determination that can be made from the data as to whether a person is a student also employed or if it is an employee taking a class.
7. What is the difference between saying a person is '**current**' versus saying a person is '**active**'?
- Current is a reference to the term of the role (role start date through role end date). Active is a reference to a person's status. Only the job and student role object hold a status. The poi and libraryBorrower role object do not contain a status and therefore one must rely solely on the role dates. Both terms, 'current' and 'active' are often used interchangeably however, it is important to evaluate using both the role term and status. Please see the individual role sections for a detail description of determining is a person is currently active.
8. What is PNG Status?



- PNG status means that someone has been flagged as a Persona Non Grata. He/she is someone, in short, who has been deemed not welcome on the University Campus by the Harvard University Police. Only the HUPD Chief of Police or Chief of Staff may issue a Trespass Letter to an individual. Through a defined business process the Chief will notify Directory Services to have the flag updated within the IdDB.
9. Why are birth date and gender not included in my file?
- Gender and birth date are only included if you are subscribed to receiving this data.
10. What is student special status? Why is it at the person level compared to the student role?
- This field is used to indicate which students carry the G4 status. The libraries consume this for borrowing privileges. The Registrars at GAS, the Divinity School and the Law School provide the ID Office a list of students who qualify and it is then manually updated in the MIDAS system. There isn't a codes list but arguably there could be. The 3 potential values are 32G4, 39G4 and 58G4 (where the first 2 digits represent the school code where the privileges have been afforded). The process remains manual as the student's year is not always a true indicator of the G4 status; some schools chose to grant privileges based on credit transfers from other schools.
The student special status is carried at the person level because it cannot be mapped to a specific student role.
11. Why is there an Ethnicity object in the schema?
- Ethnicity is used in the Hiring process of PeopleSoft. It is supported in the XML Schema as the IdDB provides student data to PeopleSoft. Ethnicity is not used in any security nor access management logic.
12. Why do I see the person object every time a record is sent?
- In addition to carrying person-level information like gender, birth date etc., the person object serves as a wrapper for secondary objects like address, emailAddress, job. etc.
13. If the person object is included every time, how do I know when those pieces of data have truly changed?
- Person-level attributes such as gender, birthDate, etc are included only when there is a change to one of these attributes. When the person object is serving only as a wrapper for secondary objects, only univId, effectiveDate, effectiveStatus, updateBy, updateDate and updateSource (the mandatory attributes) are populated.
14. I see Effective Date is part of the record key; it looks like it is changing each update I receive to the same piece of data. Is this an update to data I have already received or is it new?
- Effective date is the data on which the record becomes active. If supporting an effective dated database, effective date is part of the record key. If simply trying to replace a previously received data the effective date should be ignored as a part of the record key.



3 ROLE DEFINITIONS

This section will assist you in reading the XML formatted message to define the populations of interest accurately.

3.1 Employees

The presence of the job object indicates that someone is an employee. IdM receives job data from PeopleSoft.

3.1.1 Definition of Current Active Employee

Current active employees are those where there is at least one job object that meets both of the following criteria:

- The role is current when
 - job.roleStartDate is equal to or less than today;
 - job.roleEndDate is null or equal to or greater than today;
- The role is active when
 - job.employmentStatus is one of the following:

Employment Status Code	Employment Status Description
A	Active
L	Leave of Absence
P	Leave With Pay
S	Suspended

If either the role is not current or inactive, IdM does not meet the current active affiliation definition. Key: remember to evaluate all roles for a person.

3.1.2 Employment Classes

Below is a guide to the PeopleSoft employee classes as well as typical categorizations. Directory Services suggests consulting with HR subject matter experts if you have detailed questions.

Employee Class		
Class Description	Class Code	Category
Admin & Professional	A	Exempt Staff
Special Exclusion	B	Faculty
Temporary Academic	C	Faculty
Temporary Student	D	Temporary Staff
Intern	E	Non Exempt Staff
Senior Faculty	F	Faculty



Graduate Students	G	Exempt Staff
Harvard Grad Stud. Fellowship	H	Non Employee
TAs, Other Staff	I	Exempt Staff
Junior Faculty	J	Faculty
Part Time Service & Trade	L	Non Exempt Staff
External Post Docs NHR	N	Post Docs
Other Faculty	O	Faculty
Apprentice	P	Non Exempt Staff
Survivor	R	Non Employee
Support Staff	S	Non Exempt Staff
Temporary Staff	T	Temporary Staff
Service & Trade Hourly	U	Non Exempt Staff
Temp Off Campus Work Study	W	Temporary Staff
Ex-Spouse	X	Non Employee
Internal Post Docs	Y	Post Docs
Ext Post Docs Harvard Research	Z	Post Docs

3.1.3 Considerations for the employee population

There are nuances of the employee data which are important to consider within your own business context:

- Employee Class H – this population identifies students who are receiving financial stipends. Most often the employee role will be concurrent to a student role. However, this may not always be the case. Customers often ignore this population when according employee privileges since they are not ‘job holders’.
- Emeritus Faculty – Emeritus signifies a person who is retired from the University, however it is presented with a current active job with a jobCode that equates to emeritus. There will be a concurrent retiree role (poi.roleType = RETIREE) for the same person.
- Extended Part time – this is carried at the person level in the person. huEPEStatus attribute.
- Longer Service – Longer Service is provided by PeopleSoft as an indication of employees who have 15 or more years of service. It is carried at the person level in the person. longerService attribute.
- Post Docs – If you are concerned with determining whether a group like this should be afford a particular privilege; please consult the Office of Human Resources. From a legal point of view, the post docs are not employees of Harvard University. However, in many cases they are treated as employees.

3.1.4 FAQ’s – Employees

1. Can a person be active but non-current or current and non-active?
 - The short is answer is yes. Although it is not expected, it may occur.
2. How do I tell the non-current inactive employees?



- job.roleStartDate is greater than today;
or
- job.roleEndDate is less than today;
or
- job.employmentStatus is one of the following:

Employment Status Code	Employment Status Description
D	Deceased
Q	Retired With Pay
R	Retired
T	Terminated
U	Terminated With Pay
V	Terminated Pension Pay Out
W	Short Work Break
X	Retired-Pension Administration

3. Will I see future hires or rehires?
 - It is up to each customer to determine whether they are interested to receive future employees. Most customers elect to receive only current employees. A future employee is defined as a person with a future effective dated job object. The object should also have a future dated job.roleStartDate.

4. How is prime role determined?
 - Prime role is determined by PeopleSoft and fed to the IdDB. PeopleSoft guarantees that only one current role will be indicated as prime. Note that any number of past roles may also be indicated as a prime role.

5. What is the RoleId?
 - This corresponds to the PeopleSoft job number.

6. What can I expect to see a department transfer or a promotion?
 - The data will vary depending on the given case. Most often a promotion will present itself with a new jobCode to the same RoleId. A transfer most often is seen with a new DepartmentId and often uses the same roleId. As all job data is provided by PeopleSoft, IdM cannot guarantee how the data will be presented in another fashion.

7. How do I tell if someone has an additional job?
 - An additional concurrent job will have been represented with a separate instance of the job object.

8. How do I know if this is a full-time or part-time job?
 - IdM no longer carries this data about a given job.

9. Will I ever see a person with no prime role?
 - The answer is yes. Although it is not expected, it may occur.



10. What is the difference between a Start Date (job.roleStartDate) and a Hire Date (job.hireDate)?
- The hireDate value is the original hire date for a job. roleStartDate is the most recent value of hire date, rehire date or job entry date (note the job entry date is not carried in IdDB).
11. How do I determine if someone is an Officer?
- There is no longer a University standard definition of 'Officer'. It roughly equates to Exempt Staff & Faculty and often includes Post Docs (see 3.1.2 Employment Classes). Local definitions vary.
12. How do I tell if someone is retired?
- The job.EmploymentStatus may be R (Retired) however IdDB will also have poi.roleType of RETIREE. IdM recognizes someone as a retiree when the RETIREE poi role type exists (not by the employment status). Please see the POI Role Section for details on retirees.
13. I used to use the Employee Special Status ('RE', 'BN', 'RH', 'OV' etc) in HUID. Where do I find those now?
- For the most part, in IdDB each of these special statuses has been broken down into its own role. See the table below for where to find them now:

HUID		IdDB
emp_spec_stat	emp_spec_stat_desc	where to find
BN	Beneficiary	poi.roleType = SPOUSE
DE	Deceased	GAP, it is not carried at the person level. It is carried only at the role level for a student (student.studentStatus = D) or employee (job.employmentStatus = D).
EP	Extended Part-Time Staff	person.huEPEStatus = TRUE
HM	Harvard Management Company	poi.roleType = HMCEMP
OV	Overseer	poi.roleType = OVERSEER
RE	Retiree	poi.roleType = RETIREE
RH	Retired Hospital Affiliate	poi.roleType = HOSPRET
SH	Spouse of Deceased Retired Hospital Affiliate	poi.roleType = HOSPSPOU

14. Why are the values for Faculty Code different in IdDB versus HUID?
- 'Faculty Code' in the HUID database is an obsolete classification system for grouping HR departments. It dates back to the old IDMS HR System. In HUID, it was superseded by the PeopleSoft affiliation code. It has been renamed in IdDB to reflect its applicability across student and poi roles in addition to employee roles.
15. Should be using the appointment end date or role end date when determining a job's end date?
- Both are provided by PeopleSoft to the IdDB. Appointment end date is a



predicted end date and would only be populated when the employment status is 'A', 'L', 'P', 'S', though may also not be provided. Role end date should be used when determining current versus non-current.

16. How can I tell who is in the Longwood 'Quad'?

- address.location will be one of the following:

Location Code	Description
H05532	HMS Vanderbilt Hall
H05544	HMS Seeley G Mudd
H05551	HMS Warren Alpert
H05589	HMS, One Kendall Square
H05594	HMS, Family Van
H02805	HMS Landmark Ctr
H05501	HMS NEPRC, 1 Pine Hill Dr
H05502	HMS NEPRC,1 Pine Hill,Anml Res
H05503	HMS NEPRC,1 Pine Hill,Low LWst
H05504	HMS NEPRC, 1 Pine Hill, Annes1
H05533	HMS Gordon Hall
H05534	HMS Goldenson
H05535	HMS 240 Longwood Ave
H05536	HMS Arminese
H05538	HMS 643 Huntington Ave
H05539	HMS 180 Longwood Ave
H05540	HMS 641 Huntington Ave
H05541	HMS Countway 10 Shattuck St
H05542	HMS 164 Longwood Ave
H05543	HMS LHRRB 45 Shattuck St
H05560	HMS 220 Longwood Ave
H05563	HMS MEC
H86002	HMS NERCE/BEID,200 LongwoodAve
HX2048	HMS NRB, 77 Ave Louis Pasteur
HX0035	HMS, 250 Longwood Ave
HX0051	HMI,1135 Tremont St

3.2 Student

The presence of the student object indicates that someone is either a degree or certificate seeking student (student.roleType = STUDENT) or a class participant (student.roleType = CLASPART). IdM receives student data from the Student Information System (herein, SIS) and individual registrars who either provide a feed of data or enter data manually to the IdDB through the MIDAS application.

3.2.1 Definition of Current Active Student

Current active students are those where the at least one student object that meets the following criteria:



- The role is current when
 - student.roleStartDate is equal to or less than today;
 - student.roleEndDate is null or equal to or greater than today;
- The role is active when
 - student.studentStatus is one of the following:

StudentStatus Code	StudentStaus Description
R	Registered
EG	Registered
P	Pending Enrollment
SP	Special Program
SA	Study Abroad
LF	Leave, Paying Facilities Fee
LA	Leave of Absence
EP	Registered
A	Active class participant

3.2.2 Considerations for the student population

There are nuances of the student data which are important to consider within your own business context:

- HUID's school_1 and school_2 – in HUID the schools for a student were carried in the school_1 and school_2 fields. In IdDB school_1 and school_2 no longer exist. The presence of multiple student role objects indicates that the student is attending more than 1 school.
- Student versus Class Participant – the student role can be broken down into 2 general categories defined within the student.roleType
 - STUDENT – this is a person in a degree or certificate program
 - CLASPART – this is a person simply taking a class / course

3.2.3 FAQ's – Student

1. Why do I see student role start dates that do not appear to correspond to the registration calendar?
 - Student role start dates are supplied by the source system of record. In the case of newly admitted students, the role start date typically corresponds to the timeframe in which the student accepted admission, and was assigned a Harvard ID number by the Registrar.



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2. Does past student indicator have anything to do with student status?
 - No. This is a flag that is used in conjunction with FERPA status only.

3. Why are board house and resident house included for students who are not undergraduates?
 - The IdDB supports the same database structure for all students, undergrad, grad or class participant. House codes are populated for undergrads and Summer School students.

4. What is the difference between graduation date, last date of attendance, and role end date?
 - Graduation Date is the expected date where the student graduates. Note a class participant does not receive a degree and therefore, would not have a graduation date. The Last Attendance Date is the last date a student attended classes, either due to the end of semester or premature separation (i.e. withdrawal from the University). The Role End Date is calculated using either the Graduation or Last Attendance as described below:

	What we do in HUID	What we will do in IdDB
Last Date Of Attendance		
DCE degree	No value (blank)	Will be blank until the grad date or date of separation has passed
Student Fed through SIS	SIS provides it to HUID. SIS only provides it when the person is gone (in hindsight). In a few cases -- deferred admission and never enrolled – HUID never receives a last attendance date, (because they never attended).	SIS provides it to IdDB. SIS only provides it when the person is gone (in hindsight). In a few cases -- deferred admission and never enrolled – IdDB never receives a last attendance date, (because they never attended).
Program participant or Summer School (regardless of school)	No value (blank)	Will be blank until the grad date or date of separation has passed
Grad Date		
DCE degree	DCE provides it	DCE provides it
SIS	SIS provides it to HUID in form of Month and Year. HUID inserts the last day of the month.	SIS will provide IdDB Month Day & Year. Unclear if it will be actual date of graduation or last day of month.
Program participant or Summer School (regardless of school)	DCE puts the term expiration date here	No value (blank)
Role End Date		
DCE degree	Does not exist	Expected graduation date or the separation date (in hindsight)
SIS	Does not exist	Expected graduation date or the separation date (in hindsight)
Program participant or Summer School (regardless of school)	Does not exist	Expected term expiration date or the separation date (in hindsight)



5. What is the difference between a degree program, special program and a department?
 - Degree program is an identifier of the degree toward which a student is studying, e.g. MD, PhD, MBA, etc. Special Program is an indicator of participation; used as a ‘catch-all’ to further define a student’s role, e.g. Traveling Scholar, Crimson Summer Academy. Department is used for GSAS students to indicate a student’s department of study, e.g. Romance Languages & Literatures, Linguistics, Mathematics, etc.

6. What is the business meaning of the prime student role?
 - IdM evaluates all student roles and applies a ranking order for the student roles. It is important to consider whether your own business needs can be achieved by only reading the primary student role; it does not apply in all business cases. For example, a student may be registered simultaneously at 2 schools, KSG & HBS. KSG may be set as prime. If your business rank HBS higher, you cannot rely on the prime setting.
 - The IdM system uses a formula to determine which student role is flagged as prime when multiple roles exist. The process at a high level ranks the roles as follows: Active, SIS roles over DCE or other sourced roles, degree seeking over non-degree seeking. The following is the detail of the process used to determine the prime student role.

Process for Evaluating

1. Evaluate all Student roles that are
 - a. Current (start date is less than or equal to today and role end date is greater than or equal to today)
 - AND
 - b. Have an Active Status.

Active statuses are as follows:

<u>Active?</u>	<u>Student Status</u>
Y	R Registered
Y	EG Expected Graduation
Y	P Pending Enrollment
Y	SP Special Program
Y	SA Study Abroad
Y	LF Leave, Paying Facilities Fee
Y	LA Leave of Absence
Y	EP End of Program
N	<i>GR Graduated</i>
N	<i>GH Graduated, Held for Fin. Reasons</i>
N	<i>ND Completed Non-Degree Program</i>
N	<i>DF Deferred Admission</i>
N	<i>NE Never Enrolled</i>
N	<i>NR Not Registered</i>
N	<i>WR Withdrawn</i>
N	<i>D Deceased</i>
Y	A Active class participant
N	<i>I Inactive class participant</i>

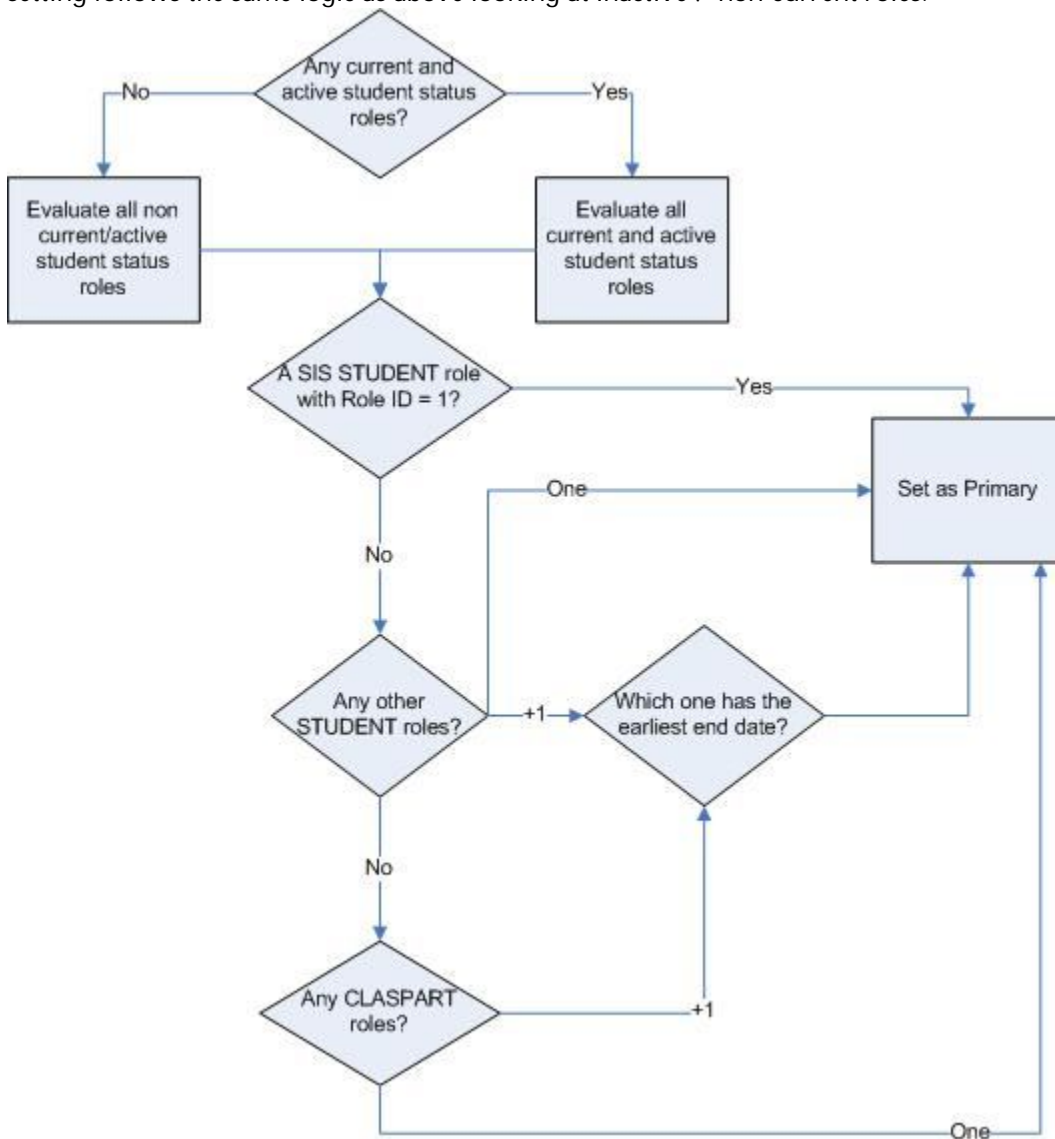
2. Of the roles that met the conditions in step 1, if there is an SIS sourced role with student.roleType =STUDENT and Role ID of 1 (SIS’s Primary School), set to Primary.



3. Else, if no SIS sourced role with student.roleType of STUDENT and Role ID of 1, evaluate all other roles with roleType of STUDENT. If there is one, set it to Primary. If there is more than one, set the one with the earliest role end date to Primary.

4. If no roles of type STUDENT exist, look for any other role of type CLASPART. If there is one, set this to Primary. If there is more than one, set the one with the earliest role end date to Primary.

If there are no roles which meet the conditions in step 1 (Active and Current) then setting follows the same logic as above looking at inactive / non-current roles.



7. Is there a way to tell if someone is primarily a student or primarily and employee?

- No.

8. How do I determine the newly admitted students that will be arriving this fall (or any given semester)?



- student.studentStatus = P

9. How do I determine the non-current inactive students?

- student.roleStartDate is greater than today;
or
student.roleEndDate is less than today;
or
student.studentStatus is one of the following:

StudentStatus Code	StudentStaus Description
GR	Graduated
GH	Graduated
ND	Completed Non-Degree Program
DF	Deferred Admission
NE	Never Enrolled
NR	Not Registered
WR	Withdrawn
D	Deceased
I	Inactive class participant

10. I've never seen a start date for a student before, what does it mean? Does it relate to when a student physically arrives on campus?

- The student.roleStartDate indicates when the role data at the given school was received by IdM. It does not relate to when the student physically arrives on campus.

11. I am seeing new student status values. What do these new values mean?

- In HUID users were presented with a 'rolled up' value of the student status. In IdDB the actual provided values are preserved. The following is a mapping of the IdDB values to the HUID values:

IdDB Code	Description	HUID Equivalent
R	Registered	R
EG	Registered	R
P	Pending Enrollment	P
SP	Special Program	SP
SA	Study Abroad	F
LF	Leave of Absence	F
LA	Leave of Absence	L
EP	Registered	R
GR	Graduated	GR
GH	Graduated, Held for Fin. Reasons	GH
ND	Completed Non-Degree Program	NR
DF	Deferred Admission	NR
NE	Never Enrolled	NR
NR	Not Registered	NR
WR	Withdrawn	W



D	Deceased	D
A	Active class participant	A
I	Inactive class participant	I

12. What happened to school_2 that I used to see in HUID?
 - HUID held school 1 & school 2 and maintained this data in one row. The IdDB environment improved the handling of student data by tracking the each role with its own status, dates, degree etc. School 2 would now be seen in the export as a separate instance of the student object.
13. Is it possible that a student would have 2 roles in the same school?
 - Yes, the IdM data structure supports a student having multiple roles in the same school.
14. How do I determine who the current/active MIT / HST Students are?
 - student.schoolCode is '60', student.roleStartDate is less than or equal to today, student.roleEndDate is greater than or equal to today, student.studentStatus is 'SP' and student.studentYear is 'HST'.

3.3 Persons of Interest

The presence of the poi object indicates that someone is a person of interest. A person of interest is someone who has an affiliation with the University and does not fall into the category of Employee, Student nor Library Borrower. IdM receives poi data primarily through user entry into the MIDAS application (a web-based application over the IdDB). Users of the application are distributed throughout the University; the group entering the poi data will depend on the role type in question.

Some poi data, like Smithsonian Astrophysical Observatory affiliate data, is provided through a feed.

3.3.1 Definition of current poi

Current poi's those where there is at least one poi object that meets the following criteria:

- The role is current when
 - poi.roleStartDate is equal to or less than today;
 - poi.roleEndDate is null or equal to or greater than today;

Note that unlike the employee and student role, the poi role object does carry a status. Therefore poi's are considered current / non-current with no further qualification of active / in-active.

3.3.2 Considerations for the poi population

There are nuances of the poi data which are important to consider within your own business context:





3.3.3 FAQ's – Persons of Interest

1. Will I see address, telephone and e-mail data for POI's?
 - The MIDAS application (the primary provider of poi data) allows users to enter address, telephone and email data for pois. However, they are not required to create the person's record. In other words, IdM cannot guarantee that there will be neither address, telephone nor email data for each poi.
2. How do I determine the non-current poi's?
 - poi.roleStartDate is greater than today;
or
poi.roleEndDate is less than today;
3. Is it possible that in a case of multiple poi role objects, that none will be marked as primary?
 - Yes, IdM does not evaluate poi roles against each other to determine the primary role.
4. Why do I see many directory privacy values blank for pois?
 - Directory privacy values are determined by membership in a 'privacy group', typically defined as a set of one or more faculty codes or school codes. Policy is usually set by registrars or administrative deans. The absence of a privacy value for a poi indicates that either that the affiliate does not fall into a defined privacy group or that the privacy group they belong to does not define default values for poi affiliates. Privacy for these individuals may be set in the MIDAS application by users who have sufficient privileges.

3.4 Library Borrowers

The presence of the libraryBorrower object indicates that someone is a library borrower. IdM receives library borrower data through user entry into the MIDAS application (a web-based application over the IdDB). Users of the application are distributed throughout the University including at Widener, Countway and Loeb libraries.

3.4.1 Definition of current library borrower

Current library borrowers those where a libraryBorrower object that meets the following criteria:

- The role is current when
 - libraryBorrower.roleStartDate is equal to or less than today;
 - libraryBorrower.roleEndDate is null or equal to or greater than today;

Note that unlike the employee and student role, the libraryBorrower role does not carry a status. Therefore libraryBorrower's are considered current / non-current with no further qualification of active / in-active.



3.4.2 Considerations for the library borrower population

There are nuances of the libraryBorrower data which are important to consider within your own business context:

- Due to restrictions within the Library’s systems, there is a maximum of one role per HUID. This may result in what looks like multiple HUIDs for the same person. For example a research assistant will have one HUID with an employee role and perhaps a student role. However, there will be another HUID with the library borrower role. IdM cannot guarantee that the contact data (address, phone, email, etc) will be the same. There is no connection maintained between the multiple HUID records for a given person.
- Library Borrower Role Types & Borrower Codes

The following is a list of the library borrower role types and the associated borrower codes one can expect to see.

roleType	libraryBorrowerCode	libraryBorrowerDescription
WIDENER	FASX	FAS Cross-Registered
WIDENER	OFFI	Research Assistant
WIDENER	SPLA	Special Borrower - Alum
WIDENER	SPLB	Special Borrower
WIDENER	SPLC	Special Borrower - College Alum
WIDENER	SPLF	Special Borrower - Fletcher
WIDENER	SPLM	Special Borrower - MIT
WIDENER	SPLO	Special Borrower - Extended Privileges
WIDENER	SPLU	Special Borrower
WIDENER	SPLW	Special Borrower - WGBH
WIDENER	ALUM	Special Borrower - GSD Alum
LOEB	RAHU	Research Assistant to HU Faculty
LOEB	RGSD	Research Assistant to GSD Faculty
LOEB	SPCC	GSD Special Corporate
LOEB	SPEC	GSD Special
COUNTWAY	CSPA	Longwood Area Alumnus
COUNTWAY	CSPB	Boston Medical Library
COUNTWAY	CSPG	Countway Special Borrower (General)
COUNTWAY	CSPR	Countway Research Assistant
COUNTWAY	CPSX	Countway Research Assist - no e-privileges

3.4.3 FAQ’s – Library Borrower

1. Will I see address, telephone and e-mail data for Library Borrower’s?
 - The MIDAS application (the provider of library borrower data) allows users to enter address, telephone and email data for library borrowers. However, they are not required to create the person’s record. In other words, IdM cannot guarantee that there will be either address, telephone or email data for each library borrower .
2. How do I determine the non-current library borrowers?



- libraryBorrower.roleStartDate is greater than today;
or
libraryBorrower.roleEndDate is less than today;
- 3. Will there be multiple library borrower role records per HUID?
 - No, there is a maximum of 1 library borrower role per HUID.
- 4. Why do I see many privacy values blank for library borrowers?
 - Directory privacy values are determined by membership in a 'privacy group', typically defined as a set of one or more faculty codes or school codes. Policy is usually set by registrars or administrative deans. The absence of a privacy value for a library borrower indicates that either that the affiliate does not fall into a defined privacy group or that the privacy group they belong to does not define default values for library borrower affiliates. Privacy for these individuals may be set in the MIDAS application by users who have sufficient privileges.
- 5. Is it okay for the same person to have a different HUID for their student role than their library borrower role?
 - Yes, it is expected.
- 6. How do I tell if a library borrower is a research assistant.
 - A research assistant will carry the libraryBorrowerCode of OFFI, RAHU, RGSD, CSPR or CSPX.
- 7. Who authorizes a library borrower?
 - The libraries maintain their own business rules for determining who may be a library borrower. Research Assistants will be linked with an authorizer in the data. This authorizer is the faculty member whom they are performing research.
- 8. What determines the end date of a library borrower role?
 - The libraries maintain their own business rules for the role end date. All libraries borrowers are required to have a role end date.

4 PERSON DATA DEFINITIONS

This section will assist you in understanding the data IdM XML Schema carries about a given person.

4.1 Directory Privacy

The XML people data schema contains a separate personPrivacy object. Directory privacy values are also stored in the database with the object to which they pertain. For example, the email privacy value is part of the email object. The IdM system keeps the privacy values in synch between the objects.

Please refer to this imbedded document for full detail on applying privacy in a Directory context.



Data Display and
Applying Privacy.doc

4.1.1 FAQ's – Directory Privacy

1. Should my local system use the privacy data?
 - The privacy system is designed to support the preferences of individuals with regard to whether their data should be displayed in the online directories. If your system is allowing users to browse the directory data of individuals, you need to determine whether the context of use is a 'back-office administrative use' or a directory lookup context. If your application is facilitating data redisplay to users who are not performing an administrative task with the data, then you should be filtering display based on privacy values. Please contact the Directory Product team at directory_services@harvard.edu to discuss your specific use cases for policy guidance.
2. Why are privacy values missing for some people?
 - Privacy values are created based on role and affiliation. Not all possible values will exist for an individual. For example, if an individual never had a student role, they will not have privacy for student-specific privacy values such as dormitory residence address. Likewise, an employee will not normally have a privacy value for special role (e.g., non-employee, non-student role).
3. Why are privacy values present for someone who does not have a current role that corresponds to the type of privacy values? For example, why does an individual with only a current employee role also have student privacy values?
 - The privacy values that were created in the past during a prior role are not removed from the system when the role ceases to be current/active.
4. Are all privacy values role-specific?
 - Some privacy values are shared across roles. For example, privacy values for email, image, residential address, and residential phone pertain to any type of role. Office address and office phone and fax will pertain to employee and other types of non-student roles. A student who also has an employee role may have privacy defined for employee privacy values associated with office.
5. Why is there a separate privacy object?
 - The privacy object contains all the defined privacy values for a person. It allows privacy data to be disseminated without requiring the object to which the privacy pertains to also be included in the data. Also, separate storage of privacy data allows a person's privacy settings to be preserved if the data which it applies is deleted. For example, if someone's office address privacy value is stored only in the address object, it would be lost if that object were deleted.
6. Why is FERPA a separate object?
 - It is separate because of the additional legal implications of a FERPA privacy status above & beyond Harvard's own internal privacy policies.
7. Why are there repeats of the personPrivacy object?



- It is sent once for each privacy category and subcategory of interest for the given export.

4.2 Name

Currently IdM supports carrying up to 2 names per person. The first is the Official Name (nameType = OFFICIAL), a person's legal name. The second is the Listing Name (nameType = LISTING), sometimes referred to as the 'preferred' name. An example of a Listing Name would be Jimmy versus James; or someone who prefers to be known by his/her middle name. The Listing Name is optional. The Official Last Name is required for all persons.

4.2.1 FAQ's - Name

1. How does a legal name change look in XML?
 - You would see an Update to the nameType of OFFICIAL.
2. Are prefix and suffix free form or are they codes?
 - This varies in each of the source systems. IdDB will accept what it receives; there are not codes.
3. Why do I see an upside down question mark (or other funny characters) in a person's name?
 - The IdDB stores data with special characters and exports using ISO-8859-1 encoding. Ensure that your system can support receiving data with this encoding and you will eliminate the possibility of seeing these characters in a person's name or other fields.

4.3 Address

IdM supports multiple addresses per person which are received from the various sources of data (PeopleSoft, SIS, individual registrars, Smithsonian or the MIDAS application). For the most part, IdM does not validate that addresses are well formed. For example, IdM does not guarantee that if State is populated that the state is valid or that the country matches the State listed. Similarly, the postal code may be invalid. It is up to the source system to ensure that addresses are properly formed.

The following are the types of addresses that are currently supported.

addressCategory	addressCategoryDescription	Notes
OFFI	Office address	
EMER	Emergency address	This is the address for a person's emergency contact
HOME	Residence address	For employees, this is the residence address. For students, it is the local address. It may or may not be on campus.
ORIG	Original address	Carried only on Students, this is the address provided at the time of applying to the University. It may or may not be the parent's address. There is no guarantee that this address is accurate; it is often not updated throughout the student's time at the



		University.
MAIL	Mailing address	The only address type provided for DCE Students

4.3.1 FAQ's – Address

1. Does every person have all the address types?
 - While it is possible, it is fairly unlikely.
2. Why is mailing address used so infrequently?
 - DCE is the primary provider of the mailing address. Source such as PeopleSoft and SIS do not provide a mailing address. If you need assistance determine which address is best to use for a given population, please contact the Directory Services Team (directory_services@harvard.edu).
3. Where do I get list of the valid country codes?
 - IdM uses country codes as defined by the ISO 3166-1-alpha -3 standards. The latest list of the country codes and others can be found here: <http://xml.cadm.harvard.edu/idm-xml/>
4. Are there any differences between how HUID stored addresses and how IdDB stores addresses?
 - Yes.
 - IdDB no longer carries Address line 4 and 5.
 - Country should no longer be populated in Address Line 5
 - HUID previously carried the combination of city, state and ZIP in one of its five lines of address data; IdDB stores them only in the city, state and postal attributes.
 - Canadian Provinces are now carried in the State field.

All of the listed changes were made in an effort to maintain address data consistently. However, as IdM is not the source of a majority of address data. As previously mentioned, there is minimal validation done upon receiving address data. IdM does not guarantee addresses will be well formed.

5. Do addresses get updated or removed after a person's role expires?
 - In most cases, no. IdM receives most addresses from the source systems which provide role data. However, IdM does not correlate address data with a given role. IdM will continue to hold the data until the source system updates / removes it. IdM will consider the address effective and valid regardless of the role dates.
6. What is Mail Realm? How is it determined?
 - Mail Realm is an IdM attribute which designate an address is a University Mail, Domestic or Foreign address. Historically if the address.location (for example, H02158) started with an 'H' the address.addressMailRealmDescription was set to University Mail. During the course of this project it came to our attention that PeopleSoft assigns H location codes to addresses that are actually off campus. Similarly locations that begin with other letters, such as 'X', may be on campus.



At this time IdM has not determined an accurate method for determining the Mail Realm.

4.4 Directory Listing

IdM has defined a structure for associating multiple diverse categories of an affiliate's contact data - phone numbers, fax numbers, phone locations, display order, listing title & status, etc., into a single directory listing. A full directory listing includes 3 types of objects: dirListing, dirListingData and dirListingLocation. Business practice limits the numbers of Listings per person as follows:

- Employee (listingCategory = 'E'): 4
- Student (listingCategory = 'S'): 1
- Emergency Contacts (listingCategory = 'C'): no limit

DirListingData contains the data information associated with a directory listing: phone / fax / pager numbers, homepage URLs, SMS addresses, etc. The contact data type is defined with a type & subtype. There may be multiple type / subtype combinations per listing however; there is a maximum of 1 type / subtype combination per directory listing. The currently supported type & subtypes are as follows:

(type)	(subtype)	
PHONE	OFFICE	Office phone
PHONE	HOME	Home phone
FAX	OFFICE	Office fax
PHONE	MOBILE	Mobile phone
NAME	EMERGNCY	Emergency contact's name
RELATION	EMERGNCY	Emergency contact's relationship
PHONE	EMERGNCY	Emergency contact's primary phone number

DirListingLocation contains the location information for a given directory listing: building location and room number, city/state, etc. The location is defined with a location type. There may be multiple locations per listings however; there is a maximum of 1 location per location type. The currently supported location types are as follows:

DORM	Student dorm location
OFFICE	Office location
MAILSTOP	Student mail stop location
CITYSTAT	Student city/state

4.4.1 FAQ's – Directory Listing

1. Is there any relationship between directory listings and employee roles? How do I know which listing is for which job.
 - There is no relationship between listings and jobs; IdM does not support the 'linking' of a listing to a specific job. A person may have multiple listings and only one job. Similarly, they may have multiple jobs and just one listing.
2. What is the difference between office address and directory listing location.
 - The office address is provided to IdM from PeopleSoft; it relates specifically to the person's primary job record. It is a complete address which USPS mail can be



delivered to. The directory listing location is the physical location for the corresponding listing. For example, it may be a professor's laboratory versus office.

3. Who creates directory listings?
 - For employees and some poi's, directory listings are maintained within MIDAS by users throughout the University; most often the users are administrative staff in the given employee's department.
4. How do I tie together the directory listing with the directory listing data and / or location?
 - Each record will have the same listingId and listingCategory.
5. How do I tell if a phone number is international?
 - It will begin with '011'.
6. Will phone numbers have dashes and parentheses? How will they be formatted?
 - Phone numbers will be formatted in a numeric string, without dashes or parentheses.

4.5 Email

Each person may carry one to many e-mail addresses. It is possible that multiple sources will submit the same e-mail for a person. IdDB will store each instance it receives from the various sources (source is part of the record key).

A person may elect one Official (a.k.a. *preferred*) e-mail address. Within the IdDB each instance of the same functional e-mail address (username@domainName) will be marked as the Official. Similarly if the Official e-mail changes, each instance of the former Official will be marked as Official = N.

4.5.1 FAQ's – E-mail

1. Will the user name or domain name have the '@' included?
 - No
2. Why do I see two e-mails that are marked as official?
 - They have a different source.
3. Why do I see two different people with the same e-mail address?
 - IdM does not validate that an email address is unique to a given person. In some cases people use a departmental e-mail account or have e-mail sent to his/her boss.
4. Does an Official Email Address have to have a Harvard domain?
 - No
5. Does IdM validate that an e-mail address is valid?
 - Beyond proper formatting, no.

4.6 FERPA

Harvard University is committed to complying with the Family Educational Rights and Privacy



Act of 1974 (FERPA; also known as the Buckley Amendment), which protects the privacy of student records. The IdDB serves as the source system for a student's election of a FERPA block. The individual registrar's will work with a student so that he/she may elect a FERPA block under the proper circumstances and maintain the records of such an election. For full detail on FERPA please visit www.security.harvard.edu.

4.6.1 FAQ's – FERPA

1. What is a FERPA Block?
 - A FERPA Block represents a student's election to be protected under the Family Educational Rights and Privacy Act of 1974.
2. What is the past student indicator?
 - The past student indicator allows a person to elect disclosure of non-student data while keeping his/her student records protected. For example, a person attended Harvard as a student and returns as an employee. This person would like to be available in directories as an employee however, would like to keep his/ her student records protected. He / she will work with Registrar to elect disclosure of employment related data, i.e., the past student indicator. Only in-active students may elect this setting.

4.7 ID Cards

Each person may or may not carry a physical ID Card. When a physical ID Card(s) have been issued to have person, there will be one PersonCard object and one to many idCard objects. The idCard object represents each physical card issued to the person.

4.7.1 FAQ's – ID Cards

1. I have seen the reissue digit decrement; in what business scenario does this occur?
 - In HUID this may occur when a card is disabled after being lost or stolen. Also, because it is a single digit, if someone has a value of 9 and loses their card, the reissue digit wraps back around to 0.
 - Once the conversion to IdDb is complete, when a card is disabled the reissue digit will not change. The reissue digit will increment only when a new card is issued.
2. Why do I see reissue digit in 2 places (personCard and idCard)? Which one should I use?
 - The idCard object contains the value of the reissue digit at the time the card was produced, which may have been several years ago. The personCard object contains the current value of the reissue digit. The value from the personCard object is preferred for use, but ultimately it is a local business decision. For example, if the data we provide is to be used in an access fedd that needs to know exactly how the magnetic stripe of a card is encoded, you would read from the idCard object.

5 DATA

The following is each element of data that can be carried for a given person.



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Data Element (Object Keys are marked with *)	IdDB XML Schema Object	IdDB XML Schema Element	Description	Mandatory in Export from IDDB		Mandatory in Import to IDDB		Format
				Updates	Deletes	Updates	Deletes	
* Address Category Code	Address	addrCategory	A code identifying a category of mailing address (emergency address, original student address, DCE mailing address, office address, or residential address)	Y	Y	Y	Y	X(8)
Address 1	Address	address1	A line of address data, including company name, building name, street number, apartment number, etc., but excluding city, state, ZIP, and country	N	N	N	N	X(0..55)
Address 2	Address	address2	A line of address data, including company name, building name, street number, apartment number, etc., but excluding city, state, ZIP, and country	N	N	N	N	X(0..55)
Address 3	Address	address3	A line of address data, including company name, building name, street number, apartment number, etc., but excluding city, state, ZIP, and country	N	N	N	N	X(0..55)
* Address ID	Address	addressId	A numeric value, which, in conjunction with Harvard ID number, address category code, and address source, uniquely identifies an address record.	Y	Y	Y	Y	9
Address Mail Realm Code	Address	addressMailRealmCode	A code indicating the type of address (University Mail, domestic, or foreign)	N	N	N	N	X(1)
Address Mail Realm Description	Address	addressMailRealmDescription	A plain-text description of the code indicating the type of address (University Mail, domestic, or foreign)	N	N	N	N	X(1..30)
Address Source	Address	addressSource	An identifier of the source system responsible for providing the address record	Y	N	Y	N	X(0..50)
City	Address	city	The city where the given address is located.	Y	N	Y	N	X(0..30)
Country	Address	country	A three-character country code defined by the ISO 3166-1 country code standard	Y	N	Y	N	X(3)
* Effective Date	Address	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	Address	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)



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Location	Address	location	A code used within PeopleSoft to uniquely identify a location (address).	N	N	N	N	X(10)
Postal Code / ZIP	Address	postal	The ZIP or other postal code corresponding to the address location	N	N	N	N	X(12)
Address Privacy Value	Address	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	9(1)
State	Address	state	The abbreviation of the name of the state or province containing the address	N	N	N	N	A(0..6)
Update By	Address	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	Address	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	Address	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
Display Order	dirListing	displayOrder	A number indicating the ordinal value of a code, to be used for display purposes within an application	Y	N	N	N	9
* Effective Date	dirListing	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	dirListing	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
* Listing Category	dirListing	listingCategory	An identifier of the directory in which this listing is included.	Y	Y	Y	Y	X(1)
* Listing ID	dirListing	listingId	A numeric value that, in conjunction with Harvard ID number and listing category, uniquely identifies a directory listing entry.	Y	Y	Y	Y	9
Listing Status	dirListing	listingStatus	A status value used within a directory listing, e.g. "On Leave", "Fall", "Spring", "On Leave Spring", "On Leave Fall"	N	N	N	N	X(1..20)
Listing Title	dirListing	listingTitle	A listing title (e.g. "Prof", "Asst Prof", "House Master, etc.")	N	N	N	N	X(1..20)
Update By	dirListing	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	dirListing	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ



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Update Source	dirListing	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
Contact Data Extension	dirListingData	dataExtension	Contact data extension	Y	N	N	N	X(0..255)
* Contact Data Subtype	dirListingData	dataSubtype	Contact data subtype	Y	Y	Y	Y	X(8)
* Contact Data Type	dirListingData	dataType	Contact data type	Y	Y	Y	Y	X(8)
Contact Data	dirListingData	dataValue	Contact data	Y	N	Y	N	X(0.255)
* Effective Date	dirListingData	effectiveDate	Effective datetime	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	dirListingData	effectiveStatus	Effective status	N	N	N	N	A(1)
* Listing Category	dirListingData	listingCategory	Listing category	Y	Y	Y	Y	X(1)
* Listing ID	dirListingData	listingId	Listing ID	Y	Y	Y	Y	9
Listing Privacy Value	dirListingData	privacyValue	Privacy value	N	N	N	N	9(1)
Update By	dirListingData	updateBy	Update by	Y	Y	Y	Y	9(8)
Update Date	dirListingData	updateDate	Update datetime	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	dirListingData	updateSource	Update source	Y	Y	Y	Y	X(0..50)
* Effective Date	dirListingLocation	effectiveDate	Effective datetime	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	dirListingLocation	effectiveStatus	Effective status	N	N	N	N	A(1)
* Listing Category	dirListingLocation	listingCategory	Listing category	Y	Y	Y	Y	X(1)
* Listing ID	dirListingLocation	listingId	Listing ID	Y	Y	Y	Y	A(1)
Location	dirListingLocation	location	Location - For OFFICE and DORM locationTypes, the building name or street address. For MAILSTOP locationTypes, the mail center name. For CITYSTAT locationTypes, the city name and two-character state abbreviation	Y	N	Y	N	X(0..25)



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Location identifier	dirListingLocation	locationIdentifier	Location identifier - For OFFICE and DORM locationTypes, the room number, floor, or other similar refinement of the location data. For MAILSTOP locationTypes, the mailbox number. For CITYSTAT, blank.	Y	N	N	N	X(0..15)
* Location Type Code	dirListingLocation	locationTypeCode	Location type	Y	Y	Y	Y	X(8)
Privacy Value	dirListingLocation	privacyValue	Privacy value Note: This is a read only field	N	N	N	N	9(1)
Update By	dirListingLocation	updateBy	Update by	Y	Y	Y	Y	9(8)
Update Date	dirListingLocation	updateDate	Update datetime	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	dirListingLocation	updateSource	Update source	Y	Y	Y	Y	X(0..50)
* Effective Date	emailAddress	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	emailAddress	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
* Email Address Source	emailAddress	emailAddressSource	An identifier of the data source responsible for providing the email record	Y	Y	Y	Y	X(0..50)
Email Address Type	emailAddress	emailAddressType	Identification of mail type	N	N	Y	N	X(8)
* Email Domain Name	emailAddress	emailDomainName	The fully qualified domain name component of the email address	Y	Y	Y	Y	X(35)
* Email User Name	emailAddress	emailUserName	The user name component of the email address	Y	Y	Y	Y	X(35)
Official Email Indicator	emailAddress	officialEmailIndicator	An indicator (true/false) showing whether an address is to be used for official University purposes	N	N	N	N	A(5)
Email Address Privacy Value	emailAddress	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	9(1)
Update By	emailAddress	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	emailAddress	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	emailAddress	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)



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* Id Card Class	idCard	cardClass	A code indicating the high-level category to which the card belongs	Y	Y	Y	Y	A(1)
Id Card Type	idCard	cardType	A code indicating the specific type of a card (undergraduate regular, graduate temp, staff regular, etc.)	Y	N	Y	N	A(2)
Issue Date	idCard	issueDate	The date and time when a card was issued.	N	N	Y	N	YYYY-MM-DDThh:mm:ssZ
Reissue Digit	idCard	reissueDigit	A numerical value indicating the number of times an affiliate's ID card has been reissued due to loss or theft; it is used to prevent misuse of a lost or stolen card.	Y	N	Y	N	9(1)
Update By	idCard	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	idCard	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	idCard	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
Valid Thru Date	idCard	validThruDate	The date on which a card expires.	Y	Y	Y	N	YYYY-MM-DDThh:mm:ssZ
Appointment End Date	job	appointmentEndDate	The date on which an employee's appointment is set to end (not necessarily the same as their termination date).	N	N	N	N	YYYY-MM-DD
Company	job	company	The company code with which a given employee role, department ID, or pay group is associated in PeopleSoft	N	N	Y	N	X(3)
Department Entry Date	job	departmentEntryDate	The date on which an employee first began working in the specified department.	N	N	Y	N	YYYY-MM-DD
Department ID	job	departmentId	A code uniquely identifying the PeopleSoft HR department within which an employee works.	Y	N	Y	N	X(10)
* Effective Date	job	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	job	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)



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Employment Class	job	employmentClass	A code corresponding to an employee's high-level job category in the PeopleSoft HR system.	Y	N	Y	N	X(1)
Employment Status	job	employmentStatus	A code indicating the employment status of an employee (Active, Deceased, Retired, Leave of Absence, Terminated, etc.)	Y	N	Y	N	A(1)
Hire Date	job	hireDate	The date on which an employee began working in the given job	N	N	Y	N	YYYY-MM-DD
Job Code	job	jobCode	A numeric code corresponding to an employee's job classification in the PeopleSoft HR system.	Y	N	Y	N	9(6)
Location	job	location	A code used within PeopleSoft to uniquely identify a location (address).	N	N	Y	N	X(10)
Pay Group	job	payGroup	A code specifying the pay group to which an employee role belongs	N	N	Y	N	X(3)
Primary Role Indicator	job	primeRoleIndicator	A 'true/false' value indicating whether the role defined by the record is the primary role for this person and role type.	Y	N	Y	N	A(5)
Job Role Privacy Value	job	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	9(1)
Rehire Date	job	rehireDate	The date on which an employee was rehired to an employee role he/she previously held and left.	N	N	N	N	YYYY-MM-DD
Role End Date	job	roleEndDate	The date on which a given role ends.	Y	N	N	N	YYYY-MM-DD
* Role ID	job	roleId	In conjunction with Harvard ID number, role type, and role source, uniquely defines a role.	Y	Y	Y	Y	9(2)
* Role Source	job	roleSource	An identifier of the system responsible for creating and maintaining the data associated with a given role.	Y	Y	Y	Y	X(1..50)
Role Start Date	job	roleStartDate	The date on which a given role begins.	Y	N	Y	N	YYYY-MM-DD
Role Title	job	roleTitle	A text description of the affiliate's role--a job title, or description of the job class, or description of a student's registration status and school affiliation, etc.	N	N	Y	N	X(1..255)
* Role Type	job	roleType	A code identifying the role type of a given role (employee, student, retiree, etc.)	Y	Y	Y	Y	X(8)



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Termination Date	job	terminationDate	The date on which an employee role actually ended (distinct from the appointment end date).	N	N	N	N	YYYY-MM-DD
PeopleSoft Union Code	job	unionCode	A PeopleSoft generated code representing a particular union.	N	N	N	N	X(0..3)
Update By	job	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	job	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	job	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
Authorizing Harvard ID	libraryBorrower	authorizingId	The Harvard ID number of the person authorizing the creation of this record. (For research assistants, this is the Harvard ID number of the professor for whom the RA is working.)	N	N	N	N	9(8)
* Effective Date	libraryBorrower	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	libraryBorrower	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
Borrower Code	libraryBorrower	libraryBorrowerCode	A code identifying a category of library borrower (e.g. research assistant, alum, special borrower, etc.)	Y	N	Y	N	X(4)
Primary Role Indicator	libraryBorrower	primeRoleIndicator	A 'true/false' value indicating whether the role defined by the record is the primary role for this person and role type.	Y	N	N	N	A(5)
Borrower Role Privacy Value	libraryBorrower	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	9(1)
Role End Date	libraryBorrower	roleEndDate	The date on which a given role ends.	Y	N	Y	N	YYYY-MM-DD
* Role ID	libraryBorrower	roleId	In conjunction with Harvard ID number, role type, and role source, uniquely defines a role.	Y	Y	Y	Y	9(2)
* Role Source	libraryBorrower	roleSource	An identifier of the system responsible for creating and maintaining the data associated with a given role.	Y	Y	Y	Y	X(1..50)
Role Start Date	libraryBorrower	roleStartDate	The date on which a given role begins.	Y	N	Y	N	YYYY-MM-DD



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Role Title	libraryBorrower	roleTitle	A text description of the affiliate's role--a job title, or description of the job class, or description of a student's registration status and school affiliation, etc.	N	N	N	N	X(1..255)
Role Type	libraryBorrower	roleType	A code identifying the role type of a given role (employee, student, retiree, etc.)	Y	Y	Y	Y	X(8)
Update By	libraryBorrower	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	libraryBorrower	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	libraryBorrower	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
* Effective Date	name	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	name	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
Name, First	name	firstName	The first name of an affiliate	Y	N	N	N	X(0..30)
Name, Last	name	lastName	The last name (family name) of an affiliate	Y	N	N	N	X(0..30)
Name, Middle	name	middleName	The middle name of an affiliate	Y	N	N	N	X(0..30)
Name, Prefix	name	namePrefix	An affiliate's name prefix (i.e. title or salutation)	N	N	N	N	X(0..15)
Name, Suffix	name	nameSuffix	A generational suffix (Jr., III, etc.) appended to an affiliate's name	N	N	N	N	X(0..15)
Name Type	name	nameType	An identifier of the intended usage of the specified name record (official or listing).	Y	Y	Y	Y	X(8)
Update By	name	updateBy	The datetime of the last update to the record.	Y	Y	Y	Y	9(8)
Update Date	name	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	name	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
Birth Date	person	birthDate	The date of birth of the affiliate	N	N	N	N	YYYY-MM-DD
* Effective Date	person	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y*	Y*	Y*	Y*	YYYY-MM-DDThh:mm:ssZ



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Effective Status	person	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
Gender	person	gender	An indicator of the affiliate's gender	N	N	N	N	A(1)
huEPEStatus Indicator	person	huEPEStatus	An indicator of whether the person has an extended part-time employee status. 'true' indicates such a status.	N	N	N	N	A(5)
15 yrs+ Indicator	person	longerService	An indicator of whether the person has been employed at Harvard for 15 years or more	N	N	N	N	A(5)
National ID (SSN)	person	nationalId	An external, usually government-issued, personal identifier for an affiliate (e.g. Social Security number or Individual Tax Identification number).	N	N	N	N	X(20)
Persona Non Grata Status	person	pngStatus	An indicator of whether the specified person is considered 'persona non grata' at the university (i.e. has received a trespass warning)	N	N	N	N	A(5)
Person Privacy Value	person	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	9(1)
Student Special Status	person	studentSpecialStatus	An indicator of whether a student has G4+ (graduate student, 4th year or higher) privileges in their school	N	N	N	N	X(4)
Update By	person	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y*	Y*	Y*	Y*	9(8)
Update Date	person	updateDate	The datetime of the last update to the record.	Y*	Y	Y*	Y*	YYYY-MM-DDThh:mm:ssZ
Update Source	person	updateSource	An identifier of a data source or application from which the last update was received.	Y*	Y	Y*	Y*	X(0..50)
ID card disabled indicator	personCard	disableFlag	An indicator that the specified person's ID card has been temporarily disabled in the event of loss or theft, to prevent its misuse.	Y	N	Y	N	A(5)
* Effective Date	personCard	effectiveDate	An indicator that the specified person's ID card has been temporarily disabled in the event of loss or theft, to prevent its	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ



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			misuse.					
Effective Status	personCard	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
Reissue Digit	personCard	reissueDigit	A numerical value indicating the number of times an affiliate's ID card has been reissued due to loss or theft; it is used to prevent misuse of a lost or stolen card.	Y	N	Y	N	9(1)
Update By	personCard	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	personCard	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	personCard	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
* Effective Date	personEthnicity	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	personEthnicity	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
* Ethnicity Code	personEthnicity	ethnicityCode	A code identifying the person's ethnicity	Y	Y	Y	Y	X
Primary Indicator	personEthnicity	isPrimary	Denotes the entry as the primary ethnicity	N	N	N	N	A(5)
Update By	personEthnicity	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	personEthnicity	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	personEthnicity	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
* Effective Date	personImage	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	personImage	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
Image Data	personImage	imageData	The current effective status (active/inactive) of a record.	N	N	Y	N	
* Image Number	personImage	imageNum	A numeric unique identifier of the image	Y	Y	Y	Y	9
Image Privacy	personImage	privacyValue	A numerical value corresponding to a level of	N	N	N	N	9(1)



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Value			privacy.					
Image Purge Indicator	personImage	purgeFlag	An indicator of whether the specified record should be disregarded for business purposes and purged from the database	N	N	N	N	A(5)
Update By	personImage	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	personImage	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	personImage	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
Authorizing Harvard ID	poi	authorizingId	The unique (internal) identifier of the affiliate in the Harvard People Data repository. Independent of the Harvard ID number.	N	N	Y**	N	9(8)
Company	poi	company	The employer, if any, of the contractor	N	N	Y	N	X(0..50)
ID card description line 1	poi	description1	A line of short text description of the role, for card printing purposes	N	N	Y**	N	X(0..15)
ID card description line 2	poi	description2	A line of short text description of the role, for card printing purposes	N	N	Y	N	X(0..15)
* Effective Date	poi	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	poi	effectiveStatus	The current effective status (active/inactive) of a record.	N	N	N	N	A(1)
Faculty Code	poi	facultyCode	A three character code indicating the affiliate's tub	Y	N	Y	N	X(3)
Primary Role Indicator	poi	primeRoleIndicator	A 'true/false' value indicating whether the role defined by the record is the primary role for this person and role type.	Y	N	N	N	A(5)
POI Privacy Value	poi	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	9(1)
Role End Date	poi	roleEndDate	The date on which a given role ends.	Y	N	Y	N	YYYY-MM-DD
* Role ID	poi	roleId	In conjunction with Harvard ID number, role type, and role source, uniquely defines a role.	Y	Y	Y	Y	9(2)
* Role Source	poi	roleSource	An identifier of the system responsible for creating and maintaining the data associated with a given role.	Y	Y	Y	Y	X(1..50)



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Role Start Date	poi	roleStartDate	The date on which a given role begins.	Y	N	Y	N	YYYY-MM-DD
Role Title	poi	roleTitle	A text description of the affiliate's role--a job title, or description of the job class, or description of a student's registration status and school affiliation, etc.	N	N	Y	N	X(1..255)
* Role Type	poi	roleType	A code identifying the role type of a given role (employee, student, retiree, etc.)	Y	Y	Y	Y	X(8)
Update By	poi	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	poi	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	poi	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
* Category	Privacy	category	A code identifying the general class of data to which a privacy value relates: an image, a phone number, an email address, a role, etc.	Y	Y	Y	Y	X(8)
* Effective Date	Privacy	effectiveDate	The start date and time when a record's currently specified effective status starts.	N	N	N	N	YYYY-MM-DDThh:mm:ssZ
Effective Status	Privacy	effectiveStatus	The current effective status (active/inactive) of a record.	Y	Y	Y	Y	A(1)
Privacy Value	Privacy	privacyValue	A numerical value corresponding to a level of privacy.	Y	Y	Y	Y	9(1)
* Subcategory	Privacy	subcategory	A refinement of the privacy category to identify subtypes within a category, e.g. employee vs. student role, home vs. office phone number, etc.	Y	N	N	N	X(8)
Update By	Privacy	updateBy	The datetime of the last update to the record.	Y	Y	Y	Y	9(8)
Update Date	Privacy	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Update Source	Privacy	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
* Effective Date	privacyFE RPA	effectiveDate	The datetime of the last update to the record.	Y	N/A	Y	N/A	YYYY-MM-DDThh:mm:ssZ



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FERPA Status Indicator	privacyFERPA	ferpaStatus	A true/false value indicating whether the specified affiliate has requested a FERPA privacy block.	Y	N/A	Y	N/A	A(5)
Past FERPA Status Indicator	privacyFERPA	pastStuIndicator	A true/false indicator of whether the affiliate is considered a 'past student' for purposes of Harvard's interpretation of FERPA restrictions	Y	N/A	Y	N/A	A(5)
Update By	privacyFERPA	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	N/A	Y	N/A	9(8)
Update Date	privacyFERPA	updateDate	The datetime of the last update to the record.	Y	N/A	Y	N/A	YYYY-MM-DDThh:mm:ssZ
Update Source	privacyFERPA	updateSource	An identifier of a data source or application from which the last update was received.	Y	N/A	Y	N/A	X(0..50)
Board House	student	boardHouse	The code for the house or residence hall where the student receives board privileges.	N	N	N	N	X(2)
Boarding Status	student	boardStatus	A 'true'/'false' value indicating whether the student is or is not included in a board plan.	N	N	N	N	A(5)
Degree Program	student	degreeProgram	A code indicating the degree which a student is currently pursuing.	N	N	N	N	X(4)
* Effective Date	student	effectiveDate	The start date and time when a record's currently specified effective status starts.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ
Effective Status	student	effectiveStatus	The start date and time when a record's currently specified effective status starts.	N	N	N	N	A(1)
Graduation Date (expected or past)	student	gradDate	The date on which a student graduated or is expected to graduate from a given student role.	N	N	N	N	YYYY-MM-DD
Last Attendance Date	student	lastAttendanceDate	For graduated, non-registered, or withdrawn students, the date on which the student last attended classes for a given student role.	N	N	N	N	YYYY-MM-DD
Primary Role Indicator	student	primeRoleIndicator	A 'true'/'false' value indicating whether the role defined by the record is the primary role for this person and role type.	Y	N	N	N	A(5)
Student Privacy Value	student	privacyValue	A numerical value corresponding to a level of privacy.	N	N	N	N	X(1)



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Records House	student	recordHouse	The code for the house or residence hall where the student's records are kept	N	N	N	N	X(2)
Residence House	student	residenceHouse	The code for the house or residence hall where the student resides.	N	N	N	N	X(2)
Role End Date	student	roleEndDate	The date on which a given role ends.	Y	N	Y	N	YYYY-MM-DD
* Role ID	student	roleId	In conjunction with Harvard ID number, role type, and role source, uniquely defines a role.	Y	Y	Y	Y	9(2)
* Role Source	student	roleSource	An identifier of the system responsible for creating and maintaining the data associated with a given role.	Y	Y	Y	Y	X(1..50)
Role Start Date	student	roleStartDate	The date on which a given role begins.	Y	N	Y	N	YYYY-MM-DD
Role Title	student	roleTitle	A text description of the affiliate's role--a job title, or description of the job class, or description of a student's registration status and school affiliation, etc.	N	N	N	N	X(1..255)
* Role Type	student	roleType	A code identifying the role type of a given role (employee, student, retiree, etc.)	Y	Y	Y	Y	X(8)
School Code	student	schoolCode	A code indicating the school with which a student is affiliated.	Y	N	Y	N	X(2)
Special Program Code	student	specialProgram	A code identifying a program within a student's school, in which a student is enrolled.	N	N	N	N	X(3)
Student Department	student	studentDepartment	GSAS Students only code from SAS	N	N	N	N	9(2)
Student Status	student	studentStatus	A code indicating a student's registration status (registered, pending, withdrawn, graduated, etc.)	Y	N	Y	N	X(2)
Student Year	student	studentYear	Ordinal year in which a graduate student is resident, or code indicating Freshman/Sophomore/Junior/Senior for undergraduates, or special affiliation (HST / Visiting Undergraduate).	N	N	N	N	X(3)
Time Status	student	timeStatus	An indicator of the student's time status: full, half, or less than half time.	N	N	Y	N	A(1)
Update By	student	updateBy	The Harvard ID number of an affiliate responsible for the last update to the record, if known.	Y	Y	Y	Y	9(8)
Update Date	student	updateDate	The datetime of the last update to the record.	Y	Y	Y	Y	YYYY-MM-DDThh:mm:ssZ



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Update Source	student	updateSource	An identifier of a data source or application from which the last update was received.	Y	Y	Y	Y	X(0..50)
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