

EDIR EMPL & DEPTADMIN “HOW TO”

How/When are EDIR “people” records created?

The Banner HR and Student information systems are the primary source of EDIR “people” records. An EDIR record is automatically created (the next working day) after a Banner entity meets the following criteria:

Non-terminated employee with active assignment(s)
or
Student enrolled in one or more courses for the current or future terms.

The EDIR record is retained as long as the Banner entity meets the following criteria:

Non-terminated employee
or
Student has been enrolled in one or more courses any time in the last 4 terms or for a future term.

Once an individual no longer meets the inclusion criteria, the EDIR record is hidden from display and is subject to being purged during regular directory maintenance.

Exceptions: “seeded” records

EDIR can be seeded with “expected” records for people that exist in Banner but do not meet the inclusion criteria (record not automatically created). The resulting EDIR ID is identical to that which would be generated if the record was created through the automated process. Examples include faculty members coming on board in the fall – that a future assignment in Banner - but not qualifying for automatic inclusion at the start of summer.

EDIR can also be seeded with “sponsored” records for people who are not in Banner. Examples include individuals associated with non-University organizations located on campus and included in the printed phone book

The preference is always to seed an “expected” record since that action results in a UID that won’t change as the individual’s relationship to the University changes. Expected accounts also have UA Username (maybe) and UA UserID values since they come from Banner (systems like OnBase which utilize EDIR authentication require UA UserID).

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How/When are EDIR “department” records created?

The Board of Regents (BOR) structure table is the primary sources of EDIR department/unit records. The BOR structure table organizes Banner org records (DLEVEL orgs) under a unit structure used when reporting to the State. Updates to the BOR structure table are processed monthly, at the beginning of the month. Department updates to EDIR are made on the same, or following, day.

The EDIR interface indicates that a department/unit “reports to” the unit under which it is organized. We call that the “roll-up” for the department/unit record. In actuality the BOR structure table *does not* claim to represent supervisory reporting relationships and perhaps the label should be changed.

The BOR structure table is designed to report budget information to the State and therefore does *not* include DLEVELs having no budget. As such, it is not a complete source for real life department records.

Exceptions:

If the MAU Business Office determines that a DLEVEL or BOR roll up change is desired, it creates/modifies the DLEVEL in Banner and/or works with IR to implement a change in the BOR structure table.

If/when Banner or the BOR structure table can not accommodate unit changes, or the Business Office determines a change is not appropriate, the Business Office can request that a “faux” department/unit record be created in EDIR. Faux records coexist with official BOR department/unit records. They can be inserted anywhere in the department/unit hierarchy.

Faux records point to a “roll-up” record which may be an official BOR department/unit record. Those “roll-up” relationships must be maintained manually. As such, faux records are *not* the preferred EDIR solution. The preferred EDIR solution is the creation and maintenance of an official BOR department/unit record.

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What if I need *exception* “people” or “department” records created?

Both people and department records can be created at the request of departments.

PEOPLE records:

Email or call the OIT Help Desk. You will need to supply the following identifying information for the record to be created:

“Expected” records require the individual’s name, UA UserID (e.g., 30 million number, Banner ID, student ID, employee ID) and EDIR ID of sponsoring department. Banner ID uniquely identifies a Banner entity. Because the record does not meet the normal inclusion rules, it must have a department sponsor in order to be included and then retained in the directory.

“Sponsored” records (for people who are *not* found in Banner) require the individuals name, contact phone number and EDIR ID of sponsoring department. The technician seeding the record will contact the individual and ask for SSN and birth date. SSN enables us to uniquely identify a specific entity so that we don’t create multiple directory records unintentionally. The last four digits of SSN and birth date comprise the standard default password. SSN is *not* stored anywhere in EDIR.

Note: Both “expected” and “sponsored” EDIR records require department sponsors. The distinction between the two is that the EDIR record created for an “expected” person is the same record they will have throughout their relationship with the University.

“Sponsored” records may be transitory (replaced by regular EDIR record if person ever has faculty, staff or student relationship with the University).

DEPARTMENT records:

Contact your MAU business office. That office determines when it is appropriate to add new DLEVEL records to Banner and works with IR to determine where those DLEVELs occur relative to other records in the BOR structure table (and so EDIR “Reports To” value). When a BOR structure table solution is not possible, the Business Office will contact the EDIR group and request “faux” record creation and designate wherein the EDIR directory structure the record should appear.

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What EDIR records can I edit?

Each of us has the ability to edit our own EDIR records. The only exception is when changing security related information. Updates to attributes that constrain EDIR roles (like Other Department Affiliations) must be made by another EDIR administrator.

Ability to edit other people or department EDIR records depends on being granted the appropriate EDIR role. EDIR roles that may be applicable are:

EMPLADMIN<unitID>
DEPTADMIN<unitID>
EMAILADMIN

(Where “unitID” is an EDIR department/unit identifier; e.g., D4SYST05, 2A2C05.)

The unitID portion of a DEPTADMIN role grant indicates that you can edit the department record with that ID and department records rolling up to that ID.

In the case of EMPADMIN role grants, you can edit the records of people who have a Home Department or Other Department Affiliation matching that unitID or rolling up to that unitID.

The EMAILADMIN role grants the ability to update email information on any EDIR record. Because email routing is such a sensitive area, very few people are granted the EMAILADMIN role. Those people include email administration staff and front line support staff.

How do I request EDIR admin access?

EDIR administrative access is requested through the same channels as if requesting access for Banner, or VistaPlus, or OnBase – your campus security coordinator. When requesting EMPL or DEPTADMIN access, express your request as follows:

“I need <employee|department> update access in EDIR to unit <EDIR unit ID>”

Look up the EDIR unit ID by querying EDIR for department name or key word.

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Why do/don't people show up under my department?

Home Department and Other Department Affiliations on *people* records determine who is listed under *department* records when displayed in EDIR. On the *people* records themselves, Home Department and Other Department Affiliations are displayed as links to department records. On the department records, individual's names are displayed as links to *people* records.

Home Department comes from the Banner employee record. If a Home Department is in error, you must contact your HR/Personnel office and request that “home org” on the Banner PEBEMPL record be corrected.

Other Department Affiliations originate in EDIR. If you have edit access to an individual's record, you can **add** or **remove** Other Department Affiliations. Be careful when **removing** Other Department Affiliations. If you remove the affiliation that gave you access, then you lose update access to the record.

If you do *not* already have edit access to the individual's record, you must contact someone who does and ask them to add your unit as an Other Department Affiliation. You can use the EDIR Advanced Search page to locate individuals with EMPLADMIN access over an individual's record.

Log in to EDIR:
<https://edir.alaska.edu> (click Log In link)
Search for the individual
Beth Mercer
Follow links to the individuals Home Department or Other Department Affiliations
Note the EDIR unit ID
4A805
Load the search page
Click Advanced Search box
Enter the following filter: (where 4a8 is EDIR unit ID minus last two characters)

(&(edirrole=*)(edirrole=empladmin4a8))

If that search fails, try a broader search (by branch of University)

(&(edirrole=*)(edirrole=empladmin2*))

Where 1* 2* 3* or 4* is UAA, UAF, UAS or SW respectively.

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Where does EDIR data come from?

EDIR data comes from three primary sources: Banner, the IR BOR structure table and self service updates to the directory by record owners and by authorized staff. The EDIR update page contains a link to a document with a table indicating the origins of directory data:

https://edir.alaska.edu/cgi-bin/ldap_update_help#origin

At present, “origin” is broadly defined as “Banner” or “not-Banner” but we’re working on a version that provides more specific (Banner table element for instance). More importantly, that same table includes a column indicating whether or not the attribute allows “self service” updates via the EDIR web gateway.

What EDIR data can I change?

As a general rule, data originating outside of EDIR is maintained outside of EDIR (like name changes in Banner). Data originating in EDIR is maintained in EDIR (like office, phone and fax numbers).

A noted exception to that rule is email data. We are in the process of developing procedures that update EDIR email data based on MAU feeds to Banner. That batch process co-exists with self service updates to email data that can be performed by record owners and authorized staff.

The EDIR update page contains a link to a document that contains the definitive list of what data is editable by EDIR role:

https://edir.alaska.edu/cgi-bin/ldap_update_help#write

Most of what you are able to update with EMPL or DEPTADMIN is displayed in the EDIR “Search Results” window. That is *not* to say you can update every thing displayed in that page.

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University of Alaska Directory Search - Microsoft Internet Explorer

Address: https://edir.alaska.edu/cgi-bin/ldap_query

UA Enterprise Directory (EDIR)

[Help] [Search Directory] [Log In]

EDIR SEARCH RESULTS

Revise Search

Display Name: Beth Mercer (Elizabeth Mercer)
 Title: Senior Systems Programmer & Data Base Administrator
 Email Address: beth.mercer@alaska.edu
 Office: 105 Butrovich Building
 Phone: +1 907 450 8325
 Office Postal Address: P.O. Box 755320 Fairbanks, AK 99775-5320
 Admin Contact: Sacques Johnson
 Home Department: OIT Systems Services
 Other Department Affiliations: Information Technology, Office of (OIT)
 Information Technology, Office of (OIT)
 OIT Systems Services

1 qualifying record(s).

UNIVERSITY of ALASKA | Many Traditions One Alaska

Campuses | On-Line Services | Searches | System Offices

Callouts:

- Title
- Office, phone and fax
- Admin Contact
- Other Department Affiliations

University of Alaska Directory Search - Microsoft Internet Explorer

Address: https://edir.alaska.edu/cgi-bin/ldap_query

UA Enterprise Directory (EDIR)

[Help] [Search Directory] [Log In]

EDIR SEARCH RESULTS

Revise Search

Unit Display Name: Information Technology, Office of (OIT)
 BoR Unit Name: UAF Office Information Technology
 OUP ID: 24030N (006 Unit 2403)
 Campus: UAF Main Campus
 Office: 103 Butrovich Building
 Phone: +1 907 450 8380
 FAX: +1 907 450 8381
 Website: <http://www.alaska.edu/oit/>
 Unit Head: Steven Smith
 Unit Head Title: Chief Information Technology Officer
 USPS delivery address: P.O. Box 755320, Fairbanks, AK 99775-5320
 Street address: 310 Yukon Dr, Fairbanks, AK 99775
 Reports To: UAF Academic Affairs
 Sub Dept/Units: OIT Business Office & Office of the CITO
 OIT Chief Information Tech Officer
 OIT Core Applications Services
 OIT Desktop Support
 OIT Network Operations
 OIT Security
 OIT Support Center
 OIT Systems Services
 OIT Technology Oversight Services
 Telephone Services

People:
 Andy Anderson Jr, Computer Operator
 Shawn Armstrong, Lead Network Engineer

Callouts:

- Unit Display Name
- Website
- Unit Head and Title
- USPS delivery address and Street address

Not shown but *also editable* on the example people record are Description and Website. Shown but *not editable* is Email Address.

Not shown but *also editable* on the example department record are Email Address and Website. Shown but *not editable* are BoR Unit Name, EDIR ID, Reports To and Sub Dept/Units.

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How do I update Admin Contact and Other Department Affiliations?

In EDIR, references to other records are stored as pointers to those records. Pointers require the EDIR ID of the record being referenced. So, if you want to record an Admin Contact of “Susie Snowflake”, you must look up Susie’s EDIR ID. If you want to record an Other Department affiliation of “Underwater Basket Weaving”, you must look up that department’s EDIR ID.

It is currently possible to reference an existing vanity email address (beth.mercer@alaska.edu), instead of the EDIR ID, when recording an Admin Contact. EDIR looks up and records the corresponding EDIR ID.

In a *future* enhancement to EDIR, – for references to people records – we expect to allow entry of UA Username or UA UserID as alternate record identifiers. EDIR will look up and record the corresponding EDIR ID.

How can I put a label on the Website link?

When recording websites in EDIR, you have two choices. You can either record the simple URL, or you can record a labeled URL. See following examples:

<https://edir.alaska.edu>
<https://edir.alaska.edu> Enterprise Directory

When recorded as in the first example, the EDIR web gateway displays the URL as a link.

When recorded as in the second example, the EDIR web gateway displays the *label* as a link to the URL.

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I have EDIR admin access... why can't I load the update page?

There are two major reasons why an individual with EMPL or DEPTADMIN might not be able to *load the update page* for EDIR records:

- 1 in between job assignments (old assignment has expired and HR has not recorded new assignment)
- 2 scope of EDIR access does not include employee or department

Administrative access is restricted to individuals with an active employment relationship with the University (one or more active assignments). This insures that terminated individuals lose update access even before account termination actions are completed. It also means that student employees tend to lose their access (temporarily) between summer and fall or spring sessions when HR is busy processing student job changes.

EMPL and DEPTADMIN access is also “scoped”. Your update authority extends only to those records that match or roll up to the EDIR unit ID associated with your EMPL or DEPTADMIN EDIR role grants.

Why do my EDIR updates fail?

Most update failures are data related and the error messages at the bottom of the update page clearly indicate what is wrong. In some cases, however, EDIR will return an obscure error message.

The EDIR web gateway exists independent of the ever changing security restrictions on who can see and update what in the Enterprise Directory. The gateway shows you only what you're entitled to *see* according to those security restrictions. The gateway *attempts* to limit the update page to that data you are entitled to *change*. However, the interface is not perfect. Occasionally the update page will include data that you are *not* privileged to change. Attempts to update that data result in the obscure error messages.

Who can update email information in EDIR?

The EMAILADMIN role grants the ability to update email information on any EDIR record. Because email routing is such a sensitive area, very few people are granted the EMAILADMIN role. Those people include email administration staff and front line support staff.

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Why can't I see/edit records for our student employees?

MAU interpretation of FERPA regulation is implemented in EDIR security restrictions. The records of student who have elected privacy under FERPA are *not* generally visible in EDIR. Exceptions to that rule include EDIR access by front line support staff and access by individuals who have been granted the ABIDEBYFERPA EDIR role.

Also, because student employment is *not* deemed directory information by the MAUs, employment specific attributes – like title, office, phone and fax – are neither editable nor visible on student records.

Student employees are distinguished from employees taking courses by the employee type recorded in Banner. During the summer, students have non-student related employee types. During the fall and spring semesters, student with part time employment have student related employee types.

What is AUTHSERV?

AUTHSERV is a web interface that provides authentication services to a number of web based applications hosted by the University (MyUA, EDIR, Start Walking, etc.). When you “log in” via AUTHSERV, you authenticate who you are by identifying yourself with a specific EDIR record and password. For your convenience, your EDIR record can be identified by any of the following: EDIR ID, UA Username, UA UserID or EDIR vanity address.

In order for AUTHSERV to successfully authenticate your access to an application, your EDIR record (account) must first be “activated”.

When are EDIR records (accounts) activated?

At present, EDIR records are created inactive. Anyone who wants to edit their own EDIR record must request his account be activated. That is accomplished by calling your MAU help desk.

Accounts are also activated in batch at the request of an MAU, specific department or in support of applications utilizing AUTHSERV authentication.

Accounts are also activated during the process of granting EDIR admin access.

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Why do the EDIR/AUTHSERV interfaces sometimes look different?

A recent enhancement to the EDIR and AUTHSERV web gateways allows MAUs to customize the presentation style of EDIR and AUTHSERV pages.

<https://edir.alaska.edu/?style=default>
<https://edir.alaska.edu/?style=sw>
<https://edir.alaska.edu/?style=uaf>

At present, customized “styles” exist only for SW and UAF. UAA and UAS “styles” will be created on request by those MAUs.

For security reasons, it is important that you *know* you are interacting with the official AUTHSERV site before supplying your ID and password. Regardless how presented, you’ll know you are at the official AUTHSERV site if the Certificate Information available through your browser indicates that the certificate was issued for authserv.alaska.edu.

