Manage Guest Access Application

Identity & Access Management Office

Information Technology at Purdue
Office of the Vice President for Information Technology
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Manage Guest Access Application  
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Your comments are welcome at <iam-staff@purdue.edu>
MANAGE GUEST ACCESS

Application Overview
The Manage Guest Access application is used by approved Purdue staff members to create short-term computer accounts for individuals who are guests of Purdue University. These accounts can be used to access various Purdue computer and network resources around campus such as PAL Wireless.

This application provisions guest accounts belonging to one of two categories. The first are single accounts created one at a time for individual guests. The second are groups of accounts created all at once for multiple guests. The application window consists of two tabs—one for each of the two categories (see Figure 1.) The first tab is "Guest Accounts" and is used for the first category and the second tab is "Special Events" and is used for the second category.

Terms

**Authorizer**: Staff members who use this application are called "authorizers" because they are authorizing guests to use Purdue resources.

**Provisioning**: The term for creating guest accounts is called "provisioning".

**Team**: The department or group that the authorizer belongs to.

Figure 1: Application window showing the two tabs.
The following sections describe the differences between the two categories and when they would be used.

**Guest Accounts Tab**

The first tab is the *Guest Accounts* tab. It is used to create and manage accounts created individually for each guest one at a time. This is used in cases where just a small number of guests need provisioned rather than a large group. Figure 2 shows the "Guest Accounts" tab. Refer to Table 1 for a description of the columns shown. (Refer to the next section; *Special Events Tab*; for information on provisioning large groups.)

To create a guest account click the "Create Guest" button on the "Guest Accounts" tab. This launches a "wizard". **Step 1** of the wizard asks for the guest's personal information (see Figure 3.)

**Table 1:** Column descriptions for the "Guest Accounts" tab.

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**Columns**

- **Guest Name:** Name of the guest who will be using the account.
- **Assigned Login:** Account login created for the guest.
- **Activation Date:** Date the account will become active.
- **Expiration Date:** Date the account will expire.
- **Created By:** Authorizer that created the account.
- **Managed By:** Team that authorizer belongs to.
- **Status:** Account status; "Available" for accounts that can be used now, "Pending" for accounts that are not yet active.
It is the Authorizer's responsibility to collect accurate guest information and ensure that it is correctly loaded into the Manage Guest Access application. In the event it is discovered that an account was used in an illegal or inappropriate manner, Purdue must have the ability to identify who had control over the account at any given time. It is important that the guest information is correct, and it is the Authorizer's job to verify this accordingly.

Step 2 of the wizard is where the resources are assigned to the account. The available resources vary depending on the team that the authorizer belongs to. Figure 4 shows the team selected in this example is "Dept. XYZ". This team has one resource available to assign to guest accounts; "PAL Wireless".
Step 3 of the Wizard is used to set the Activation and Expiration dates. The Activation date can be today's date if the account is needed immediately or a date in the future if the guest is expected later. The Expiration date can be the same as the Activation date if the account is just needed for one day, or a date in the future if needed for multiple days. The maximum number of days that an account can be active depends on the team that the Authorizer belongs to. It may be anywhere from a few days to several weeks. The wizard will not allow setting an expiration date that will cause the account to be active for longer than the maximum number of days. In this example the Activation date chosen is in the future and the Expiration date is two days after the Activation date (see Figure 5.) This gives a duration of three days. Accounts expire at 10:00 PM on the Expiration date.

![Figure 5: Wizard step 3; Duration Information](image)

Step 4 of the wizard presents all the information previously supplied for review to ensure that everything is correct. Any discrepancies can be corrected by using the "Back" button and correcting the information in the previous steps (see Figure 6.)
Clicking the "Next" button on step 4 causes the account to be loaded. It will now be displayed in the list of accounts on the "Guest Accounts" tab as "Pending" (see Figure 7.)

The newly created account for Carlo Rizzi is shown at the bottom of the list of accounts on the "Guest Accounts" tab. The Status column shows "Pending" and the Assigned Login column shows "To Be Assigned". The following night the account will be created unless the Activation Date is today, in which case the account is created immediately. The following day the login information will be available, even if the
Activation date is in the future. This allows the account information to be distributed to the guest ahead of the Activation date. The authorizer can generate a print-out for the guest containing their login information. This is known as the "Guest Contract". Refer to the Guest Contract section later in this document for more information.

**Special Events Tab**

![Application window showing the "Special Events" tab.](image)

**Columns**

- **Event Name**: Name of the event that a set of accounts are created for.
- **Activation Date**: Date the accounts will become active.
- **Expiration Date**: Date the accounts will expire.
- **Created By**: Authorizer that created the account.
- **Roster Count**: The number of guest accounts for the event.
- **Managed By**: Team that authorizer belongs to.
- **Status**: Status of accounts; "Available" for accounts that can be used now, "Pending" for accounts that are not yet active.

Table 3: Column descriptions for the "Special Events" tab.

The second tab in the application is the Special Events tab. Like the "Guest Accounts" tab, this tab is used to create and manage guest accounts. What differentiates this tab from the "Guest Accounts" tab is that it is used when multiple guest accounts are needed for a large group such as a conference. A large group can be created and managed together as a whole unit rather than individually by using this tab. Here an Event is created first. The "Event" has characteristics that all accounts created for the event share such as Activation and Expiration dates and a list of resources. This is more convenient for provisioning a large number of guests. Unlike the "Guest Accounts" tab, the earliest that an event can be activated is the next business day. The columns shown on the "Special Events" tab are somewhat similar to...
those shown on the "Guest Accounts" tab with a few exceptions (see Figure 8 and Table 3.) The columns shown are Event Name, Activation and Expiration Dates for the event, authorizer, number of accounts created for the event, team managing the event, and the event status. The status shown applies to all accounts managed under that event.

When creating accounts using the special event tab, an "Event" must first be created. The event has an Activation Date and an Expiration Date. It also has certain resources assigned to it. Once the event is created then guests can be added to the Roster. They can be added either one at a time, or using a convenient bulk import method. This bulk import method involves importing a TAB delimited text file containing the information for multiple guests. Microsoft Excel has the ability to save a spreadsheet in this form. Any number of guests can be loaded or removed from the event at any time using either the bulk method or one at a time.

Figure 9: "Special Events" tab; the guest list for an event can be imported from Excel.
Creating an Event

To create an event click the "Create SE" button. This launches a wizard. **Step 1** of the wizard asks for the Event Name (see Figure 10.)

![Figure 10: Wizard step 1; Special Event name](image)

**Step 2** of this wizard is where the resources are assigned to the event. All accounts created for this event will inherit these resources. The available resources vary depending on the team that the authorizer belongs to. Figure 11 shows that the team selected in this example is "Dept XYZ". This team has one resource available to assign to guest accounts; "PAL Wireless".

![Figure 11: Wizard step 2; Team & Resource Information](image)

This step is identical to the same step (step 2) from the "Guest Accounts" tab presented in the previous section.
The next step, **Step 3**, is also identical to that of the "Guest Accounts" tab. It is used to set the Activation and Expiration dates. The Activation date can be as early as the next business day (this differs from the "Guest Accounts" tab in which the Activation date can be as early as today) or a date in the future if the event starts later. The Expiration date can be same as the Activation date if the event is just one day, or a date in the future. The maximum number of days that a accounts can be active depends on the team that the authorizer belongs to. It may be anywhere from a few days to several weeks. The wizard will not allow setting an expiration date that will cause the accounts to be active for longer than the maximum number of days. In this example the Activation date chosen is in the future and the Expiration date is two days after the Activation date (see **Figure 12**.) This gives a duration of three days. Accounts expire at 10:00 PM on the Expiration date.

![Step 3 - Duration Information](image)

**Figure 12: Wizard step 3; Duration Information.**

Just like on the "Guest Accounts" tab, **Step 4** of the wizard presents all the information previously supplied for review to ensure that everything is correct. Any discrepancies can be corrected by using the "Back" button and correcting the information in the previous steps (see **Figure 7** above.)

Clicking the "Next" button on step 4 causes the event to be loaded. The status will be displayed as "Pending" (see **Figure 13**.) Guest information may now be loaded (see the next section; **Populating the Event Roster**.)
Populating the Event Roster

To load the guest information into the event using the bulk import method, the guest information must be in a TAB delimited text file. The information must be properly formatted with one guest per row and with the columns as follows:

<table>
<thead>
<tr>
<th>First name</th>
<th>Last name</th>
<th>Address</th>
<th>Phone</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcus</td>
<td>Chong</td>
<td>876 N Pleasant Run, Kokomo, IN, 46902</td>
<td>555-803-8494</td>
<td><a href="mailto:chong@example.com">chong@example.com</a></td>
</tr>
<tr>
<td>Belinda</td>
<td>McClory</td>
<td>891 N. River Rd, Greentown, IN, 46936</td>
<td>n/a</td>
<td></td>
</tr>
</tbody>
</table>

The required fields are "First name", "Last name", and "Address". Phone number is encouraged, but is optional. However, the field cannot be left blank or an error will result (place a dummy value such as "n/a" in the phone number field if necessary.) The "comment" field can be left blank but is a good place to record additional information such as email address.

To begin the import, right-click the event name and choose "Manage Roster". The "Manage Event Roster" window will appear (see Figure 14.) Next click the "Load Guests" button.
The "Load Guest File" window will appear. Click the "Browse" button and browse to the location on your computer where the TAB delimited text file is stored and select it. The path should appear in the "Local File" text box (see Figure 15.) Now click the "Load Guests" button to complete the process.

The loading process will generate an error if the TAB delimited text file is not properly formatted. Upon successful completion of the loading process the "Manage Event Roster" will display the newly populated guests (see Figure 16) and the "Roster Count" on the "Special Event" tab will reflect the current guest population.
Guest Contracts

This application automatically generates a print-out for each account known as the "Guest Contract". This is for distribution to the guest and contains the account Login and Password, the Expiration Date, the other information. The "Account Usage Agreement" is printed on the Guest Contract. This stipulates the "rules" that the guest must abide by regarding their use of the account.

To print the Guest Contract for an account on the "Guest Accounts" tab, right-click the "Guest Name" in the list and choose "Show Guest Contract". This will open the contract in your web browser. The contract can then be printed from the web browser.

To print the Guest Contracts for an event on the "Special Event" tab, right-click the "Event Name" and choose "Show All Contracts". Again, this will open the contracts in your web browser and they can be printed from there.

An example Guest Contract is shown on the next page.
Example Guest Contract

ITaP Guest Account
Guest Name: Purdue, John
Assigned Login: g00001
Assigned PUID: 000XXXXXXX
Initial Password: gA3k3s16
Available: 7am Sun Jun 17
Expires: 10pm Fri Jun 29

Account Usage Agreement
- I understand that this account belongs to Purdue University and is merely on loan for the duration of this event.
- I understand that I have no expectation of privacy in this account and am subject to the Purdue University privacy policy.
- I understand that I must use this account in a responsible manner and am subject to the Purdue University Acceptable Use Policy.
- I acknowledge the Office of the Vice President for Information Technology’s right to act if I violate any Purdue policy. I may be denied access, have access reduced, and/or be reported to University authorities and/or civil authorities for further action.
- I understand that my use of this account during the use period constitutes my consent to the above terms.

To Change Your Password
- http://www.purdue.edu/apps/account/ChangePassword/

For additional help and assistance, contact the ITaP customer service center
- On the web at http://www.itap.purdue.edu/help/
- Phone: (765) 494-4000
- In Person: STEW G65

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