FAS Administrators’ Town Hall

April 29, 2021
Zoom
Agenda

Welcome
Mary Ann Bradley

FAS Return to Campus Workgroups
Mary Ann Bradley, Kathy Santoro, Nina Zipser

Financial Update / GL - PCR
Jay Herlihy, Nancy Guisinger

PeopleSoft Changes
Isabelle Modiano, Lisa Lavoie

FAS Educational Support Services (ESS)
Joya Sengupta

Administrative Operations, POI Update
Stephanie Nasson, Gretchen Gingo

Closing / Q & A Session
Mary Ann Bradley
Return to Campus

Mary Ann Bradley  
Interim Dean for Administration and Finance

Kathy Santoro  
Director of HR Programs and Operations

Nina Zipser  
Dean for Faculty Affairs and Planning
PPRG Fall Planning Work Groups

Community Health Practices – Chris Stubbs

Residential Life (UG and GR), including facilities – Katie O’Dair

Return to Campus (faculty and staff), including facilities – Mary Ann Bradley

Academic Program (UG and GR), including facilities – Amanda Claybaugh

Calendar and Scheduling – Mike Burke
<table>
<thead>
<tr>
<th>Category</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>- What days do I have to come to campus?</td>
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<td></td>
<td>- What are my hours?</td>
</tr>
<tr>
<td>Commute</td>
<td>How will I get to work?</td>
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<td></td>
<td>- Concerns about public transportation</td>
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<td>- Concerns about parking</td>
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<tr>
<td>Work Space</td>
<td>How will I feel safe in my workspace?</td>
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<td></td>
<td>- Concerns about air filtration</td>
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<td>- Concerns about shared offices</td>
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<td>- Concerns about wearing a mask and compliance monitoring</td>
</tr>
<tr>
<td>Meetings</td>
<td>How will meetings happen?</td>
</tr>
<tr>
<td></td>
<td>- How many people can meet in person?</td>
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<tr>
<td></td>
<td>- What technology is needed to enable these if hybrid?</td>
</tr>
<tr>
<td>Food</td>
<td>- How will we use shared spaces (kitchens, common areas, conference rooms)?</td>
</tr>
<tr>
<td></td>
<td>- What campus dining options will be open?</td>
</tr>
</tbody>
</table>
Who Makes What Decisions?

University

FAS

Division

Dept
University Decisions

• **Health and Safety – HUHS/EH&S**
  - Are masks required and where?
  - What masks are acceptable?
  - Are vaccines required and if so for whom?
  - Who needs to be tested and how often?
  - What is the process for accommodations?
  - What are social distancing expectations?
  - What building density is allowed?

• **Flex work Policy and Guidelines – HHR**

• **Parking – Campus Services**
  - Are more flexible parking passes available?
  - Will additional parking be available?

• **Technology- HUIT**
  - Who will ensure campus computers are refreshed and laptops that have been remote will connect seamlessly?
Division Decisions

- **Health and Safety**
  - Manage building density
  - Monitor compliance to health and safety protocols

- **Flex work Guidelines**

- **Focus on equity and inclusion** as it relates to the division
Dept/Manager Decisions

• **Health and Safety**
  - Ensure staff and faculty questions are answered
  - Monitor compliance to health and safety protocols

• **Flex work**
  - What will the phased return look like for the dept/team?
  - What flexibility will work for each position?
  - What work can be done remotely?
  - What schedule will work for the dept/team?

• **Focus on equity and inclusion**
  as it relates to the dept/team
Technology Guidance

AV Technology for Classrooms and Conference Rooms

If departments want to invest their funds in AV technology, all purchases will need to be vetted by the Learning Spaces Steering Committee to ensure:

- Appropriate technology is selected that meets departmental needs and integrates with Harvard's network and IT infrastructure
- Support model is available (ESS staff will not be available to support all spaces)
- Appropriate funding is allocated for support, maintenance, repair and future enhancements

- We will circulate a form for these requests
Technology Guidance cont’d

**Technology required for remote work**
- FAS will not be providing employees with duplicate technology (monitors, keyboards, webcams etc.) if employees and their managers agree on a hybrid schedule
- Departments will be responsible for ensuring that all equipment (including furniture) that was taken to employee’s houses is returned to campus once the employee has returned to campus

**Computers on campus**
- HUIT has a plan to address security and software updates for computers on campus – these updates can take several days
- HUIT will contact departments before they begin this work
Space Guidance

In March, FAS Dean Claudine Gay announced an ambitious planning goal to restart all campus-based activities this fall. This goal is especially challenging because we anticipate a larger than average number of students will be on campus this fall due to deferrals and leaves of absence during the pandemic. Given these challenges, allocation of FAS classroom spaces will abide by the following:

- **First priority** - operations that support in-person teaching and research activities
- **Lower priority** – conferences and other gatherings that bring external parties to campus (Please note: short-term visitors are generally discouraged due to health and safety concerns)
  - No spaces for these activities will be assigned until spaces have been assigned to all courses and sections
  - These space assignments may not be completed until several weeks into the semester

**Approvals will be handled at the Divisional or unit level.** It is important to consult early with your Division or unit about the desired activity so the community health, space use, and the impact on our campus-based teaching and research considerations can be addressed.
Out of State Payroll Guidance

• Per current state law, Harvard will keep U.S.-based employees on the Massachusetts payroll while the Massachusetts State of Emergency is in place.
• Once the Governor ends the Massachusetts State of Emergency, full or partially-remote employees will have 90 days until they need to work from a state where Harvard has registered to do business.
• Harvard is currently working to expand the number of states where it is registered to do business - that list will include:
  • New England states (CT, MA, ME, NH, RI, VT)
  • New York
  • California
• If current employees want to continue to work remotely in states that are not listed above, they will need to move and work in a state in which Harvard is registered or may transition to AllSource with manager approval and will lose their Harvard benefits.
  • Managers can decide whether or not to offer AllSource as an option as it may not work for all roles.
Self Care Resources

• **Employee Assistance Program (EAP)**
  - 24/7 access to clinicians
  - New LifeSeries, focused on both responding to current issues as well as planning for the future – Learn more here: https://hr.harvard.edu/employee-assistance-program

• **Office of Work/Life**
  - Mindfulness sessions on zoom
  - Access to the Ten Percent Happier App for free: https://hr.harvard.edu/mindfulness

• **Center for Wellness**
  - Virtual resources including yoga and meditation: https://wellness.huhs.harvard.edu/

• **University Wellbeing Newsletter**
  https://hr.harvard.edu/wellbeing
Where to go if you have questions

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Resource Links</th>
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<tbody>
<tr>
<td>General Questions</td>
<td>• <a href="mailto:CampusReturn@fas.harvard.edu">CampusReturn@fas.harvard.edu</a></td>
</tr>
<tr>
<td></td>
<td>• <a href="https://www.harvard.edu/coronavirus/faq/">https://www.harvard.edu/coronavirus/faq/</a></td>
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<tr>
<td>Websites</td>
<td>• <a href="https://adminfindean.fas.harvard.edu/return-campus">https://adminfindean.fas.harvard.edu/return-campus</a></td>
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<tr>
<td></td>
<td>• <a href="https://www.harvard.edu/coronavirus/">https://www.harvard.edu/coronavirus/</a></td>
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</tbody>
</table>
Financial Updates

Jay Herlihy  
Associate Dean for Finance

Nancy Guisinger  
Assistant Dean for Finance, Controller
What is GL-PCR?

What does it stand for:
General Ledger Payroll Cost Redistribution

What does it do:
A tool to support salary redistributions that ties back to PeopleSoft details. Using that information, the University will have both flawless effort reporting and robust analytics related to changes in Salary and Wages.

What does it replace:
GL-PCR replaces salary journal entries- both Web ADI and Manual

When does it go live:
July 1, 2021. All FY22 salary adjustments must be processed through the GL-PCR.
GL-PCR Features

• Accessed through Oracle Financials
• Flexible search/select of data, similar to Transaction Listing parameters
• Can be used to adjust Payroll or Non-Payroll transactions
  – MUST be used for All Payroll adjustments-- Faculty, Staff, Researchers.
• Fringe Rates
  – Salary adjustments for up to 5 prior years will automatically use correct fringe rate
    • No more calculating prior years fringe and entering additional lines
  – Can bypass Fringe

GL-PCR is required for all Salary Adjustments in FY22
More GL-PCR Features

- Preparers and Approvers
  - One user creates and saves adjustment, next user submits.
  - Users have ability to edit Batch Description

- Original transaction is locked once selected for adjustment. If a future change is needed, it would be on the adjusted entry.
  - Adjust the adjustment

- Coding will be validated against the Cross Validation Rules before saving

- Transaction details are available in the HART dashboards just like original payroll entries and current salary journal entries.

GL-PCR is required for all Salary Adjustments in FY22
Related processes TBD

- Adjusting
  - Salaries greater than 5 years prior
  - Period of Work Performed for retroactive salaries
  - Salary object codes

GL-PCR is required for all Salary Adjustments in FY22
GL-PCR Access and Training

• Access
  • All Oracle GL transactional responsibilities will have access to the form
  • Access to the data and submitting batches will be driven by the specific Oracle GL Security of the user

• Training Plan
  • Zoom recorded training- Released in June
  • Job Aids
  • Office Hours from July through September

GL-PCR is required for all Salary Adjustments in FY22
# GL-PCR Timing

<table>
<thead>
<tr>
<th>Step</th>
<th>Date(s)</th>
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<tbody>
<tr>
<td>Feedback &amp; Demos</td>
<td>through March 12th</td>
</tr>
<tr>
<td>Development &amp; Testing</td>
<td>through April 16th</td>
</tr>
<tr>
<td>Development of Schedule of Releases of functionality of Product</td>
<td>April 16th</td>
</tr>
<tr>
<td>P-3 Internal Testing by project team</td>
<td>April 17th – April 30th</td>
</tr>
<tr>
<td>Promote to P-2</td>
<td>May 1st</td>
</tr>
<tr>
<td>P-2 Internal Testing by project team</td>
<td>May 1st – May 30th</td>
</tr>
<tr>
<td>P-2 Family &amp; Friends testing *</td>
<td>May 17th – May 21st</td>
</tr>
<tr>
<td>Promote to P-1</td>
<td>June 1st</td>
</tr>
<tr>
<td>P-1 Testing by project team</td>
<td>June 1st – June 28th</td>
</tr>
<tr>
<td>P-1 Family &amp; Friends testing *</td>
<td>June 14th – June 18th</td>
</tr>
<tr>
<td>Promote to Production</td>
<td>June 29th</td>
</tr>
<tr>
<td>Office hours</td>
<td>July 1st – September 15th</td>
</tr>
</tbody>
</table>

*this step needs to be reviewed for access

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GL-PCR is required for all Salary Adjustments in FY22
What does this mean for the FAS?

• All FY22 salary adjustments must be posted with GL-PCR
  – Any FY22 salary journal manually entered or uploaded via Web ADI will be deleted/reversed

• Entries will be continued to be forwarded to finjrnl for entries outside department view
  – E-mail batch name/id to finjrnl along with appropriate back up

GL-PCR is required for all Salary Adjustments in FY22
GL-PCR is required for all Salary Adjustments in FY22
PeopleSoft Update

Isabelle Modiano
Director, HR Systems

Lisa Lavoie
Associate Director, HR Systems
New Navigation!
Cleaner Home Page

Easier to find what you need

- Most used pages are on the home page: Approvals, View your Paycheck, Request an Absence, Report your Time, Time and Absence for Administrators.

- Manager Self Service pages are under “Manage My Team”

- Employee Self Service pages are under “My Self Service”

New!

- Explore Harvard

- Users can move tiles by dragging them around
Manage My Team Tile

Everything managers need to manage their direct and indirect reports.

- Approvals
- Team Performance
- Team Time and Absence
- Reports
- My Team Information

New!

- Analytics
- Employee Snapshot

But not so new… these are existing pages that are currently under “My Team” tile and are now on their own for easier access.
My Self Service Tile

Everything employees need.

Will include:
• My Performance
• My Pay
• My Time and Absence
• My Agreements
• My Benefits
• My Personal Details

New!
• Employee Photos
• My Personal Details as Tiles
My Personal Details Tile

Same pages as before... But with tiles.

Click on any tile and it is easy to change your photo.
Explore Harvard Tile

Make it easier for new hires to find everything Harvard has to offer….
Time and Absence
Automated Vacation Payout Balance Adjustments

Good news! You will no longer need to do a manual absence balance adjustment after a vacation payout 😊

• When a payout occurs for the following earning codes, an automated balance adjustment will be run in the system using the hours associated with the specific earning codes
  – Payout for VAO, VCD, LSO and LSD on or prior to 5/15, departments must create a manual balance adjustment
  – Payout for VAO, VCD, LSO and LSD after 5/15, the automated balance adjustment process will create the balance adjustment
• If the hours paid for VAO or VCD are greater than the balance, the adjustment will result in a negative vacation balance
• If the hours paid for LSO or LSD are greater than the balance, the balance will reduce to zero (this balance will not be negative)
• If the employee has excess vacation, no adjustment will be made
• Note: there will be exceptions to the auto balance adjustment and admins will still need to run the balance report

IMPORTANT: these earning codes will be modified to only accept hours.
Longer Service, Personal Days and Excess Vacation

Longer Service, Personal Days and Excess Vacation will not longer be allowed to go negative. Employee requesting over their balance will receive the following message
Two Ways To Manage Time and Absences

1) Home > Team and Absence Administrator
   – Same as before, on the Home page

2) Manage My Team > My Team Time and Absence
   – Simplified: we kept the pages Managers use most (based on a survey)
The Enter Time pages will display the reported time totals with different time units (hours, amounts, and units of work).

**Current State:**

![Current State Image]

**Future State:**

![Future State Image]
For Workforce Administrators: Kibana Analytics
• From Workforce Administrator, click on the **new tile “Workforce Insight”**
• Available to **all admins** with access to at least one department
• Will show all information based on **department-level security**
In Summary….

• All changes will be in PeopleSoft on Monday, May 17
• PeopleSoft and Aurora HR will be unavailable May 15-16
• New navigation, nothing is lost
  – Cleaner home page
  – Photos
  – New Explore Harvard Tile
  – Analytics for Administrators
• New process: automated absence balance adjustment after vacation payout
FAS Education Support Services (ESS)

Joya Sengupta
Executive Director
ESS Vision

To create a consistent teaching & learning experience and provide world-class event & media production services to FAS through investments in learning spaces, AV technology, integrated faculty support, common standards, and an effective support model.

Goals

- Standardize FAS Learning Space Technology
- Produce world-class events
- Integrate Faculty Support
- Upgrade FAS Learning Spaces
- Optimize Support Organization

Services

- Teaching and Learning Support
- Event and Media Production
- Language Instruction Support
- Assistive Technology Services
- Piano Technical Services
- Design and Engineering for FAS Learning Spaces
ESS Services – What we Do

Integrated Faculty Support
All requests are sent to ess@fas.harvard.edu

<table>
<thead>
<tr>
<th>Assistive Technology Center</th>
<th>Teaching &amp; Learning Support</th>
<th>Event &amp; Media Production</th>
<th>Design &amp; Engineering</th>
<th>Language Center</th>
<th>Piano Technical Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Consultations for Students with disabilities</td>
<td>• Faculty/Instruction consultation</td>
<td>• Central event coordination</td>
<td>• Learning space design and engineering</td>
<td>• Instructional support for ancient and modern language courses</td>
<td>• Tuning and maintenance of FAS pianos and keyboards</td>
</tr>
<tr>
<td>• Consultants with local Disability Coordinators</td>
<td>• Course production support</td>
<td>• Event consultation</td>
<td>• Learning space AV standards</td>
<td>• Technical/AV support for language faculty and students</td>
<td>• Piano repair and restoration</td>
</tr>
<tr>
<td>• Assistive technology software and hardware demos</td>
<td>• Virtual and hybrid course support</td>
<td>• Event production</td>
<td>• AV design consultation</td>
<td>• Language Exchange Program</td>
<td>• Piano rebuild projects</td>
</tr>
<tr>
<td>• Alternative text services (braille, tactile graphics, electronic text)</td>
<td>• Lecture capture</td>
<td>• Short form videos</td>
<td>• Learning space upgrades</td>
<td>• Language Tutoring</td>
<td></td>
</tr>
<tr>
<td>• Exam assistance</td>
<td>• Post-production for courses</td>
<td>• Live event recording &amp; streaming</td>
<td>• Design/build project management</td>
<td>• Exam Assistance</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Studio recordings</td>
<td>• Vendor management</td>
<td></td>
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<td></td>
<td></td>
<td>• Remote video production</td>
<td>• Learning space asset management</td>
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<tr>
<td></td>
<td></td>
<td>• Music and audio event production</td>
<td>• AV technology refresh</td>
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<td></td>
<td></td>
<td>• Admin &amp; VIP events</td>
<td>• AV equipment loans</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Post-production services</td>
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</tbody>
</table>
Integrated Support Model – How We Do It

Email: ess@fas.harvard.edu

Education Support Services

One door into all Education Support Services:
- Client Consultation
- Media Production for Courses & Events
- Field Support for Learning Spaces
- Virtual Teaching & Learning Support
- Virtual Event Production & Support
- FAS Event Production (Studio & Location)
- Language Instruction Support
- Learning Space Design & Engineering
- Learning Space Technology Upgrades
- Assistive Technology Services
- Piano Tuning Services
ESS Organization – Our Team

Executive Director
Joya Sengupta

Deputy Director
Andrew Ross

Department Administrator
Tara Joyce

Integrated Faculty Support

Language Center
Andrew Ross
  Classroom Support
  Remote Support
Teaching & Learning Support
Director (Open)
  Classroom Support
  Remote Support
Event & Media Production
Director (Open)
  Event Production
  Media Production Center
  Tony DiBartolo
Design & Engineering
Technical Director (Open)
  AV Equipment Maintenance
  Design & Engineering
Piano Technical Services
Marianna Quinn
Assistive Technology Center
Tanya Washburn

All Classroom and Client IT Support is now provided by HUIT
FAS Learning Spaces

LEARNING SPACE TECHNOLOGY

<table>
<thead>
<tr>
<th>Category</th>
<th>Analog</th>
<th>Hybrid</th>
<th>Digital</th>
<th>No AV</th>
<th>Unknown</th>
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<tbody>
<tr>
<td>Initial Year of Install</td>
<td>2003-2004</td>
<td>2008-2009</td>
<td>2013-present</td>
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<tr>
<td>Registrar &amp; OPRP Spaces</td>
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<td>26%</td>
<td>70%</td>
<td>2%</td>
<td>3%</td>
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<tr>
<td>Department Spaces</td>
<td>16%</td>
<td>13%</td>
<td>32%</td>
<td>16%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Analog: systems obsolete; No replacement parts available; Not compatible with current laptop/mobile devices

Hybrid: Analog system obsolete; Workaround wiring added; Not self-service friendly; Not compatible with classroom capture systems; requires frequent maintenance

Digital: Current AV technology; Compatible with all current laptop/mobile devices; Designed to support future technology implementations

LEARNING SPACE COUNT

- FAS Buildings with Learning Spaces: 75
- Total FAS Learning Spaces: 480
- General Use Learning Spaces:
  - Controlled by Registrar’s Office or Office of Physical Resources and Planning: 158
- Department Learning Spaces:
  - Scheduled by 72 different departments (includes DCE, SEAS, and Residential Houses): 322
  - These spaces are generally not available to other departments
- Number of Learning Spaces with AV equipment: 351
Governance: FAS Learning Space Steering Committee

All AV Technology Investments in FAS Learning Spaces or Conference Rooms will need to be vetted by the Learning Spaces Steering Committee to ensure:

- **Appropriate technology is selected** that meets departmental needs and works with network, security and IT infrastructure protocols
- **Appropriate support is available;** ESS primarily supports registrar scheduled spaces where classes are held
- **Appropriate funding is allocated** for support, maintenance, repair and future enhancements

**FAS Learning Space Steering Committee**

Reviews and approves any technology purchases and space upgrades planned to ensure adherence to these new standards.

**Chair: Katherine Gates**

- Nia Leahy, RO
- Erika McDonald, RO
- Jeni Miller, DCE
- Cara Noferi, OPRP
- Rebecca Nesson, OUE
- Annie Rota, ATS, HUIT
- Kaitlyn Santa Lucia, Harvard College
- Joya Sengupta, ESS
- Christian Wisecarver, DCE
- Director, D&E, ESS

**STAKEHOLDER GROUPS**

- **Faculty Focus Groups** – Consult with faculty to determine future pedagogical needs to guide space and technology upgrades
- **Future Technology Working Group** - (FAS, HKS, GSE, DCE) has developed new AV Technology standards and packages to guide future space upgrades.
- **ESS Design and Engineering** – ESS team specialized in AV and network infrastructure design, engineering and maintenance of learning space technology through a planned refresh cycle and space upgrade projects.
- **OPRP** – Will continue to lead space related decisions, investments and manage space projects.
- **HUIT** – FAS IT partner will provide expertise in network and infrastructure design and maintenance.
Preparing for Fall

To better understand your Fall 2021 support needs, we are requesting that you complete this questionnaire by Friday May 14th:

• What academic and administrative events do you need support for in FY22? Fall and Spring?
• Do you have any department AV support needs?

https://harvard.az1.qualtrics.com/jfe/form/SV_0fl9H6ioamuuLn8
Questions?
Administrative Systems Landscape

Stephanie Nasson
Senior Director of Administrative Operations
## Administrative Systems Landscape

<table>
<thead>
<tr>
<th>FY 21 Recently Completed/Updated Projects</th>
<th>FY 21/22 Projects Underway</th>
<th>What Comes Next…</th>
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<tbody>
<tr>
<td>• Position Request Portal (PREP) – April 19</td>
<td>• Computer operating system upgrades for Windows and Mac - May</td>
<td>• eShip Global</td>
</tr>
<tr>
<td><strong><a href="https://prep.fas.harvard.edu/">https://prep.fas.harvard.edu/</a></strong></td>
<td>• Yoh MSP – Go-live June 7</td>
<td>• AD Security Update</td>
</tr>
<tr>
<td>• HART migration to OAS – April 12</td>
<td>• GL – PCR – effective July 1</td>
<td>• File Share Departmental Drives – <em>optional</em> assessments for interested depts.</td>
</tr>
<tr>
<td>• SNOW Lite for Phone Billing – Go-live April 1</td>
<td></td>
<td>• Office Message Encryption (to replace Accellion Kiteworks) - wider access</td>
</tr>
<tr>
<td>• File Share (individual drives) Final reconciliation</td>
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<td></td>
</tr>
</tbody>
</table>

**FY 21/22 Projects Underway**

- Computer operating system upgrades for Windows and Mac
- Yoh MSP – Go-live June 7
- GL – PCR – effective July 1
- eShip Global
- AD Security Update
- File Share Departmental Drives – *optional* assessments for interested depts.
- Office Message Encryption (to replace Accellion Kiteworks) - wider access
Register for classes on the Harvard Training Portal at TrainingPortal.Harvard.edu:

**Finance Fundamentals VI - Mastering Procurement**: Tuesday, May 11 – 10:00am - 12:00pm

- Additional round of Finance Fundamentals to be offered in the summer! Please watch your email for dates/times to be announced for late July.
Additional Trainings & Clinics

- Upcoming Admin Ops/ASAP Steady State offerings:
  - TF/TA Aurora – May 3rd
  - Concur – May 3rd
  - HART – May 10th
  - Chart of Accounts – May 6th
  - B2P Shopper – May 10th
  - B2P Requestor – May 13th

- Year End Review Session
  - June 3rd

- SPECTRA Refresher Clinics
  - June 8th
  - June 16th

- Please check HTP for more details!
Person Of Interest (POI) Update

Gretchen Gingo
Director, Identity and Access Management Services
Person of Interest (POI) Policy & Process Work

Goals

• Define a policy and business process for POIs that supports legitimate uses of POI roles while guarding against inappropriate or misguided uses that open the University to risk.

• Provide a POI tool that streamlines the business process for creating and maintaining POIs while adding accountability and transparency for sponsors, administrators, schools and units.

Deliverables

• Published POI policy

• Clarified POI business process

• New POI Portal that supports the policy and business process
POI Policy Update

POI Policy Includes:

● Clearly defined roles and responsibilities for POI sponsors and administrators providing oversight for POIs
● A refined list of POI Role Types with clear descriptions and examples
● Requirements for training and attestation
● Expectations for compliance monitoring

Significant Policy Decisions:

● All POI requests will require approval from both the sponsor and designated approvers
● POI sponsors, approvers and administrators will be required to complete policy training in order to access the POI Portal
● Services (ID card, email, etc.) can be individually requested and approved as part of the POI request process
● POI roles may not be used to extend access to services for a departing employee
● All POIs must be categorized into one of the refined role types
  ○ The “Other” POI role type will not be available for general use
POI Portal Vision

Provide a tool that streamlines the business process for creating and maintaining POIs while adding accountability and transparency for sponsors, administrators, schools and units.

● POI Creation:
  ○ Replace existing PDF forms with online form linked to institutional data
  ○ Require all fields necessary to verify identity, minimize duplicates, support onboarding and facilitate lifecycle management
  ○ Enforce rules re: POI sponsorship and term lengths
  ○ Rationalize data collection by role type
● Automated approval workflow for requests with notifications
● Distributed tools for POI lifecycle management (e.g., Renew, Terminate, Update)
● Notification of role expiration to POI, sponsor, sponsor delegate and local approvers
● Distributed dashboards/reporting for administrators, sponsors, and approvers

We are targeting mid-to-late July for rollout of the POI Portal!
Preparing for POI Policy and Portal Rollout

In preparation for rollout IAM will:

- Hold brown bag sessions for the FAS in late May and early June
- Communicate with all current Authorizers and Authorizer Admins about upcoming changes and training requirements
- Partner with AppSec and Admin Ops on initial FAS user set-up
- Clean up data for active POIs to align with the new policy
  - Role type adjustments
    - Move POIs from “Other” to appropriate role types
    - Move POIs between role types based on clarified descriptions
  - Ensure all POIs have associated PeopleSoft departments (used for authorization)
  - Standardize Company names

What we need from you:

- The IAM team will be reaching out to departments for assistance reviewing and cleaning up POI data in advance of rollout
- Please attend an upcoming brown bag to learn more!