Administrators’ Town Hall will be starting soon...
Rules of the Road for today’s meeting:

- **Attendees** are asked to **stay on mute** with **video off** to preserve meeting bandwidth.

- Presenters will be off mute and on video during their presentations.

- If you have a **general question** that you think others would benefit from, please use the **chat** to send a message to “Everyone”.

- Q&A is **not** a forum for **specific questions**. If you have a specific question, please follow up with one of the subject matter experts we will be providing to you at the close of the meeting.

**Please note:** The chat from this meeting will be saved to help update future FAQs. We will not be distributing the chat transcript.
Agenda

Welcome
Leslie Kirwan

Financial Update
Leslie Kirwan, Jay Herlihy

Human Resources
Chris Ciotti

HUIT
Bill DeSimone

Administrative Operations
Mary Ann Bradley, Sean McQuarrie

Closing / Q & A Session
Leslie Kirwan
Welcome

Leslie Kirwan
Dean for Administration and Finance
Financial Update

Leslie Kirwan
Dean for Administration and Finance

Jay Herlihy
Associate Dean for Finance
Human Resources Update

Chris Ciotti
Associate Dean for Human Resources
Year End Update
VERIP Offboarding Next Steps
Year End Update

- **Massachusetts Paid Family and Medical Leave** benefits will become available for all eligible Harvard employees starting on **January 1, 2021**. More information will be forthcoming from the Benefits Office. Further details can be found here: [https://hr.harvard.edu/ma-pfml](https://hr.harvard.edu/ma-pfml)

- **Massachusetts Minimum Wage** increases to $13.50 on **January 1, 2021**. Please contact your HR Consultant if you have questions about this change.

- FAS staff should update their mailing addresses in PeopleSoft as needed so this information is accurate for **W-2 forms**.
VERIP Offboarding Next Steps

• Salary reduction agreement forms (SRA) must be received by your department’s FAS HR Coordinator before **Friday, December 11** to defer all or part of your vacation payout to a tax deferred account (TDA).

• If you haven’t already done so, make sure all your vacation requests are updated in PeopleSoft **ASAP**.

• Put an out-of-office message on your voicemail and email **two weeks** prior to your departure date that instructs others who to contact after your departure.
  - Email addresses for VERIP retirees will be disabled upon the last day of employment as per Harvard-wide policy.
    - There is an exception process to this policy that allows for an additional 30 days of email access if there is a demonstrated critical business need; approval from the FAS Dean of HR is also required.
    - Exceptions to this policy will be considered on a case-by-case basis.

Review VERIP offboarding checklists on the FAS HR website:
https://hr.fas.harvard.edu/verip-departures
HUIT Update

Bill DeSimone
Director of Support Services, HUIT
FAS Remote Learning & VERIP Processes
Remote Learning Challenges – Fall Semester 2020

• Across the University, we all worked to enable Staff, Faculty, and Students to continue the teaching mission from any version of “classroom” or “Office”

• In many cases, this required the distribution of hardware

• Covid-19 had yet to become our ”new normal” so we had little time to plan and prepare.

• The HUIT Service Desk, OUE, and the EUS Projects team manually vetted over 2000 equipment requests all submitted by various methods including email and phone call

• The Field Support Team subsequently purchased and deployed over 2000 devices to Faculty and Students in close to 50 states. It would be safe to say that the Fall was a scramble!

28 Travis St

Smith Campus Center

Private Homes
Fall Semester by the Numbers

• Equipment Deployed
  – 78 Hotspots
  – 23 Headsets
  – 25 Monitors
  – 1766 iPads
  – 99 Computers
  – 16 A/V Stations

• End of Semester Communications
  – 1700 Emails Sent
  – 1008 Responses
  – 881 Extensions
  – 150 Returns
  – 900 Auto-Responses
iPad Task Timeline

**HUIT Tasks**

- **October**
  - 10/30 - Finalize with faculty classes that need iPads
  - 10/30 - Finalize International process

- **November**
  - 11/6 - Finalize communication to students and process with links to Snow forms for returning (return by After finals) and requesting iPads
  - 11/18 - Communication to students goes out for returns
  - 11/12 (will be available prior in test)
    - Finalize Snow return form

- **December**
  - 11/30 - Finalize Snow request form
  - 11/30 - Create FAQ for team
  - 12/9 - Receive Shipment of 200 iPads at 28 Travis St
  - 12/3 - Begin collecting returned iPads
  - Begin reviewing tickets & shipping

- **January**
  - 1/4/21 - Order 400 new iPads
  - Plan WiFi Communication

**FAS Tasks**

- 10/30 - Finalize International process

- **November**
  - 11/6 - Finalize communication to students and process with links to Snow forms for returning (return by After finals) and requesting iPads
  - 11/18 - Communication to students goes out for returns

- **December**
  - 12/7 - Communication to faculty goes out how students request iPad
  - 12/9 – Receive Shipment of 200 iPads at 28 Travis St
  - 12/3 - Begin collecting returned iPads
  - Begin reviewing tickets & shipping
• Intake will be done via request form that will force the requestor to provide all pertinent data.

• This will eliminate the large amount of back-and-forth communication we saw in the fall.

• This request form will appear on the Syllabus for eligible classes.
Spring Semester Improvements

• Additional established staffing and locations
• Streamlined Shipping Process
• Inventory Planning
  – Computers
    • 101 Available
  – Monitors
    • 4 available
  – Headsets
    • Loaned Devices are not being returned (value/safety)
    • 19 Available
  – Hotspots
    • Loaned Devices are not being returned (hardware has little value)
    • 85 Available
Spring Semester Improvements

– Webcams
  • 1 Available

– iPads
  • 65 New Units left from last Fall order
  • 150 return requests
  • 200 New Units Arriving 12/9
  • 400 Units to be ordered on 1/4/2021
  • Approximately 815 bundles for first time requestors
HUIT Assistance with VERIP Activity
VERIP Services Provided by HUIT

• HUIT will assist with the offboarding and equipment collection for VERIP participants on HUIT-Managed Devices. Details can be found on the IT Offboarding Checklist Page. This page teaches the retiree about managing email and digital records along with transitioning work to colleagues and returning equipment
  – CADM - 255 Retirees
  – FAS - 148 Retirees

• VIP Staff can request a 1-1 Session with a HUIT technician via Service Desk
  – Set up OOO message & Call Forwarding
  – Transfer Ownership of SharePoint/Teams Sites
  – Move/Transfer files to departmental sites
  – Transfer mobile number
VERIP Services Provided by HUIT

• **HUIT Equipment Return Form**
  
  – Intake form will capture all pertinent information necessary to facilitate action from HUIT staff
  
  – Most Returns will happen via drop-off at 28 Travis St
  
  – Filling out the form will result in a Microsoft Bookings Calendar offering where the retiree will be able to select a convenient date/time for drop-off
  
  – For those who cannot come to campus, we have partnered with HUMS to ship all necessary packing materials and labels to the home of the retiree
VERIP Services Provided by HUIT

• Per FAS Guidance, HUIT will not facilitate the retention of computers
  – Financial Complexities (Lease Vs. Purchase), Software Licensing, Proprietary Data
  – Consistency/Equity for all retirees

• Equipment Outcomes – Somewhat dictated at the department level
  – Quarantine/Wipe - Store
  – Quarantine/Wipe - Redeploy
  – Quarantine/Wipe - Return to department
VERIP Equipment Return Form

For retiring faculty and staff who are returning Harvard-owned equipment

* Requested For
  - Bill DeSimone

MUID
  - 112355506

* Harvard Email Address
  - bill_desimone@harvard.edu

* Personal Non-Harvard Email Address

* Personal Non-Harvard Contact Number

* Retirement Date

Where do you currently have Harvard-owned equipment?
Select all that apply
- At home
- On-Campus Workspace

At Home Equipment Being Returned
* Select all that apply
- Laptop Computer(s)
- Desktop Computer(s)
- Monitors
- Dock
- Peripherals (Keyboard, Mouse, Adapter)
- Headset
- Webcam
- Mobile Devices (Cell Phone, Tablet, hotspot)
- Other

* Are you able to drop off the equipment on campus?
  - Yes
  - No

* Provide full address where we should send shipping label and packing materials

On-Campus Equipment Being Returned
* Select all that apply
- Laptop Computer(s)
- Desktop Computer(s)
- Monitors
- Dock
- Peripherals (Keyboard, Mouse, Adapter)
- Headset
- Webcam
- Mobile Devices (Cell Phone, Tablet, hotspot)
- Other

* Provide on-campus workspace location

VERIP Intake Form
PPRG Update

Mary Ann Bradley
Associate Dean for Administrative Operations
Pandemic Planning & Response Group (PPRG) Updates

- Work Group Planning - Spring Decision
- Getting Ready for January Move-in & Remote Learning
- Phased Openings Based on Community Health
- Off-Campus Students
- Vaccine in the future…
Buy2Pay Update

Sean McQuarrie
Director of Procurement Operations
## Buy2Pay Deployment Schedule

### Calendar Year 2020

<table>
<thead>
<tr>
<th>Cohort 0</th>
<th>Cohort 1</th>
<th>Cohort 2</th>
<th>Cohort 3</th>
<th>Cohort 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>April 29 2020</strong></td>
<td><strong>August 12 2020</strong></td>
<td><strong>October 1 2020</strong></td>
<td><strong>November 4 2020</strong></td>
<td><strong>December 2 2020</strong></td>
</tr>
</tbody>
</table>

**FAS:**
- Admin Ops
- DCE
- Psychology
- Romance Lang.
- SCRB

**FAS:**
- Social Sci Depts
- Sci Depts
- RAS
- Sci Ops

**FAS:**
- Social Sci Centers
- Libraries
- Science Depts.

**FAS:**
- A & H
- Admissions
- Athletics
- Hvd College
- GSAS
- Sci Depts.

**FAS:**
- Administration and Finance

### Other Harvard:

- HUIT
- GSE
- Some CSPH, FAD, HMS

- Allieds
- CADM
- CSPH
- HKS
- HMS
- HSDM

- CS
- HBS
- HL
- HLS
- RIAS
- WYSS

- CS (Housing)
- CSPH
- DIV
- GSD
- HBS
- HLS
- SEAS (w/Physics)
- WYSS

**FAS Only**
## Buy2Pay Transaction Data

Transactions from 4/29/2020 to 12/8/2020

<table>
<thead>
<tr>
<th>Purchase Type</th>
<th># of PO's</th>
<th>Total $</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO</td>
<td>12,085</td>
<td>$32,548,556.77</td>
</tr>
<tr>
<td>NR</td>
<td>315</td>
<td>$88,214.22</td>
</tr>
<tr>
<td>PR</td>
<td>4,858</td>
<td>$20,209,596.39</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>17,258</strong></td>
<td><strong>$52,846,367.38</strong></td>
</tr>
</tbody>
</table>
Buy2Pay Benefits

- **Paperless Process** – all paperwork (invoices, attachments etc.) in the procurement process will be electronic

- **Transparency** – workflows and transaction information visible to all users - shoppers, approvers, Central Administration, and suppliers

- **Cost Savings** – system will incorporate negotiated contracts and preferred suppliers to drive increased savings

- **Integration of Procure to Pay Process** – this platform provides multiple modules that are easily leveraged to improve the whole procurement lifecycle including sourcing, contract management, buying and paying

- **Electronic Forms** – special handling, NR, VJF and other forms are now available electronically through Buy2Pay

- **Debarment** – system will automatically verify that suppliers have not been debarred – no more Debarment Forms for most transactions
Administrative Systems Update & Support

Mary Ann Bradley
Associate Dean for Administrative Operations
# B2P Training & Support

<table>
<thead>
<tr>
<th>Role</th>
<th>University</th>
<th>Admin Ops</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopper (optional)</td>
<td>1,021</td>
<td>149</td>
<td>1,170</td>
</tr>
<tr>
<td>Requestor</td>
<td>440</td>
<td>1,064</td>
<td>1,504</td>
</tr>
<tr>
<td>Approver (includes Sr.)</td>
<td>135</td>
<td>336</td>
<td>471</td>
</tr>
<tr>
<td><strong>Total (as of 12/08/20)</strong></td>
<td><strong>1,596</strong></td>
<td><strong>1,544</strong></td>
<td><strong>3,145</strong></td>
</tr>
</tbody>
</table>

- **Reminders:**
  - University Office Hours offered 2x daily through Teams
  - Admin Ops B2P Cohort Channels available in Teams through January 2021 for daily support for department LIMs & end users
  - As of February 1, revert back to Admin Ops/ASAP email for support
  - B2P access is removed 30 days after go-live date if online or Instructor led training has not been completed for Requestor and Approver roles
Additional Training Resources/Information

• Admin Ops/ASAP will continue to hold a specialized B2P class covering:
  • Advanced Tips & Tricks
  • Document Search

• Next offering - Friday, December 11th from 11:00 a.m. – 1:00 p.m.
  • No registration required
  • https://harvard.zoom.us/j/91880070340?pwd=QytVZ2dpeXhsblBJZjFuemoycXJOZz09&from=addon

• The next round of Finance Fundamentals will kickoff on January 26, 2021 - dates to be posted shortly on adminops@fas.harvard.edu
Year End Deadlines - AP

• **PO-related Invoices:**
  - Due to AP by **5PM on Friday, 12/11/20** to pay by **Friday, 12/18/20**
  - Invoices received after 12/11/20 will be paid in January
    - *B2P PO-related invoices, send to AP via: AP_Invoices@harvard.edu*
    - *HCOM PO-related invoices, send to AP via: AP_CustomerService@harvard.edu*

• **PR-related Invoices:**
  - PR-related invoices must be **approved in B2P by 12/16/20** to pay by **12/18/20**
    - *Reminder: Do not send PR-related B2P invoices to AP - they are systematically generated*

• **Non-standard Check Processing:** (Special Handling, Department of Homeland Security, etc.)
  - **Must reach AP by 5PM on Friday, 12/11/20** to accommodate paper check distribution by **Wednesday, 12/16/20.**
  - After 12/16, Special Handling of paper checks will resume **1/4/21**

• **HCOM:** During the Winter break, electronic invoices will continue to arrive and be processed, generating system receiving e-mails. Shoppers can also receive goods in the system during the break.
Year End Deadlines – Travel

- Concur reimbursements submitted and approved by 5:00 p.m. on **Monday, 12/14/20** will be processed before winter recess.
  - Concur Reimbursements received after the specified deadline will be posted in January.

- ‘Days to Approve’ will be increased to 30 days on 12/14/20 and will revert back to 10 days on 1/11/21.
  - Please note, this extended approval time will only apply to reports created on or after 12/14/20.

- Object code 6660 (Computer Supplies & Materials) has been added in Concur and is now available for use.

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Object code 6660:

- Meeting Room Rentals & Leases of Space (7230)
- 04. Supplies & Materials
  - Animal Supplies (6530)
  - Classroom Supplies (6540)
  - Computer Supplies & Materials (6660)
  - Food Supplies (6570)