

FAS Administrators' Town Hall

January 19, 2023
Zoom



Welcome

Scott Jordan

Dean of Administration and Finance



Agenda

Welcome

Scott Jordan

Financial Updates

Scott Jordan, Jay Herlihy, Susan Duda,
Nancy Guisinger

HUIT

Michael Tran Duff, Kyle Shachmut, Alan
Wolf, Kenton Doyle, David Cloutier

Human Resources

Tiffany Jadotte

Administrative Operations

Mary Ann Bradley, Sean McQuarrie,
Stephanie Nasson

Closing

Scott Jordan



Financial Updates

Scott Jordan

*Dean of Administration and
Finance*

Susan Duda

Assistant Dean for Finance

Jay Herlihy

*Associate Dean for
Finance*

Nancy Guisinger

*Assistant Dean for
Finance, Controller*



Budget Reimagining Committee Findings

**Administrator's Town Hall
January 19, 2023**

Committee Membership

Executive Committee

Scott Jordan
Jay Herlihy
Susan Duda
Katherine Gates

- **Workgroup members include 66 staff representing 46 different departments**
- **The workgroups include at least one representative from each of the divisions and affiliated tubs.**

Reporting & Accountability

Co-Chairs: Nancy Guisinger & Susan Duda
Project Manager: Katherine Gates

Barbara Beaudoin
Christine Boyer
Holly Ciavattone
Elise Ciregna
Thomas Chelstowski
Carla Greenwood
Benjamin Jeder
Chuna Keophannga
David King
Chantal Mont-Louis
Stephen Murphy
Deana Reardon
Tanya Sukhareenko
Alex Taylor
Ruth Wilson

Workforce Planning

Co-Chairs: Tiffany Jadotte & Mary Ann Bradley
Ad Deans: Beverly Beatty & Sheila Thimba
Project Manager: Katherine Gates

Yota Batsaki
Thomas Bourgeois
Maria Curcio
Susan Duda
Natalie Durham
Denise Oberdan
Zachary Pelletier
Kathy Santoro
Etaine Smith
Sandy Stergiou
Lauren Szufat
Monica Tesoriero

Space Planning

Co-Chairs: Zak Gingo & Jay Herlihy
Ad Deans: Russ Porter & Allen Aloise
Project Manager: Katherine Gates

Thomas Bourgeois
Catherine Cezeaux
Becky Chetham
Susan Duda
Ranna Farzan
Celia Kent
Reema Khan
Raymond Traietti
Victoria Koc
Christy Krant
Purvang Patel

Multi-Year Financial Planning

Co-Chairs: Susan Duda & Carla Greenwood
Ad Deans: Geradine Mahoney, John Langridge & Vaughn Waters
Project Manager: Katherine Gates

Sarah Elwell
Meg Hastings
Chuna Keophannga
Shawn Lee
Katie Mc Arde
Chantal Mont-Louis
Ryan Sullivan
Geoff Tierney
Emily Ware
Kwok Wah Yu

Budget Process

Co-Chairs: Susan Duda & Chuna Keophannga
Ad Dean: Gretchen Brodnicki
Project Manager: Katherine Gates

Barbara Beaudoin
Thomas Chelstowski
Manuel Cuyun
Kathleen Daly
Cheryl Frodermann
Julie Knippa Colby
Pat McVay
Chantal Mont-Louis
Stephen Murphy
Stephanie Nasson
John Park

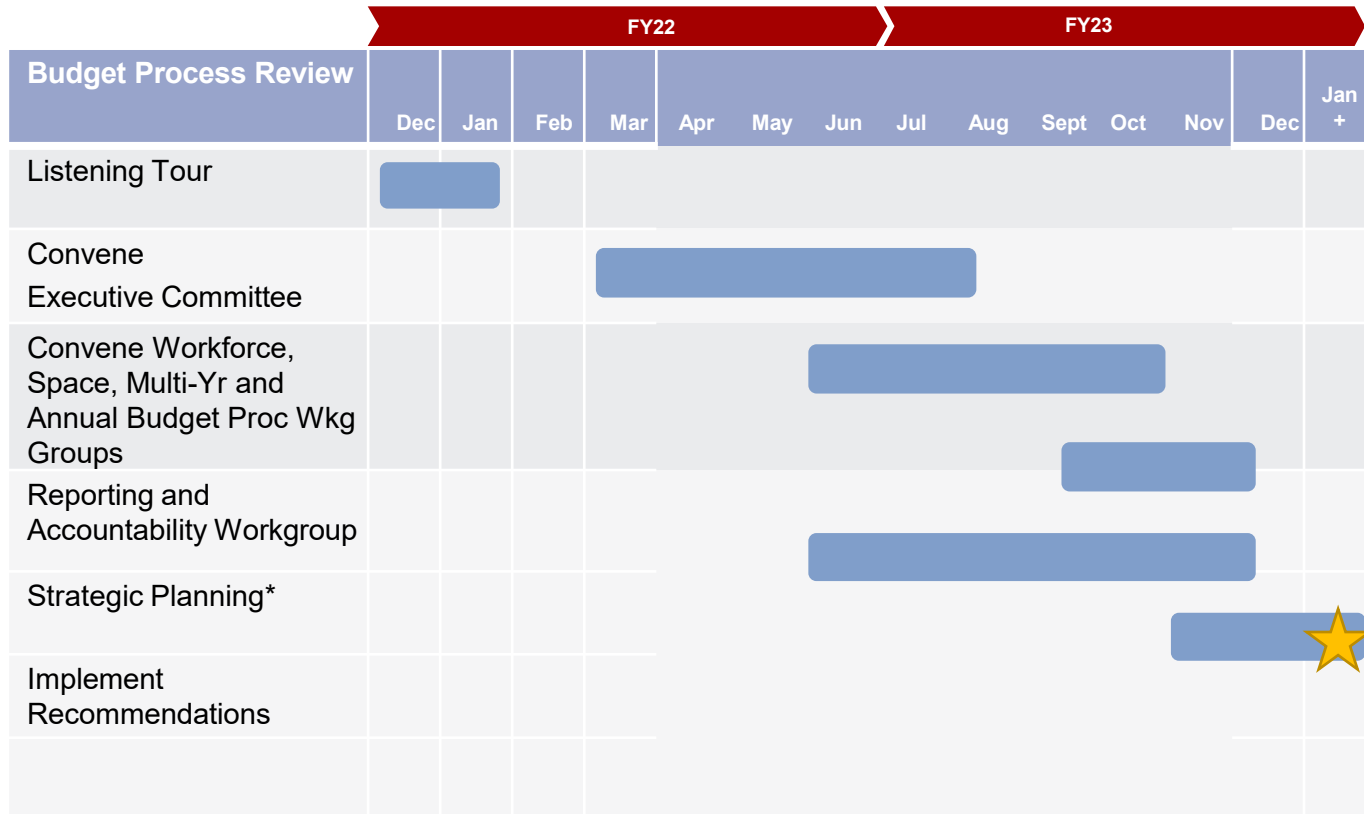


Budget Reimaging Workgroups - Update



- Four of the five Budget Workgroups have met bi-weekly since June
- Reporting and Accountability kicked off in Sept and is still developing their recommendations:
 - principles of accountability
 - reports for measuring results
- Strategic Planning is managed by the FAS Dean

Budget Reimagining Timeline



* Managed by the FAS Dean's Office

Budget Workgroups - Summary

- **Multi-Year Financial Planning (MYFP) Workgroup** - FAS multi-year financial planning will be phased in over multiple years and will be supported by a new system in future.

- Ongoing Pilots:

- ✓ Affiliated Tubs - GSAS, Athletics, Dumbarton Oaks and Harvard College Library
- ✓ Development Office and HUIT
- ✓ Harvard College

- Future Pilots:

- ✓ Academic Divisions
- ✓ Admin Divisions
- ✓ Museums

- **Workforce Planning Workgroup Next Steps:**

- ✓ Perform pilot(s) with divisions and determine project timelines and outcomes
- ✓ Evaluate to determine success(es) and areas for improvement with pilot group
- ✓ Develop, finalize and socialize workforce planning guidance, case studies and training for access for future FAS workforce planning
- ✓ Incorporate into budget submissions

Budget Workgroups - Summary

•Space/ Capital Planning Workgroup Next Steps:

- Share Data:** make departments aware of space use/cost to encourage efficiency with existing space
 - ✓ Leverage existing data/reporting tools
 - ✓ Consider metrics/norming at Divisional level (FAS-wide = impractical/infeasible)

•Annual Budget Process Workgroup – based on feedback from this group the following changes will be implemented this year:

- ✓ Budget Guidance communication
- ✓ Extended Calendar continues
- ✓ Budget Workbooks include 3 year planning tools and short form for small units
- ✓ Forecast Submission is due along side the budget submission
- ✓ Enhanced Training sessions (ongoing)
- ✓ Contingency Planning (more guidance to come)

GL-PCR Sticky Search

- Search and Back to Search.. Parameters are now saved during the session!!!!

The screenshot displays the 'Search GL Transactions' interface. At the top, there are two tabs: 'Search GL Transactions' (active) and 'Search Adjustment Batches'. Below the tabs, the search criteria are organized as follows:

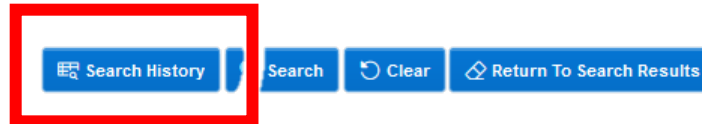
- Fiscal Year:** 2023 (dropdown menu)
- Period:** FEB-23, JAN-23, DEC-22, NOV-22, OCT-22, SEP-22, AUG-22, JUL-22 (checkboxes)
- COA (enter at least 2 segments):** 370 (dropdown menu)
- TUB:** (text input)
- Org:** (text input)
- Object:** 6010 (dropdown menu)
- Fund:** 454103 (dropdown menu)
- Activity:** (text input)
- Subactivity:** (text input)
- Root:** (text input)
- Effective Date Between:** From Date (text input) - To Date (text input)
- Posted Date Between:** From Date (text input) - To Date (text input)
- HUID:** (text input)
- Position:** (text input)

At the bottom right, there is an 'Advanced Search' button and a row of navigation buttons: Search History, Search, Clear, and Return To Search Results.

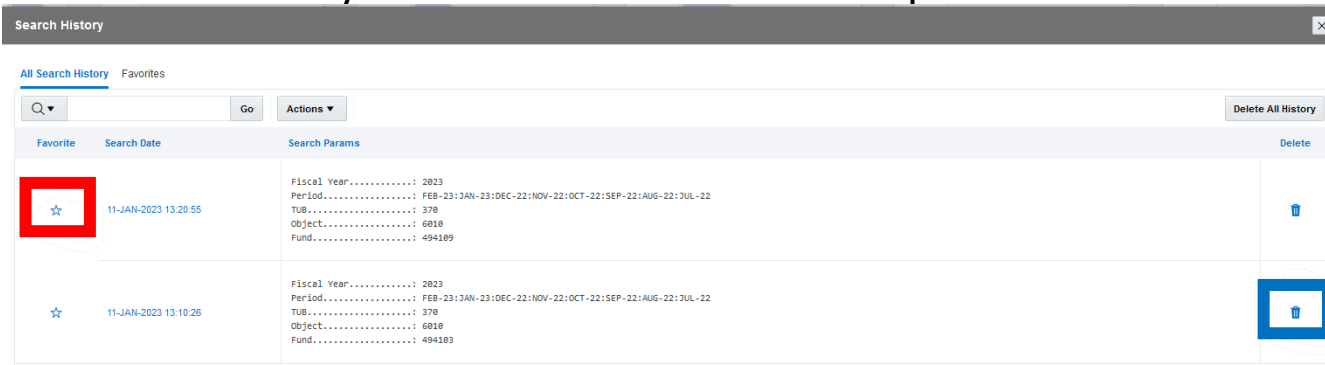
Makes it easy to refine a search if the lines returned is either too much or not enough

GL-PCR Search History and Favorites

- GL-PCR keeps track of all your searches. Click new Search History button to review.



- & within History, make a search a Favorite by clicking the Star, or delete search by clicking the Delete icon
 - Delete All History will delete all searches except Favorites



.... & it's never too early

- To think about Year End
 - Approve POs/Travel/PCard
 - Review reports to verify everything is coded correctly
 - Check Fund Balances

New for FY23:

- HART report to manage AP accruals
- Increase in frequency of posting assessments to Gifts





LastPass Update

Michael Tran Duff

*Chief Information Security and
Data Privacy Officer, HUIT*

Password Managers @ Harvard

January 19, 2023

Michael Tran Duff, Chief Information Security and Data Privacy Officer



HARVARD

Information Security and Data Privacy

HARVARD CONFIDENTIAL

Incident notifications from LastPass

Dear LastPass Customer,

We recently notified you that an unauthorized party was able to gain access to a third-party cloud-based storage service which is used by LastPass to store backups. Earlier today, we posted an update [to our blog](#) with important information about our ongoing investigation. This update includes details regarding our findings to date, recommended actions for our customers, as well as the actions we are currently taking.





Your guide to a better future

Tech > Services & Software

LastPass Breach: What Subscribers Need to Know and Do

It's time for LastPass customers to find a different password manager.



Attila Tomaschek

Jan. 6, 2023 1:00 p.m. PT

7 min read

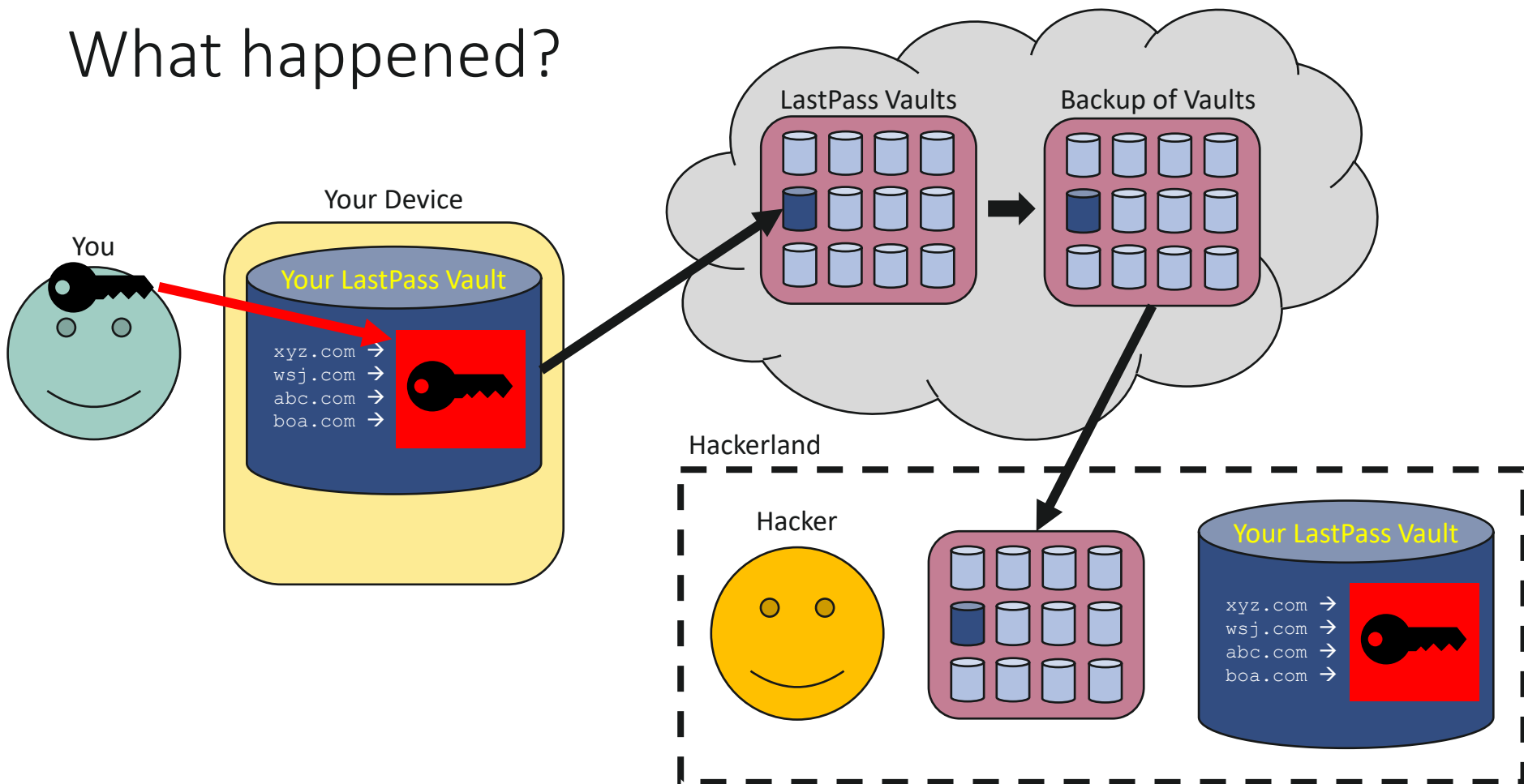


HARVARD

Information Security and Data Privacy

HARVARD CONFIDENTIAL

What happened?

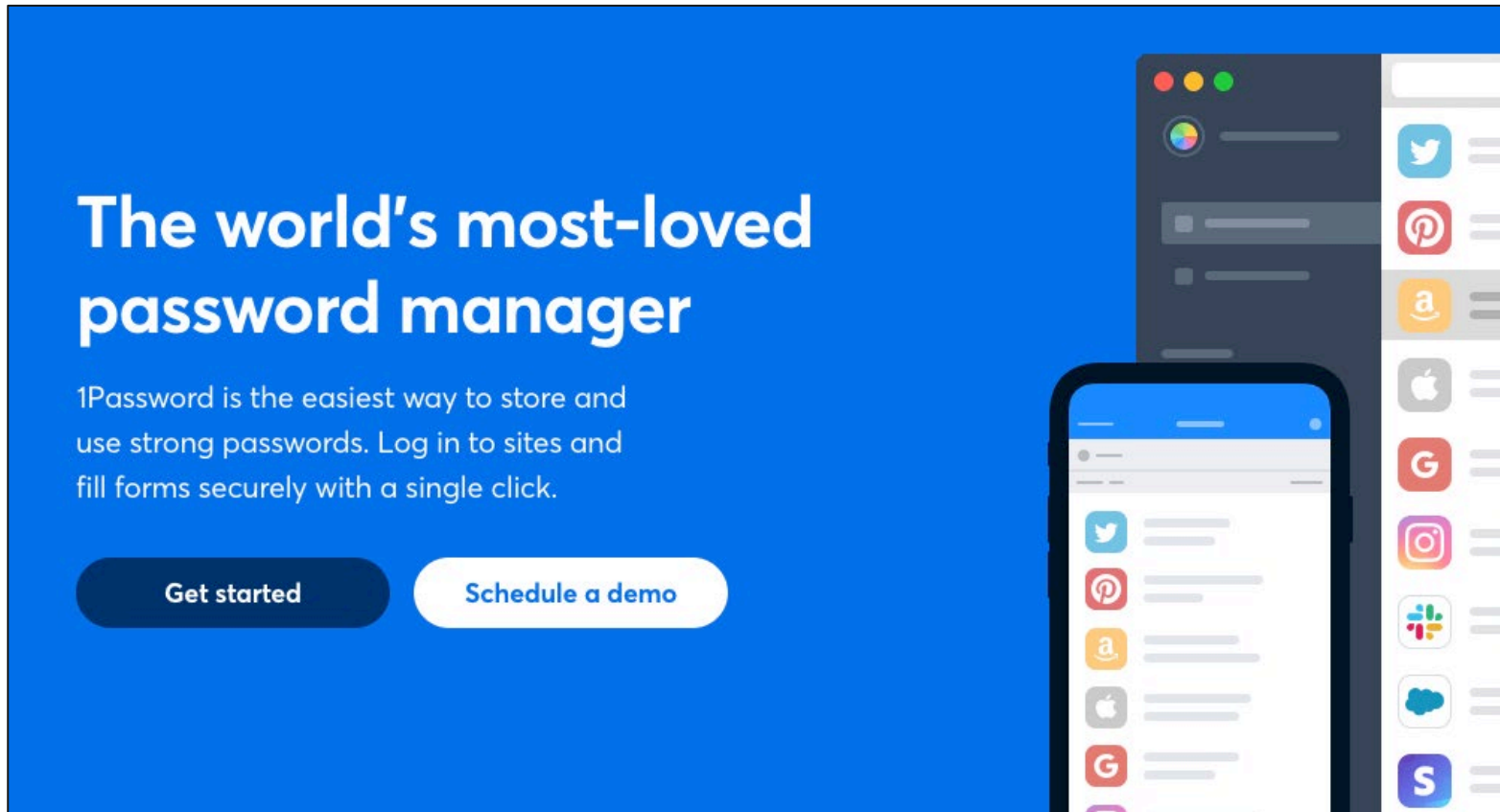


Guidance to Harvard LastPass Users

1. Change your LastPass master password, using 12+ randomly selected characters (from the full 94-character set) or 5+ randomly selected words (e.g., “method frame carpet green willow”).
2. Begin changing your stored passwords, prioritizing your email, financial, and Harvard accounts.
3. Ensure that two-factor authentication is enabled on these accounts. Reject any two-factor prompts that you did not initiate.
4. Monitor your financial accounts for fraudulent transactions.



Transitioning to 1Password

A promotional graphic for 1Password. It features a blue background with white text. On the right side, there are illustrations of a desktop monitor and a smartphone, both displaying lists of social media icons (Twitter, Pinterest, Amazon, Apple, Google, Instagram, etc.).

The world's most-loved password manager

1Password is the easiest way to store and use strong passwords. Log in to sites and fill forms securely with a single click.

[Get started](#) [Schedule a demo](#)

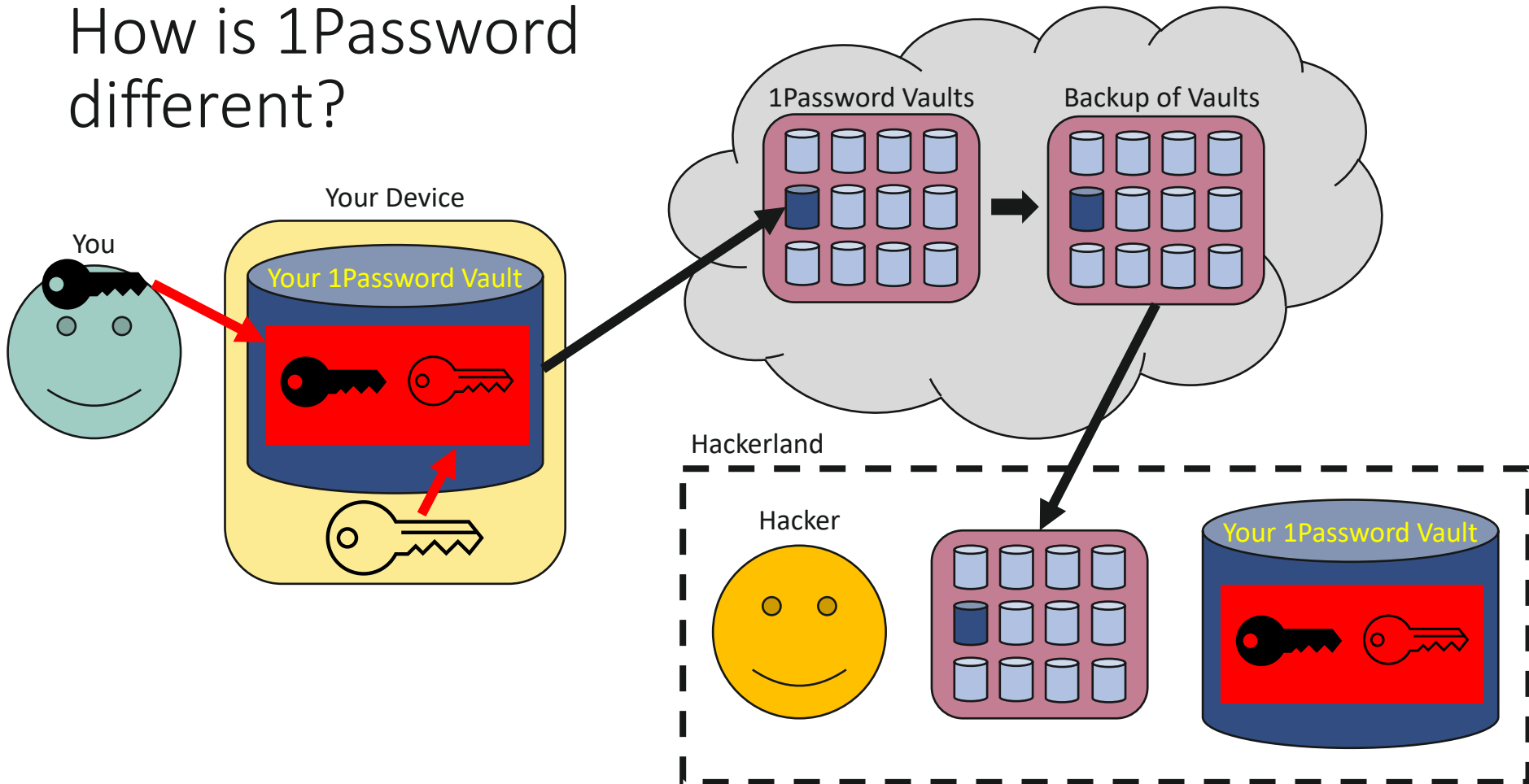


HARVARD

Information Security and Data Privacy

HARVARD CONFIDENTIAL

How is 1Password different?





Digital Accessibility

Kyle Shachmut

*Director of Digital Accessibility
Services, HUIT*

Alan Wolf

*Managing Director, Academic
Technology Services, HUIT*

What is digital accessibility?

Digital accessibility - making electronic content available to and usable by everyone - at the same time, with the same ease of use - including and especially people with disabilities.



Digital accessibility is one part of Harvard's many efforts toward equity, diversity, inclusion and belonging.

accessibility.huit.harvard.edu

Why Update Harvard's Digital Accessibility Policies?

Policy Update Goals

1. Support Harvard's goal of inclusive excellence by promoting digital environments that do not pose barriers to any of our users
2. Level accessibility Standards at Harvard so that those for non-public content match what is already expected for public content under existing Policy
3. Ensure that accessibility expectations are consistent across schools and units
4. Position the University to address more proactively any legal or regulatory requirements (including §504 of Rehab Act, Title III of the ADA)
5. Conserve time, effort and resources by promoting accessibility at the point of development, as costs of barrier remediation exceed costs of prevention
6. Merge the 2 Policies into one to simplify communication about current expectations based on #2 & #3

Why Now?

- [Digital Accessibility Policy](#) (for Public websites) - created in 2019 amid captioning litigation with NAD about captioning public content
- Address existing gaps while being more deliberative and proactive about Harvard's approach to accessibility

Primary Proposed Policy Changes

Digital Accessibility Policy (for websites)	Public Websites	Websites behind authentication (intranets, secured pages, web apps)
Present	Should aim for WCAG 2.1 AA	n / a
Future State	Should aim for WCAG <2.2> AA	

Accessible Technology Procurement & Development Policy	Tech purchases by HUIT or IT Offices reporting to a school-level CIO	All Harvard tech purchases
Present	Should aim for WCAG 2.1 AA	n / a
Future State	Should aim for WCAG <2.2> AA	

Rollout Timeline: Proposed Accessibility Policy Updates



Digital Accessibility Help and Resources

- Use self-service resources and contact Digital Accessibility Services with further questions or needs:

accessibility.huit.harvard.edu

digitalaccessibility@harvard.edu

- Expert assistance or casual questions welcome at regular DAS office hours

[digital accessibility office hours](#)

DAS offers targeted trainings, specific to roles and tasks. Take the ones relevant to your work!

[🔗 Digital Accessibility for Content Creators](#)

[🔗 Intro to Accessibility and Harvard's Policies](#)

[🔗 Document Trainings: Documents, Slide Decks, and PDFs](#)

[🔗 Testing Web Accessibility Training](#)

[🔗 Digital Accessibility Foundations \(Level I & II\)](#)

[🔗 Web Accessibility in HTML & CSS](#)

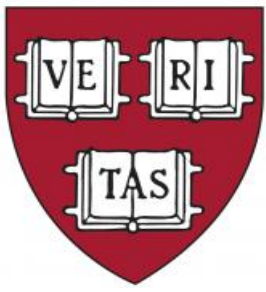
DAS will host any of these as a custom session for teams upon request!

Questions, Consideration and Feedback

1. Who else should be consulted as we work toward final adoption?
2. Timeline feedback: Effective **June 1, 2023**
3. Are there key constituencies within your school / unit that might desire further consideration or support? Why / how?
4. As Implementation Procedures are developed to accompany this updated Policy, what concerns or clarifications do you want addressed in community guidance?
5. What do you need to be supported in your area with a change like this on the horizon?
6. What questions do you anticipate in this rollout?

Consult & Approval Roadmap:

- U-CIO & CIO Council
- Accessibility Steering Committee (Policy governance)
- University Accessibility Committee
- Univ Disability Resources
- OGC & Risk Management
- EVP / Provost previews
- President & Deans
- FAD & Procurement
- Digital Accessibility Liaisons
- Local Disability Coordinators



Open Scholar & Website Auditing

Kenton Doyle

Director, Harvard Web Publishing



Harvard Web Publishing: OpenScholar Update

Since 2012, Harvard University Information Technology (HUIT) has offered the [OpenScholar platform](#) for members of the Harvard community to create websites. As web publishing technologies and our community's needs evolve, HUIT is enhancing our web services to offer new website platform service options based on WordPress and Drupal 9.

From mid-2023, HUIT will begin transitioning away from the OpenScholar platform and migrating current Harvard OpenScholar websites to new platforms. In preparation for this transition, HUIT will be moving current Harvard OpenScholar websites to a new hosting provider, Acquia, in the January – March 2023 timeframe.



OpenScholar Update: what is changing?

Why are Harvard OpenScholar websites moving to a new hosting provider?

Moving websites to a new hosting provider, Acquia, will ensure their stability and reliability ahead of a future migration to a new platform. HUIT will continue to support all current Harvard OpenScholar websites that are compliant with [Terms of Use](#) beyond March 2023 and until websites are migrated to a new platform.

What impact will this have for current Harvard OpenScholar websites?

Moving Harvard OpenScholar websites to Acquia hosting will create minimal impact for site owners:

- Websites will continue to use the same OpenScholar software as they currently do.
- The user interface and experience of managing and posting content will remain the same.
- Website visitors will not experience any change.
- Beginning in January 2023, the HUIT Service Desk will provide technical support for Harvard OpenScholar websites.

Many large Harvard websites were already moved to Acquia this fall. Remaining sites will be moved in early 2023, and HUIT will work with Schools and Units to notify and provide information to site owners.



OpenScholar Update: what comes next?

What platforms will websites be migrated to?

From mid-2023, HUIT will begin migrating Harvard OpenScholar websites to new platform service options based on WordPress or Drupal 9. These new platforms will enable:

- More options of functionality to meet a variety of user needs
- Greater security, reliability, support, and up-to-date software
- Improved accessibility, appearance, and overall user experience

HUIT is working with Schools and Units to identify the best future platform options for current websites and will contact site owners with more information.

New website requests should be routed to [your School or Unit's web publishing resource](#) to determine what platform is most suitable for the user's needs.



OpenScholar Update: removing ineligible sites

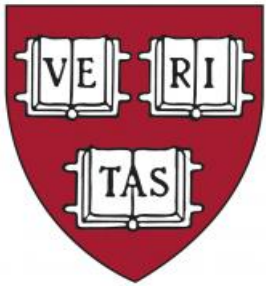
Reducing the footprint of sites

In advance of migrating Harvard OpenScholar websites to new platform offerings, HWP has been identifying websites that do not meet [Terms of Use](#). There are approximately 12,000 Harvard OpenScholar sites currently, and half of these have been identified as potentially inactive or ineligible.

In September HUIT launched a campaign to notify site owners for one of the following reasons:

- The site has not been updated in more than 12 months.
- The site owner has left Harvard or moved to a role that is no longer benefits-eligible for a Harvard-managed site
- The site does not meet Use Limitation or Policy Compliance conditions in the Terms of Use

Anyone leaving Harvard who manages a website must [transfer site ownership](#) to another member of their department. Throughout 2023 HWP will continue to work with groups and departments across the FAS to reduce the footprint while preparing to migrate to new platforms.



FAS Computer Selection Process

David Cloutier

*Deployment/Implementation
Program Manager, HUIT*



Agenda

- Selection Strategy
- Process Overview
- Computer Selection Process Demo
- Communication template
- Next Steps
- Appendix



Overview of Computer Selection Strategy

- During the pandemic, the Refresh and Deployment team partnered with FAS to utilize surveys to help fulfill equipment requests.
- We recommend moving to a similar survey strategy for the fulfillment of annual refresh requests. This will help to:
 - **Improve user experience** connecting directly with the end user about their preferences
 - **Reduce administrative burden** for DAs and the Refresh team
 - **Optimize efficiency by** streamlining the information gathering process
- We recommend piloting the use of the computer selection process to the upcoming refresh cycle for a few identified departments in January 2023.



New Process Overview

- Assets up for refresh will be sent to department administrator/contacts (DA/DC)
- Those eligible will be vetted using various sources
 - Those that are confirmed as eligible will be sent the survey. This eliminates the need for the DA/DC to act as an intermediary.
 - Those that require follow up (role does not qualify, user has left, etc.) will not be sent a survey. These will be sent to our DA/DC contact per our current process for resolution.
- Survey results that follow FAS Refresh computer selection protocol will be recorded and placed into scheduling queue
 - Staff – PC to PC, Mac to Mac, Mac to PC
 - Faculty – any selection
- Survey results that do not follow FAS Refresh computer selection protocol will be collected and sent to department contact for approval along with any outstanding questions
 - Staff – PC to Mac
 - Custom configs requiring bill codes



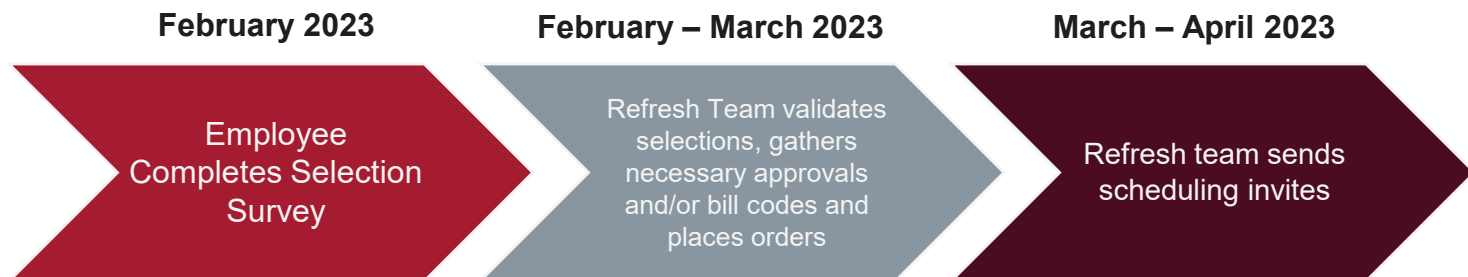
Sample Email Outreach

Dear Colleague,

Your machine has been identified as a device that is due for refresh. Please complete the steps outlined below to select your new machine.

- Review the [FAS Standard Computer Offerings](#)
- Be prepared to verify the Asset Tag and Serial Number on your existing machine
- Complete the **Computer Selection Survey [LINK]**

Please submit your response no later than xxx. Below is an overview of the refresh process, including relevant deadlines to be aware of.





Computer Selection Process Demo



Next Steps

- Launch new survey process for pilot group in January
 - GSAS
 - Physical Resources
 - CCB
 - MCB
 - MCZ
 - FAS HR
 - Anthropology
- Apply any necessary lessons learned from pilot
- Launch new process FAS-wide in February



Thank you!



Final Paycheck Update and Staff Professional Development and Wellbeing Opportunities

Tiffany Jadotte

Associate Dean for FAS Human Resources



Final Paycheck for Involuntary Terminations

- Employees who are terminated involuntarily must receive their final paycheck, inclusive of wages and accrued but unused vacation time, on their last day of paid employment
- Term positions that end and are not renewed or reappointed (unless the employee voluntarily resigns) are considered to be involuntary terminations.
- Now recommending that the employee be notified, and can be relieved of their duties, but their **last date of employment should be coordinated with the regular paycheck cycle.**
- It's important for managers to plan the timeline for all involuntary terminations in advance and coordinate with HR and Payroll.
- An outline of this [paycheck process](#) was sent to administrators on January 5, 2023.



Professional Development and Wellbeing Opportunities

- The Center for Workplace Development (CWD) has released its [schedule of virtual and hybrid classes](#) on topics such as communications, giving and receiving feedback, and career navigation running through June 2023. Access more information about these courses: <https://hr.harvard.edu/training-courses>
- Benefits-eligible staff can enroll in [new mindfulness sessions](#) from the Office of Work/Life. Learn more here: <https://hr.harvard.edu/worklife>
- Join FAS HR for one of the sessions remaining in the new Managing Effectively at FAS series, which covers practical topics about managing and leading. Find registration links here: <https://hr.fas.harvard.edu/managing-effectively-fas>

Email hr_programs@fas.harvard.edu with any questions about enrolling in these programs or other professional development opportunities at Harvard and FAS.



Administrative Operations Initiatives

Mary Ann Bradley

*Associate Dean for
Administrative Operations*

Sean McQuarrie

*Director of Procurement
Operations*

Stephanie Nasson

*Senior Director of
Administrative
Operations*



Administrative Operations Initiatives

Upcoming Projects Q3 2023 – Q2 2024

Current Q3 2023

- PCard to Concur
- Day-in-the-life intv/focus groups
- Website terms of use audit

On Deck Q1 2024

- Electronic I-9 roll outs



Upcoming Q4 2023

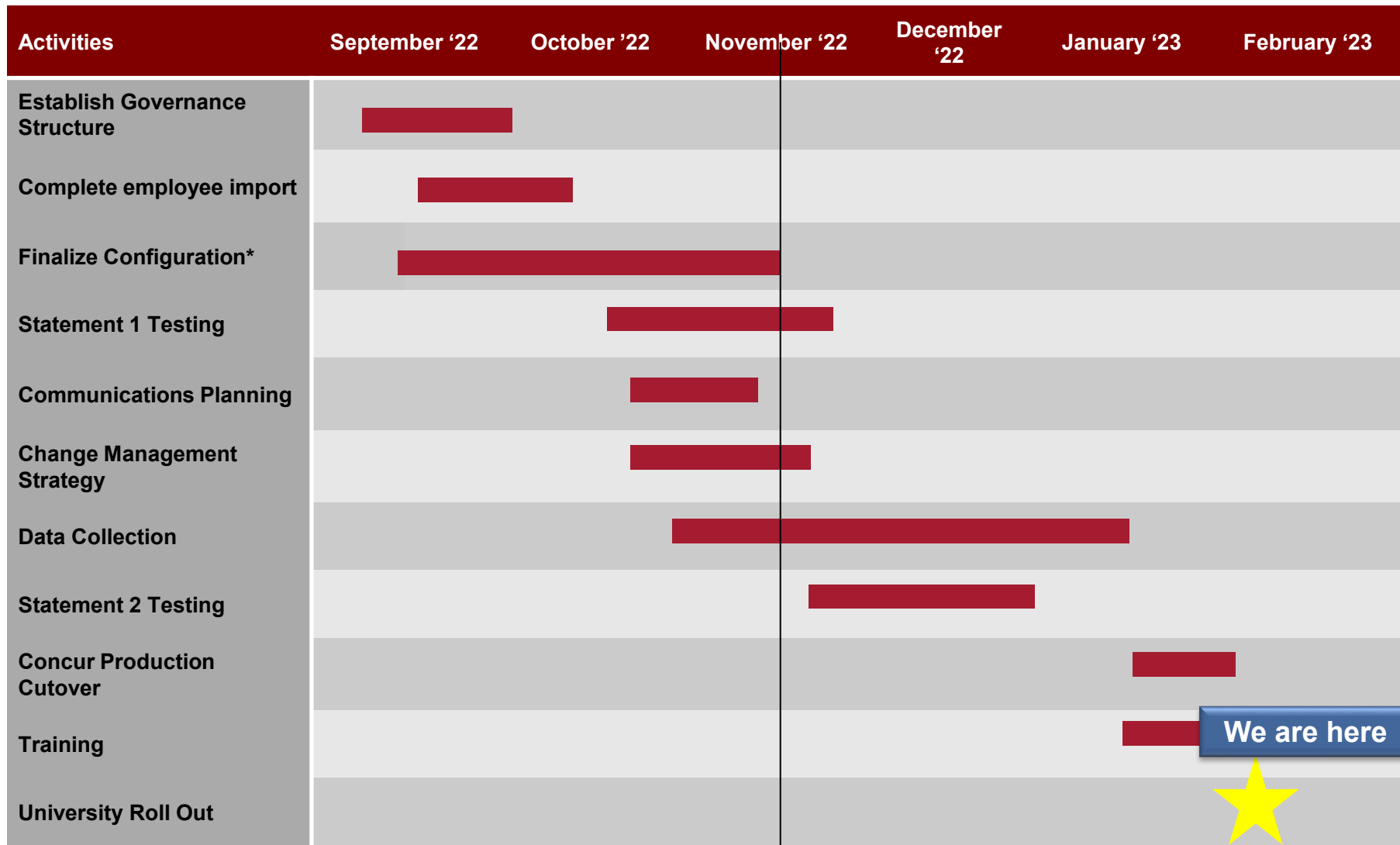
- eShip Global in B2P
- Phone infrastructure upgrade
- FileShare Dept. SharePoint

Future Q2 2024

- FAS Data Hub
- Jabber softphone discovery
- Crimson Print
- Crimson Fax – add'l tubs



PCard to Concur Transition Project Timeline



We are here





PCard to Concur: Next steps

- **Go-live:** January 30, 2023
- **Please register for training in HTP:**
 - [Concur PCardholder training](#)
 - [Concur PCard Approver training](#)
 - [Concur Dual PCardholder training - PCard and Corporate card](#)
- **Resources & Support:** January – March 2023
 - **Concur Office Hours:** Mondays & Wednesdays 11 – 12pm; Fridays 11 – 12pm starting 02/03/23 - [Zoom online meeting](#)
 - **Admin Ops Office Hours:** First Friday of the month, 11 – 12pm – [Zoom online meeting](#)
 - Recorded trainings for all classes available on the [Concur training page](#)



Finance Fundamentals

The Administrative Operations team is offering a full round of Finance Fundamentals with all six sessions starting this month.

These trainings are free and open to all FAS staff members with financial responsibilities*. You can attend just the session(s) that pertain(s) to your current position or join us for all six sessions (within three years) and receive a certificate!

Remember, if you are a Finance Fundamentals graduate you are welcome to attend any session as a refresher.

Finance Fundamentals I – Managing Cash

Finance Fundamentals II – Managing Compensation

Finance Fundamentals III – Mastering Reimbursements

Finance Fundamentals IV - Monitoring Funds

Finance Fundamentals V - Maximizing Funds

Finance Fundamentals VI - Mastering Procurement

[Register in](#)
[HTP](#)

* All Finance Fundamentals attendees must have a working knowledge of the Chart of Accounts.



Ongoing Trainings

A reminder - the Administrative Operations team continues to offer monthly trainings on FAS/University applications.

For more details, please visit: <https://adminops.fas.harvard.edu/asap-training>

Upcoming sessions include:

Aurora	Concur Tips & Tricks
B2P Approver	GL-PCR
B2P Requestor	HART
B2P Advanced Topics	Journal Transfers & TLX
Chart of Accounts	PeopleSoft
Concur	Supplier Portal

First Friday Drop In (aka ‘Stump the Trainer’) – no registration required

Please register for all classes in the Harvard Training Portal:
<https://trainingportal.harvard.edu/>



Oracle Outage – mark your calendars

- **Unavailable - Tuesday, April 18th, at 5:00 pm to Monday, April 24th, at 8:00 am**
- Oracle E-Business:
 - Accounts Payable
 - Accounts Receivable
 - Cash Management
 - Fixed Assets
 - Capital Projects and Project Services (CAPS)
 - General Ledger and all Chart of Accounts services (maintenance, APIs and security)
- Buy to Pay:
 - Supplier Onboarding
 - Requisitioning/PO/PR/NR
 - Contract Management
 - Sourcing
- **Unavailable - Friday, April 21st, 5:00 pm to Monday, April 24th, at 8:00 am**
 - Financials Data Warehouse
 - HART Financial Dashboards
- See current edition of [eNews](#) for more details



Save the Date!

Next Administrators' Town Hall:
March 23, 2023
2 – 4:00 p.m.



Celebrating Reverend Dr. Martin Luther King Jr. and Mrs. Coretta Scott King

The FAS Diversity, Inclusion, and Belonging Leadership Council announced a series of events celebrating the lives and impact of Reverend Dr. Martin Luther King Jr. and Mrs. Coretta Scott King.

This inaugural celebration honors the many contributions of the Kings, whose sacrifices and influence continue to guide our progress toward social justice today.

Details and a full listing of events can be found on [FAS OEDIB website](#).