Individual Recipients

Robert Bellantuoni
Daniel Bertwell
Allyson Bieryla
Jillian Casey
Emily Crowell
Madeleine Currie
Deborah De Laurell
Danielle Doyle
Irvin Dumay
Jeannette Everritt
Silke Exner
Jason Fleming
Feven Girmay
Erin Holder
Nikki Hughes
Lesley Hunter
Reema Khan
Susan Kinsella

Team Recipients

Hutchins Center Events Team
Justin Sneyd
Matthew Weinberg

University Area Indirect Cost Proposal Preparation Team
Charlotte Gallant
Marina Magid
Cara Noferi
Andres Orco-Zerpa
Monica Patel

Undergraduate Advising & Employer Relations Team (Office of Career Services)
Linda Chin
Christiana Cough
Amy DiGiovine
Leanne Gaffney
Loredana George
Tyrene Jones
Daniel Lobo
Marissa Long
Emiko Morimoto
Nicole Satyanarayan
Nancy Saunders
Danielle Zelaya
• University-wide recognition program

• Celebrates the accomplishments of Harvard staff whose work supports the mission of the university at the highest levels of contribution, impact and excellence

• Honorees will be announced in mid-April (nomination window was Feb. 19 to March 8)

• Awards ceremony with President Lawrence S. Bacow will be held on June 13 at 3:30 p.m. in Memorial Hall

• We welcome you to attend and celebrate Harvard Heroes, especially those FAS recipients
President’s Administrative Innovation Fund

• The PAIF was created to catalyze administrative innovation and collaboration across Harvard by investing in staff-generated, creative solutions that support our faculty, students and staff colleagues. **Applications due by April 2\textsuperscript{nd}**.

• Our theme for this year will be “Creating Connections and Community”. Specifically projects that facilitate cross-unit initiatives, that expedite learning across organizational boundaries (both inside and outside of Harvard), and that continue our commitment to diversity, inclusion, and belonging.

• Please visit [https://innovationfund.evp.harvard.edu/](https://innovationfund.evp.harvard.edu/) for details.
Minors Policy Annual Reminder

https://youthprotection.harvard.edu

• Compliance with *Guidelines for Interacting with Minors*, including reporting suspected abuse or neglect
• Registration of activities involving minors
• Risk mitigation:
  o “minors in labs” policy (hazardous environments)
  o program administrator training
  o background screening and training of any “responsible adults”
• Obtaining agreements from lessee organizations

**Department Administration Role**

1. Remind unit faculty and staff of Minors policy
2. Poll your unit regarding presence of minors
3. Register all minors; contact TSO (jmsheph@fas) with questions

**Additional Resources:** Please note, Jennifer Shephard, Mary Corrigan and Eliza Brown are available to attend department/lab meetings. Minors will be an agenda item at our next meeting in May.
Welcome, Introductions and General Updates

Leslie Kirwan
Dean for Administration and Finance
Agenda

Welcome, Introductions and Updates
Leslie Kirwan, Mary Ann Bradley

PeopleSoft Time & Labor Changes
Isabelle Modiano, Lisa Lavoie

Faculty Startup Funds
Nancy Guisinger

Accessible Technology Procurement
Kyle Shachmut

Buy2Pay Supplier Portal Overview
Katherine Gates

Global Support Services
Krister Anderson, Elizabeth Esparza

Closing / Q & A Session
Leslie Kirwan
# Administrative Systems Landscape

<table>
<thead>
<tr>
<th>Operational/Maintenance Enhancements &amp; Support</th>
<th>Change Management &amp; Implementation</th>
<th>What comes next…</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Concur</td>
<td>• PeopleSoft Mobile Changes</td>
<td>• I-9/E-verify</td>
</tr>
<tr>
<td>• GMAS</td>
<td>• Buy2Pay-Supplier Portal</td>
<td>• Research Administration and Compliance Program/Portal</td>
</tr>
<tr>
<td>• Harvard Training Portal (HTP)</td>
<td>• Spectra Enhancements</td>
<td>• PI Dashboard</td>
</tr>
<tr>
<td>• OBI/HART</td>
<td></td>
<td>• Position Tracking &amp; Reporting</td>
</tr>
<tr>
<td>• Harvard Careers</td>
<td></td>
<td>• File Share</td>
</tr>
<tr>
<td>• Harvard Phone</td>
<td></td>
<td>• B2P - eProcurement</td>
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<tr>
<td>• Aurora</td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Mark your calendars!

- **Finance Fundamentals**
  - Continues through May 8th
  - Remaining modules include Budgets, Gifts & Endowments and Procurement
  - Attend one or more as a refresher, all six for a certificate
  - Please register via the Harvard Training Portal

- **Admin Ops - ASAP Training Calendar – April, May, June now available**
  - Chart of Accounts
  - Concur
  - OBI/HART
  - Concur / OBI Tips & Tricks
  - Spectra 2.0
  - Journals and other YE Prep classes
  - Monthly Drop In sessions & more…

- Please visit [adminops.fas.harvard.edu](http://adminops.fas.harvard.edu) for additional information
Mark your calendars!

• **Supplier Portal**
  • Admin Ops - ASAP is offering two sessions each in April & May
  • Project team also offering University-wide training in April
  • Job aids and videos to be made available as additional training resources
  • Please register via the Harvard Training Portal

• **PeopleSoft Upgrade**
  • PeopleSoft Overview class w/Mobile changes **May 16th** from **10 -11:30 a.m.**
  • PeopleSoft Mobile changes Drop In session immediately following training from 11:30 a.m. – 12:30 p.m.
Mark your calendars!

• **Independent Contractors**
  - Offered by the University Financial Policy Office
  - The Independent Contractor (IC) Policy has been revised with an effective date of 7/1/19 (with early adoption encouraged).
  - Expanded training materials have been created to help hiring department properly classify and pay these individuals.
  - **April 2nd from 1:00 – 2:30 p.m. / April 16th from 9:30 – 11:00 a.m. @ CWD**
  - Additional dates available on the Longwood campus

• Please register via the Harvard Training Portal, selecting “Training on the Revised Independent Contractor Policy”
PeopleSoft Time & Labor Changes

Isabelle Modiano
Director, HR Systems

Lisa Lavoie
Associate Director, HR Systems
HUIT, Academic Technology Services
Harvard HR Systems – What’s Next?

Mobile Strategy - “working anytime, anywhere”
• Based on our multi-year plans, we are looking at rolling out more mobile (“fluid”) functionality to employees and managers.

Manager Self-Service
• Most HR systems are centered around the manager, and modern HR systems rely on the manager for approvals, and enable managers to initiate transactions directly in the application. We are starting to explore moving in that direction.

Less Customization
• In order to be able to adopt new functionality more rapidly, we need to customize less. This is an industry trend as cloud vendors are offering more configuration and deploying changes more rapidly.

More frequent and more incremental changes
• Harvard’s and PeopleSoft’s strategy is to introduce enhancements and new functionality more frequently and incrementally. In order to continue to improve our user experience, we need to consider how we now approach change, training and communication.
HR Systems – Upcoming changes

PeopleSoft Major Release

• PeopleSoft Spring Release: May 13th, 2019
  • PeopleSoft will be down Friday, May 10th at 5pm

• Release Scope

  • Technical Upgrade
  • Changes to support the Position Tracking and Reporting project
  • New PeopleSoft functionality
    – Day One onboarding
    – **New Mobile Time and Labor pages:**
      » Timesheet page is **replaced** by new Mobile Time Entry pages – impacts EMPLOYEES
      » Time Approvals are being **added** to the Approvals Tile, existing page remains unchanged – impacts MANAGERS
      » Harvard Exception page is being replaced by a Mobile Exceptions page – impacts ADMINISTRATORS

  – New Mobile Direct Deposit page – impacts EMPLOYEES
  – New “look and feel” for administrative pages
Changes for Time and Labor pages – Employees

![Time and Absences screenshot]

- **Timesheet**
- **Report Time and Absences**
- **Request Absence**
- **Cancel Absences**

- **Select Another Timesheet**
  - **View By** Week
  - **Date** 01/20/2019
  - **Scheduled Hours** 20.00
  - **Reported Hours** 0.00

- **From Sunday 01/20/2019 to Saturday 01/26/2019**

- **Submit**
- **Apply Schedule**

- **Overtime Premium Hours**

- **Reported Time Status**
  - **Date**
  - **Total TRC**
  - **Description**
  - **Sched Hrs**
  - **Comments**

- **Personalize | Find | [ ] 1 of 1**
Enter Time (Fluid) – from laptop

<table>
<thead>
<tr>
<th>Time Reporting Code / Time Details</th>
<th>Sunday 9</th>
<th>Monday 10</th>
<th>Tuesday 11</th>
<th>Wednesday 12</th>
<th>Thursday 13</th>
<th>Friday 14</th>
<th>Saturday 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>REG - Regular</td>
<td></td>
<td>25.00</td>
<td>8.00</td>
<td>17.00</td>
<td>7.35</td>
<td>24.00</td>
<td></td>
</tr>
<tr>
<td>PERAM - Personal Day - Absenc</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Exception**
- **Pending Approval**
- **Absence**
- **Approved**
- **Summary**

Reported time on or before 01/12/2018 is for a prior period.

View Legend

[Request Absence]
Weekly Time Entry (small form) – from a Smartphone
Mobile Time Entry – Key Changes

• **Replaces** our current timesheet pages available to employees and managers
  – Enter Time page will make it easier to report time on laptops and tablets
  – Weekly Time Entry page specifically for small devices
• Employees will be able to request absences directly from the Time Entry page
• Smaller changes may be noticeable to employees:
  • Information currently displayed in different tabs will now be icons
  • Comp Time is no longer a tab but is accessible on another page
  • Comments are by day, not by day and week
  • No restrictions to enter time in .25 increments
  • No validation on the number of hours reported but manager will see a flag
Changes for Time and Labor pages
– Managers and Administrators

- Approve Reported Time
  - Timesheet Summary
  - Employee Selection Criteria
    - Selection Criterion: Time Reporter Group
      - Value: 71167
    - Selection Criterion: Employee ID
      - Value: 81374341
    - Selection Criterion: Empl Record
      - Value:
    - Selection Criterion: Last Name
      - Value: Modiano
    - Selection Criterion: First Name
      - Value:
    - Selection Criterion: Department
      - Value:
    - Selection Criterion: North American Pay Group
      - Value:

- Harvard Exceptions

- Timesheet
  - Replaced by fluid pages

Stays “as is”. In addition, approvers can approve time from the Approvals Tile (fluid page)

- Change View
  - View By: All Time
  - Date: 01/27/2019
  - Hide Absence Columns
  - Show Schedule Information

- Employees For Isabelle Modiano, Time Needing Approval Before 01/27/2019
  - Time Summary
  - Demographics
  - Approval
    - Select All
    - Deselect All
    - Approve
    - Deny
    - Push Back

- Hourly Rate: 0.00000
- Hours to be Approved: 0.00000
- Reported Hours: 0.00000
- Time Rpt Codes:
Mobile Time Approval
Mobile Time Approval
Mobile Time Approval – Key Changes

• Time Approvals will be on the same “Approvals Tile” as Absence Approvals
• Easier to use, with same access to details as before
• Ability to select multiple rows and approve with a single click
• Important: we are keeping the Approved Reported Page for now (primarily for admins)
Communication Plan

Time and Labor Changes

• Working closely with all our user groups from all schools
• Conducted User Acceptance Testing with 40-45 people from across the University
• We will include an announcement in the eNews
• We are working with CWD on a training video for the new Time Entry pages
• We will notify via email all time reporters about the new page

Other Changes

• Day One Onboarding - communication handled by CWD and the Advisory Group
• New Direct Deposit Page – no communication, the new page is easier to use
Feedback? Questions?
## Appendix: Changes for Time and Labor pages–Summary

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Timesheet</td>
<td>Enter Time</td>
<td>Yes, the Timesheet page will be replaced by the Enter Time and Weekly Time Entry. If the employee is on a mobile device they will automatically be transferred to the Weekly Time Entry page.</td>
<td>Time Reporters (all hourly employees) and Managers</td>
</tr>
<tr>
<td>Timesheet</td>
<td>Weekly Time Entry</td>
<td>Yes, the Timesheet page will be replaced by the Enter Time and Weekly Time Entry. If the employee is on a mobile device they will automatically be transferred to the Weekly Time Entry page.</td>
<td>Time Reporters (all hourly employees) and Managers</td>
</tr>
<tr>
<td>N/A</td>
<td>Approvals</td>
<td>Fluid Approvals tile will now include the ability to approve Reported Time.</td>
<td>All Time Approvers (Managers and Time Administrators).</td>
</tr>
<tr>
<td>Approve Reported Time</td>
<td>Approve Reported Time</td>
<td>No changes</td>
<td>Department Administrators and Time Administrators.</td>
</tr>
<tr>
<td>Adjust Time</td>
<td>Adjust Time</td>
<td>No changes</td>
<td>Department Administrators and Time Administrators.</td>
</tr>
<tr>
<td>Harvard Exceptions</td>
<td>Manage Exceptions</td>
<td>Yes, the classic Harvard Exceptions page will be replaced by the fluid Manage Exceptions page. No filters we be applied: all Exceptions will be displayed.</td>
<td>Department Administrators and Time Administrators.</td>
</tr>
<tr>
<td>All other pages</td>
<td></td>
<td>No changes</td>
<td></td>
</tr>
</tbody>
</table>
Faculty Startup Funds

Nancy Guisinger
Assistant Dean for Finance & Controller
FAS Office of Finance
Faculty Start Up Accounts

• Current:
  • Several Faculty Start Up Accounts that are Unrestricted Undesignated Fund Types

• Beginning in FY20:
  • One Faculty Start Up Account that is Unrestricted Designated Fund Type.

This change will increase Efficiency, Accuracy and Transparency of Faculty Start Up Accounts with no impact to Financial Results

New Fund Number: 016110
Impact

- There will be a new Fund Number to use. Fund 016110
- Finance/Admin Ops will update Payroll, Concur and PCard defaults
- Open POs will need to be closed and new POs with new Fund will need to be opened
- Internal Billings & Service Centers costing strings will need to be updated
- Old Start Up Funds 000770, 000772 & 000775 will be DISABLED in July
Help with Transition

Transaction Listing

• Transaction Listing Customization created by Admin Ops will be shared with DAs to aggregate 000770, 000772, 000775 and 016110.

PI Dashboard

• Accounts with 000770, 000772 and 000775 will be updated to also include 016110.

Deficits

• Faculty Start Up Deficits are defined as the aggregate of 000770, 000772, 000775 and 016110. Fund Management Customization will be shared with DAs to identify deficits.
Timing

**Now**
- Purchase Assets with 016110
- Purchase Orders going into FY20, use Fund 016110
- PI Dashboard Accounts with current Start Up will be updated to include 016110
- Internal Billing review to get updates in place

**June**
- Payroll, PCard and Concur defaults updated
- PI Dashboard Accounts added
- Transfer Balances to 016110

**July**
- Old Funds will be disabled
Questions/Comments/Feedback
Faculty Start Up Accounts

• Beginning in FY20:
  • One Faculty Start Up Account that is Unrestricted Designated Fund Type.

New Fund Number:
016110
Accessible Technology Procurement

Kyle Shachmut
Manager of Digital Accessibility
University Disability Services
today’s discussion

1 what is accessibility?
definitions, demonstrations & discussion of barriers created by inaccessible technology

2 accessibility in procurement
considering accessibility when purchasing technology

3 accessibility resources
use & share guides when your department makes technology purchases
what is 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
diverse, welcoming & inclusive for all
HUIT Accessibility Policy

central IT has an online accessibility policy stating technology **developed** or **procured** should adhere to the WCAG 2.0 AA standard.

[accessibility.huit.harvard.edu](https://accessibility.huit.harvard.edu)
Pathways to Accessibility
ensure accessibility through process

contract
to access
exception
rider
process
The President's Administrative Innovation Fund was created to catalyze administrative innovation and collaboration across Harvard by investing in staff-generated, creative solutions that support our faculty, students and staff colleagues.

2017-18 PAIF-ATP team:

Kyle Shachmut  HarvardX - UDS - HUIT
Michele Clopper  University Disability Services
Bob Doyle  FAS & Assistive Tech Center
Mildene Bradley  HUIT, Admin Technology
Chris Gambon  VPF-Strategic Procurement
Joe Holewa  HUIT-Vendor Management
Harvard digital accessibility contract rider

- 1.5 page contract rider from OGC’s model document website
- ensures vendors will deliver tech to WCAG 2.0 AA
- vendor will test & maintain accessibility conformance
- make reports available to Harvard
- demonstrate progress on issues

OGC’s model document website: [ogc.harvard.edu/pages/model-documents](http://ogc.harvard.edu/pages/model-documents)
Pathways to Accessibility
ensure accessibility through process

- contract
- rider
- roadmap
to access
- exception
- process
accessibility data in Novatus
questions asked and available for reporting

1. accessibility addressed in contract?*
2. Is there a signed accessibility rider?
3. where is the accessibility rider?
4. Is there an accessibility roadmap for this product?
   - if roadmap, create Novatus events for key deliverables
5. has an exception been granted for this contract?
6. approver of waiver + documentation location
7. did the vendor provide a VPAT?
8. location of the VPAT
9. How was this product reviewed for accessibility?
   - q & a with the vendor; automated tools, assistive technology user testing; product not reviewed
10. when was the product reviewed?
11. share results from the product review
   - if available, free text or report documents uploaded from #10-11

process overview and supporting documents at: accessibility.huit.harvard.edu/procurement-process
resources & info

• RFP & Contract Templates – To find templates with standard Harvard questions and terms, visit the Online Accessibility website
  
  [Link to Online Accessibility website]

• Send signed contracts to: huitvm@harvard.edu

• Email digital accessibility questions to: disabilityservices@harvard.edu

  [Link to procurement process page]
Accessible Technology Procurement

Questions?

Kyle Shachmut
HUIT
HarvardX
University Disability Resources
kyle_shachmut@harvard.edu
Buy2Pay Supplier Portal Overview

Katherine Gates
Senior Director of Planning and Administrative Initiatives
FAS Administrative Operations
Buy2Pay Overall Project Timeline

**FY19**

- Design & Configuration, Validation, Testing & Training
  - Design, Build, Integrate & Test Solution
  - Training Development
  - Policy and Process Alignment

**FY20**

- Phased Go-Live Rollouts
  - Communications & Training Delivery
  - Phased Go-Live Rollouts

Supplier Portal
04/29/19

Change Management & Organizational Readiness
# Buy2Pay Module Definitions

## Buy2Pay Solution

*Single platform that simplifies, streamlines, and removes guesswork in the procurement process*

## Supplier Management

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Supplier Portal</td>
<td>Allows suppliers to enter and maintain their contact, tax and payment information and also accommodates white glove registration by departments. This module automates some compliance checks, including debarment, and offers robust search features for users.</td>
</tr>
</tbody>
</table>

## Sourcing

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A centralized module for procurement sourcing actions required by financial policy such as soliciting bids, tracking RFPs, and awarding contracts. Used in conjunction with Buy2Pay reports and analytics, this module could potentially help the university recognize cost savings through strategic supplier sourcing.</td>
<td></td>
</tr>
</tbody>
</table>

## Contracts

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>An end-to-end contract management tool. Users can automate the authoring, redlining and signing of contracts and store executed contracts. Users can receive alerts about upcoming contract renewals or actions.</td>
<td></td>
</tr>
</tbody>
</table>

## eProcurement

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This module guides users through the buying process in the marketplace or for non-catalog items and gives users visibility into available and preferred supplier options. Users can link PO information to other modules, route invoices, and track payment status.</td>
<td></td>
</tr>
</tbody>
</table>

## Spend Analytics

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This module provides reporting and analytics to assist central procurement and schools in analyzing their spend with particular suppliers or types of spend categories. The University could potentially recognize savings through negotiating volume and early payment discounts, and leveraging campus-wide buying power.</td>
<td></td>
</tr>
</tbody>
</table>

---

*Harvard Faculty of Arts and Sciences / Administrative Operations*
What is a Supplier?

A supplier is an **individual or company** that provides **goods or services** to Harvard.
The Supplier Portal allows suppliers to enter and maintain their contact, tax and payment information and also accommodates white glove registration by departments. This module automates some compliance checks, including debarment, and offers robust search features for users.

- Supplier Portal will go live university-wide on **April 29, 2019**
- Allows users to begin to realize our expected benefits sooner
- The Supplier Portal is the building block for rolling out other modules - need Suppliers for Contract and Sourcing modules
Supplier Portal Workflow

- Department approvals are no longer needed on vendor requests.
- TSM stands for Total Supplier Management (the module name)
Next Steps for Departments

• Look for email with list of current HCOM Requestors and Approvers and their transaction volume in early April

• Determine which staff should have Requester access to the supplier portal
  • No Approver role like in HCOM
  • Requesters will be responsible for entering in supplier names and email addresses for invitations or completing proxy registrations
  • Potential to reduce number of users in departments

• Encourage Requesters to attend recommended FAS Supplier Portal training coming in April 2019
Global Support Services

Krister Anderson
Senior International Program Consultant

Elizabeth Esparza
Senior Program Manager
Global Support Services
Harvard Global Support Services (GSS) offers international travel, research, and programming support for students, faculty, and staff across Harvard’s Schools, Departments, and centers.

Since 2011, we have helped the Harvard community minimize risk, manage complexity, and maximize the impact of their international travel and activities.
A WORLD OF EXPERTISE

SAFETY AND SECURITY

HEALTH

CULTURE

INTERNATIONAL SOS

OUTBOUND IMMIGRATION

EMPLOYMENT

FINANCIAL AND LEGAL MATTERS

RESEARCH CENTER OPERATIONS
TRAVEL BY THE NUMBERS

6,859 TRAVELERS

8,760 TRIPS

165 COUNTRIES VISITED
TRAVEL BY THE NUMBERS

Fluctuation in registered trips by School/Unit is common as programming changes year over year and awareness of travel registration and oversight by program administrators increases.

*FAS includes the College as well as faculty, staff, and other students who may have identified themselves as FAS.
International Safety and Security
International SOS is the market leader in global medical, mental health, and travel security for higher education, and our vetted partner for emergency response. The services are available to eligible students, faculty, and staff who are traveling or working overseas on behalf of Harvard.

**KEY CAPABILITIES AND SERVICES**

- Routine and emergency advice, assistance, and evacuations
- 24/7 hotline: +1-617-998-0000
- MyTrips travel registration platform: globalsupport.harvard.edu/mytrips
- Proactive incident communications
- Mobile app with country guides, alerts, and real-time check-in and chat features
CALL FOR ASSISTANCE
One-touch dialing for routine advice and emergency support

The call is directed to an International SOS assistance center.

CHECK IN
Travelers can ‘check in’ so we know where they are in case of an emergency.

GLOBAL INFORMATION
Special advisories that affect multiple regions around the world

Download the app: app.internationalsos.com
• Outbound Visas – Harvard.gettraveldocs.com

• Shipping – Imports/Exports, Permits, Export Controls

• Hiring – Research Assistants, Drivers, Translators, Others

• Troubleshooting Other Challenges – Just ask!
Find out more about how GSS can help get you exactly where you want to be.

**CONTACT US**

+1-617-495-1111  
globalsupport@harvard.edu  
globalsupport.harvard.edu

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Emergencies abroad  
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International SOS Assistance app  
Available from the Apple, Android, and Windows app stores