Agenda

Connect with FAS Colleagues

Welcome, Introductions and Updates

Touch Net

Administrative Systems Update

PeopleSoft Notifications

HUIT Panel

Closing / Q & A Session

B1 Lobby

Leslie Kirwan

Nancy Guisinger, Stephanie Motta

Mary Ann Bradley

Isabelle Modiano, Lisa Lavoie

Kenton Doyle, Susan DeLellis, Mike Milligan, Christian Hamer

Leslie Kirwan
Welcome, Introductions and General Updates

Leslie Kirwan
Dean for Administration and Finance
Touch Net

Nancy Guisinger
Assistant Dean for Finance & Controller, FAS

Stephanie Motta
eCommerce Manager
Office of Treasury Management
New TouchNet applications

Secure and intuitive payment applications for departments to sell goods and services to external customers. Payments are made with credit cards and provides Financial Managers the ability to track and manage revenue.

Revenue recognition

Revenue is posted to the department account automatically.

Merchant Account

FAS Finance provides a centrally managed merchant account for departments with low dollar sales.

Cost (if using FAS Central Merchant Account)

Annual cost of $500, or

Transaction-based Store w/ less than 150 transactions annually at a cost of $3.95 per transaction

Registration only

YES!!!!! It will work for accepting no cost registrations.

Student Groups

IF the student group finances flow through the GL, can be used for student groups.
Services Offered

Services Offered:
(Payment Types supported: Credit cards, eCheck/ACH)

1. uStores: A simple, configurable eCommerce platform (TouchNet) for business units to create and manage their own storefronts to sell goods or services using a basic template design

2. uPay:
   1) TouchNet-Ready Partner Systems: A new standard payment gateway to use with existing front-end systems that process events, non-traditional educational offerings, and other products and services. (Current partners* available are: ASAP, Canvas, Cvent, Fusion, Slate, and TargetX)
   2) uPay Custom API: A new standard payment gateway to use with any system or customer web site that process events, non-traditional educational offerings, and other products and services.

3. Oracle Receivables: A self-service process whereby business units allow end-users to review bills, statements, and make direct online payments using Oracle iReceivables

Support Services Provided:
1. Pre-service consulting, setup and configuration, system training, testing, and ongoing support
2. PCI compliance impact and training

### Benefits

#### To School/Units

- Automatic posting of revenue to G/L reduces resource time and overhead
- Offers cost effective ecommerce solution for most merchants
- Reduction in PCI compliance – reduce # of SAQ’s, qualify for SAQ-A, no vulnerability scanning for uStores
- Reduce credit card merchant accounts, and compliance (if share merchant account)
- Enhanced reporting
- Reduce checks and incoming wires processing at Cash Receipts; administrative cost to identify recipient
- Provides mobile solution
- Higher Ed-specific vendor

#### To Administration

- Reduce PCI Compliance risk by using certified ecommerce hosting and payment gateway vendor
- Mitigate risk to University
- Reduce PCI scope by reducing number of merchants (opportunity for schools to consolidate merchant accounts)
- Standardize ecommerce vendor and development; turnkey solution for easy implementation
- Automatic posting of cash to G/L
- Reduce collection of cash, checks and wires
- Direct end-user credit card payment
Services Available Illustrated

1. Self-managed eCommerce websites
2. Integrated eCommerce applications
3. Receivables collector automation
4. Receivables customer self-service
5. Implementation tools
How to set up a UStore

• Complete application at https://otm.finance.harvard.edu/touchnet-ustores
• Forward completed application to Nancy Guisinger/Central Finance for approval
• Refer to TouchNet uStores home page to review Intro to uStores and Building a uStore from drop down menu
• Schedule Training and Review with Martha McEwan in OTM. Trainings are 60 minutes in length and held at 1033 Massachusetts Avenue.
• Once trainings are scheduled, users will receive login credentials.
• Subsequent to training, users are responsible for adding products and branding the store.
• Prior to going live, OTM completes a final review of the store and initiates a test transaction. Allow 3 – 5 business days for this process.
• Current average set up time is 60 days from application receipt to go-live.
Administrative Systems Update

Mary Ann Bradley
Associate Dean for Administrative Operations
<table>
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<th>Operational/Maintenance Enhancements &amp; Support</th>
<th>Change Management &amp; Implementation</th>
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<td>• Concur</td>
<td>• File Share (individual drives)</td>
<td>• Research Administration and Compliance Program</td>
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<td>• GMAS</td>
<td>• I-9/E-Verify - Pilot</td>
<td>• Buy2Pay – eProcurement &amp; Contract Management</td>
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<tr>
<td>• Harvard Training Portal (HTP)</td>
<td>• Position Tracking &amp; Reporting (PTR)</td>
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<tr>
<td>• Buy2Pay - Supplier Portal</td>
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<td>• OBI/HART*</td>
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<td>• Harvard Careers*</td>
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<td>• Aurora*</td>
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<td>• PI Dashboard*</td>
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<td>• HUBS*</td>
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<td>(*Part of PTR Integration)</td>
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Position Tracking & Reporting (PTR) Basics

- PTR is NOT a New System!
- University-wide initiative with the goal of streamlining & supplementing existing position management practices.
- Provide methods to consistently analyze data to support informed decisions about local school & university workforce and financial resources.
- Conversion on October 6, 2019 includes Staff, Coaches and Exempt Temps/LHT’s. (Ladder Faculty will be converted in spring of 2020.)
- Staff Conversion Weekend – October 5-6, 2019
  - Identify active/approved vacant positions by 9/27.
  - Complete all outstanding Staff transactions in Aurora by 9/30.
  - Blackout periods: Harvard Careers 10/4-10/7 (only for creating new requisitions), PeopleSoft/Aurora 10/5-10/7 (lookup and transactions).
- Impacts to Business Processes:
  - Harvard Careers, Aurora, HUBS (spring 2020) - Recruiting, Hiring & Budget.
Systems Integrated through Position Tracking & Reporting (PTR)

Harvard University | PeopleSoft | AURORA

Qlik | QlikView

ORACLE ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

HUBS

HART Harvard Analytics and Reporting Tool

The Transaction listing includes position numbers

HR Data Warehouse

Financial Data Warehouse

PI Dashboard
Position Tracking and Reporting (PTR) Benefits

- Position number will now be integrated across enterprise and local systems: OBI/HART, Data Warehouse, Oracle Financials, PeopleSoft, HUBS, Harvard Careers, Aurora, PI Dashboard, Qlikview.

- Beginning in FY21 – the ability to report on budget to actuals by position due to the addition of position number to the GL.

- Harvard Careers will populate certain data from the position, reducing data entry for departments.

- Job Description fields on all Harvard Careers postings will align with the format of Job Framework postings.

- Changes to positions will be visible in Aurora immediately following completion of the Edit Position action. Corresponding changes to appointments will be visible in Aurora the day after the action is complete in Aurora.

Position Tracking and Reporting (PTR) Resources

• PTR Overview Session – 10/17/19, please register in HTP

• Aurora Knowledge Center ([https://about.aurora.fas.harvard.edu](https://about.aurora.fas.harvard.edu))
  ▪ PTR Impact Overview (Harvard Careers & Aurora)
  ▪ Updated User Guides (on 10/6/19)

• Administrative Operations Website & support team (ASAP)
  ▪ PTR Fact Sheet
  ▪ [https://adminops.fas.harvard.edu/current-projects](https://adminops.fas.harvard.edu/current-projects)
PeopleSoft Notifications

Isabelle Modiano  
Director, HR Systems

Lisa Lavoie  
Associate Director, HR Systems  
HUIT
Absence Management Notify Functionality

- Thank you for your feedback, we have brought back the notify functionality!!
- As of 8/29, after submitting an absence request, users are able to notify an approver from the absence request confirmation page.
Absence Management Notify Functionality

- The body text will be pre-populated with the employee's name, absence type and dates of the request along with any comments that were entered on the request. The submitter has the ability to edit the message.
HUIT Panel

David Sobel, Kenton Doyle
Susan DeLellis, Mike Milligan
Christian Hamer

HUIT
HUIT Panel Discussion

- Digital Accessibility (Kenton Doyle)
- FileShare Project and MS Teams (Susan DeLellis)
- Zoom Rollout (Michael Milligan)
- Duo for O365 (Christian Hamer)
Increasing digital accessibility

University policy to 'make information and resources more easily available to those who need it'

Digital Accessibility Policy Updates

Kenton Doyle (HUIT)

September 26, 2019

accessibility.huit.harvard.edu
Digital Accessibility Policy Rollout

- **Announced April**: University-wide digital accessibility policy announced to the community. See Harvard Gazette (April 30).
- **Communication Summer**: Communicate and solicit feedback from the Harvard community about the policy and resources.
- **DAS July**: Starting FY 2020, HUIT will begin to staff up Digital Accessibility Services group.
- **Networks & training Summer & Fall**: Over summer & fall, many trainings will be conducted and bodies established under the policy (Liaisons & ASC) will be designated and trained.
- **Policy applies to content December 1, 2019**: December 1, 2019 is the day from which all new content and new/redesigned websites should aim to be accessible.

accessibility.huit.harvard.edu
What does the digital accessibility policy do?

1. University websites created or revised after Dec 1, 2019 required to meet WCAG 2.1 AA

2. Owners of existing University websites posting Harvard-produced content after Dec 1, 2019 should aim to make content conform with WCAG 2.1 AA

3. Establishes three new entities
   - Oversight: Accessibility Steering Committee (ASC)
   - University Network: Digital Accessibility Liaisons (DAL)
   - HUIT Service Team: Digital Accessibility Services (DAS)
What is a university website?

- Public facing
- On a university controlled domain
- For university business

University websites are not student created or owned.

Even if the policy does not directly apply to a given site or web app, we encourage content owners to use available resources, learn how to make their content accessible, and build inclusive digital experiences for the entire Harvard community.

accessibility.huit.harvard.edu
Accessible Technology Procurement & Development Policy (ATPDP)

adopted by HUIT and the University's CIOs:

**Procurement**
- Include accessibility rider in contracts
- Inquire about accessibility at the RFP stage
- Ask for roadmaps w/ timelines
- Temporary exceptions (1 year) may be granted, require sign-off by CIO, after 1st level review (Managing Director)

**Development**
- Incorporate accessibility as part of roadmap and updates
- Should be tested with time to remediate before production
- Issues ordinarily expected to be fixed within 12 months

**technical standard:**
WCAG 2.1 AA

accessibility.huit.harvard.edu/policies
Procurement Pathways to Accessibility

contract rider

roadmap to access (with dates)

exception process

accessibility.huit.harvard.edu
How can FAS Administrators help?

- Support accessibility improvement efforts to help FAS and Harvard become more **diverse & welcoming** communities
- Act as an **ambassador** and champion, promoting accessibility and the policies
- Familiarize yourself with **tools, trainings and offerings** from the new DAS
- Volunteer to receive extra training this fall
How can we all get started?

DON’T PANIC!
CHECK OUT EXISTING RESOURCES & TRAININGS ALREADY AVAILABLE! ...AND MORE HELP IN THE PIPELINE

WEBSITES
ENSURE ALL WEBSITES HAVE A SITEIMPROVE ACCOUNT
ALL WEBSITE VIDEOS SHOULD BE CAPTIONED

PROCUREMENT
ASK ALL VENDORS TO SIGN THE ‘ACCESSIBILITY RIDER’
ASK QUESTIONS WHEN IN RFPS

CONTENT & DOCUMENTS
USE BUILT-IN TOOLS TO CHECK DOCUMENTS & CONTENT WE CREATE EVERY DAY
O-365 | REVIEW —> CHECK ACCESSIBILITY

accessibility.huit.harvard.edu
A link across campus

Introducing: link.harvard.edu
Why use OneDrive:

- A common university platform for individual file storage.
- Secure anywhere, anytime access to files without the need for VPN.
- Project brings greater security through the elimination of unnecessary data, desktop upgrades and level 4 data compliance.

<table>
<thead>
<tr>
<th>FAS Scope</th>
<th>Statistic</th>
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<tbody>
<tr>
<td>Users</td>
<td>4,050</td>
</tr>
<tr>
<td>Number of Files</td>
<td>15 Million</td>
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<tr>
<td>Volume of Data</td>
<td>10 Terabytes</td>
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FAS Project Status

Accomplishments:

- Engagement Council meets monthly.
- 31% complete (1,256 users).
- 1TB data deleted, 80% desktops upgraded.
- Bringing level 4 data into compliance.
- 77 users trained.

Communications:

- Project Team to reach out to DAs.
- Email Templates, Checklists & more.
- Visit fileshare.harvard.edu.
- Register for Training.

Upcoming Migrations:

- Finance: 9/23.
- GSAS: 10/9.
- FCOL (Phase 2): 10/16.
- EPS: 10/21.
- Statistics: 10/23.
- HR: 10/28.
- RAS: 11/18.

Project Contacts:

Maureen Berry, FAS Administrative Operations
Laurie Gamble, HUIT Project Manager
fileshare.harvard.edu
Microsoft Teams
Collaborative workspace for teams, and project groups for management of meetings, communications and documents.

Why Use Microsoft Teams?

- Chat, file management, screen share in a single workspace.
- Replacement for Skype for Business (SfB) application.
- Accessible from any device, anywhere w/out VPN.
- Teams and their data are owned by the department.

<table>
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<th>Scope</th>
<th>All O365 licensed users</th>
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<tbody>
<tr>
<td>Users</td>
<td>All O365 licensed users</td>
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Get started and learn more

HUIT Deployment Approach:

- SfB transition plan in development.
- Teams app is part of HUIT desktop standard.
- HUIT to push down Teams app mid-Oct to mid-Nov.
- Windows deployment is silent, desktop shortcut created.
- MAC deployment installed in apps folder, silently.
- Teams app is available now at the [HUIT Software Center](#).

Resources & Training:

- [Microsoft Teams HUIT Service Catalog](#).
- [Microsoft Teams Naming Conventions](#).
- [HUIT instructor led training classes](#).
- [Microsoft Help Center](#) (live training, user guides).
**O365 Email Self-Service**  
Claim O365 Email accounts for new hires.

**Why use O365 Email Self-Service:**

- Get your email address quicker & closer to new hire start day.
- Choose your email address from a set of standard options.
- Incorporated into the FAS HR hiring/on-boarding process.

**FAS Scope**

<table>
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<tr>
<th>Faculty and Staff new hires</th>
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<tbody>
<tr>
<td>O365 Email accounts (does not apply to Google accounts)</td>
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</table>

**Get Started and Learn More**

**Impacts:**

Effective August 15, 2019.  
All Hiring Managers in the FAS.  
Communicate to new hires.  
HR Coordinators & Consultants informed.  
Faculty Affairs informed.  
I-9 required on file to start the process.

**Information & Resources:**

- Onboarding Toolkit.  
- Onboarding Checklist.  
- Admin Ops Resources Website.  
- Questions? adminops@fas.harvard.edu.
Why Use Zoom?

- Desktop and room conferencing meetings (300 participants) or large events/webinars (up to 10,000.)
- Collaboration with internal Harvard colleagues or external guests.
- Screen sharing, white board and in meeting chat fosters collaboration.
- Accessible from any device, anywhere w/out VPN.

Get started and learn more

Outreach and Awareness:

Communication about Zoom is coming soon. Available now to faculty, staff and students. Set up your account at harvard.zoom.us. App is available now at the HUIT Software Center. For smartphone/tablet visit iTunes App & Google Play store.

Resources & Training:

- Zoom HUIT Service Catalog. (web based, live training)
- Zoom Instructor Led Training. (web portal)
- Zoom Resources and Support. (quick start guide)
- Setting up your Zoom account. (quick start guide)

YOU help keep Harvard secure!
PROTECT YOUR EMAIL ACCOUNT…

…from hackers and cybercriminals
DUO IS COMING TO OFFICE 365…

…required 10/29 for FAS faculty and staff
DON’T WAIT!

Activate before the deadline to avoid interruption to your email
Questions

https://huit.harvard.edu/twostep

Christian Hamer
christian_hamer@harvard.edu