

FAS Administrators' Town Hall

September 26, 2019
William James Hall, B1



Agenda

Connect with FAS Colleagues

B1 Lobby

Welcome, Introductions and Updates

Leslie Kirwan

Touch Net

Nancy Guisinger, Stephanie Motta

Administrative Systems Update

Mary Ann Bradley

PeopleSoft Notifications

Isabelle Modiano, Lisa Lavoie

HUIT Panel

Kenton Doyle, Susan DeLellis,
Mike Milligan, Christian Hamer

Closing / Q & A Session

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

HARVARD
UNIVERSITY



Harvard University

Event Management Project Overview

26 September 2019

Event management and ticketing applications



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

*<https://www.touchnet.com/en/partners/touchnet-ready-partners>

Benefits

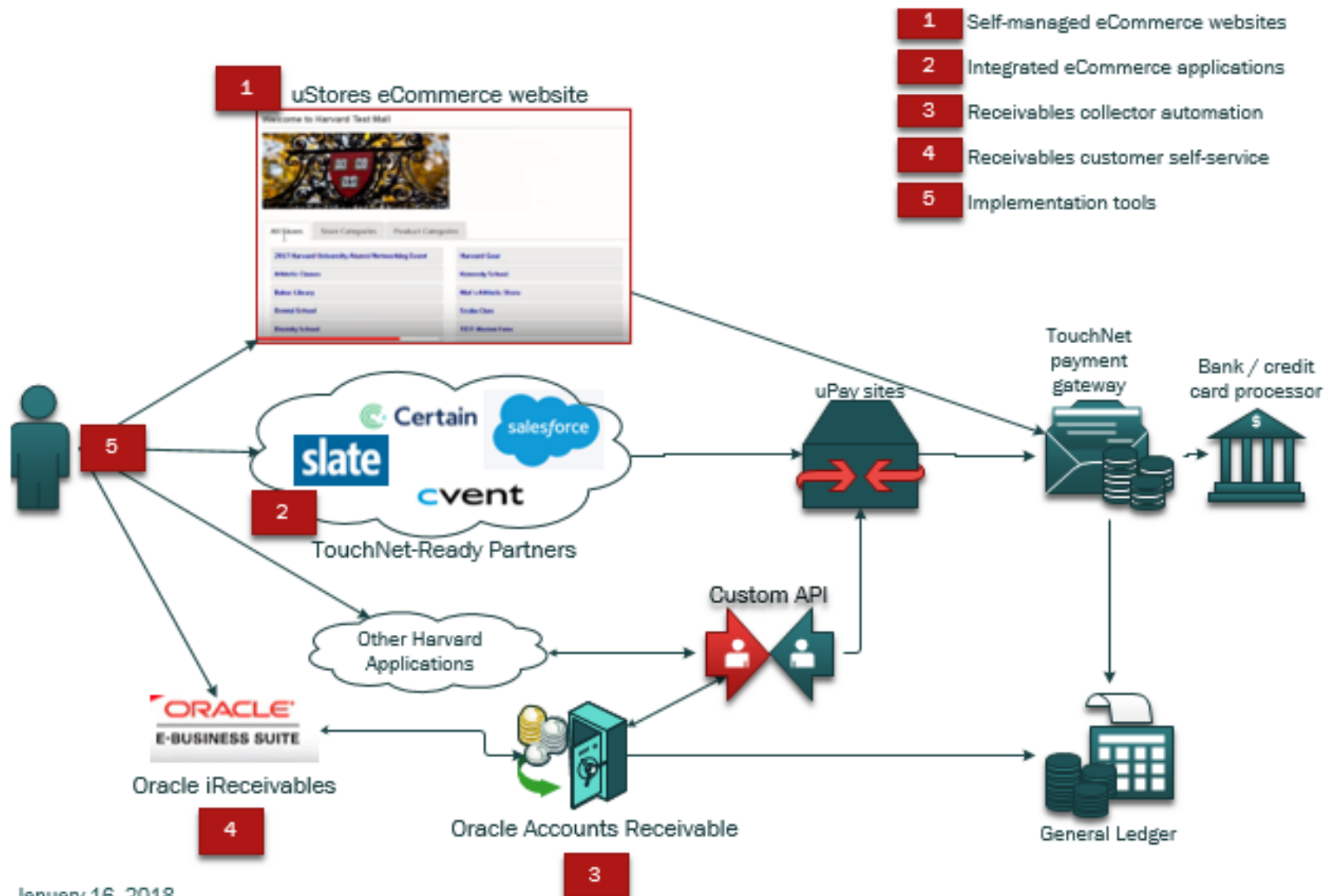
To School/Units

- 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



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*



Administrative Systems Roadmap/Landscape

Operational/Maintenance Enhancements & Support	Change Management & Implementation	What Comes Next...
<ul style="list-style-type: none">• Concur• GMAS• Harvard Training Portal (HTP)• Buy2Pay - Supplier Portal• OBI/HART*• Harvard Careers*• Aurora*• PI Dashboard*• HUBS* <p>(*Part of PTR Integration)</p>	<ul style="list-style-type: none">• File Share (individual drives)• I-9/E-Verify - Pilot• Position Tracking & Reporting (PTR)	<ul style="list-style-type: none">• Research Administration and Compliance Program• Buy2Pay – eProcurement & Contract Management

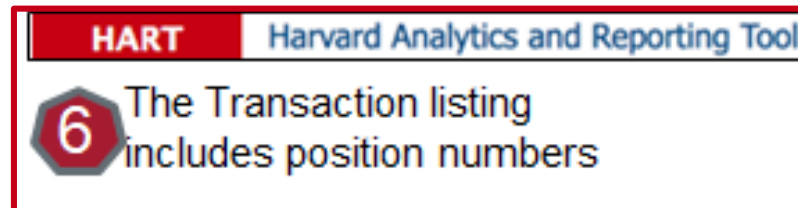
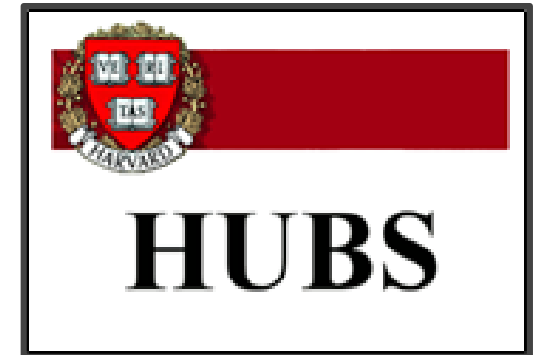
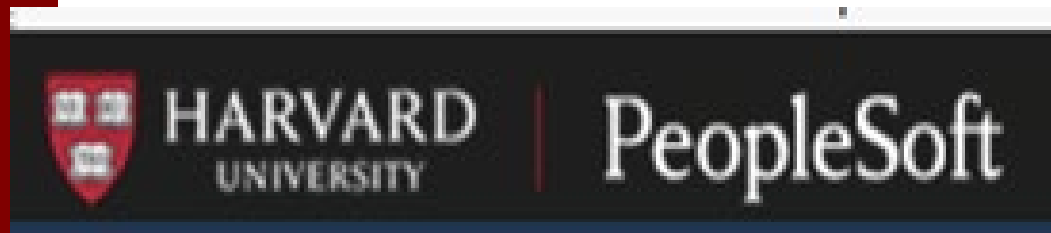


Position Tracking & Reporting (PTR) Basics

- 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)





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.
- Futuristically, position costing in PeopleSoft – Spring of 2020.



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>)
 - 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>



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.

The top screenshot shows the 'Request Absence' form in the 'Time and Absences' application. The form includes fields for 'Absence Name' (Vacation), 'Start Date' (09/16/2019), 'End Date' (09/16/2019), 'Duration' (8.00 Hours), and 'Partial Days' (None). A red arrow points to the 'Submit' button.

The bottom screenshot shows the 'Request Absence' confirmation page. It displays the same information as the form above, plus a 'Notify' button highlighted with a red arrow. The status is 'Submitted'.



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.

The screenshot shows a 'Notify' dialog box with the following fields and content:

- Approver Name:** A search bar with a magnifying glass icon.
- Subject:** A text field containing 'Notice of Absence Approval Request'.
- Email Message:** A large text area containing the following text:
 - John Harvard has requested Vacation for the following dates: 2019-09-16 through 2019-09-16.
 - Comments: Demo of comments
 - Please review the request and take appropriate action.
 - Approval Tile:
https://peoplesoft.harvard.edu/PIN/pslogincontrol?target=/psp/psprdaws_11/EMPLOYEE/HRMS/c/EOAWMA_MAIN_FL EOAWMA_MAIN_FL GBL

At the bottom right of the text area, it says '683 characters remaining'. At the bottom of the dialog are 'Send' and 'Cancel' buttons.



HUIT Panel

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

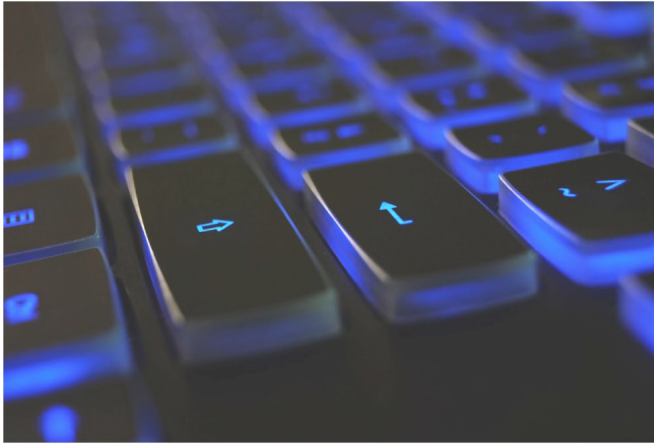
HUIT



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



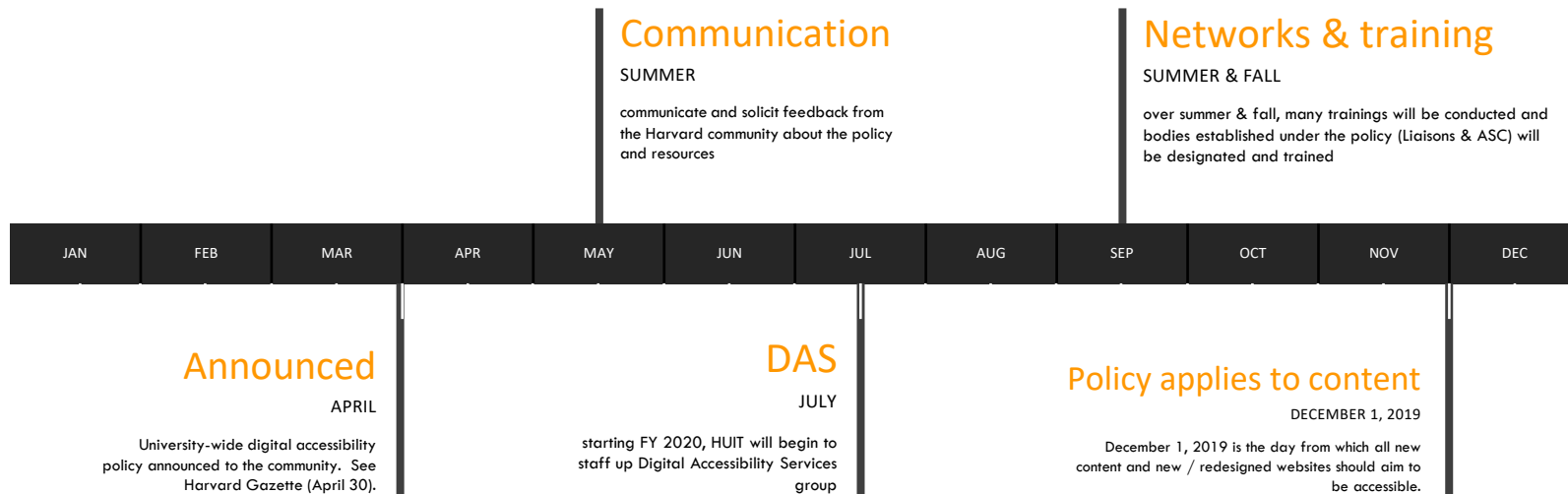
University policy to 'make information and resources more easily available to those who need it'

Digital Accessibility Policy Updates

Kenton Doyle (HUIT)

September 26, 2019

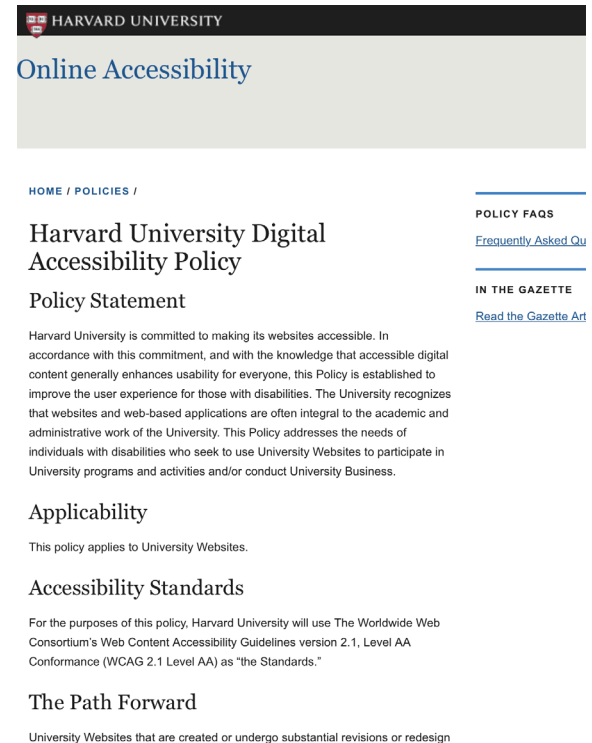
accessibility.huit.harvard.edu



Digital Accessibility Policy Rollout

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)**



The screenshot shows the Harvard University Online Accessibility Policy Statement page. The header includes the Harvard University logo and the title "Online Accessibility". The main content area is titled "Harvard University Digital Accessibility Policy" and "Policy Statement". It states that Harvard University is committed to making its websites accessible and that the policy is established to improve the user experience for those with disabilities. The page also includes sections for "Applicability" (stating the policy applies to University Websites) and "Accessibility Standards" (referencing the Worldwide Web Consortium's Web Content Accessibility Guidelines version 2.1, Level AA). A sidebar on the right contains links for "POLICY FAQs", "Frequently Asked Questions", and "IN THE GAZETTE", with a link to "Read the Gazette Article".

HARVARD UNIVERSITY

Online Accessibility

HOME / POLICIES /

Harvard University Digital Accessibility Policy

Policy Statement

Harvard University is committed to making its websites accessible. In accordance with this commitment, and with the knowledge that accessible digital content generally enhances usability for everyone, this Policy is established to improve the user experience for those with disabilities. The University recognizes that websites and web-based applications are often integral to the academic and administrative work of the University. This Policy addresses the needs of individuals with disabilities who seek to use University Websites to participate in University programs and activities and/or conduct University Business.

Applicability

This policy applies to University Websites.

Accessibility Standards

For the purposes of this policy, Harvard University will use The Worldwide Web Consortium's Web Content Accessibility Guidelines version 2.1, Level AA Conformance (WCAG 2.1 Level AA) as "the Standards."

The Path Forward

University Websites that are created or undergo substantial revisions or redesign

POLICY FAQs

[Frequently Asked Questions](#)

IN THE GAZETTE

[Read the Gazette Article](#)

accessibility.huit.harvard.edu/policies

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.

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)

technical standard:
WCAG 2.1 AA



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

Procurement Pathways to Accessibility



contract
rider



roadmap
to access
(with dates)



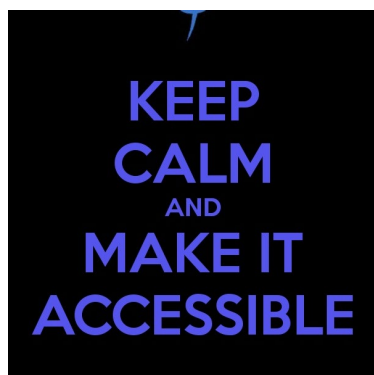
exception
process



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



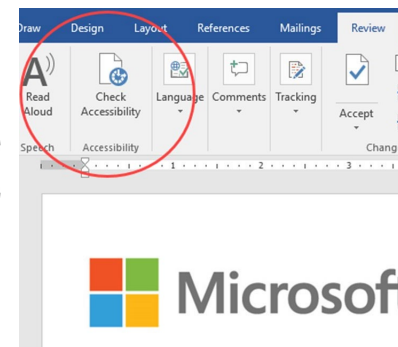
WEBSITES

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

0-365 | REVIEW —> CHECK ACCESSIBILITY

The
Harvard
Gazette

CAMPUS & COMMUNITY

A link across campus

Judy Singer (from left), Anne Margulies, and Dustin Tingley helped create Harvard Link, a platform to connect Harvard faculty members to one another across disciplines.

Rose Lincoln/Harvard Staff Photographer



Introducing:
link.harvard.edu



File Share Project (OneDrive)

Migration, training and adoption of personal file storage in OneDrive for individual workspace productivity

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.

FAS Scope	Statistic
Users	4, 050
Number of Files	15 Million
Volume of Data	10 Terabytes

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.
IMS: 11/13.
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.

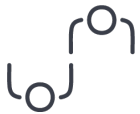
Why Use Microsoft Teams?

- 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.

Scope	
Users	All O365 licensed users

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

Faculty and Staff new hires

O365 Email accounts (does not apply to Google accounts)

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.



Zoom Video Conferencing

Video conferencing service for scheduled or ad hoc meetings.

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](#).
[Zoom Instructor Led Training](#). (web based, live training)
[Zoom Resources and Support](#). (web portal)
[Setting up your Zoom account](#). (quick start guide)



Small Actions. Big Difference.

YOU help keep Harvard secure!



**Small Actions.
Big Difference.**

PROTECT YOUR EMAIL ACCOUNT...

...from hackers and cybercriminals



**Small Actions.
Big Difference.**

**DUO IS COMING TO
OFFICE 365...**



**...required 10/29 for
FAS faculty and staff**



**Small Actions.
Big Difference.**

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