The Transition From FinMIS to BEN: We’re Almost There

The introduction of BEN Financials at the start of 2002 launched enhancements to Penn's way of conducting business. Many of you are pleased with the new features and greater access to information, and ultimately, we anticipate processes to become easier and to realize improvements on many fronts. On the whole, the transition and the initial weeks since the launch have been fairly smooth. Quite naturally there have been some difficult moments along the way, but we're continuing to make progress in eliminating the remaining implementation issues.

The volume of purchase orders you have placed with BEN Financials has reached the same level as with FinMIS, and by the week of February 15, more than 18,795 approved purchase orders were processed from 11,850 shopping carts.

"I think it has very good potential for the University," said end user Julie McDonald, manager of on-campus recruiting at the Wharton School. "It has a more contemporary 'feel' to it, and in the long run will serve the users very well.

"I come from an Information System background and have managed several large software conversions myself," she continued. "This was an enormous job, and from my perspective, it has gone very well. There are always adjustments to a new system, but the issues we've faced are just tweaks in operations, not major flaws, and should smooth out in a few weeks."

Response to the system overall has been positive. Users generally recognize the benefits of the system and are enthusiastic about the potential, but also acknowledge a necessary learning curve and frustration caused by certain system problems.

"The system will be good once all the kinks are worked out," said Trish Volpe, office administrative assistant in the Chemistry Department at the School of Arts and Sciences. "It's a little slow, it's a new challenge, but once we all get used to it, it will be great."

"I'm remaining positive," noted Chris Cataldo, financial administrator at the Graduate School of Fine Arts, who said he'd also been "knighted" as the School's BEN Representative. "I know it's a massive change, and for the two other users and me, it's been like taking baby steps. Overall I'm excited about it, but I'm remaining cautiously optimistic."

Merceda Lafferty, manager of support and training for financial systems at the School of Medicine (SoM), wears many hats in relation to BEN. As part of her day-to-day responsibilities,
she is the BEN Rep for her school with some 500 users and serves as a Local Financial Support Provider (LFSP). When users call 6-HELP and dial the code for the SoM, they reach Lafferty or one of two other LFSPs. From the perspective of her varied roles, she sees the benefits of BEN and believes that it is a significant step in the right direction. She also noted that the greatest source of frustration for users in the SoM has been with BEN Buys.

Lafferty estimated that of the calls she's handled so far, about 60 percent have been technical or desktop-related, while the other 40 percent have been questions that arose because users forgot how to execute a function. Of the calls related to the system, she said that better than 90 percent have been related to using the Penn Marketplace.

"When I field calls for end users, I first try to determine if it's the system or the user," she explained. "I ask what they're trying to do and what they did, and work from there."

"A certain percentage of the population, just like anywhere in life, resists change. For those people, I try to convince them otherwise. I say, 'If you can be positive, you might have better results.'"

Some users are still experiencing dilemmas arising from desktop and network issues, typical in a distributed environment with a variety of desktop configurations. Together with Lafferty, the other LFSPs and LSPs in the SoM, the Project Team is working to determine the causes and to resolve these problems.

"I think the biggest problem to users that I hear about," McDonald said, "is when the purchasing module bogs down. This is frustrating, of course, but it seems to be lessening, so that is a good sign."

There have also been several outages, but few have lasted longer than an hour. When these outages occur, departments can be temporarily inconvenienced, but users have appreciated the advance notifications and have been patient.

"We normally get an email to let us know of a technical difficulty," said Volpe, whose department places a large volume of orders and requires a two-day turnaround in purchasing. "Being well-informed helps us a great deal so that we can notify the research doctors."

The Project Team is working diligently not only to correct problems, but also to keep users informed along the way. The source for all the latest information is the "Advisories" web page: http://www.finance.upenn.edu/ben/benfin/advisories.shtml. Advisories contain current information on new problems, status information on known problems, as well as suggestions to make it easier to use BEN Financials. For example, did you know you should not use the carriage return when entering long descriptions of items that are not in the Penn Marketplace? To find out why or check out other handy tips about the system, refer to the "Advisories" web page.

### Making the Transition

And, how have users been coping with difficulties? For the most part, they've used BEN Helps, referred to what they learned in training, and helped each other.

**BEN Helps**

Users and BEN Reps throughout the University have been impressed with the quality of support provided by FSPs. They have commented on the reliability of the answers to their questions and the responsiveness of both the local and central FSPs.

"We are not afraid to use BEN Helps, and we call with the slightest question," said Cataldo. "I want to see what the standard answer is, and I get a consistent answer every time I call. It's been really nice to go to one source." As a user of central support, he declared, "Janice has been wonderful!"

Assisting Janice, and all the other FSPs that do Level 1 support, are subject matter experts within Financial Systems, Acquisition Services, and Accounts Payable [Level 2], as well as several technical support experts [Level 3]. Great work all you FSPs who have such a personal touch with BEN users!

At the heart of the BEN Helps support service is the Remedy database of questions and answers, problems and solutions. In addition to being the repository of consistent, accurate information for the FSP taking your call, it is used to route the more complex issues to the subject matter experts and the technical support team. It is also used to prioritize problems and manage them through to resolution.

Through February 15, BEN Helps has handled more than 4,000 calls, created 814 cases in the database, and closed 759 (or 93%) of them. The breakdown below illustrates that the most questions arose in the applications that changed the most:

<table>
<thead>
<tr>
<th>Application</th>
<th>Cases</th>
<th>% Resolved</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEN Buys (purchasing)</td>
<td>496</td>
<td>468 (94%)</td>
</tr>
<tr>
<td>BEN Balances (general ledger)</td>
<td>168</td>
<td>149 (89%)</td>
</tr>
<tr>
<td>Application Access</td>
<td>75</td>
<td>71 (95%)</td>
</tr>
<tr>
<td>BEN Pays (accounts payable)</td>
<td>75</td>
<td>71 (95%)</td>
</tr>
</tbody>
</table>

"Knowledge Transfer" meetings for FSPs in Schools and Centers are being held monthly as a forum to share ideas, tips, and best practices, and to discuss issues affecting the support of BEN Financials.
BEN Teaches

Users also concur that BEN Teaches was very helpful in preparing them for BEN Financials.

"The Financial Training Department has done an excellent job," said business administrator and BEN Rep John L. Baji at the Annenberg Center. "Their mission of having to train all users was tremendous. They established a well thought out and systematic approach. The trainers were well prepared, and the proctors I encountered were most helpful. Two of my proctors are working the phones for BEN Helps. We are becoming 'phone-buddies.'"

Update on BEN Buys

As stated earlier, BEN Buys and the Penn Marketplace, the areas that were changed the most, seem to be the areas where users have been experiencing the bulk of the problems at this point. Rest assured that the Project Team is working to resolve problems as expeditiously as possible and learn why problems are occurring to begin with.

Acquisition Services is focusing on getting catalog content accurate and reliable before putting new catalogs online. At the same time, the Team is aggressively attacking reported problems with BEN Buys. Quality is of utmost concern.

"Every day using BEN gets easier," said Baji. "Right now I am trying to master the functions I need to complete my work. When time permits, I will explore even more of BEN’s capabilities and discover more helpful information. BEN Buys has been the most difficult for me. It is so much larger than FinMIS and has taken more time to successfully complete a transaction. But, I know this will also get easier in time. I understand there have been technical problems with BEN Buys, and the Project Team has been busy problem solving, but I know that, too, will pass."

Supplier Updates

At launch, the Penn Marketplace contained several hundred-thousand products and services offered by dozens of Penn’s contract suppliers. Supplier recruitment is an ongoing initiative, so don't forget to refer to the Acquisition Services web site for updates on when suppliers’ catalogs are added to the Penn Marketplace and on when new suppliers join the system. Visit http://www.purchasing.upenn.edu/eBusiness/Penn_Marketplace_supplier_recruitment.asp for updated supplier information.

Become a BEN Buys User

All Procard holders and others who frequently request purchases are encouraged to become Requisition-only users, as Procards are not to be used for purchases from Marketplace suppliers. The benefits of becoming a user of BEN Buys and the Penn Marketplace include:

- Access to thousands of items, all in one place.
- Ability to compare the features and prices of items and make the best possible purchasing decisions.
- No more notes and emails to request items needed. Requisitions will move electronically through the approval process to the supplier.
- The item selection and requisitioning capabilities will minimize potential delays due to errors, omissions, or supplier questions.

Users will also enjoy favorable contract prices that are based on Penn’s volume of business with each supplier. Competitive bids will not be required for purchases from suppliers participating in the Penn Marketplace.

Becoming a Requisition-only user is simple. Start by registering for training using the form found at “Financial Training Registration” at http://www.finance.upenn.edu/ftd/. Your manager or supervisor and the access administrator in your School or Center must sign the form.

New Procurement and Procard Policies

Please be aware of the revised procurement policies, including a new policy for the Procard. They’re all detailed at http://www.finance.upenn.edu/vpfinance/fpm/2300/index.shtml. Changes to the Procard policies are also highlighted at http://www.purchasing.upenn.edu/eBusiness/creditcard.asp.

Resources at your finger tips

Several sources of information are available online:

- Links to documentation, advisories, and more are readily available via the BEN Welcome page at http://benapps.isc-seo.upenn.edu/
- BEN’s informational site is at http://www.finance.upenn.edu/ben/benfin/
- The Advisories page, mentioned earlier, provides information about current problems, their status, work-arounds, and resolutions, plus usage tips. Bookmark and check it often: http://www.finance.upenn.edu/ben/benfin/advisories.shtml.

And of course, don't forget BEN Helps, an increasingly trusted and speedy resource available by calling 6-HELP. Users should call the service for answers to any questions or problems encountered with BEN Financials. It is the only way to be assured of getting the most reliable and up-to-date answers and information.

CONTINUED ON PAGE 4
Special thanks are in order to those whose teamwork and commitment contributed to the successful upgrade of FinMIS to BEN Financials. This was an enormous, multi-faceted, and complex project, and the development, training, and launch of BEN Financials required patience and cooperation across all departments and all Schools and Centers. The following people played important roles on the BEN Financials Project Team, as BEN Reps, proctors, developers, or key contributors who in some other way helped make it happen. Congratulations on a significant achievement for the University of Pennsylvania!

Our Goal: Steady State

The BEN Project Team is working to achieve "steady state," the point when both functional and technological procedures and processes are operating at a pre-determined level of consistency and reliability. These procedures and processes encompass help desk functions, software features, business processes, backup/recovery procedures, end user training, and system administration, including responsibility to authorize and make software changes. Steady state takes some period of time to achieve. We expect to have the plan in place this spring.

The Project Team wishes to thank all of you for your eagerness, focus, and even humor during this transition to BEN Financials. Your patience and cooperation have been greatly appreciated and have been an important ingredient in our success.

"We have experienced a smooth transition from FinMIS to BEN," said Baji. "Recalling the birth of FinMIS, the Project Team has done well, considering our needs and the slide into this new environment."

<table>
<thead>
<tr>
<th>Marstin Alexander</th>
<th>Jack Collins</th>
<th>Karen Higgins</th>
<th>Amy Miller</th>
<th>Julie Shuttleworth</th>
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Important Financial Web Pages

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<tr>
<td>Center for Technology Transfer</td>
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<tr>
<td>(Includes Accounts Payable, Corporate Tax, General Accounting, Payroll, and Travel, along with a comprehensive “Forms” library)</td>
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<td>Financial Training Department</td>
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</table>

Quarterly Quiz

Instructions: The following 5 questions can be answered based solely on information contained in this issue of The Bottom Line. To participate in the contest, please submit your answers to Jim Riley via email at jriley@pobox.upenn.edu. Please note that entries will only be accepted via email! The third and eighth entries to correctly respond to all five questions will receive a prize as follows:

Third correct entry: One year Faculty Club membership.
Eighth correct entry: Two complimentary passes to the University of Pennsylvania Ice Rink (including food and beverage package).

1. What course is the prerequisite for Payroll/Personnel training?
2. On what date must all work-study students in the Federal Work-Study Program stop working?
3. How many securities gift information sessions are available this calendar year?
4. What is the next BEN feature that will be rolled out in phases, beginning in March ‘02?
5. If you have forwarded a requisition to your default approver, but they are on vacation, what should you do?

Eligibility: Members of the Financial Training Department and previous winners are prohibited from winning this contest.
March 29, 2002, is the last day a student can submit a Federal Work-Study (FWS) Job Appointment Form for the 2001-2002 academic year. The FWS program ends May 12, 2002. All work-study students must stop working on this date.

TREASURER’S OFFICE

Securities Gifts Information

To learn how to monitor securities gifts proceeds, BAs and Development Officers are invited to attend one of the Securities Gifts Information sessions listed below.

Securities Gifts Information Sessions held in the Franklin Building, 7th floor conference room.

| March 6 2002 | 9:30 - 10:30 a.m. |
| April 3 2002 | 9:30 - 10:30 a.m. |
| August 7 2002 | 9:30 - 10:30 a.m. |
| September 4 2002 | 9:30 - 10:30 a.m. |
| October 2 2002 | 9:30 - 10:30 a.m. |
| November 6 2002 | 9:30 - 10:30 a.m. |

For information, please contact Bobbie Coats at 215-573-3360

OFFICE OF STUDENT FINANCIAL SERVICES

STUDENT FINANCIAL SERVICES

is pleased to announce that

Zero (0%) Fee Stafford Loans

will be available to Penn Undergraduates borrowing Keystone Best Stafford Loans Directly from PHEAA and to Graduate and Professional Students through Penn’s Keystone Best Stafford Loan Program

BEGINNING ACADEMIC YEAR 2002-2003

For more information visit the SFS website at http://www.sfs.upenn.edu/home

STUDENT EMPLOYMENT OFFICE

March 29, 2002, is the last day a student can submit a Federal Work-Study (FWS) Job Appointment Form for the 2001-2002 academic year. The FWS program ends May 12, 2002. All work-study students must stop working on this date.
March Programming in Learning and Education

Moving Ahead: Breaking Destructive Behavior Patterns at Work - Yours and the People You Work With March 5 & 6

A hands-on seminar to help you understand the psychological underpinnings of negative behavior patterns, provide you with the tools to overcome them, and enable you to successfully resolve workplace situations where ineffective behavior is at play so that you can move forward and get the rewards you deserve.

Professional Development Program March 12 & 13

This program provides you with an opportunity to assess your career, skills and goals, both personal and professional, all within a streamlined 2-day format. Participants will learn about the new market-driven workplace and define their career and their market.

Brown Bag Matinee - Discussing Performance - FREE! March 14

This video is not just for managers. Every person, at every level within an organization, can learn how to improve the quality of performance discussions between themselves and their managers. We promise to have you in and out in a lunch hour.

Live Satellite Broadcast -
A Conversation with Jack Welch - FREE! March 19

Join us for this opportunity to participate in a live discussion with Jack Welch. Of all current and former CEOs, Jack Welch is the least likely to need introduction. During his tenure as CEO of GE over the past 20 years, Mr. Welch has become one of the most admired business leaders in the world. A copy of his book, Jack. Straight from the Gut, will be raffled at the end of the program.

The Cornell Interactive Theatre Ensemble (CITE) - FREE! March 20

To foster and strengthen our diverse work environment in the Penn community, we are proud to present a unique interactive theatrical experience designed to foster a respectful and productive workplace. Join us for this provocative and moving program that has received kudos from corporations across the country.

Visit our website at http://www.hr.upenn.edu/learning for detailed information and registration.

Announcing something new in Human Resources:
Career Coaching at Penn!

The Division of Human Resources has recently created the new position of Career Coach to support Penn staff in their career development.

Consult with the Career Coach about your career development, your skills, and your career mobility.

Who is Eligible?

- All regular Penn exempt and non-exempt staff

How to Contact the Career Coach?

- Call Gale Gibbons Lang, in Learning and Education, at 898-1371, or e-mail her at: glang@hr.upenn.edu

What Next?

- Click here http://www.hr.upenn.edu/learning/forms/Intake.pdf to download the registration form and mail or FAX to:

Gale Gibbons Lang, Career Coach
Learning and Education
3624 Market Street, 1B-South
Philadelphia, PA 19104
FAX: 215-573-2151

Visit our website at http://www.hr.upenn.edu/learning for detailed information and registration.
**Mileage reimbursement rate for 2002**

Effective March 1, 2002 the mileage reimbursement rate for personal vehicles being used for business purposes is $.365 per mile. This rate should be in effect for the entire calendar year. (Effective 3/1/02 the mileage reimbursement rate for moving will be $.13 per mile).

**Amtrak Kiosk**

Don't forget to use the Amtrak kiosk that is located here on campus. The machine is called a Quik-Trak machine and it is located on the lower level in Houston Hall at the west entrance near the vending machines.

This Amtrak Quik-Trak machine is the same as those self-ticketing machines located at 30th Street Station. Faculty, staff and students alike are able to make reservations with the machine itself or on the Amtrak website at [http://www.amtrak.com](http://www.amtrak.com). Just enter your credit card, punch in your reservation or reservation number and your Amtrak ticket is generated. It is quick, easy and you won't incur any travel agency service fees!

For additional information on how to use Quik-Trak machines, click here: [http://www.amtrak.com/plan/quiktrak.html](http://www.amtrak.com/plan/quiktrak.html)

**National Car Rental**

National Car Rental is one of the preferred car rental companies with the University.

Now, when you use our corporate ID # 5001856, National will seek out the "Best Rate" and confirm either our negotiated pricing or discounted promotional rates, whichever is lower. Now there is no excuse not to use National — our preferred car rental company — when renting a car for business purposes.

For additional information on car rentals or to enroll in National’s Emerald Club, click here for the Travel website: [http://www.finance.upenn.edu/comptroller/travel/how/cars/](http://www.finance.upenn.edu/comptroller/travel/how/cars/).

To make reservations on-line, click here on National’s web site: [http://www.nationalcar.com](http://www.nationalcar.com).

**AirTrain . . . the new rail link from Philadelphia to Newark Airport**

A new train station now makes it possible to get from the Amtrak station in Newark to the Newark Airport. The new station, which opened in late October, is three miles south of Penn Station in Newark and connects to the airport via a 1.9 mile airport monorail. The monorail leaves every three minutes, taking 7 minutes to get to the closest terminal C and 10 minutes to terminal A.

Passengers must have their Amtrak ticket stub in order to ride the monorail. The cost of the monorail is included in the price of an Amtrak ticket. Amtrak guests must present to the station gate agent their Amtrak ticket receipt showing either "Newark Airport" or "EWR" (the station code for Newark Airport Station) as the destination or boarding point to pass through the gates.

AirTrain is also partnering with Continental Airlines and, beginning in March, will allow travelers to make one reservation for both air and rail services by simply calling Continental Airlines or logging onto [http://www.continental.com](http://www.continental.com).

For additional information, click on: [http://www.amtrak.com/savings/airtrain.html](http://www.amtrak.com/savings/airtrain.html)

**Currency contributions to UNICEF**

On January 1, 2002, the euro replaced local currencies throughout most of Europe. For a couple of months both the euro and the old money will be used. After this period, the old money will become convertible only through European banks.

Now you can donate that old currency to UNICEF through "Change for Good." Change for Good is a partnership between UNICEF, the United Nations Children's Fund, and the International Airline Industry, designed to redeem unused and outdated foreign currencies into supplies and services for the world's neediest children.

You can send this currency to:

Travelex America — Change for Good
UNICEF
JFK Airport
Terminal 4 IAT, Jamaica, NY 11430
You can send your unused currency to the Travel Administrator at Penn, Susan Storb, 308 Franklin Bldg, 6284 and she will send it on to Change for Good on behalf of Penn travelers.

Additional information about the program can be found at [http://www.unicefusa.org/donation/change.html](http://www.unicefusa.org/donation/change.html)

The countries that have adopted the euro are Austria, Belgium, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal and Spain. Countries not adopting the euro in Europe are listed below.*

So, please dig deep into your pockets and send us those French francs, German marks and other Western currencies that you do not anticipate using in the near future. Your generosity will support a great cause.

*Denmark, Norway, Sweden, Switzerland and the United Kingdom are staying with their own currencies for now.

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**PAYROLL OFFICE**

**Closing Schedules**

Please go to the following web site for information on Payroll and Salary Management closing schedules: [http://www.finance.upenn.edu/comptroller/accounting/closingsch/payroll/index.shtml](http://www.finance.upenn.edu/comptroller/accounting/closingsch/payroll/index.shtml)

This site includes dates to run your GRPA and GRPS Salary Management reports, as well as deadlines for processing both weekly and monthly Payroll transactions.

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**Paid Time Off Schedule: January through December 2002**

Paid Time Off is credited to employees on the following dates each month:

- January 23
- February 21
- March 28
- April 25
- May 31
- June 27
- July 24
- August 28
- September 25
- October 23
- November 27
- December 18

This means that for those individuals who have accrued their 24-day limit, time should be taken and reported in Time Reporting before the date listed above if they want to take maximum advantage of their paid time off accrual.
Preparing to create the Requisition:

- Authorization from Research Services, in the form of a fully executed subcontract/consortium agreement, must be received prior to preparing the requisition.

- Only users with PO Manager responsibility should create and submit a requisition for a subcontract.

- Using Supplier Info on the Self-Service Navigator, verify that the supplier is an approved supplier in BEN Financials and has the appropriate PO Site.

- Requisitions are limited to one subcontract per requisition. Notes should be attached at the header level, not the line level.

- “Non-Catalog Request” will be used for creating subcontract requisitions.

- Review the total amount of the subcontract and determine, if applicable, the amount that will be subjected to F&A.
  - F&A may only be applied to the first $25,000 of the total of each subcontract over the life of the grant or contract.
    - If the initial year of the subcontract exceeds $25,000, then a two (2) line requisition must be created. The first $25,000 will be on line 1 of the requisition (OBJC 5332), and line 2 will be the balance above $25,000 (OBJC 5333).
      - Note: A two (2) line requisition is required to ensure appropriate charging of F&A rate. A one (1) line requisition having two (2) distributions (OBJC 5332 & 5333) will result in F&A not being applied correctly.
    - If the initial year of the subcontract is less than $25,000, then a one (1) line requisition must be created. Until the $25,000 threshold is reached, continue to create one (1) line requisitions (OBJC 5332). Once the $25,000 threshold has been reached, then OBJC 5333 should be used exclusively for that subcontract.

Creating the Requisition:

- Go to the BEN Requisitions home page in BEN Financials
- Click Create Non-Catalog Request link
- Complete “Describe Your Item”:
  - Item Type: Services/Maintenance
  - Category: SERVICES.SUBCO.NTRACTS
  - Item Description: “Allocation set forth in award document issued by SPONSOR NAME for research services related to SPONSOR AWARD NUMBER. Final itemized invoice must be received by the University of Pennsylvania no later than MM-DD-YY.”
- Complete “Describe the Supplier”:
  - Supplier Name: As indicated on the signed agreement. Must be entered exactly as found in Supplier Info.
    - Note: Search for the Supplier using the flashlight will populate the “Site” field as well
  - Supplier Site: Populated by Selecting a Supplier from Supplier Search or you may enter exact site information found in Supplier Info.
  - Contact Name: As indicated on Subcontract Agreement
  - Phone: As indicated on Subcontract Agreement
  - Click “Add to Cart” button
- Shopping Cart
  - Review item(s) in cart
    - If a 2nd requisition line is needed for subcontract exceeding $25,000, click on Return to Shopping and again click Create Non-Catalog Request.
  - Click “Proceed to Checkout” button to start “Checkout” process
- Complete “Delivery” segment of “Checkout” Process
  - Change “Need-By Date” to last date of this year of the subcontract
  - Accept default information for “Requestor”
  - Change “Deliver-To Location” to the Principal Investigator’s location.
  - Accept “yes” for applying delivery information to all the items.
  - Click “Continue” button
- Complete “University Contact” section in “Billing” segment of “Checkout Process”
  - Enter your University phone number
  - Click “Continue”
How to Create a Requisition for a Grant Subcontract

- Complete “Review Charge Account” section in “Billing” segment of “Checkout” Process
  - Click ZZZ-account in “Charge Account” column to edit the charge account
    - Complete “Edit Charge Account” information
      - Update all ZZZ segments of the charge account
        - Short cut tip: If this requisition has 2 lines because of the differing OBJ C's, click the 2nd ZZZ-account line.
        - Update the ZZZ segments and change the OBJ C to 5333.
        - Click the checkbox for “Apply this account to all requisition lines”. The charge account information, excepting OBJ C, will be applied to the 1st line.
      - Click “OK” button
      - Review Charge Account information for correctness
    - Click “Continue” button
- Complete “Enter Notes & Attachment” section in “Notes” segment of “Checkout” Process
  - Requisition Description: “Subcontract to SUPPLIER related to PI NAME’s SPONSOR NAME award (SPONSOR AWARD NUMBER)”.
    - Note: Enter the exact language as written above substituting appropriately for SUPPLIER, PI NAME, SPONSOR NAME, & SPONSOR AWARD NUMBER).
  - “Note to Buyer”: Not used unless forwarding the Requisition for review by someone else.
  - “Note to Approver”: Not used unless forwarding the Requisition for review by someone else.
  - Two (2) “Notes to Supplier” attachments are needed.
    - Click Add Attachments to add the 1st note to Supplier.
      - From the “Attention To” drop down menu, select “To Supplier”
      - Description: “Subcontract Terms”
        - Enter the exact language as specified in parenthesis
        - Attachment Type should be “Text”
        - Text: “Subcontract in accordance with the terms & conditions of the consortium agreement XXXXXX, dated MM-DD-YY, covering the period MM-DD-YY to MM-DD-YY Subcontract to SPONSOR NAME, SPONSOR AWARD NUMBER for PI NAME.”
      - Note: Enter the exact language as specified in parenthesis. See the signed agreement for the appropriate dates
    - Click “OK” button
  - “Review Approver List & Enter Justifications” section in “Approvers” segment of “Checkout” Process
    - Add approvers is generally not used by PO Managers. Used only if additional internal approvals are required within your department or school/center.
    - Click “Continue” button
  - “Review and Submit Requisition” section in “Review and Submit” segment of “Checkout Process”
    - Perform a final review of the requisition for accuracy and completeness
    - Click “Submit” button
    - Funds checking is performed
      - If you fail funds checking, click cancel, and check the following information:
        - Review account combination for errors, such as transposition of numbers or incorrect CREF values
        - If the account combination is correct, insure that the current year budget has been entered, down to the CREF level
        - If requisition passes funds check, click “Continue” button
        - Requisition creation process will complete and will automatically begin Requisition to PO process via PO Workflow Administrator.
    - Purchase Order processing: No special approvals are needed for subcontract PO’s. The PO will follow the normal PO Hierarchy based on your approval limit and approval hierarchy.
My Profile Function - allows you to create and update pre-defined deposit template lines to simplify making deposits and allows you to set up an alternate contact to receive deposit receipts and/or deposit adjustment receipts.

The security structure of BEN Deposits has been designed so that each deposit is linked to a specific University center (for a list of centers, visit: http://www.finance.upenn.edu/ben/benhelps/schoolcodes.shtml). You will have the ability to download and/or find deposit activity based on this structure and your unique security level. Please understand that this security structure does not limit where you may deposit funds.

The following security levels are available in BEN Deposits:

- View and edit own deposits only
- View all deposits within center (includes ability to view & edit own deposits)
- View and edit all deposits within center (includes ability to view & edit own deposits)

**ROLL OUT PLANS**

BEN Deposits is being implemented in two phases. Phase I of BEN Deposits is expected to begin in mid-March. Phase I participants will provide feedback to the project team on the application as well as the training strategy.

Phase II of BEN Deposits, which includes a University wide rollout, is expected to begin in May 2002. In preparation for Phase II, a demonstration of the application was provided to the BEN Representatives at their February 2002 meeting.

**ACCESS REQUIREMENTS**

In order to gain access to the BEN Deposits application, each user of the system must satisfy the four requirements listed below:

1. **PENN Authentication System (PAS):** Security of the BEN Deposits application is based on the University's "Penn Authentication System (PAS)". Each time you log into BEN Deposits you will have to identify yourself to the system using your PennNet ID and password. If you do not remember your ID and/or password, visit http://www.upenn.edu/computing/netid/ for further instructions. Note that a PennNet ID and password are also required to add or update your information in the University's on-line directory (requirement #2).

2. **University On-line Directory:** In an effort to have accurate and consistent profile information for each user of the application, BEN Deposits has been designed to use the University's on-line directory as its source of user profile information. Please visit the University's on-line directory at http://www.upenn.edu/directories/dir-update.html to add or update your contact information as necessary. Be sure to include your full name, campus address/mail code, University phone number, University fax number and a complete email address. You must complete this information before you submit the BEN Deposits access form (requirement #3).

3. **BEN Deposits Access Form:** A BEN Deposits access form with profile information that matches your on-line directory information must be received in the Financial Training Department, 700 Franklin Building, 3451 Walnut Street, Philadelphia, PA 19104-6205 by March 25th. Access forms were distributed to the BEN Representatives at their February 2002 meeting. If you have not received an access form, please see your BEN Representative or download an electronic version of the access form at http://www.finance.upenn.edu/ben/bendep/access_forms.

4. **Training:** The Financial Training Department (FTD) has developed a training strategy to ensure that all users of the application are properly trained and fully understand the new business process to deposit funds. The initial phase of training includes a prerequisite knowledge building course for BEN Deposits followed by a short quiz designed to measure your understanding of the materials. A score of 80 fulfills the prerequisite requirement. Once you have successfully completed the prerequisite course you will be ready to take the next level of training.

It is anticipated that the Financial Training Department will offer two options for training:

- Web-based training in which you learn the application and complete workshops at your own workstation at your own convenience.
- Hands-on training in which you attend a classroom session with an instructor. You would learn the application and complete workshops in class.

Additional training details will be provided shortly to those individuals that submit a completed access form.

We welcome comments and/or questions regarding the transition to BEN Deposits. Please contact the Cashier's Office at either 8-7258 or via email at deposits@pobox.upenn.edu. We would like to thank you in advance for your cooperation during the transition to BEN Deposits.
OFFICE OF RESEARCH SERVICES

The Office of Research Services is sponsoring two additional workshops in the 2001-2002 Live Satellite Broadcast Series presented by the National Council of University Research Administrators.

We invite all business administrators and grant/research administrators and interested faculty members to attend these sessions. Please send e-mail to Stuart Watson (wswatson@pobox.upenn.edu) to confirm your attendance at the workshop.

More information on each workshop and the respective presenters is available on the web at: http://www.ncura.edu/meetings/videoseries/2001/vidcon2001.pdf

Workshop

From a Culture of Compliance to a Culture of Concern: Building a Compliance Education Program that Works

Date: March 19, 2002
Time: 11:30 AM to 3:30 PM
Location: Dunlop Auditorium of Stemmler Hall. Stemmler Hall is located on Hamilton Walk across from the Rhodes Pavilion. The auditorium is located on the ground floor.

Program Overview:
This program is presented by NCURA in cooperation with the National Association of College and University Attorneys (NACUA). Regulatory actions and compliance audits are important tools for enforcing minimum standards of behavior on sometimes-obdurate grantees and investigators. In the long run, however, creating a culture of concern in our institutions will do more to foster better stewardship and a greater sense of care for humans and animals in our research, for the environment, and for the health and safety of our students, staff, and faculty. Just making rules, creating policies and procedures, and policing the actions of investigators are ultimately ineffective gestures, if we have not instilled a deep sense of commitment to the common good in our research community. This videoconference will explore many important questions to demonstrate how education is the key in moving from a culture of compliance to a culture of concern and caring.

Workshop

The True Costs of Compliance and Why We Must Invest

Date: May 14, 2002
Time: 11:30 AM to 3:30 PM
Location: Biomedical Research Building II/III Auditorium. BRB II/III is located at the corner of Curie Boulevard and Osler Circle and can be entered from either street. The auditorium is located on the ground floor.

Program Overview:
The panel, which will include federal agency representatives, will give research administrators, and senior officials, a realistic view of the true costs of research compliance, and provide some real world advice and suggestions for meeting requirements during a time of budgetary constraints and competing needs within the overall research enterprise.

BUDGET OFFICE

FY 03 EB and F&A Rates

The University Budget Office has established a Full Time Employee Benefit rate of 29.2% and a Part Time rate of 9.7% for FY03. These rates should be used in preparing proposals for sponsored projects for all fiscal years beginning July 1, 2002 and after. The Full Time benefit rate does not include the 1.8% dependent tuition charge.

Please note, however, that these rates have not been approved by DHHS, our cognizant federal audit and negotiation agency. Until approval is received from DHHS, it is unlikely that any federal awards will include costs calculated at these rates. When approval is received from DHHS, we will send out notification.
As we move into the final quarter of the FY, the ABA Steering Committee will be working to wrap up our administrative duties for this term, and prepare to turn the reigns over to the representatives for next year! As such, we would like to make everyone aware that on Tuesday, May 14, in addition to Omar Blaik's presentation on the Campus Development Plan, we will be holding elections for next year's steering committee!

If you would like to nominate one of your colleagues to appear on the ballot, please email any of the Steering Committee members listed below. Please note that only current members of the ABA can be placed on the ballot.

Joanne Gorman  
Financial Training Department  
gorman@pobox

Kevin McBride  
Office of the Comptroller  
kevin05@pobox

Libby Moore  
Inst. for Environmental Med.  
emoore@mail.med

Mark Patrick  
Radiation Oncology  
mpatrick@mail.med

Rob Perlish  
Genetics Core Facilities  
rperlish@mail.med

Jim Riley  
Financial Training Department  
jriley@pobox

Jenny Sherwood  
Division of Rheumatology  
jsherwood@mail.med

We would also like to take this opportunity to have you update your contact information with the ABA. So, if you've had a job change, moved to a new location, or taken on a different email address, please go to the following web site and submit those changes to us: http://www.upenn.edu/aba/abaaapp.html. If you have any new employees who might be interested in joining our general membership, they can complete the same application.

Below you will find a listing of our upcoming events. As you notice, we don't have specific plans for the end of year celebration, so if you have any suggestions, please contact a member of the Steering Committee.

<table>
<thead>
<tr>
<th>Date</th>
<th>Day</th>
<th>Time</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 13, 2002</td>
<td>Wednesday</td>
<td>12pm</td>
<td>BEN Deposits Project Team</td>
</tr>
<tr>
<td>April 11, 2002</td>
<td>Thursday</td>
<td>12pm</td>
<td>Mary Ann Piccolo re: Payroll Tax Issues</td>
</tr>
</tbody>
</table>
| May 14, 2002  | Tuesday   | 12pm | Steering Committee Elections  
              |            | Omar Blaik re: Campus Development Plan                 |
| June 7, 2002  | Friday    | TBA   | Special Evening Event                                  |

As always, thanks for your support this Fiscal Year. We look forward to seeing a healthy turnout at the remaining luncheons, and we hope that your School/Center will continue to support the organization as our funding drive begins this Spring.

Thanks,

ABA Steering Committee
Question of the Quarter

Q. Within the Requisitioner responsibility, how can I change the default approver for an individual requisition, or add an additional approver for a requisition?

A. Regardless of which checkout option you use (Power Checkout, Modified Power Checkout, or Proceed to Checkout), from the "Approver" area on your progress indicator the Review Approver List & Enter Justifications page provides the following features:

1. Change First Approver - Allows you to change your default approver to another authorized individual for this Requisition. This should only be done when specified by department business process or University policy. This feature is useful when your default requisition approver is not available for an extended period of time. When this feature is utilized, the first approver is changed only for the current requisition that you are working on.

2. [Add Another Approver] - Optional button takes you to the Approver List Search page, where other approvers can be added either before or after your default First Approver.
   E.g.: Adding your Department Chair as an Approver to see and approve a specific requisition before it goes to your Business Office for financial authorization.

3. Note to Approver
   (A) PO Managers - Note used when a Requisition is being forwarded to another person for their review.
   (B) Requisitioner Only - Note must be used to explain 1) Nature of transaction 2) where item(s) should be delivered and 3) what budget to charge.

*Note: Only requisitions with a status of "In Process" or "Pre-approved" may be cancelled or withdrawn.
Question of the Quarter (Continued)

If there is a requisition that you have created and forwarded for approval, but for some reason you need to make changes to that requisition, or your default approver is not available, you can do the following from the Requisitions Status: Requisitions Page:

1. **Cancel** - Allows you to cancel a Requisition that has not yet been Approved. Note that this action will permanently cancel your requisition, preventing it from being resubmitted for approval.

2. **Withdraw** - Allows you to withdraw a Requisition with a status as follows:
   - **In Process**: The requisition has been forwarded to an approver, but no action has been taken by that approver yet.
   - **Pre-Approved**: A PO Manager has forwarded the requisition on to another approver.
   - Use the Withdraw option when you would like to resubmit the requisition for approval in the future, either with changes, to a different approver, or both.

3. **Select** - To perform either the Cancel or Withdraw option, click in this column on the row for which it is required, then click on the appropriate button ([Cancel] or [Withdraw]) and follow the prompts as they appear on your screen.
### Chart of Accounts 3 Hours

This workshop provides participants with a detailed explanation of the University's seven segment, twenty-six digit, Chart of Accounts. Understanding the Chart of Accounts is the gateway for enabling you to initiate transactions as well as analyze & manage your accounting activity thoroughly and effectively. Also explained at this session is the foundation for Responsibility Center Management (RCM) at the University. A 'Web Expedition' is provided as a homework assignment prior to attending class. There is also a quiz included at the end of the session.

### BEN Buys-Requisition Only 1 half-day

Hands-on training required to initiate online requests for goods and services through the Penn Marketplace. Users will learn:
- How to create and forward a requisition on for further approval
- Procurement/disbursement policies and procedures,
- How to effectively and efficiently select the desired goods and services,
- The navigational techniques of the application, and
- How to process receipts.

### BEN Buys-Purchase Order Manager 5 half-days

Prerequisite: Chart of Accounts

Hands-on training required to procure goods and services at the University through the Penn Marketplace, approve requisitions, and manage purchase orders. Users will learn:
- Procurement/disbursement policies and procedures,
- The navigational techniques of the web application,
- How to effectively and efficiently select the desired goods and services,
- How to manage purchases, from requisitioning through the purchase order approval process
- The navigational techniques of the Oracle application,
- How to process receipts, and
- AP/Invoice Imaging, including how to relieve PO invoice holds.

### BEN Balances-GL Inquiry and Reporting 2 half-days

Prerequisite: Chart of Accounts

Hands-on training teaches participants the basic inquiry and reporting processes required to analyze and manage financial accounting activity at Penn. Included are reviews of:
- The University's business processes and financial policies,
- Functions, such as determining funds available, the various ways to perform an inquiry on account balances and transactions, and
- How to run, print and/or export standard BEN Balances reports.

### BEN Balances-Manual Journal Entry 1 half-day

Prerequisite: BEN Balances-GL Inquiry and Reporting

This hands-on training session teaches participants:
- Policies and procedures for the journal entry process,
- How to enter a manual journal entry process,
- How to enter a manual journal entry for transferring a cost and correcting an error,
- Procard redistribution, and
- Correcting suspense transactions

### BEN Balances-Budget Journal Entry 1 half-day

Prerequisite: BEN Balances-GL Inquiry and Reporting

This hands-on training session teaches participants:
- Policies and procedures for the budget journal entry process,
- The different categories of budget journals, and how to enter them,
- A review of the RCM model and how it pertains to budgeting

### BEN Balances-Freeze Grants 2 hours

Prerequisite: BEN Balances-GL Inquiry and Reporting

This hands-on training session offers instruction on how to freeze and/or unfreeze grants or contracts, as well as identifying the key decision points to freezing or unfreezing.

### BEN Reports 2 hours

Prerequisite: BEN Balances-GL Inquiry and Reporting

This two-hour training session will be a demonstration of the new web-based query tool titled BEN Reports. BEN Reports allows authorized users to run predefined reports against the Data Warehouse using a web browser. The first release includes:
- Financial Reports
  - Budget/Actual Variance
  - General Ledger Revenue/ Expense Detail
  - RCM Category Comparison
- Salary Management Reports
  - Employee Payments by Fund
  - Employee Payments by Individual
- Sponsored Program Reports
  - GRAM (Grants Reporting and Management) Protocol
Announcing the return of Sponsored Programs Workshops

After a brief hiatus due to the BEN Financials upgrade, FTD is proud to present the return of Sponsored Programs Workshops!

This popular series currently includes the following:

1. Grant Proposal Preparation & Submission Process
2. Contract Negotiations
3. Award Set-Up
4. Project Management
   - part 1-Allowability of Costs
   - part 2-Post Award Administration
5. Audit Issues
6. Effort Report

Beginning with Effort Reporting on March 14, two courses per month will be offered through June on the second and third Thursday of each month. For a schedule of courses, please see the Financial Training Calendar on page 19.

To register for one or more of these workshops, please go to the on-line registration site at http://www.hr.upenn.edu/training_coursecatalog/search_results.asp?mode=dept&criteria=FN.

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Payroll/Personnel System  5 half-days
Prerequisite: Chart of Accounts

Procurement Credit Card (ProCard)  1 1/2 hours
Location: Suite 427A, 3401 Walnut

Who should attend? Individuals buying goods and services on behalf of the University using a Procard.

This one and one-half hour training session provides an overview for the University’s procurement credit card program. Highlighted will be the ordering process, documentation, disputed transactions, ease of use, restricted commodities, and card misuse.

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COURSE SPOTLIGHT

Announcing the return of Sponsored Programs Workshops

After a brief hiatus due to the BEN Financials upgrade, FTD is proud to present the return of Sponsored Programs Workshops! This popular series currently includes the following:

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# March, 2002

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<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
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<tbody>
<tr>
<td>4</td>
<td>Payroll/Personnel (1 of 5) 9:00 - 1:00</td>
<td>Payroll/Personnel (2 of 5) 9:00 - 1:00</td>
<td>Payroll/Personnel (3 of 5) 8:30 - 12:30</td>
<td>Payroll/Personnel (4 of 5) 8:30 - 12:30</td>
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<td>Req Only Refresher 2:00 - 4:00</td>
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<td>Req Only NEW USER 1:00 - 5:00</td>
<td>Req Only NEW USER 1:00 - 5:00</td>
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<tr>
<td>11</td>
<td>Chart of Account 9:00-12:00</td>
<td>GL Inquiry/Reporting (NEW USER 1 of 2) 8:30-12:30</td>
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# April, 2002

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# Financial Training Calendar

**March, 2002 - June, 2002**

Visit our website [here](http://www.finance.upenn.edu/ftd/)

## May, 2002

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## June, 2002

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<td>Req Only NEW USER</td>
<td>1:00 - 5:00</td>
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# Additional Notes

- **Memorial Day**
- **NEW USER**
- **Req Only**
- **Sponsored Program Workshop (TBA)**
- **Procard**
University of Pennsylvania Financial Training Registration

Please complete the following information and return to:
Financial Training Department (FTD) • Suite 700 Franklin Building • Fax: 898-9954 • Phone: 573-5603
Visit us at our web page http://www.finance.upenn.edu/ftd/

Chart of Accounts One three-hour session __________ GL Budget Journal Entry** One half-day session __________
Req Only One half-day session __________ BEN Reports*** One two-hour session __________
PO Manager Five half-day sessions __________ Freeze Grant User** One two-hour session __________
GL Inquiry/Reporting* Two half-day sessions __________ Payroll/Personnel* Five half-day sessions __________
GL Manual Journal Entry** One half-day session __________

Please note: You will be notified via e-mail of the dates and location for which you are to be scheduled.
*The pre-requisite for this training session is Charts of Accounts
**The pre-requisite for this training session is GL Inquiry/Reporting
***If you are registered for GL Inquiry/Reporting, you will automatically be included in this training session.

Personal Data: (Please print or type)
Name: __________________________________________________________________________________________________________
Years at Penn: __________________________________________________ Title: ____________________________________________
School/Center: _________________________________________________ Department:______________________________________
Campus Phone: ______________ - __________________________ ______ E-mail: _________________@ ______________________

Education and Training: Circle and complete the appropriate answer
Do you have a business degree? Y N Major: __________________________ Year earned: ___________
Have you ever taken an Accounting course? Y N Name: __________________________ Year taken: ___________

Financial Responsibilities: Circle or complete the appropriate answer
Process requisitions Y N Review and adjust Procard transactions Y N
Approve requisitions and PO’s Y N Manage Unrestricted fund(s) Y N
Prepare budget entries Y N Manage Sponsored Program fund(s) Y N
Review accounting reports Y N Manage Gift fund(s) Y N
Prepare journal entries Y N Manage Endowment fund(s) Y N
Clear suspense accounts Y N Other ______________________________

Familiarity with University financial policies and procedures: Please select the appropriate response

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<th>1 - No familiarity</th>
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## ACCESS ADMINISTRATOR
(In alphabetical order by School/Center name)

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<td>Donna Burdumy</td>
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<td>93,95</td>
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<td>Linda Kristekas</td>
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<td>Dennis Matthews</td>
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<td>Andrea Williams</td>
<td>07</td>
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