PennERA: Electronic Proposal Development Wider Release Planned

The PennERA (Electronic Research Administration) Team is preparing for a campus-wide release of the Proposal Development application of the PennERA system to investigators and other research personnel in advance of the June 2007 electronic proposal submission deadlines.

What is Proposal Development?

In addition to meeting the mandatory government requirements for electronic submission, Proposal Development is a web-based application that will help streamline the process for preparation, review, approval, and submission of all proposals. Initial focus will be on proposal development that will meet Grants.gov electronic system requirements, but the overall goal is to ensure that all proposals will benefit from these streamlined processes.

Benefits of Proposal Development

Benefits of the Proposal Development application include:

- Reduction in time/cost to prepare and submit proposals to sponsors
- Streamlining internal review and approval of proposals
- Integration of funding opportunities and investigator profiles with proposals
- Standardization of templates for sponsor forms and budgets
- Data validations for many elements in Grants.gov proposals, prior to submission
- Ability to conveniently copy and reuse information from previous proposals
- Electronic submission of proposal data for sponsors able to accept electronic submissions
- Penn's capture and ability to report on data that formerly went directly to sponsors

Timeline

The PennERA team is using a phased implementation strategy to roll out the application to researchers across campus:

- February 2007—The application is currently being used by a group of "early adopters," in select ORGS from Nursing, Vet, SAS, and SOM
- Full campus rollout is targeted in time for preparing applications for June 2007 submissions, with training beginning in late March for remainder of Schools and departments

Users will be contacted directly with detailed information about access, training dates, and end-user support.

Continued on Page 8

In This Issue...

Did You Know.................................Page 6
P2P (Procure-to-Pay) Enhancement
Project ............................................Page 8
PaymentNet Online Purchasing Card
Management System.........................Page 2
PennERA Update..................................Page 1
Ready Computers for March 11.......Page 4
Tips for Manager and Supervisors ....Page 7
Travel Advisory ...............................Page 6
Voice Mail System Coming ...............Page 3

Additional Newsletters
Office of Research Services
http://www.upenn.edu/researchservices/newsletter.html
Executive Vice President’s Office
http://www.evp.upenn.edu/
Coming Soon:
PaymentNet Online Purchasing Card Management System

A new, easy-to-use self-service system to allow University purchasing and Fleet Cardholders to track credit card purchases online will debut in May. Known as PaymentNet, the new system speeds up administrative tasks for those who approve and review card activity, facilitates management and reporting on purchasing activity, and supports compliance with University policy and recommended procedures. Purchasing Services, the Office of the Comptroller, and Information Systems and Computing (ISC) jointly sponsored development of the PaymentNet system.

What are the Benefits of PaymentNet?

PaymentNet will provide many new benefits to both Cardholders and administrators responsible for the management of the University's Purchasing and Fleet Card program. Features include:

- **Online Transaction Inquiry and Review:** Cardholders will be able to review and confirm their line item transaction details via the web instantaneously in real time.

- **Self-Service Statements and Reports:** Cardholders will be able to print individual statements to submit for approval along with supporting documentation.

- **Management Inquiry Capabilities:** Transaction Approvers will be able to review transaction details and confirm that any supporting documentation is appropriate. This improved access to information will contribute to a more comprehensive review process that, we anticipate, will result in a reduction of unauthorized purchases, with simultaneous reinforcement of following proper purchasing card buying practices University-wide.

- **Online Transaction Disputes:** Should Cardholders fail to reach agreement with suppliers for erroneous charges, disputes can be handled via an online process.

What's Changing with PaymentNet?

The PaymentNet application will define new role names for Cardholders, Transaction Approvers, and Managers. Functions, however, will remain the same--enhanced with added online features. New role names and corresponding functions are described below:

- **Cardholder**
  - Views online transaction detail
  - Reviews transactions and includes detail transaction notes
  - Views and prints monthly statements in PaymentNet
  - Enters and reviews disputes
  - Reviews declines
  - Uses individual PennKey ID and Password to ensure secure system access

- **Transaction Approver**
  - Verifies reviewed transactions and detail notes
  - Reviews declines and monitors spending
  - Reallocates in BEN Financials
  - Runs reports
  - Reviews monthly statement by Cardholder & signs off with the detailed notes or attached supporting documentation  

  **Note:** Today's "Approver" role and responsibilities have been replaced by the Transaction Approver.

- **Manager**
  - Reviews monthly statements filed by Cardholders or Transaction Approvers
  - Monitors spending activity of all Cardholders within hierarchy as assigned
  - Monitors real-time spending balances
  - Runs Summary or Audit Reports for all orgs in the hierarchy for which the Manager is responsible

Continued on Page 9
New Voice Mail System Coming

Listen to this! During the summer 2007, Information Systems & Computing (ISC) will replace the current voice mail system which has been in service for almost 15 years. The new voice mail system in use with traditional land lines or the new VoIP service will offer many new capabilities and features, helping faculty and staff to better manage their communication needs. On your traditional phone, you will be able to listen to deleted voice mail messages and resave them during the same session; and save messages to folders marked work, family, and friends. Many of the new system prompts are also similar to the ones you already know, such as pressing # (pound) to bypass a greeting and leave a message. Faculty and staff who elect to use ISC’s new VoIP (Voice over IP) service will be able to listen to voice mail messages via email and manage voice mail features wherever they have access to a web browser. The new system is part of ISC’s initiative to provide the next generation of integrated communication services (data, voice, Internet, media) to the University community. To learn more about the new voice mail system, go to the Voice web site at:

www.upenn.edu/computing/voice

Click the link “New Voice Mail System FAQ.” Expect to see more questions added to the FAQ as the conversion date approaches.

The new system will have no effect on the phone number used to access voice mail: you will continue to dial the 898-6423 number.

Watch for announcements about the new voice mail system in the coming months in various University publications. In the meantime, if you have any questions, please contact Michele Narcavage, Voice Services Project Leader, at narcavag@isc.upenn.edu.

--Michael Palladino, Associate Vice President, Information Systems & Computing

Don’t Miss This Telephone Savings Opportunity

Information Systems & Computing (ISC) would like to encourage and remind Schools and units that they can still take advantage of lower telephone bills by participating in the VoIP (Voice over Internet Protocol) pilot program. In addition to having the opportunity to evaluate and migrate to a state-of-the-art technology, departments will receive savings until June 30th! Specifically, each participant’s voice mail service and telephone set are free until the end of June. In addition, telephone conversion charges and accompanying PennNet fees ($80) are waived. Please note that post-pilot prices will be lower than the traditional phone service with voice mail. See the chart below.

Manage Your Communications Better

VoIP features and benefits include new IP phones, email access to voice mail, and the ability to manage phone features wherever you have access to a web browser. Via the web you can reset your voice mail password, change your voice mail delivery method, assign proxy rights to a designated staff member to manage your account while you’re away from the office, and forward your calls to any landline or cell phone.

Apply now!

If you are a Business Administrator and have a group of 5 or more in your department or center who would be interested in participating in the pilot, please apply for participation. The pilot offers a unique opportunity for individuals to be among the first at Penn to experience the features and benefits of VoIP technology. To apply and learn more about the pilot, including program prerequisites, go to the Voice web site at www.upenn.edu/computing/voice/ and click on the link “Penn iPhone.” At the pilot web site, select “Become a Pilot Participant” in the left menu bar. Or, feel free to contact Deke Kassabian, Senior Technology Director, at deke@isc.upenn.edu. We appreciate your help and look forward to your participation and feedback.

--Michael Palladino, Associate Vice President, Information Systems & Computing

Pilot Prices for Voice over Internet Phone (VoIP)

<table>
<thead>
<tr>
<th></th>
<th>Traditional Phone</th>
<th>VoIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centrex line/VoIP line</td>
<td>$15.60/month</td>
<td>$17.60/month</td>
</tr>
<tr>
<td>MBS Set (1) w/maintenance</td>
<td>$10.03/month</td>
<td>$8.00/month</td>
</tr>
<tr>
<td>Voicemail</td>
<td>$9.75/month</td>
<td>$6.75/month</td>
</tr>
<tr>
<td><strong>Subtotal/ average user</strong></td>
<td><strong>$35.38/month</strong></td>
<td><strong>$32.35/month</strong></td>
</tr>
<tr>
<td>Average Usage - Local ($0.065/call)</td>
<td>$3.00</td>
<td>$1.50</td>
</tr>
<tr>
<td>Average Usage - Long Distance ($0.10/min)</td>
<td>$3.00</td>
<td>$1.50</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$41.38/month</strong></td>
<td><strong>$35.35/month</strong></td>
</tr>
<tr>
<td>Conversions (from traditional to VoIP)</td>
<td>N/A</td>
<td>$80 waived</td>
</tr>
</tbody>
</table>

The Bottom Line March 2007

March 2007
Make Sure You and Your Computer are Ready for the March 11 Onset of Daylight Saving Time

Beginning this year, Daylight Saving Time (DST) will be in effect for four extra weeks, as mandated in the 2005 Energy Policy Act. DST will start on the second Sunday in March, three weeks earlier than previously, and end on the first Sunday in November, one week later than previously. This year's actual start date is Sunday, March 11, 2007, at 2 AM, and the end date is Sunday, November 4, 2007, at 2 AM.

Many newer electronic devices (computers, PDAs, cell phones, etc.) and recent versions of software will handle the change automatically; however, older devices and software programmed to gain or lose an hour according to the traditional DST schedule will need to be "patched" or have the time adjusted manually on the new DST dates. Check with your Local Support Provider (LSP) regarding recommendations and plans for patching the applications and systems in use within your department or office.

<table>
<thead>
<tr>
<th>Daylight Saving Time: New and Traditional Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007 DST Start Date</td>
</tr>
<tr>
<td>2nd Sunday in March (3 weeks earlier)</td>
</tr>
<tr>
<td>March 11, 2007, 2 a.m.</td>
</tr>
<tr>
<td>2007 DST End Date</td>
</tr>
</tbody>
</table>

**Key Products and the 2007 DST Change**

**Windows desktops and laptops:** Systems running Windows XP Service Pack 2 will change to and from DST on the new dates automatically, provided the systems have been "patched" recently using Microsoft's Update Service. Most University-owned Windows systems fall into this category. New Windows Vista systems will also change time automatically on the new dates. However, on systems running older versions of Windows, the time will need to be adjusted manually on the new DST dates. For instructions on adjusting your computer's clock, please see the information at: [www.upenn.edu/computing/product/dst2007.html](http://www.upenn.edu/computing/product/dst2007.html)

**Mac OS desktops and laptops:** Systems running Mac OS 10.4.6 and later will change to and from DST on the new dates automatically. Systems running OS 10.3.9 through 10.4.5 will also change to and from DST on the new dates automatically, provided they have been "patched" recently using Apple’s Software Update Service. However, users of earlier versions of Mac OS X will need to change their system time manually on the new DST dates. To change the time, go to the System Preferences for Date & Time, accessible from the Apple menu, reset the time and be sure to deselect the option to set date and time automatically.

**Mobile devices:** The system clocks of PDAs, smartphones, and other mobile devices also need to be adjusted for the new DST rules. Some vendors are providing operating system patches that users can install and others are requiring manual updates. Please see the web address below for details: [www.upenn.edu/computing/product/dsthandheld2007.html](http://www.upenn.edu/computing/product/dsthandheld2007.html)

Continued on next page
Make Sure You and Your Computer are Ready for the March 11 Onset of Daylight Saving Time

Continued from the previous page

**Calendarining Software:** Users of calendaring software such as Meeting Maker and Microsoft Office Outlook/Exchange need to pay special attention to meetings scheduled between March 11 and April 1 and those scheduled between October 28 and November 4, when some participants' calendars may be out of synch. Repeat meetings scheduled throughout the year may also be problematic. Users who synchronize their calendar between two or more devices may also see inconsistencies. To be safe, all repeat meetings/appointments as well as those scheduled for the date ranges above should be considered suspect until confirmed via email with all meeting participants. It's also a good idea to print out, before March 11, your calendar for the subsequent four weeks to help check for possible problems.

- The version of Meeting Maker calendar software currently used at Penn will work correctly for meetings that are proposed and accepted within the same time zone. However, meetings that are proposed or accepted across certain time zones (Arizona, Indiana, and international time zones), for example, by traveling faculty and staff, may show incorrectly, as may repeat meetings that occur during the DST period and beyond. To be safe, Meeting Maker users should heed the general advice in the previous paragraph.

- Microsoft Office Outlook 2007 handles the new DST dates correctly. However, Outlook 2003 needs to be patched. Please see the web address below for more information: www.upenn.edu/computing/product/dst2007.html
  To be safe, Outlook users should also heed the general calendaring advice above.

**Kerberos:** Anyone using Kerberized applications such as FTP or Kerberized email will be unable obtain a Kerberos tickets if their system time is incorrect.

**Other Software:** Most desktop applications inherit date and time from the system and will handle time correctly provided the system time is correct.

**Overall Recommendation**

It’s important to update or patch your system in accordance with the information above and any local requirements, and to check meeting and appointment times because of calendaring issues. If you have questions or need assistance related to the time change, please contact your Local Support Provider. If you don’t know who your LSP is please see www.upenn.edu/computing/view/support/.

Regardless of the system and software you use, it's wise to be on the alert for time-related problems for several weeks beginning on March 11 and again in the fall, beginning on October 28th 2007.

—Mark Aseltine, Executive Director, ISC Technology Support Services
Travel Advisory

Amex Corporate Card Late Fee Policy Change

Amex is changing the date of the first late fee charged. Previously, it was 60 days. For billing statements on and after May 2, 2007, the first late fee will be assessed at approximately 45 days past due, which is about two weeks earlier than it was assessed in the past. The first late fee will be $29, but each following late fee (at approximately 60, 90, 120 etc days) will be the greater of $29 or 2.99% of the balance that remains delinquent.

All Penn employees should have received a notice from American Express of this policy change. As Business Administrators, in order to reduce the possibility of late fee assessments, our assistance in getting people reimbursed in a timely manner will be critical.

Savings Opportunity with Continental Airlines

Effective in February, Penn started a new discount of 2% on all flights booked through the Penn desk at American Express on Continental Airlines. It’s not a large discount but it is a discount on all fares, even deeply discounted fares, so book Continental Airlines through American Express and use the discount to offset the service fee expense.

For more information regarding ‘Travel’ at Penn, go to the following web link:

http://www.finance.upenn.edu/comptroller/travel/

DID YOU KNOW...

Danielle ‘Dani’ Howard is the new Purchasing Card Administrator in Accounts Payable. Danielle can be reached at 215-898-3606 or pnet@pobox.upenn.edu. Good luck Dani!

There is a training program titled ‘BEN Buys - Invoice Inquiry’ for those individuals who need access to invoices but do not have either GL Inquiry or PO Manager responsibilities in BEN Financials, go to http://Knowledgerlink.upenn.edu and go to the Financial Training list of courses under ‘Optional’.

Paid Time Off cutoff dates and when to run Salary Management Reports can be found by going to the following Payroll Closing Schedule link and scrolling down below the Monthly Closing Schedule:

http://www.finance.upenn.edu/comptroller/accounting/closingsch/payroll/
Tips for Managers and Supervisors to **Ensure Better Job Performance from** Their Training ‘Investments’

**Before**
- Discuss with the trainee your expectations and goals for their training experience
- Orient the trainee by providing insight into what type of work your department does and the role they will play once training is completed
- Place your training goals in the context of how the trainee will be using their newly acquired knowledge and skills when they return to the job after training
- Plan in advance with the trainee how day-to-day jobs will be covered while the trainee is away at training, so the trainee can focus on learning
- Allocate time on your calendar for pre and post training discussions
- Ask the trainee to identify several personal benefits of their participation in training
- Display enthusiasm for the training opportunity
- Prepare relevant material your trainee will need ahead of time so they are better prepared for training
  - Ensure all pre-work assignments are completed before class
  - Ensure that the appropriate access form is completed so your trainee can obtain access to the system asap

**After**
- Recognize the trainee’s successful completion of the training program
- Provide an opportunity for the trainee to use the knowledge/skill learned in the training program, immediately
  - Studies show that a trainee exposed to an idea 6 times over a 30 day period has a >90% retention rate
  - A trainee exposed to an idea 1 time over a 30 day period has a <10% retention rate
- Notice job performance related to the training and provide feedback that reinforces proper performance and corrects any problem areas or misunderstandings
- Track and measure the use of the newly learned skill and document results in performance reviews
- Look for ways to involve the trainee in situations that require them to use their knowledge/skill in more advanced ways

For more information regarding the Financial Training Department please go to: [http://www.finance.upenn.edu/ftd/](http://www.finance.upenn.edu/ftd/) or e-mail us at training@pobox.upenn.edu
P2P (Procure-to-Pay) Enhancement Project

The following are a list of project activities and events competed by the P2P project team during the month of February 2007:
- Initial P2P Champions Meeting
  http://www.purchasing.upenn.edu/buytools/P2P-20070215.pdf
- New "Authorized Buying Methods" Document
  http://www.purchasing.upenn.edu/buytools/authorized-buying-methods.php
- New "About the Purchase Order" Document
  http://www.purchasing.upenn.edu/buytools/about-the-purchase-order.php
- Updated "Purchase Order & Contract Approval Process" Document
  http://www.purchasing.upenn.edu/buyinfo/guide/po_approval.php
- Updated "Competitive Bidding Guidelines" Document
  http://www.purchasing.upenn.edu/buyinfo/bidding.php
- Updated "Purchase Order Revision Procedure" Document
  http://www.purchasing.upenn.edu/buytools/purchase-order-revision-procedure.php
- Updated "After-the-Fact Transaction" Document
  http://www.purchasing.upenn.edu/buytools/after-the-fact.php
- Updated "Supplier Payments" Document
  http://www.purchasing.upenn.edu/buytools/payments.php
- Updated "Purchase Order Hold Resolution Guide" Document
  http://www.purchasing.upenn.edu/buytools/po-hold-resolution-guide.php

PennERA: Electronic Proposal Development Wider Release Planned

NIH-Only Submissions

Initially the Proposal Development application will be available to create, route, approve, and submit only NIH proposals. Other sponsors/mechanisms will be added to the application as the software allows. Please refer to the PennERA web site for the NIH mechanism types available through Proposal Development at
http://project.pennera.upenn.edu/project/current_phase/PDfundingopps.pdf  (may have to copy & paste)

Proposal Development Help Available

Help information about Proposal Development is available on the PennERA web site:
- Advisories—For important information about the Proposal Development application, please check the Advisories web page at
  http://project.pennera.upenn.edu/advisories

- End-user support—For complete information on end-user support, please visit the PennERA Help page at
  http://project.pennera.upenn.edu/help.asp

More Information About PennERA

For more information about PennERA, please visit the PennERA web site at
https://www.pennera.upenn.edu/

If you have any questions, comments, or suggestions, please send an e-mail to
pennera@pobox.upenn.edu

--Robin H. Beck, Vice President of
  Information Systems and Computing
--Pamela S. Caudill, Executive Director of the
  Office of Research Services
--Joseph R. Sherwin, Ph.D., Director of the
  Office of Regulatory Affairs
Coming Soon:
PaymentNet Online Purchasing Card Management System

What's Not Changing with PaymentNet?

Cardholders will continue to maintain supporting documentation (e.g., receipts) for purchases, but can now track their transaction activity online. Cardholders can also review individual transactions and details, decline and dispute charges online, and use the handy self-service access to monthly statements. In the “Notes” section of the PaymentNet application, the Cardholder can state what was purchased and for what purpose. The following will not change:

- There will be no change to the current reallocation process in place today via BEN Financials and the General Ledger.
- Cardholders or Transaction Approvers will continue to be required to attend GL training if they are responsible for reallocating purchasing and Fleet Card charges.
- There will be no change to the current Purchasing and Fleet Card application process.
- A new purchasing card is not required. Purchasing cards will renew as usual.

Access Requirements

A web browser, like Internet Explorer, is all that is needed to access PaymentNet. No additional software or hardware will be required.

Users will point their browsers to a specific URL and log in with an ID and Password. The Purchasing Card Administrator will send specific instructions and login credentials for access to all Cardholders, Transaction Approvers, and Managers.

Mandatory Training Requirements

All Cardholders, as well as School/Center administrators who approve and review purchasing card activity, are required to take PaymentNet online training. Training consists of two sections: one on policies and procedures and the other on using the PaymentNet application. Both sections must be completed and a score of 100% attained before PaymentNet access will be granted. If training is not completed and a successful score of 100% not attained, the purchasing card will be deactivated.

For more information regarding the Financial Training Department, including Course Descriptions, How to Register for a Financial Training Course, Documentation, the Financial Training Calendar, previous issues The Bottom Line please go to:

http://www.finance.upenn.edu/ftd/