PennWorks: Merit Increase Functionality Coming Soon!

This spring, the PennWorks team will incorporate merit increase functionality into the PennWorks application. This feature in PennWorks will evolve and this year, to minimize training and disruption during the merit increase process, the PennWorks team will release only those functions that are most manually intensive and leverage the current use of spreadsheets or School-specific processes to do the modeling and planning of merit increases. Included in this first release will be salary tasks currently performed and processed in the UMIS mainframe system, using new PennWorks Export and Rapid Entry functions, which are described below. The current system used to process merit increases (SALINC) will be retired.

Anticipated implementation dates are as follows:
- April 2010—Export functions
- May 2010—Rapid Entry functions

More information will be provided to School/Center BAs as well as to all affected users as release schedules are finalized.

What are the Export Functions?

The Export functions include Role Export and Faculty Compensation Export:
- Role Export will allow users to generate Excel spreadsheets to facilitate the modeling, routing, and approval of pay changes. This function replaces the spreadsheets currently distributed by the Compensation Office of Human Resources at the beginning of the merit increase process in April. Designated School/Center coordinators will use this function to download the list of their merit increase eligible staff/faculty.

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PennWorks: Merit Increase Functionality Coming Soon!

Continued from Page 1

- **Faculty Compensation Export** will allow designated Home ORG users who process faculty compensation to generate Excel spreadsheets to facilitate the collection of information about faculty compensation components.

What are the Rapid Entry Functions?

The Rapid Entry functions include Role Rapid Entry and Faculty Compensation Rapid Entry:

- **Role Rapid Entry** will allow users to update pay information and distributions for a group of employees. This function replaces one-at-a-time updating of records in the current merit increase system. School/Center coordinators responsible for updating pay and distribution information will use this function in PennWorks, as well as coordinators responsible for bargaining unit updates.

- **Faculty Compensation Rapid Entry** will allow users to update faculty compensation package information, including Academic Base, for a group of faculty. This function replaces the spreadsheet faculty compensation survey conducted by faculty members’ Home ORGs in the fall.

Key Features and Benefits

The anticipated key features and benefits of the Export and Rapid Entry functions include:

- Ability to review and modify staff and faculty records from the user’s internet browser rather than the current, less intuitive mainframe application
- Immediate access and ability to export the most current information at any time
- Flexible filtering options for users to export or update a specific population, including employee group (monthly/weekly), job grade, job class, faculty class, eligibility status, current salary, or members of a bargaining unit

Key Features and Benefits (continued)

- Multiple updating of merit and distribution information for groups of employees, rather than the one-at-a-time process of the current system
- Ability to apply the same percent or amount increase across an entire group or a set of selected records
- Ability to update groups of employees (e.g., bargaining units) on scheduled dates other than July 1
- Ability to copy distributions
- Improved data quality for reporting and analysis

Access and Training

Only those users who need access to the new Export and Rapid Entry functions (including current PennWorks users or non-PennWorks users who would normally receive spreadsheets from HR during the merit increase process) will be required to complete a web-based, self-guided training session for each function they will use. Training is targeted to begin three-four weeks prior to the release of the new functions. More information on training, including instructions and timing, will be provided to School/Center BAs as well as to all affected users as we progress toward the training window.

Questions

If you have any questions, comments, or suggestions, please send an e-mail to pennworks@lists.upenn.edu. For more information on PennWorks, please visit the PennWorks project page at:

http://www.upenn.edu/computing/isc/apps/pennworks/

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-- Vincent Price, Provost
-- Jack Heuer, Vice President for Human Resources
-- Stephen Golding, Vice President of Finance and Treasurer
-- Robin Beck, Vice President of Information Systems and Computing

The Bottom Line  March 2010
Animal Research Information

Electronic Submissions (ARIES) Now Available

Continued from Page 1

Using ARIES for new protocols and those due for their three-year renewal is currently optional but highly recommended. It is expected that ARIES will become the only acceptable method of submitting these types of protocols in the very near future.

Who Should Use ARIES?

ARIES can be used by members of the research community involved in IACUC protocol creation, submission, routing, review and/or approval. The following internal review entities with appropriate access may also use this application to view a protocol:

- IACUC Committee Members
- Veterinary Review
- Office of Environmental Health and Radiation Safety
- Office of Research Services
- HUP Department of Healthcare Epidemiology and Infection Control
- ULAR Diagnostic Services
- Animal Welfare Compliance (ORA)

Benefits of ARIES

Anticipated benefits of ARIES include:

- Streamlined submission process, eliminating the need for researchers to copy and deliver multiple copies of a protocol to other University review units, and eliminating duplicative data entry
- Official inclusion of delegated research personnel into the submission and review process, effectively reducing the amount of direct effort of the Principal Investigators
- Ability for Principal Investigators to reuse data and reduce manual efforts associated with the submission of protocols
- Improved process efficiency and accuracy through electronic routing for approvals and reviews and automatic generation of alerts/notifications based on status changes
- Easy access to review step-wise progress and status of the protocol review
- Secure access to information, including historical data
- Enhancing regulatory compliance through integration of organizations that support animal research, including ULAR (Veterinarians, Diagnostic Services, and Training), EHRS, and HUP Infection Control
- Ability for IACUC Members to electronically review IACUC protocols and amendments

Access

ARIES will be available to all research staff at Penn with a valid PennKey and password. Users will only need to authenticate with their PennKey and password before accessing the system with a standard web browser (see http://www.upenn.edu/computing/pennkey/ for more information about PennKeys and PennKey passwords).

Optional Orientation Sessions

Optional orientation sessions are available to researchers who create, review, or approve animal research protocols. These sessions will provide an overview of the ARIES application, including navigation and other features.

To register for a session:

1) Go to Knowledge Link at http://knowledgelink.upenn.edu/.
2) Authenticate with your PennKey and PennKey password.
3) Click Training - Optional in the left toolbar.
4) When the training list loads, scroll down to the course titled ARIES - Animal Research Information Electronic Submissions Orientation Sessions – UNIV and click Enroll.

If you have any trouble accessing the course, contact aries_help@lists.upenn.edu.
Desktop Requirements
ARIES can only be accessed using one of the University-supported browsers. For a current list of Penn-supported browsers see the Supported Products page at http://www.upenn.edu/computing/product/.

Saving to PDF: If you do not currently have software such as Adobe Acrobat Pro to save documents as PDF files, there are shareware and freeware options available. See the "Saving Documents in PDF Format" section of the Penn Computing web page at http://www.upenn.edu/computing/provider/product/specs/adobereaderprovider.html for more information and for links to shareware and freeware options.

For more information on desktop requirements, see the Desktop Requirements page at http://project.pennera.upenn.edu/desktop_req.asp. If you have any questions about the desktop requirements, contact your Local Support Provider. For a contact list, go to http://www.upenn.edu/computing/view/support/.

End-User Support
For help with the ARIES application, contact aries_help@lists.upenn.edu.

Reference Materials Available
ARIES reference materials are available on the “Submissions” page on the IACUC web site at http://www.upenn.edu/regulatoryaffairs/index.php. Included are a Submitters’ Guide (plus a QRG) and a PI/Dept Reviewers' Guide.

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

--Dr. Steven J. Fluharty, Vice Provost for Research
--Stephen Golding, Vice President, Finance and Treasurer
--Robin H. Beck, Vice President, Information Systems and Computing
--Dr. Troy Hallman, Director of Animal Welfare, Office of Regulatory Affairs

BEN Knows
Quarterly Question
Q. How do I release a Qty Rec Hold (Quantity Receipt Hold)?
A. Qty Rec Holds can only be released by receipting goods and/or services via Requisitioner or PO Manager Responsibility.

From Requisitions Home Page:
• Select the "Receiving" tab
• Express Receive –OR- Click on Receipt Items to acknowledge receipt of items
• To receive item(s), select the requisition/purchase order to receipt
• Enter/ change the Receipt Quantity
• Click on [Next]
• Confirm the Receipt Date, click on [Next]
• Confirm receipt information, Click [Submit] to process

Note- Once an item has been receipted the item will be removed from "My Items to Receive".

From PO Manager Responsibility:
• Select Enter Receipts
• Enter the PO# and then click [Find]
• Close the Receipt Header box
• On the Receipts form, select the line(s) to receive
• Enter the receipt amount in quantity field.
• Save your change by selecting File>Save from the menu bar or Ctrl-S

PLEASE NOTE: The Holds Resolved Stamp CANNOT be used to release an invoice on a Qty Rec Hold.

If the invoice should not be paid:
• Apply the 'Route to Accounts Payable' markup
• Enter a reason for cancelling the invoice in the Comment box to notify AP to cancel invoice
• Click on [OK]
• Click on [OK] again to process
ENHANCED FEATURES TO THE PENN MARKETPLACE

Effective, Monday March 29, 2010 the following new features will be available in the Penn Marketplace, here is an early preview of these features. More details will be provided in the Purchasing News email and Purchasing Services website closer to the roll out date.

ABILITY TO VIEW PUNCH-OUT SUPPLIERS IN SEARCH RESULTS

This is not a new feature but a link to the supplier will be supplied within the search results, which is new. See the example below how DELL and APPLE punchout appear with links to their punchout site.

**Feature Overview:** Punch-out suppliers can be returned in the product search results alongside catalog and form items when the search criteria matches keywords on the supplier record.

PRODUCT SEARCH ENHANCEMENTS FOR FORMS

Product Search has been enhanced for forms in order to simplify the end user process for finding and selecting the correct form.

ADDITIONAL PRODUCT SEARCH FILTERS (TO THE LEFT OF SEARCH RESULTS)

Green, Recycled, and Energy Star product flag filters will be available for searching as provided by the supplier.

If you have additional questions, please contact BEN Helps at 6-HELP (746-4357).

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We encourage all staff and faculty members to participate in this year’s event “Marching into Mad Savings” and learn of our supplier’s new and ongoing sustainable efforts in support of the University’s Climate Action Plan. Consider this event as a training session and expand your knowledge about our supplier’s product offerings and promotions and encourage all your staff members’ participation.

New to the show this year will be a Shuttle service. Go to http://pennrides.com and click on the “live maps” link and in the route box click on the “Purchasing Show Shuttle” box for the pickup times and locations.

**PENN Recycles Pens/ Pencils/ Markers!**

Purchasing Services has partnered with Sanford, Office Depot and Terracycle, to recycle ALL brands of pens/markers/highlighters and create a second life for these items. Great time to start your Spring Cleaning and bring in your old pens/markers from home to the Supplier Show!!

Enter the raffle for a chance to win one of the great door prizes including an HP Photosmart printer and a Penn Digital Photo Frame. To be eligible to win one of two door prizes, you will be asked to swipe your Penn ID* card upon admission.

For more information, please visit the Penn Purchasing Services website: http://www.purchasing.upenn.edu/suppliershow

* Use of the Penn ID Card Reader is for compiling a show attendee list and for the award of the door prizes. At no time will your contact information be shared with any other internal or external organization. Admission to the show will not be denied if you choose not to have your Penn ID card swiped.
Travel Advisory

**AMERICAN EXPRESS HAS A NEW FAX NUMBER FOR TRAVEL AUTHORIZATIONS**

American Express has a new fax number for Travel Authorizations. That number is 1-623-707-4270 and the faxes go into a fax server so the issue of late or missing faxes should go away.

You can still fax travel authorizations to the old number and they will be received by Amex. The faxes are forwarded from 215 573-5635 to the new fax number. Faxes for Marathon Travel and Premier Travel should continue to be sent to 215 573-5635.

**THE TRAVEL PORTAL WEBSITE**

The Travel Portal home page was relocated. Be sure you are using the correct URL which is http://www.upenn.edu/penntravel and bookmark this page. The Travel Portal is the “go to” location for information on Penn’s preferred travel suppliers.

**SOUTHWEST AIRLINES ANNOUNCES NEW SERVICE BETWEEN PHILADELPHIA AND BOSTON COMMENCING JUNE 28, 2010**

Southwest Airlines announced new service between Philadelphia and Boston commencing June 28, 2010. Southwest Airlines will operate five flights daily out of Terminal E and we should see the prices on this market come down dramatically.

US Airways announced they will be matching the fares when Southwest Airlines commences operation.

**FOR THE LATEST TRAVEL NEWS**

For the latest Travel News, click here: http://www.purchasing.upenn.edu/travel-news

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**Quarterly Quiz**

**Instructions:** The following four 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 via email to training@exchange.upenn.edu no later than May 1, 2010.

The Winner will receive a one year Faculty Club Membership.

1. Name the ‘export’ and ‘rapid entry’ functions in PennWorks.
2. For a ‘Qty Rec Hold’ will a Markview stamp remove the hold?
3. What are the date, time and location of the Purchasing Supplier Show?
4. Where can I find BEN Deposits training?
5. What does ARIES stand for?

**Last Quarter’s Winner:**

Nancy O’Reilly, Business Administrator
Institute for Diabetes, Obesity and Metabolism

**Congratulations!**

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**Did You Know...**

...Sharing University logon IDs and passwords such as your PennKey and/or any financial access such as BEN or Payroll is a violation of University policy. If you have been asked to use someone else’s password to perform University activities, this should be reported to your Supervisor and/or contact Penn’s Office of Audit, Compliance and Privacy has established a Confidential Reporting and Help Line: 1-888-BEN-TIPS1-888-BEN-TIPS. Please see more specific information here: http://www.upenn.edu/computing/policy/aup.html

...BEN Deposits training is now on Knowledge Link at http://knowledgelink.upenn.edu). There are two courses: BEN Deposits Knowledge Building and BEN Deposits Application training. Once these courses are complete and a BEN Deposits Logon Access form has been submitted to the Financial Training Department (FTD) to review the on-line training, the form will be submitted to Financial Administration and access will be granted. No need to submit the access form first and await an e-mail from FTD.

**March 14th**

2:00 a.m.
Global Activities Registry: Helping Penn Achieve Its International Goals

Thousands of members of the Penn community travel abroad each year for myriad purposes: to teach; to study; to conduct research or University business; to set up or participate in educational, clinical, and other activities; or to participate in conferences, to name a few. Yet the true extent of Penn’s global reach is unknown. Information is distributed across offices, departments, and Schools, often making planning, support, emergency intervention, and other activities cumbersome, if not impossible, and significantly reducing opportunities for collaboration and learning from others’ experiences.

The multi-year Global Activities Registry project, sponsored by the Office of International Programs (OIP), the Provost’s Office, and Information Systems and Computing (ISC), was initiated recently to facilitate solutions to these unique challenges. The Registry is envisioned as a comprehensive tool that will support the global engagement of faculty, students, and staff through increased information-sharing and collaboration among Schools, Centers, and University administrative offices. It will also allow Penn to identify colleagues who may be in need of support or assistance while traveling abroad during natural disasters or other emergent situations.

The first phase of the project, to be completed in early summer, focuses on the development of a self-service web application that faculty, staff, and students will be encouraged to use to register programs, group activities, or individual traveler information related to Penn’s international activities. The data collected will meet Penn’s informational and privacy requirements, and will be available to authorized users in Schools and Centers to assist with travel and program planning, as well as to provide support and report on international activities. The Registry will leverage available data from existing sources to reduce redundant entry, and will automatically send individual travelers’ data to International SOS, the organization that provides Penn students, faculty, and staff with international medical, security and travel assistance.

The anticipated benefits of the first phase of the Registry project include:

- Enhanced emergency notification in high risk or crisis situations
- Improved coordination among program directors and administrative support centers to address unique operational activities
- Improved reporting of Penn’s global activities
- Identification of opportunities for closer interdisciplinary or cross-School collaboration on international research and operations
- Enhanced protocols for complying with U.S. and foreign legal requirements

Later phases of the project, in FY11 and FY12, will focus on integrating Registry data with other data sources and business processes. The goal will be to reduce redundant information collection, to bring convenience to travelers, to promote cross-school coordination of activities, to leverage knowledge gained by others, and to build regional or country-specific profiles to keep Penn travelers informed regarding travel precautions, laws, and other Penn activities in a given country.

The vision for the Registry originated with OIP, ISC, and the International Support Coordinating Group (ISCG), a cross-University body chartered by Provost Vincent Price and Executive Vice President Craig Carnaroli. The project team has gathered input from students, faculty and staff as well as program directors, offices that support global activities and School administrators, to ensure that the Registry will meet the needs of a variety of constituencies.

Additional information about the Global Activities Registry will be published as the project develops. In the meantime, please address any questions to the project managers, Erika Gross (egross@upenn.edu) and Jim Cunningham (jcunnin@isc.upenn.edu). Members of the project team would also be happy to meet with departments and other organizations to provide more information and answer questions.

– Global Activities Registry Project Team