Dear Penn Traveler:

The events of the last twelve months have had a profound impact on the travel industry. During this period, we have seen airlines eliminate all commissions. Under the terms of Penn’s business arrangement with American Express, Penn was previously reimbursed commissions as an offset to the costs of American Express travel services. Now, we are confronting the elimination of these reimbursements, which has dramatically increased Penn’s costs related to the delivery of travel services to the Penn community. The Penn Travel Office has undertaken a number of initiatives to assist Penn travelers in adapting to this new environment. These initiatives include:

- Redesigning the Travel Office web site to better highlight Penn’s principal travel partners and to provide links to their direct booking tools, including Amtrak, US Airways, and National Car Rental (available at http://www.finance.upenn.edu/comptroller/travel),
- Negotiating the placement of an Amtrak self service ticket machine in Houston Hall (the first Amtrak self service machine outside of a rail station), and
- Working to maintain our discount arrangements with US Airways and American Airlines despite the present turbulence in the airline industry.

As you may be aware from our prior communications, effective July 1, 2002, the service fees charged by American Express for domestic and international airline and Amtrak tickets increased significantly from $12 to $40 (domestic airline and Amtrak) and $45 (international airline). These fees were necessitated by the airlines taking the action discussed above, i.e. taking the action during this past year to eliminate all commissions they once paid to travel agencies for tickets issued. The amounts of these service fees are comparable to the fees other agencies are charging in Philadelphia and across the country. Service fees represent the new reality in the travel agency business. Financially troubled airlines have chosen to reduce commissions rather than increase fares to the travelers, although either action results in increased costs to the traveling public.

We certainly want Penn travelers to continue to use the services of American Express, when appropriate. At the present time, we will continue to reimburse travel agency fees for airline ticketing, pending review if further changes occur in the travel industry. The following situations would still be appropriate for the use of American Express travel:

- When the services of a dedicated agent are needed for complex domestic or international travel,
- When an agent’s help is needed in locating the most cost effective airfare,
- When travelers are making airline reservations that are being charged to the central billing account, or
- When traveling on preferred suppliers, such as US Airways and American Airlines, with which Penn has negotiated discounts ranging from 5% - 12%. Only American Express can offer such discounts.

One of the unique aspects of Penn travel is the extensive use of Amtrak given our proximity to New York and Washington as well as the convenience of 30th Street Station. Amtrak travel represents about 25% of the number of business trips taken annually. Under our present arrangement with American Express, a transaction fee is assessed on every ticket issued. Given the limited value provided by American Express, or any
other travel agency when purchasing an Amtrak ticket, we are revising the University’s travel policy with respect to Amtrak travel. Effective 9/1/02, the University will no longer reimburse service fees related to Amtrak travel regardless of where purchased. American Express has been instructed not to issue Amtrak tickets to Penn travelers. Amtrak tickets can be easily purchased at the Amtrak kiosk in Houston Hall, on Amtrak’s web site or at 30th Street Station. Reservations also can be made on the Amtrak web site or by calling 1-800-USA-RAIL.

Information on the Amtrak kiosk is located on the Travel Office web site, which has been redesigned to better highlight Penn’s preferred suppliers and to provide links to their direct booking tools. The first place to start when making travel plans is the Travel Office web site at: http://www.finance.upenn.edu/comptroller/travel. By familiarizing yourself with the Travel Office’s web site, you can begin to make wise travel decisions and reduce costs by making reservations on-line and using Penn’s preferred suppliers, whenever possible.

If you have any questions, please contact me at storb@pobox.upenn.edu.

Susan Storb
Travel Administrator

SHARE YOUR EXPERTISE?

Want to share your expertise with new employees?

Have you considered ‘Proctoring’ a BEN or Payroll Training session?

Proctors are an invaluable part of the financial training experience. If you would like to consider proctoring a future program, please e-mail training@pobox.upenn.edu.

Remember, BEN courses are now modularized, so even if you only have a half day to offer, that’s enough to cover some classes entirely! The trainer will guide you every step of the way.

It’s a win/win situation for all involved.

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 no later than September 27, 2002 at 5 p.m. Please note that entries will only be accepted via email! After the contest has closed, 2 names will be drawn randomly from a list of those who responded correctly to determine the mystery prize winners.

1. If one has direct deposit into a Mellon/Citizen’s Bank account, what must be done by the individual to ensure smooth transition of bank routing and account numbers?

2. As of what date will the University cease to reimburse travelers for service fees related to Amtrak travel?

3. How many manufacturers are currently represented in the Penn Marketplace?

4. By what date should all Spring 2002 Effort Reports be certified and returned to Research Services?

5. When will the PennKey authentication system replace the use of PennNet ID’s and passwords?

Eligibility: Members of the Financial Training Department and previous winners are prohibited from winning this contest.
The Office of the Treasurer is presently conducting a University-wide review and confirmation of Petty Cash accounts. Our goal is to verify the custodians and balances of all petty cash accounts and to ensure the accounts are being monitored and managed appropriately. Once completed, this information will also be used to populate an enhancement to BEN Deposits that will allow for better tracking and reporting of the activity in our petty cash funds.

NOTE: If your school or center has not yet completed the confirmation of its petty cash accounts, please do so immediately. Without this response, we will be forced to terminate the petty cash account (that is, they will not be eligible for reimbursement). Should you have any questions on this information, please contact Kathy McMullen at kmcmulle@pobox.upenn.edu.

We are also working with the Financial Training Department to create a training module on best practices for managing a petty cash fund. The training will be mandatory for all petty cash custodians and will include information on Policies and Procedures for proper use of petty cash funds, the correct way to complete reimbursement forms, tips on keeping funds secure, and safety tips when handling cash.

Thanks for your cooperation with this initiative.

CONTINUED ON NEXT PAGE
PennERA (continued)

- **Human Subjects Adverse Events Reporting System (PennAEs)** - this web-based system will give principal investigators (PIs), clinical coordinators, and staff in the Office of Regulatory Affairs a means of tracking, collecting, and reporting serious adverse events involving human subjects. PennAEs will be released to a pilot group in September 2002 and to the University at large in phases later in the fall. Adverse event reporting functionality will later be integrated into the core PennERA system. For more information on PennAEs, please see the article below.

- **Next-Generation Effort Reporting System** - this system will give the University community an online tool for reporting in compliance with the requirements of OMB-A21. System needs and requirements are currently being identified and a proposal is expected to be ready by September.

- **BRIM System** - this billing and receivables system was completed last year and is used by the Office of Research Services to issue invoices and track receivables for sponsored projects. Beginning this fall, data from BRIM will be fed into the University’s central data repository, the Data Warehouse, and will eventually be made available to Data Warehouse users who wish to run their own reports or import data to their desktop systems for analysis.

Future updates about PennERA will be provided throughout the project. For the most current information, please visit the PennERA project web site at [http://www.pennera.upenn.edu/](http://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

Andrew B. Rudczynski, Ph. D.,
Executive Director of Research Services and Associate Vice President of Finance

Joseph R. Sherwin, Ph.D.,
Director of the Office of Regulatory Affairs

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**Coming Soon: Penn’s Adverse Events Reporting System (PennAEs)**

The Penn Human Subjects Adverse Events Reporting (PennAEs) component of the PennERA system will be released to a pilot group within the University of Pennsylvania’s academic research community in September 2002, followed by a phased rollout to the University at large later in the fall. Researchers, faculty, and students will be notified when PennAEs is available for campus-wide use.

PennAEs is a web-based software solution that facilitates the tracking, collecting, and reporting of serious adverse events involving human subjects to the Institutional Review Boards of the University of Pennsylvania. Specifically, this system:

- Provides a central repository of adverse event information that includes historical and current data
- Provides the ability to create and print a Voluntary Report to Sponsor Form as well as the University of Pennsylvania Adverse Event Reporting Form
- Provides immediate electronic delivery of reports to the Office of Regulatory Affairs
- Makes data easily accessible via any web browser
- Provides the ability to monitor and maintain information in a consistent and auditable manner
- Facilitates annual reporting

Adverse event reporting functionality will later be integrated into the core PennERA system.

To access PennAEs, users will need a PennNet ID and password (PennKey and PennKey password after October 14, 2002). Optional training sessions will be available. The training schedule will be published on the Office of Regulatory Affairs’ web site upon release of PennAEs.

If you have any questions or would like more detailed information about the PennAEs component of the PennERA system, please send an e-mail to pennaes@pobox.upenn.edu or contact Chris Sandy at 215-746-6266.

Joseph R. Sherwin, Ph.D.,
Director of the Office of Regulatory Affairs
OFFICE OF STUDENT FINANCIAL SERVICES

Billing Schedule

FALL 2002

Produced  
July 1, 2002  
August 6, 2002  
September 3, 2002  
October 1, 2002  
November 1, 2002

Due Date  
August 2, 2002  
August 29, 2002  
September 27, 2002  
October 29, 2002  
November 29, 2002

Financial Hold (Spring 2003)

Warning letters are mailed out on October 1, 2002
Actual holds posted and letters mailed out on October 15, 2002

Financial Drop and Add for Fall 2002 - ends on September 21, 2002 at 5:00 p.m.

Student Employment Office


A student must have received as part of his/her financial aid package a Federal Work-Study award or International Student Job award in order to be employed under these programs. The student must present a Job Appointment Form to the supervisor before the student is permitted to begin working.

For further information, go to the Student Employment Office web site at http://www.sfs.upenn.edu/seo.

If you have any questions, please e-mail John Rudolph at rudolph@sfs.upenn.edu.

eSFS - SFS On-Line Service Offerings

PennPlan on line

Introduced in April 2001 to admitted entering Freshman, PennPlan on-line permits students and their families to access a secure website to see their financial aid award, model a financial plan, receive tutorials to help them understand new terms and procedures, and enables them to follow through on the award. Non-aided students can make use of the worksheet for modeling a plan and the other features of the site. The website has been extended to Upperclass undergraduates and returning Law students.

This first program phase will help to re-engineer the financial aid process for all students and administrators. The second phase implemented this year, permits administrators to perform on-line needs analysis and to better manage the complex requirements of that process.

Penn entered into a development arrangement with a firm known as Overture. It expects to market this product throughout the country.

Net.Pay

A service which enables students to receive their Penn Monthly Student Account Billing Statements over the web, and to submit payments on-line, using an electronic interface with their bank.

Net.Pay is a product of Sallie Mae Solutions, who in conjunction with Penn, helped in the design of the program.

Direct Deposit

Direct deposit of student account refunds can be made into the student’s savings or checking account.

Employment Office On-line

The Federal Work-Study program provides employment to eligible students with financial need. All authorized work-study jobs are available on-line at http://www.upenn.edu/sfs/seo.

In addition to the work-study program, Student Employment also maintains the Job Referral Service, which assists non-financially aided students and their spouses/partners in locating part-time work during the academic year. A listing of jobs is available on-line at http://www.upenn.edu/sfs/seo.
Important Financial Web Pages

<table>
<thead>
<tr>
<th>Vice President for Finance</th>
<th>Information Systems &amp; Computing</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.finance.upenn.edu/">http://www.finance.upenn.edu/</a></td>
<td><a href="http://www.upenn.edu/isc/">http://www.upenn.edu/isc/</a></td>
</tr>
<tr>
<td>Center for Technology Transfer</td>
<td>Business Services</td>
</tr>
<tr>
<td><a href="http://www.upenn.edu/ctt/">http://www.upenn.edu/ctt/</a></td>
<td><a href="http://www.business-services.upenn.edu/">http://www.business-services.upenn.edu/</a></td>
</tr>
<tr>
<td>Comptroller</td>
<td>Purchasing Services</td>
</tr>
<tr>
<td>(Includes Accounts Payable, Corporate Tax, General Accounting, Payroll, and Travel, along with a comprehensive &quot;Forms&quot; library)</td>
<td><a href="http://www.purchasing.upenn.edu">http://www.purchasing.upenn.edu</a></td>
</tr>
<tr>
<td><a href="http://www.finance.upenn.edu/comptroller/">http://www.finance.upenn.edu/comptroller/</a></td>
<td>Business Enterprise Network</td>
</tr>
<tr>
<td>Financial Training Department</td>
<td><a href="http://www.finance.upenn.edu/ben/">http://www.finance.upenn.edu/ben/</a></td>
</tr>
<tr>
<td><a href="http://www.finance.upenn.edu/ftd/">http://www.finance.upenn.edu/ftd/</a></td>
<td>PennERA</td>
</tr>
<tr>
<td>Research Services</td>
<td><a href="http://www.upenn.edu/researchservices/">http://www.upenn.edu/researchservices/</a></td>
</tr>
<tr>
<td><a href="http://www.upenn.edu/researchservices/">http://www.upenn.edu/researchservices/</a></td>
<td>Risk Management</td>
</tr>
<tr>
<td><a href="http://www.finance.upenn.edu/riskmgmt/">http://www.finance.upenn.edu/riskmgmt/</a></td>
<td>Student Financial Services</td>
</tr>
<tr>
<td>Student Financial Services</td>
<td><a href="http://www.sfs.upenn.edu/home/">http://www.sfs.upenn.edu/home/</a></td>
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<tr>
<td><a href="http://www.sfs.upenn.edu/home/">http://www.sfs.upenn.edu/home/</a></td>
<td>Treasurer</td>
</tr>
<tr>
<td>Treasurer</td>
<td><a href="http://www.finance.upenn.edu/treasurer/">http://www.finance.upenn.edu/treasurer/</a></td>
</tr>
<tr>
<td>(Includes Cash Management, Cashiers Office, Central Gifts, Construction Finance, Trust Administration)</td>
<td>Information Systems &amp; Computing</td>
</tr>
</tbody>
</table>

September’s meeting of the Association of Business Administrators (ABA) will take place on Wednesday, September 25th, and will feature Corporal Joseph Fischer of the University of Pennsylvania Police Department. His presentation will include information regarding identity theft and other crime patterns related to the University, electronic campus security infrastructure, and general safety tips.

Membership in the ABA is open to all professional (A-1) employees who perform business management functions as the major part of their professional activity within the University. To apply for membership, please complete the application form located at http://www.upenn.edu/aba/abaapp.html.

Monthly meetings for the coming academic year are scheduled for September 25th, October 23rd, November 20th, January 22nd, February 19th, March 19th, April 16th, and May 21st. The current ABA Steering Committee is:

- Janice Brown (Comptroller's Office)
- Mary DeSalvo (Medicine Department of Finance)
- Carole Mercado (Facilities Services)
- Raynel Otero (School of Social Work)
- Brent Parker (Financial Training)
- Rob Perlish (Medicine Department of Finance)
- Mario Salvati (Chemistry)
This is to clarify the message dated July 26, 2002 regarding Additional Pay Forms.

When submitting Additional Pay Forms to the Payroll Office for processing, please ensure that the late pay screen prints read "PROCESS" instead of "PENDING".

In order to mark a monthly late pay for processing, after entering the late pay, someone with access to the Approvals Menu (for your department, school, or center) must access the late pay, and in the action "A" field, mark a "P" for process. Once this is completed and confirmed, they will see *PROCESS* appear next to the record in the Late Pay screen.

When viewing a late pay in the browse function of the Monthly Time Reporting Menu, you will see no notation at all if the record has been processed:

This will facilitate the processing of the paperwork and help us help you more efficiently.

### Monthly Salary Management schedule for September through December 2002

Following are the date ranges which GRPA and GRPS reports should be run so that they match exactly what your BEN Financials reports will show for the specified accounting period. Note that these are the only Salary Management reports that will show you actuals plus encumbrances, for reconciliation against the summary balances reported on BEN Financials reports.

<table>
<thead>
<tr>
<th>Month</th>
<th>From:</th>
<th>Through:</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>27-Aug</td>
<td>03-Sep</td>
</tr>
<tr>
<td>September</td>
<td>24-Sep</td>
<td>01-Oct</td>
</tr>
<tr>
<td>October</td>
<td>22-Oct</td>
<td>29-Oct</td>
</tr>
<tr>
<td>November</td>
<td>26-Nov</td>
<td>02-Dec</td>
</tr>
<tr>
<td>December</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Beginning at 6 a.m. Ending at 3 p.m.

Directions for running these reports: From the Salary Management main menu, enter RPTS in the Tran field and press [return]. From the Standard Reports menu, enter GRPA or GRPS in the Tran field and press [return]. Leave the fiscal year set to current. If you’re requesting the GRPA report, CNAC must be entered, but all other fields are optional. If you leave something blank in the GRP_report parameters screen, everything to the right of it must be blank (i.e. 400 405_ _ ____ ____ ____ will not work).

### Mellon/Citizen’s Bank Changes

We have been notified by Mellon Bank that Mellon’s bank routing number and account numbers will be changed to Citizen’s Bank routing number and account numbers. This notice is to inform those of you who are Mellon/Citizen customers that we are working with the bank to affect a smooth transition.

If you are not a current Mellon Bank customer or do not anticipate maintaining an account with Citizen’s Bank, you will not be affected. If you anticipate remaining a Mellon/Citizen’s Bank customer, no action needs to be taken on your part as all changes in routing number and account numbers will be handled by the University Payroll Office.

If you have any questions or concerns, please contact the University Payroll Office at 215-898-6301 or payroll@pobox.upenn.edu.

NOTE: This change has no effect on University accounts (including instructions for wire transfers).
Reminder of New Service Fees

Effective July 1, 2002, the following transaction fees charged by American Express went up. This increase is a result of the major US airlines eliminating commissions previously paid to travel agencies.

<table>
<thead>
<tr>
<th>Type of Transaction</th>
<th>Cost to Traveler</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent-assisted Domestic airline ticket transaction*</td>
<td>$40</td>
</tr>
<tr>
<td>Agent-assisted International airline ticket transaction**</td>
<td>$45</td>
</tr>
<tr>
<td>Hotel/Car/International rail only reservations</td>
<td>$25</td>
</tr>
<tr>
<td>Assistance with international visas</td>
<td>$25</td>
</tr>
</tbody>
</table>

* If a ticket needs to be re-issued because of a change, American Express charges a $40 service fee. If it is a non-refundable ticket, the airlines assess a $100 change/cancel fee as well.

** If a ticket needs to be re-issued because of a change, American Express charges a $45 service fee. If it is a non-refundable ticket, the airlines assess a $150-200 change/cancel fee as well.

Commencing July 1, 2002, service fees charged by travel providers for airline tickets, cars, hotels and visa services are considered reimbursable expenses. Make sure you include them on the Travel and Entertainment Reimbursement (C-1) form.

Commencing September 1, 2002, service fees for Amtrak tickets will not be reimbursed and should not be listed on a Travel and Entertainment Reimbursement (C-1) form.

To offset or avoid these fees you can:

- Book your own travel (see Travel Program Home Page),
- Buy your Amtrak tickets from the Quik-Trak machine in Houston Hall, or
- Use Penn’s preferred airlines through American Express (898-9439) and take advantage of our negotiated discounts (see The Bottom Line - June, 2002)

Frequently Asked Questions

Why is the University eliminating the ability to book Amtrak rail travel through American Express?

Given the limited value provided by a travel agent when purchasing an Amtrak ticket, the level of service does not warrant the payment of service fees. This is especially true since there are several other convenient options for acquiring a ticket with no fees attached, such as purchasing Amtrak tickets on-line or at the Amtrak kiosk in Houston Hall.

How do I go about making an Amtrak reservation?

You have several options when making an Amtrak reservation. You can make your reservation and purchase your ticket at the Amtrak kiosk in Houston Hall, make your reservation on Amtrak’s web site at (http://www.amtrak.com), purchase your Amtrak ticket at 30th Street Station, or call 1 800 USA-RAIL.

For additional information go to:

How do I go about obtaining an Amtrak ticket?

If you purchase your ticket at the Amtrak kiosk in Houston Hall, your ticket will be generated at that time. If you purchase your Amtrak ticket on-line you have the option to pick up your ticket at any Amtrak kiosk or have the ticket mailed to you.

What do I do if I need to change a reservation?

Once ticketed, you can change your reservation with Amtrak at 30th Street Station or you can purchase a new ticket and return the old one for a refund. Tickets to be refunded can be taken to any Amtrak ticket window or sent to:

Amtrak
Customer Refund Department
Box 70, 2nd floor, North Tower
30th Street Station
Philadelphia, PA 19104-2878

Any tickets returned to Amtrak will be credited back to the credit card on which the ticket was charged.

How do I purchase Amtrak tickets for other people?

If you make a reservation using the Amtrak kiosk in Houston Hall, it assumes the reservation is for the person whose name is on the credit card and that the travel commences from Philadelphia. If you need to make a reservation for someone other than yourself or for some other location than Philadelphia, you can make the reservation using the Amtrak web site. Once you have paid for that ticket and receive a reservation number,
FAQ continued

that ticket can be picked up by that traveler at any kiosk or Amtrak

ticketing counter. To pick up at a kiosk, the person:

1) enters the reservation number and a credit card,
2) selects "Advanced Paid Tickets, and
3) "Print tickets."

The $0.00 on the ticket indicates that the payment was made
from the credit card used to make the reservation.

Who are the University’s preferred travel partners?

The University’s preferred travel partners are:

<table>
<thead>
<tr>
<th>Travel Agency</th>
<th>Airlines (with whom we have negotiated discounts)</th>
<th>Car rental companies</th>
<th>Hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penn desk at American Express</td>
<td>US Airways</td>
<td>National Enterprise (locally)</td>
<td>Various hotels locally and in select cities (see Travel web site)</td>
</tr>
<tr>
<td>898-9439 or 800-796-7573</td>
<td>American Airlines</td>
<td>Alamo</td>
<td>Club Quarters</td>
</tr>
<tr>
<td></td>
<td>Air France</td>
<td></td>
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</tbody>
</table>

For additional information, there is a section on the Travel Office web site called "Preferred Vendors." http://www.finance.upenn.edu/comptroller/travel/air_rail/amtrak_guidelines.shtml

How can I access the direct links of these partners?

You can access direct links to several of these travel partners by accessing the Travel Program home page at: http://www.finance.upenn.edu/comptroller/travel

Who can I call if I have any questions?

If you have any questions, you can contact the Travel Administrator, Susan Storb, or email her at storb@pobox.upenn.edu

Amtrak's "Book Your Own Travel" Options

Book your Amtrak tickets at the Quik-Trak® machine in Houston Hall. Click here for more information http://www.finance.upenn.edu/travel/vendors/quiktrak.shtml.

You can use any major credit or debit card, including Penn’s ProCard and AMEX corporate credit card.

Book your Amtrak tickets online at http://www.amtrak.com/plan/quiktrak.html and generate your ticket at any Quik-Trak machine (Houston Hall or 30th Street Station) by using your online reservation number.

Buy your ticket at 30th Street Station, or call Amtrak at 1-800 USA-RAIL.
To the University Community:

Several years ago, the Penn Purchasing Department completed a successful reengineering of its business operations. That reengineering resulted in the modification of a number of business systems and processes that effectively changed the way purchasing is conducted at Penn.

At that time, in order to convey to the campus community the new role of the department in the purchasing process, the department was renamed Acquisition Services.

Over the last several months, Penn’s purchasing processes have similarly undergone a number of additional operational changes. With the support and cooperation of many of our colleagues at Penn, BEN Buys and the Penn Marketplace have been successfully implemented; EDI is now extensively used as a means of expediting both purchasing and payment transactions; new technology is being tested in several areas; and all purchasing systems are re-evaluated regularly to determine where additional improvement can be made.

Regardless of the modifications, changes, and improvements, we have always, however, been identified as the organization that facilitates the “purchasing process.”

Therefore, on September 1, 2002, Acquisition Services will become Penn Purchasing Services.

We have long been identified as “Purchasing,” and we will be pleased to continue to be known by that title. We do not anticipate this identity change will cause any disruption in service. We deeply appreciate the support we have received from the campus community and will continue to upgrade and improve the purchasing process.

Please visit our new Penn Purchasing Services web site when it is released in September 2002. As always, we welcome your feedback! Please contact us at feedback@pobox.upenn.edu with any questions or comments.

Cutting-Edge On-line Bidding Tool

Penn Purchasing Services, in partnership with Procuri Incorporated, has successfully conducted its first on-line bidding (Reverse Auction) event. The on-line bidding event, for air filters, was conducted for a cooperative purchasing initiative for the Philadelphia Area Collegiate Cooperative (PACC). PACC is a cooperative purchasing initiative between Philadelphia area colleges and universities.

Purchasing Services will look to integrate on-line bidding technology in future competitive bidding initiatives such as office supplies and copy paper.

Please direct all questions regarding the On-line Auction relationship with Procuri to Vira Homick in Purchasing Services.

Penn Marketplace - continuous growth

The Penn Marketplace has now been open since January 2nd, 2002 with the implementation of BEN Buys and is showing steady growth in its use. There are currently 28 suppliers within the Marketplace offering over 425,000 products to choose from, representing over 2766 manufacturers. To better enhance your ordering experience, the Marketplace is continually being populated with additional items from existing suppliers as well as new suppliers.

Please reference your training guides for information on how to best use the search tools in order to find the items that you need more easily. With the growing use of the Marketplace we will be able to continue to negotiate better contracts for the benefit of the University community.

Visit the Penn Purchasing Website at: http://www.purchasing.upenn.edu to get the full list of participating suppliers along with the new suppliers “in the pipeline” for the Marketplace.

CONTINUED ON NEXT PAGE
In response to requests from many users of NEXTEL phones within the Penn Community, NEXTEL COMMUNICATIONS has provided the following information for resolving problems.

Below is a guide to follow when making changes or needing assistance with your Nextel service or phone. If you have any questions regarding these processes please contact:

Scott Ulrick: 215-416-7478; scott.ulrick@nextel.com  
Hope Sweat: 215-354-5059; hope.sweat@nextel.com

<table>
<thead>
<tr>
<th>Question/ Issue</th>
<th>Who Can Call?</th>
<th>Who do I call?</th>
<th>What is the number?</th>
<th>If resolution is not to my satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Activations</td>
<td>Main Point of Contact</td>
<td>Scott Ulrick</td>
<td>215-416-7478</td>
<td>Josh Hadfield- 215-768-1614</td>
</tr>
<tr>
<td>Accessories</td>
<td>End User</td>
<td>Accessory Hotline</td>
<td>1-800-914-3240</td>
<td></td>
</tr>
<tr>
<td>Account Changes</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Add/ Delete Services (voicemail, caller id, etc.)</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Alias Changes</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Main Point of Contact Changes</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Billing Questions</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Collections/Finance</td>
<td>Main Point of Contact</td>
<td>Mark Burnett</td>
<td>720-206-2651</td>
<td><a href="mailto:mark.burnett@nextel.com">mark.burnett@nextel.com</a></td>
</tr>
<tr>
<td>Coverage/ Network/ System Problems</td>
<td>End User</td>
<td>Nextel Customer Care</td>
<td>1-800-639-6111</td>
<td></td>
</tr>
<tr>
<td>Data Assistance/ Questions</td>
<td>End User</td>
<td>Data Pod Care</td>
<td>1-800-639-6111; option #3</td>
<td>Greg Savage- 610-496-2105</td>
</tr>
<tr>
<td>Deactivation Request</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Lost or Stolen Phones</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Rate Plan Analysis</td>
<td>Main Point of Contact</td>
<td>Hope Sweat</td>
<td>215-354-5059</td>
<td>Info provided by Scott Ulrick- 215-416-7478</td>
</tr>
<tr>
<td>Rate Plan Changes</td>
<td>Main Point of Contact</td>
<td>Key Corp Acct Care</td>
<td>1-800-390-7545</td>
<td>Hope Sweat-215-354-5059</td>
</tr>
<tr>
<td>Equipment and Repair Issues (Handset Problems)</td>
<td>Main Point of Contact</td>
<td>Motorola Door to Door Express</td>
<td>1-800-453-0920</td>
<td>1-800-390-7545 (ask to be transferred to Door to Door Express)</td>
</tr>
<tr>
<td>Signal Insurance</td>
<td>Main Point of Contact</td>
<td>Signal Insurance</td>
<td>1-888-352-9182</td>
<td></td>
</tr>
<tr>
<td>Training Requests</td>
<td>Main Point of Contact</td>
<td>Hope Sweat</td>
<td>215-354-5059</td>
<td></td>
</tr>
<tr>
<td>Upgrade or Replacement Handsets</td>
<td>Main Point of Contact</td>
<td>Nextel Customer Care</td>
<td>1-888-NEXTEL-6</td>
<td></td>
</tr>
<tr>
<td>Worldwide Service</td>
<td>Main Point of Contact</td>
<td>Nextel Worldwide</td>
<td>1-201-531-5202</td>
<td></td>
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</tbody>
</table>
The University of Pennsylvania's Purchasing Services Department and Fisher Scientific would like to announce the creation of "http://www.fisherscientific.com/upenn." This new website enables all researchers at the University to have a direct connection with the most current events offered from their Purchasing Services Department and their prime contracted laboratory research supplier, Fisher Scientific. In addition, researchers will find sections included on this site such as News, Partnership Details, Deactivated Suppliers List, and links to product availability. Finally, researchers may browse the Promotions section on this site, which displays unique product offerings that will provide additional cost savings to their laboratories. So make sure you add "http://www.fisherscientific.com/upenn" to your favorites list and join us the next time you connect to the Internet!

For reconditioned and rental furniture, we have signed with Source One Furniture. Source One offers mainly systems-type furniture and the manufacturer products they recondition include Steelcase, Haworth, Knoll, Herman Miller, Allsteel and more. For information regarding the services they offer, please contact our customer service representative, David Steinbrecher at 856-428-6902.

For furniture manufactured by Herman Miller, Inc., we have signed a new contract with Herman Miller/Spectrum. Our customer service representative is Kim Pinkerton and she can be reached at 610-354-0300 ext.3209 or at kimberly_pinkerton@hermanmiller-spectrum.com.

Please direct any questions related to these new contracts or other furniture issues to Colleen Reardon.

Order your IKON supplies online!

If you have an IKON copier, you can now order your maintenance supplies (such as toner or staples) for that machine using IKON's new online order form. Simply go to the BEN BUYS Requisition Home Page and click on this icon:

Enter a few simple details:
- Your contact information
- IKON Equipment ID
- Supply type and description

Then submit the form, and your order is on its way! You will receive an e-mail confirming your order.

Save time! Order your IKON supplies online!
TH E B O T T O M L I N E

September 2002

PURCHASING SERVICES (continued)

Penn Marketplace Supplier Show

Penn Purchasing Services would like to invite the University community to the upcoming Penn Marketplace Supplier show.

The show will be held on Tuesday, September 24, 2002, from 10:00 AM-3:00 PM at Houston Hall, Hall of Flags, Ground floor. Food, beverages and giveaways will be provided.

This is an excellent opportunity for the University community to meet many of the participating Penn Marketplace suppliers. The following are the suppliers who will be participating in the show:

A. Pomerantz & Co.
Avery
BioSupplies, Inc.
Coming Life Sciences
Denville Scientific, Inc.
EMSCO
Fisher Scientific
Laser Supply, Inc.
NEC Solutions
Nunc
Staples Business Advantage
Total Video Products, Inc.

Acco-Swingline/Kensigton
Beckman
Bio Tech Solutions, Inc.
Covington Furniture Solutions
Eldon
Eppendorf
Gelman
Lexmark
New Brunswick Scientific
Smart Technologies
Strategene
VWR International

Advanced Office Environments
Bio-Rad
Continental Lab Products
Crystal Springs
EM Science
Fermenats
Global Industries
Nalge
New ark Electronics
Sony Electronics
TKR Biotech Products

Approved Caterers for the University Campus

The approved caterers list can be found on the Penn Purchasing Services website and is maintained daily. All approved caterers must provide an updated certificate of insurance; if the certificate expires and a new one is not submitted they will be removed from the approved list and we will deactivate them from Ben Buys.

If you have any questions or wish to add a caterer to the list, please contact Carol Brandt at cbrandt@pobox.upenn.edu.

ben helps

Questions of the Quarter

Q. How do I change my default approver?

A. After a requisition has been created, proceed to checkout. You are able to change or add an approver from the "Review Approver & Enter Justifications Page".

Changing your first approver allows you to change your default approver to another authorized individual. Click on "change the first approver". Search for the new individual’s name (enter in all caps). Select the name that you want to use as your first approver. To cancel your current entry click on the "Reset Approval List" button.
OFFICE OF RESEARCH SERVICES

Newsletter
The first issue of the Office of Research Service's Monthly Newsletter is available at:
http://www.upenn.edu/researchservices/.

We hope you find it informative. Please send any comments or suggestions for future issues to Kerry Peluso at pelusok@pobox.upenn.edu. Submissions for possible inclusion in future issues are very welcome.

Effort Reporting
Effort reports for Professorial and Professional Employees for the Spring Semester and 4th quarter effort reports for non-exempt weekly paid employees were mailed out during the week of August 12th-16th. These effort reports need to be reviewed, certified and returned to the Office of Research Services by October 18, 2002.

NIH announces "Just-in-Time" process for IACUC review and approval
The NIH has announced that beginning with applications submitted for the October 1, 2002 receipt date, Institutional Animal Care and Use Committee (IACUC) "just in time" will be in effect. Institutions will be permitted flexibility in the timing of IACUC review relative to submission of an application. This will allow for applications to be submitted with the IACUC approval listed as pending.

The fundamental PHS Policy requirement that no award may be made without an approved Assurance and without verification of IACUC approval remains in effect. This change only affects the timing of the submission and the verification of that review. It is incumbent upon investigators to ensure that appropriate approvals be secured in order that an award can be made. Regulatory Affairs has posted additional information on their website: http://www.upenn.edu/regulatoryaffairs/

The NIH notice can be read at: http://grants.nih.gov/grants/guide/notice-files/NOT-OD-02-064.html

DIVISION OF HUMAN RESOURCES

Learning and Education Fall, 2002

Coming Up This Fall in Learning and Education:
Highlights September
Phil Jackson on Coaching! Live satellite broadcast
The Cornell Interactive Theatre Ensemble - live on campus, a unique interactive theatrical experience, designed to foster a respectful and productive workplace.

New This Fall: Meet the Faculty Series
Penn Faculty Members Kenwyn Smith and Michael Useem share their experiences and their expertise.

Fall Programs
- Managing and Working with Difficult People (AMA Program)
- Preparing for Greater Responsibility (AMA program)
- Successful Meeting Planning (AMA Program)
- What Matters Most (Franklin Covey program)
- Myers-Briggs Type Indicator Workshop
- The Professional Development Program
- Transitioning to Management
- Words at Work

Live Satellite Broadcasts - ABSOLUTELY FREE
- Phil Jackson on Coaching
- Benazir Bhutto on Diversity
- Howard Schultz on Leadership
- John Kotter on Leading Change
- Marc Buckingham on Great Management

And More!
- Brown Bag Matinees
- Career Focus Brown Bag Matinees

Keep checking our online course catalog on our website:
http://www.hr.upenn.edu/learning for details, online registration and new additions.

Sign up for our listserv to receive email notification of new offerings. Visit our website for sign up instructions.
Low-Cost Multi-Party Conference Services Available

The University of Pennsylvania has negotiated a very competitive rate for "Meet Me" Conference Services for up to 20 parties. This service is available on a 24 hour/365 day a year basis. Participants will be provided with an 800 number, a local number and a security code for their specific conference with no set-up fees. Conference sponsors pay a low 18¢ per minute usage charge per participant. Contact ISC Networking & Telecommunications at 215-746-6006 for additional details.

Automatic Call Distribution (ACD)

A flexible and robust customer service management tool available from ISC Networking & Telecommunications, Automatic Call Distribution can help any size organization manage and direct incoming calls in a way that enables that organization to provide the best possible service to its customers while evenly distributing work load among its staff.

ACD, in its simplest form, queues calls so the customer who has been waiting for the greatest period of time is directed to the next available service representative. Traditional ACD services offer basic queuing and call distribution but little in the way of additional features. In addition, these services usually require service agents to be in a single location.

ISC Networking & Telecommunications is now offering a product - Teloquent Customer Interaction Management - that takes ACD to the next level by integrating traditional telephony with internet and e-mail. Teloquent can help any organization create a virtual contact center, regardless of equipment or service representative locations.

Teloquent's capabilities range from basic ACD functions, to complex routing that can link customers from a central intake phone number or e-mail to a variety of automated intake processes or to a specific support person most qualified to answer the customer's question. Flexible design allows for better staff utilization through adjustable routing that can meet seasonal demands. Ultimately, organizations can create a single point of contact for very dissimilar inquiries.

To learn more about Teloquent Customer Interaction Management and to determine if it's right for your organization, contact Nydia Laplante, Associate Director of Consulting Services for ISC Networking & Telecommunications at 215-898-2298.

Speech Recognition Directory

Verify your name on the new Speech Recognition Directory Assistance system! ISC Networking & Telecommunications is in the final phase of testing speech recognition software that will help callers inside and outside of the University quickly and easily contact people without the use of a printed phone directory by simply speaking the name of the person or department they wish to reach.

Penn students, faculty and staff are encouraged to test the system now to verify that the pronunciation of their name and routing to their phone number are correct. The system can be tested by calling the new Speech Recognition Directory at 6-4242 (or 215-746-4242 from off campus) and following the prompts. Omissions, routing problems, or pronunciation discrepancies should be reported via voicemail to 215-573-9077. Be sure to include your name, telephone number and a brief description of the required change when reporting problems. During the testing phase, callers to 6-4242 who experience problems will automatically be directed to the problem voicemail box at 215-573-9077.

Once testing is complete, students, faculty or staff can use the directory anytime by calling 6-4242. In addition, it will also greet callers dialing Penn's main phone number (215-898-5000) between the hours of 5:00 PM and 8:00 AM. Callers will be asked to speak the complete name of the person or department they wish to reach. If the system recognizes the name it will route the call to the appropriate number without disclosing location or telephone information to the caller. Callers experiencing problems during normal business hours will be directed to the University Operator. Callers who experience problems between 5:00 PM and 8:00 AM will be routed to the standard after-hours greeting and menu.
Help Us Protect Your Privacy Online: PennKey Ushers in Improved Network Security

The report last year of the Task Force on Privacy of Personal Information, chaired by Professor Gerald Porter, advised that while Penn has made extraordinary progress in improving physical safety, similar efforts must be extended to protecting the University community from fraudulent activities online. Two major security initiatives being introduced this fall are the next step in our commitment to protect personal privacy and Penn’s online environment.

While the University can ensure that the strongest possible security technologies are in place on campus systems, each of us, as end users, is also responsible for maintaining online security. By adhering to sound security practices - selecting unguessable passwords and keeping them secret - we greatly reduce opportunities for others to gain access not only to our private information but to the entire online environment. Indeed, secure passwords are the lynchpin of online security; no technology can overcome the risks associated with not safeguarding passwords and opening the door for others to use services only we are authorized to access.

Fall Security Initiatives

Both security initiatives being introduced this fall relate to authentication and authorization, and hence to passwords.

Kerberos. In the background, an authentication technology known as Kerberos is being phased in on many electronic services. In a fully "Kerberized" environment where all campus services take advantage of Kerberos, passwords would never be transmitted across the network, even in encrypted form, and users would sign in only once a day ("single sign-on") to perform technology-based activities on the various systems they were authorized to access.

Not all the user and server software we use today can, however, take advantage of Kerberos. Thus this fall's initial implementation of Kerberos is largely laying the foundation for the future. Some optional Kerberized services (primarily email) will be offered, but most service will continue to use other secure authentication technologies. These non-Kerberized services will still require separate logins (no "single sign-on" yet), and passwords for them will still be transmitted across the network in strongly encrypted form.

PennKey. The change that will be visible to everyone will be the move from the use of PennNet IDs and passwords to PennKeys and passwords. Your PennKey will be your username in the Kerberos-based PennKey authentication system, which will replace the PennNet ID (a.k.a. PAS ID) system on October 14. A PennKey and associated password will be required to access both Kerberized services as they become available and, more importantly, the many web-based services that now require a PennNet ID and password, such as GRAM and BEN Reports. In addition, PennIntouch, which currently requires a Personal Access Code for access, will require a PennKey and password beginning October 14.

Other web-based services that currently don't use PennNet IDs and passwords will not be affected by the switch to PennKeys immediately. BEN Financials, for example, will continue to use the familiar BEN logon ID. You'll hear more about which system will use which ID in the future, or you may consult the table of application logon methods at http://www.upenn.edu/computing/pennkey/use/chart.html.

Preparing for Change

The introduction of Kerberized services doesn't translate into global change for end-users. Initially Kerberized services, particularly email, will only be offered as options. You'll hear more about these services from your Local Support Provider (LSP) as they become available in your School or center.

The shift to PennKey, on the other hand, will require that all staff, faculty, and students register their PennKey and associated password online. We encourage you to do this between September 30 and October 13, 2002, during the two-week PennKey Priority Period. Though the registration procedure is straightforward, it's important to be prepared before going to the PennKey registration web site. If you need advice or assistance, consult your LSP.

1. Know your PennNet ID and password. You will need to enter them to identify yourself to the PennKey registration system. If you've forgotten your password, you can reset it by swiping your PennCard at one of the campus PennNet ID swipe stations. For information and locations, see http://www.upenn.edu/computing/help/doc/passport/netid.html.

2. Review the current password guidelines and be prepared to establish a new password. See http://www.upenn.edu/computing/email/pswd_guide.html for current password guidelines. Though you may reuse your PennNet password as your PennKey password, a new password offers the greatest amount of security. It's particularly important to set a new password if you have used your PennNet password elsewhere, on non-Penn systems, or have shared it with anyone. Note too that pass...
PennKey continued

Word rules have become more stringent over the years, and some passwords that work with the PennNet ID system may not be accepted by the PennKey system. In such cases, individuals will be forced to create new passwords.

3. Decide how you want to be able to reset your PennKey password should you forget it. Resetting a forgotten PennKey password will require obtaining a PIN and then resetting a password online. When you register your PennKey, you'll be presented with different options for obtaining a PIN and will be asked to choose whether to participate in an online "Challenge-Response" option, which will enable you to obtain a PIN online, without a wait. Otherwise, you would obtain a PIN by visiting a campus PIN administration office, or by calling the PennKey PIN Request Line and having a PIN sent by U.S. Mail.

The Challenge-Response option will require that you answer three personal information questions when you register your PennKey, and later provide the correct answers online if you forget your password. Challenge-Response would be a good choice for frequent travelers, international students, or anyone likely to forget their password. Individuals who provide system administration services for critical systems should not participate in the Challenge-Response option.

4. Review and change usage habits that may compromise your privacy. Think of your PennKey password as analogous to the Personal Identification Number (PIN) you use at an ATM machine, just as sharing your ATM PIN would give someone else access to your bank balance, sharing your PennKey password would give them access to grant financial information in GRAM or your GPA in PennInTouch. Indeed, when you share your password, you give others access to everything your PennKey gives you access to though you are still responsible for anything they do in your stead. If you have been sharing passwords in order to delegate tasks such as calendar scheduling, responding to email, or grant administration, your LSP can advise you on alternatives. Refer also to the information at http://www.upenn.edu/computing/pennkey/use/noshare.html.

5. Synchronize your PennNet password with your new PennKey password. If your PennNet and PennKey passwords differ and you are afraid of confusing them or of forgetting your new PennKey password during the weeks before October 14, when the PennNet ID system goes away and the PennKey system comes into effect, consider resetting your PennNet password to match your new PennKey password. You can do this at a PennNet ID swipe station as described in number one, above, or online by accessing telnet/netid.upenn.edu, logging on as "netid", and following the screen prompts.

Learn more

For more information about PennKey and Kerberos, check the PennKey web site at www.upenn.edu/computing/pennkey. Information and assistance will also be available from Local Support Providers and through various University and School channels. And always keep in mind that online security is a balancing act. The University continues to implement technologies that minimize risk, but technology will never be perfect. We are all responsible for following best practices in crafting our passwords and keeping them secure.

PennXxxx - What do all those terms mean?

Confused about all those ID-related terms that begin with "Penn"? Here's what they mean.

PennCard. Your University ID card showing your photo and PennCard Number. You need your PennCard to create a PennNet ID and password or to reset a forgotten PennNet password at a PennNet ID swipe station.

PennCard Number. The three-part number on your PennCard. It takes the form: 123456 12345678 12

Penn ID. The middle 8-digit sequence of your PennCard Number. Penn IDs are NOT required in the PennKey registration process.

PennKey. Your user name in the PennKey Authentication System.

PennKey Authentication System. A new authentication system that will replace the PennNet ID, a.k.a. PAS, authentication system on October 14, 2002.

PennName. A unique identifier that is the basis for user names in various University systems. For example, PennNet IDs, PennKeys, BEN Financials usernames, and usernames for many Penn email systems are based on PennNames. [Note: Although an individual would have the same, PennName-based username for each of these systems, the associated passwords would be the same only if the individual created the same password for some or all of the systems.]

PennNet (a.k.a. PAS) ID. Your user name in the PennNet Authentication System.

PennNet (PAS) Authentication System. Penn's homegrown authentication system that will be replaced by the PennKey authentication system on October 14, 2002.

PennNet ID Swipe Station. Stations at various campus locations where you can bring your PennCard and use it to create a PennNet ID and password or reset a forgotten PennNet password. These swipe stations will go out of service on October 14, 2002. Locations are listed at http://www.upenn.edu/computing/help/doc/passport/netid.html

Robin Beck,
Vice President Information Systems and Computing
# Financial Training Department Course Descriptions

## 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.

## 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
- The navigational techniques of the self-service web application
- How to effectively and efficiently select the desired goods and services
- How to process receipts

## 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
- How to run, print and/or export standard BEN Balances reports

## 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 self-service 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
- AP/Invoice Imaging, including how to relieve PO invoice holds

## 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 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 prior to freezing or unfreezing a grant.

CONTINUED ON NEXT PAGE
**FINANCIAL TRAINING DEPARTMENT COURSE DESCRIPTION (continued)**

<table>
<thead>
<tr>
<th>Course</th>
<th>Duration</th>
<th>Prerequisite</th>
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</thead>
<tbody>
<tr>
<td><strong>BEN Reports</strong></td>
<td>2 hours</td>
<td>Chart of Accounts</td>
</tr>
<tr>
<td>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:</td>
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<tr>
<td><strong>Financial Reports</strong></td>
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<td>Budget/Actual Variance</td>
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<td>General Ledger Revenue/ Expense Detail</td>
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<td>RCM Category Comparison</td>
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<td><strong>Salary Management Reports</strong></td>
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<td>Employee Payments by Fund</td>
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<tr>
<td>Employee Payments by Individual</td>
<td></td>
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<tr>
<td><strong>Sponsored Program Reports</strong></td>
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<tr>
<td>GRAM (Grants Reporting and Management)</td>
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<tr>
<td>Protocol</td>
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<tr>
<td><strong>Procurement Credit Card (Procard)</strong></td>
<td>1-1/2 hours</td>
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<td>Location: Suite 427A, 3401 Walnut</td>
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<tr>
<td>Who should attend? Individuals buying goods and services on behalf of the University using a Procard.</td>
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<tr>
<td>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.</td>
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<tr>
<td><strong>Payroll/Personnel System</strong></td>
<td>5 half-days</td>
<td>Chart of Accounts</td>
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<tr>
<td>This combination lecture and hands-on training takes place over 5 half days, and provides participants with a basic understanding of payroll/personnel terminology and how to navigate within the on-line payroll/personnel system. Covered throughout the week is an overview of Penn's structure; how to create positions; documentation requirements for all employee types; payroll transactions to be executed based on various human resource actions; and use of the on-line system for creating and updating payroll records, time reporting, and entering salary reallocations. Also included is the use of Salary Management for obtaining reports, as well as the BEN Reports Salary Management Reports. A series of guest lecturers also participate in this session, offering subject matter expertise in their respective areas of concentration, ranging from Human Resources to Corporate Tax.</td>
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**COURSE SPOTLIGHT**

**Research Training Opportunities**

Effort Reporting at the University of Pennsylvania, facilitated by Bob McCann, Director of Cost Studies, Office of Research Services, August 8, 10 a.m. - 12 p.m. at 3624 Market Street. To register, please access the on-line training registration system at [http://www.hr.upenn.edu/training_coursecatalog/search_results.asp](http://www.hr.upenn.edu/training_coursecatalog/search_results.asp).

"What Departmental Administrators Need to Know About Post-Award and Cost Analysis" Sponsored by the Office of Research Services (ORS), this is a segment of NCURA's Live Satellite Broadcast series, September 24, 11:30 - 3:30. The location will be announced on the ORS web site, [http://www.upenn.edu/researchservices/](http://www.upenn.edu/researchservices/).


Departmental Administrators Training Program, Facilitated by SRA [http://www.srainternational.org/newweb/sraarticle.cfm](http://www.srainternational.org/newweb/sraarticle.cfm)
Financial Training Calendar September - December 2002

To register for **Procard, Sponsored Programs** or **Review - Q & A** training go to:  
http://www.hr.upenn.edu/training_coursecatalog/search_criteria.asp

For **BEN Deposits** access, complete the BEN Deposit access form at  
http://www.finance.upenn.edu/ben/bendep/  
Once completed, an e-mail will be sent with instructions for on-line training.

To register for **all other training courses** listed below,  
complete the Financial Training Registration Form found at  
http://www.finance.upenn.edu/ftd

### SEPTEMBER, 2002

<table>
<thead>
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<tr>
<td></td>
<td>Happy Labor Day!</td>
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</tbody>
</table>
| 9       | Chart of Account 9:00 - 12:00  
BEN Reports 2:00 - 4:00 | GL Inquiry/Reporting (1 of 2) 9:00 - 12:30  
Req Only 1:00 - 5:00 | GL Manual Journal Entry 9:00 - 1:00  
Procard 9:30 - 11:00 | GL Budget Journal Entry 9:00 - 1:00 |
| 11      | GL Inquiry/Reporting (2 of 2) 9:00 - 1:00 | GL Manual Journal Entry 9:00 - 1:00  
Procard 9:30 - 11:00 | GL Freeze Grant 2:00 - 4:00 |          |
| 12      | GL Manual Journal Entry 9:00 - 1:00  
Procard 9:30 - 11:00 |          |          |        |
| 13      | GL Budget Journal Entry 9:00 - 1:00 |          |          |        |

### OCTOBER, 2002

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<tbody>
<tr>
<td>23</td>
<td>PO Manager (1 of 5) 9:00 - 1:00</td>
<td>Payroll/Personnel (1 of 5) 9:00 - 1:00</td>
<td>Payroll/Personnel (2 of 5) 9:00 - 1:00</td>
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<td>Payroll/Personnel (3 of 5) 9:00 - 1:00</td>
<td>Payroll/Personnel (4 of 5) 9:00 - 1:00</td>
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| 21      | Chart of Account 9:00-12:00  
BEN Reports 2:00-4:00 | Payroll/Personnel (1 of 5) 9:00 - 1:00 | Payroll/Personnel (2 of 5) 9:00 - 1:00 | Payroll/Personnel (3 of 5) 9:00 - 1:00 |
| 22      | GL Inquiry/Reporting (1 of 2) 9:00 - 1:00  
Procard 9:30 - 11:00 | GL Manual Journal Entry 9:00 - 1:00  
Procard 9:30 - 11:00 | GL Freeze Grant 2:00 - 4:00 |          |
| 23      | GL Inquiry/Reporting (2 of 2) 9:00 - 1:00  
Procard 9:30 - 11:00 | GL Freeze Grant 2:00 - 4:00 |          |        |
| 24      | GL Manual Journal Entry 9:00-1:00  
GL Freeze Grant (NEW USER) 2:00-4:00 |          |          |        |
| 25      | PO Manager (1 of 5) 9:00 - 1:00 | Payroll/Personnel (1 of 5) 9:00 - 1:00 | Payroll/Personnel (2 of 5) 9:00 - 1:00 | Payroll/Personnel (3 of 5) 9:00 - 1:00 |
| 26      | Payroll/Personnel (2 of 5) 9:00 - 1:00 | Payroll/Personnel (3 of 5) 9:00 - 1:00 | Payroll/Personnel (4 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 |
| 27      | Payroll/Personnel (3 of 5) 9:00 - 1:00 | Payroll/Personnel (4 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 |
| 28      | PO Manager (1 of 5) 9:00 - 1:00 | Payroll/Personnel (1 of 5) 9:00 - 1:00 | Payroll/Personnel (2 of 5) 9:00 - 1:00 | Payroll/Personnel (3 of 5) 9:00 - 1:00 |
| 29      | Payroll/Personnel (2 of 5) 9:00 - 1:00 | Payroll/Personnel (3 of 5) 9:00 - 1:00 | Payroll/Personnel (4 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 |
| 30      | Payroll/Personnel (3 of 5) 9:00 - 1:00 | Payroll/Personnel (4 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 |
| 31      | Payroll/Personnel (4 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 | Payroll/Personnel (5 of 5) 9:00 - 1:00 |

**Happy Labor Day!**
# Financial Training Calendar

**September - December 2002**

[http://www.finance.upenn.edu/ftd/](http://www.finance.upenn.edu/ftd/)

## NOVEMBER, 2002

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<tbody>
<tr>
<td>4 Payroll/Personnel (1 of 5) 9:00 - 1:00</td>
<td>5 Payroll/Personnel (2 of 5) 9:00 - 1:00</td>
<td>6 Payroll/Personnel (3 of 5) 9:00 - 1:00</td>
<td>7 Payroll/Personnel (4 of 5) 9:00 - 1:00</td>
<td>8 Payroll/Personnel (5 of 5) 9:00 - 1:00</td>
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<tbody>
<tr>
<td>11 Chart of Account 9:00 - 12:00</td>
<td>12 GL Inquiry/Reporting (1 of 2) 9:00 - 1:00</td>
<td>13 GL Inquiry/Reporting (2 of 2) 9:00 - 12:30</td>
<td>14 GL Manual Journal Entry 9:00 - 1:00</td>
<td>15 GL Budget Journal Entry 9:00 - 1:00</td>
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<tr>
<td>BEN Reports 2:00 - 4:00</td>
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<tbody>
<tr>
<td>18 PO Manager (1 of 5) 9:00 - 1:00</td>
<td>19 PO Manager (2 of 5) 9:00 - 1:00</td>
<td>20 PO Manager (3 of 5) 9:00 - 1:00</td>
<td>21 PO Manager (4 of 5) 9:00 - 1:00</td>
<td>22 PO Manager (5 of 5) 9:00 - 1:00</td>
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<tr>
<td>BEN Balances Review - Q 6A 2:00 - 4:00</td>
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<tbody>
<tr>
<td>25</td>
<td>26 Req Only 1:00 - 5:00</td>
<td>27</td>
<td>28 Happy Thanksgiving!</td>
<td>29</td>
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<tr>
<td>PO Manager Review - Q 6A 2:00 - 4:00</td>
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## DECEMBER, 2002

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<tbody>
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<td>2 Payroll/Personnel (1 of 5) 9:00 - 1:00</td>
<td>3 Payroll/Personnel (2 of 5) 9:00 - 1:00</td>
<td>4 Payroll/Personnel (3 of 5) 9:00 - 1:00</td>
<td>5 Payroll/Personnel (4 of 5) 9:00 - 1:00</td>
<td>6 Payroll/Personnel (5 of 5) 9:00 - 1:00</td>
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<td></td>
<td>Procard 9:30 - 11:00</td>
<td>BEN Balances Review - Q 6A 2:00 - 4:00</td>
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<tbody>
<tr>
<td>9 Chart of Account 9:00 - 12:00</td>
<td>10 GL Inquiry/Reporting (1 of 2) 9:00 - 1:00</td>
<td>11 GL Inquiry/Reporting (2 of 2) 9:00 - 12:30</td>
<td>12 GL Manual Journal Entry 9:00 - 1:00</td>
<td>13 GL Budget Journal Entry 9:00 - 1:00</td>
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<tr>
<td>BEN Reports 2:00 - 4:00</td>
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<tr>
<td>16 PO Manager (1 of 5) 9:00 - 1:00</td>
<td>17 PO Manager (2 of 5) 9:00 - 1:00</td>
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<td>19 PO Manager (4 of 5) 9:00 - 1:00</td>
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<tbody>
<tr>
<td>23 Holiday Break</td>
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</table>
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 Chart 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

<table>
<thead>
<tr>
<th>3 - Very familiar</th>
<th>2 - Some familiarity</th>
<th>1 - No familiarity</th>
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<tbody>
<tr>
<td>Accounts Payable</td>
<td>3 2 1</td>
<td>Payroll</td>
</tr>
<tr>
<td>Acquisition Services (Purchasing)</td>
<td>3 2 1</td>
<td>Research Services</td>
</tr>
<tr>
<td>Budget &amp; Management</td>
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<td>Travel</td>
</tr>
<tr>
<td>General Accounting</td>
<td>3 2 1</td>
<td>Other</td>
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</tbody>
</table>

Account Number ______________/____________/_____________/___________/________ Object __________/________/________

CNAC O RG BC FUND PROG CREF

*To be used only in the event of a “No Show”. Please see the FTD web site for information regarding the cancellation policy.

Employee Signature: ___________________________________________ Date: ______________________________

Business Administrator Signature: ________________________________ Date: ______________________________

School/Center Access Administrator Signature ______________________________ Date: ______________________________

Both the Business Administrator and the Access Administrator signatures are REQUIRED. Thank you!
For a complete list of the Access Administrators please see
http://www.finance.upenn.edu/ben/structure/acc_admin.shtml
## ACCESS ADMINISTRATOR
(In alphabetical order by School/Center name)

<table>
<thead>
<tr>
<th>School/Center</th>
<th>Name</th>
<th>Sch/Ctr#</th>
<th>Phone</th>
<th>E-mail Address</th>
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<tbody>
<tr>
<td>Annenberg Center</td>
<td>Darlene Sparks</td>
<td>19</td>
<td>8-6704</td>
<td>sparksjd@pobox</td>
</tr>
<tr>
<td>Annenberg School</td>
<td>Donna Burdumy</td>
<td>36</td>
<td>8-7053</td>
<td>dburdumy@asc</td>
</tr>
<tr>
<td>Audit &amp; Compliance</td>
<td>Anna Colasante</td>
<td>78</td>
<td>8-1938</td>
<td>annamc@pobox</td>
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<tr>
<td>Business/Campus Services</td>
<td>Peggy McGee-Pasceri</td>
<td>93,95</td>
<td>8-9302</td>
<td>mcgeepas@pobox</td>
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<tr>
<td>Dental</td>
<td>Linda Kristekas</td>
<td>51</td>
<td>8-5405</td>
<td><a href="mailto:linda@biochem.dental">linda@biochem.dental</a></td>
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<tr>
<td>Development</td>
<td>Richard Martorelli</td>
<td>90</td>
<td>8-8185</td>
<td><a href="mailto:martorel@ben.dev">martorel@ben.dev</a></td>
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<tr>
<td>DRIA</td>
<td>Jim Mesisca</td>
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<tr>
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<td>Christopher Bristow</td>
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<td>8-7916</td>
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<tr>
<td>EVP</td>
<td>Sara Gallagher</td>
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<tr>
<td>Facilities Management</td>
<td>Kevin Schrecengost</td>
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<tr>
<td>Finance</td>
<td>Greg Tausz</td>
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<td>Finance (SFS)</td>
<td>Michael Merritt</td>
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<td>8-9971</td>
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<tr>
<td>Grad Ed</td>
<td>Janet Plantan</td>
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<td>8-3039</td>
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<td>GSFA</td>
<td>Kathy Lorenz</td>
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<td>3-3679</td>
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<tr>
<td>Human Resources</td>
<td>Gary Truhlar</td>
<td>92</td>
<td>8-5896</td>
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<tr>
<td>ICA</td>
<td>Cassandra Green</td>
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<td>Int'l Programs</td>
<td>Julie Shuttleworth</td>
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<td>8-1644</td>
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<tr>
<td>ISC</td>
<td>Marilyn Jost</td>
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<td>3-8406</td>
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<td>Law</td>
<td>Emie Gonsalves</td>
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<td>Library</td>
<td>Robert Puri</td>
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<td>8-7567</td>
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<tr>
<td>Medicine</td>
<td>Merceda Lafferty</td>
<td>21,40,88</td>
<td>3-4064</td>
<td><a href="mailto:merceda@mail.med">merceda@mail.med</a></td>
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<tr>
<td>Morris Arboretum</td>
<td>Mark Zohar</td>
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<td>247-577</td>
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<tr>
<td>Museum</td>
<td>Alan Waldt</td>
<td>26</td>
<td>8-4052</td>
<td>awaldt@sas</td>
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<tr>
<td>Nursing</td>
<td>Jackie Lowry</td>
<td>06</td>
<td>36183</td>
<td>lowry@nursing</td>
</tr>
<tr>
<td>President</td>
<td>Janet Dwyer</td>
<td>81</td>
<td>8-0448</td>
<td>dwyer@pobox</td>
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<tr>
<td>Provost</td>
<td>Bonnie Gibson</td>
<td>04,83</td>
<td>8-6841</td>
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<tr>
<td>Public Safety</td>
<td>Anthony Whittington</td>
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<td>8-6696</td>
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<tr>
<td>SAS</td>
<td>Sophie Luzecky</td>
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<td>8-0888</td>
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<tr>
<td>Social Work</td>
<td>Raynel Otero</td>
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<td>8-5527</td>
<td>oteror@ssw</td>
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<td>University Life</td>
<td>William Turner</td>
<td>84,85,86</td>
<td>8-4922</td>
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<tr>
<td>Veterinary</td>
<td>Kelly Ardis</td>
<td>58</td>
<td>8-4597</td>
<td>kda@vet</td>
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<tr>
<td>Wharton</td>
<td>Andrea Williams</td>
<td>07</td>
<td>8-5546</td>
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