



The Bottom Line



PennWorks: Annual Salary Increase Modeling Tool Coming

A new PennWorks Salary Increase Modeling tool is scheduled for availability for Schools/Centers in April 2011. This new tool will allow those involved in the annual merit increase planning process to electronically model pay changes for the coming fiscal year for employees eligible for salary increases. Administrators in each School/Center were contacted in January to review the tool and its benefits and were asked to decide if they would like their organization to use Modeling during the annual merit increase planning and approval process, or continue with the spreadsheet export method used by their Schools/Centers last year.

Background

Last year, a baseline version of Modeling was tested by a pilot group of participants. Feedback was gathered from the pilot participants, as well as from other School/Center representatives interested in the design. As a result, the tool has been enhanced significantly and will be available to all Schools/Centers for this year's process.

What Will the Modeling Tool Do?

The new tool will allow users to electronically model pay changes for the coming fiscal year for employees eligible for salary increases. For those School/Centers using the Modeling tool, approved annual salary increase information will be updated automatically in the PennWorks Role Rapid Entry module once the increases are approved at the School level. For those School/Centers using Modeling, the PennWorks Role Rapid Entry module will only be used to enter distribution information, not to update the annual salary increase. Modeling will replace the previous method of generating and distributing Excel spreadsheets.

Key Features and Benefits

Continued on Page 3

Additional Newsletters
Executive Vice President's Office
<http://www.evp.upenn.edu/>

Penn eForms Streamlines Requests for Access to Administrative Systems

Information Systems and Computing recently released Penn eForms, a new application for submitting, routing, approving, tracking, and reporting on requests for access to administrative systems used by staff and faculty across the University. Penn eForms replaces a time-consuming manual process involving multiple handoffs of paper forms with a streamlined, web-based process that improves productivity and supports Penn's sustainability goals.

The release of eForms follows a successful pilot with representatives from the School of Medicine, the Dental School, Wharton, the Division of Finance, and the Offices of the Registrar, Payroll, Human Resources, and Research Services. ISC will be working with offices across the University to transition all administrative systems (BEN Financials, Payroll, PennERA research applications, etc.) to eForms over time.

Continued on Page 2

In This Issue...

- BEN Knows..... Page 6
- BEN Deposits..... Page 3
- Business Objects Upgrade Page 2
- Did You Know... Page 8
- Hiring Foreign Nationals Page 8
- HR & ISC Technical Training Page 8
- PennWorks Page 1
- Purchasing Services
 - Supplier Showcase Page 7
 - Supplier Show April 12th Page 7
 - Travel Advisory Page 7
- Quarterly Quiz Page 8
- Research Services Page 4 & 5

Penn eForms Streamlines Requests for Access to Administrative Systems

Continued from Page 1

eForms for Data Warehouse and BEN Reports Now Available

eForms are now available for the Data Warehouse and BEN Reports, the two systems that were involved in the pilot. If you supervise individuals who have, or may need, access to Data Warehouse collections or BEN Reports, please direct them to Penn eForms and use it yourself to request, update, or approve access. Links to individual eForms and usage documentation can be found on the Penn eForms home page at www.upenn.edu/computing/da/eforms. The page will be updated as new systems adopt eForms. The Penn eForms home page is also accessible from the U@Penn "Business" tab, under "Forms" in the right-hand column.

Key Benefits and Features

Penn eForms provides capabilities that reduce complexity, improve security, and enable faster and more accurate execution of access requests, benefiting end users, supervisors, data stewards, and security administrators. While the overall process/approval flow for obtaining access is similar to the manual process flow, administrative effort is streamlined from initial request through the approval chain, ending with provisioning by security administrators. Current status and history for each request are available to satisfy reporting and auditing requirements.

Key features include the following:

- Each eForm consists of several sections (*Requester Information, Supervisor Action, Form Routing, etc.*) As a form progresses along its routing path, various fields become editable or complete.
- Authentication with a PennKey and password enables certain information to be inserted into a form automatically, and also functions as an invisible signature for each person who acts on the form (requester, approver, etc.).
- An authorized person who is familiar with access requests may initiate a request on behalf of the actual user to save time or to terminate the user's access.

- Certain required information, such as org numbers, is validated immediately for improved accuracy.
- Supervisors are selected from a pick list; then the eForm is automatically routed to the next person in the approval chain according to the rules for the form.
- Up-to-date status, tracking, and "action required" information is provided throughout the process: Email notifications and reminders are generated automatically at each step, and the status of in-process and completed requests can be viewed on the web.

More information

Please address any questions or feedback about Penn eForms to Jim Johnson, director of ISC Data Administration, at johnsonj@isc.upenn.edu.

Business Objects Upgrade Underway!

Penn is upgrading to the next major release of Business Objects: XI3. This new version runs entirely in a web browser, replacing the Desktop Intelligence (Deski) software in use at Penn for many years. Starting with the XI3 version and going forward, all reports will be accessed and refreshed via InfoView, and all new reports will be created using Web Intelligence (Webi).

For information about the migration to Webi and instructions for report conversion, please visit:

<http://www.upenn.edu/computing/da/bo/webi/>

If you have any questions, please contact:

Amy Miller
ISC Data Administration
milleraa@isc.upenn.edu

PennWorks: Annual Salary Increase Modeling Tool Coming

Continued from Page 1

Key features and benefits of the Salary Increase Modeling tool include:

- Flexible design allows for individual School/Center workflow and approval structures
- Automatically identifies salary increase eligible population
- Protects sensitive data as opposed to spreadsheets stored on desktops or paper copies
- Approved salary increases are automatically reflected in PennWorks Role Rapid Entry module, ready for distribution data entry (no need to re-enter pay amounts)
- Ability to set target pool amount across a group
- Ability to apply an amount or percent change
- Provides a view of salary and rating history (where available), and role details
- Allows user to enter modeling notes

PennWorks: Role Rapid Entry Upgrade Coming

In addition to the release of the Salary Increase Modeling tool, the PennWorks Role Rapid Entry module will be upgraded this spring to include the following enhancements:

- Easier to maintain records with cross-fiscal year distributions
- Distribution count on main rapid entry page updated as soon as distributions are submitted
- Ability to update Role End Date from the distribution pop-up
- Allows justifications to be applied across a group
- Staged Salary Increase Program data will be cleared when a position number is released during a Home ORG Transfer or when the term is changed during a role update
- New Role Rapid Entry report provides ability to identify roles where first pay period is funded/overpaid/underpaid

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/>.

--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

ben deposits

BEN Deposit Users:

In the past, the following object codes have been used incorrectly to deposit checks or cash into BEN Deposits. Effective Friday, January 28, 2011, they are no longer be able to be used in BEN Deposits.

Object Code 418x (Student Aid, Contra Revenue)

This object code should never be used in BEN Deposits. If an outside organization has awarded a scholarship to a specific undergraduate student, the check should be sent to SRFS in Room 140 Franklin Building, to the attention of Pat Falciani.

If an outside organization has awarded a scholarship to a specific graduate student, the check should be credited to fund 0xxxxx in object code 4920 (miscellaneous revenue). For both undergraduate and graduate students, the Bursar system will debit object code 418x when crediting the scholarship money against the student's bill.

Object Code 4410 (Private Grant Revenue)

This object code should be used only by the Office of Research Services (ORS) and only in a journal entry, never in BEN Deposits.

Object Code 4420 (Fundraising Dinner Tickets/ Membership Fees)

This object codes will shortly be deactivated from BEN Financials, as well as from BEN Deposits. If a ticket to a **fundraising dinner** costs more than the value of the dinner, then the value of the dinner should be deposited into object code 4399 (other revenue), the remainder value should be deposited into object code 1149 (gift cash suspense), and a gift transmittal should be sent to Central Gifts for the amount in object code 1149 along with a copy of the BEN Deposits receipt.

If a **membership fee** (or **corporate sponsorship**) costs more than the value of the goods or services received upon becoming a member (or corporate sponsor), then the value of the goods or services should be deposited into object code 4399 (other revenue), the remainder value should be deposited into object code 1149 (gift cash suspense), and a gift transmittal should be sent to Central Gifts for the amount in object code 1149 along with a copy of the BEN Deposits receipt.

If you have any questions regarding this communication, please contact your respective Comptroller's Office representative. Thank you very much for your time and attention.



Changes to the AIS Process

Improved AIS Online

Research Services is pleased to announce that an improved AIS (Account Information Sheet) Online, made available through streamlined processing of AIS documents, began distribution online December 16, 2010. The AIS is produced by the Office of Research Services and summarizes the award and account information for a sponsored project. As part of the improvements the AIS will only be available as a web-based report in BEN Reports, allowing users to view Proposal/Award and Account data, as well as cost share, sponsor, subcontracts, and subaccounts at any time on line. ORS will no longer send the AIS documents to the responsible departments separately. Award documents (NOGA's, Contracts, Agreements) will now be available to view in the Attachment tab/screen/folder of PennERA the day the record has been updated.

Improvements

- **Immediate access to the Notice of Grant Award** - At the time of the AIS notification, the award document will be available in PennERA Proposal tracking on the Attachments tab/screen/folder.
- Availability of Check images for Clinical Trial Updates – Images of checks for Clinical Trial Updates will be available in PennERA Proposal tracking on the Attachments tab/screen/folder.
- Inclusion of **Terms and Conditions** information - This section will reflect Terms and Conditions of the award as they appear on the Terms and Conditions tab/screen/folder under Awards in PennERA Proposal Tracking. Please note, that the AIS is NOT a substitute for reading the NOGA and not all terms and conditions of the award will necessarily be printed on the AIS. It is the responsibility of the Principal Investigator to read and understand the terms and conditions of the award.
- **Notice of Award #** - This number is included both in the BEN Reports listing of AIS (in the far right column) and within the AIS itself. It corresponds to the name of the uploaded Award document (attachment) available in PennERA Proposal tracking on the Attachments tab/screen/folder. This

is the only method by which Notice of Award materials will be available for the AIS.

- Ability to query and retrieve AIS records by a range of account ORGs
- Ability to query and retrieve AIS records by a range of AIS Issue Dates

The benefits of the AIS Online include:

- * Accounts available online and can be viewed at anytime, anywhere
- * Ability to select AIS by Fund, PI, or Institution Number, ORG or Issue Date
- * Printer-friendly version available

Some AIS records will not contain a value for Notice of Award #. Some examples are:

- * Advance Accounts
- * No-Cost Extensions not requiring sponsor approval
- * Remapping requests
- * Corrections of previous AIS
- * Automatic carryover

Accessing the AIS Online Report in BEN Reports

The **AIS Online** is available to Faculty/PIs (for accounts on which they are named), School/Center BAs (based on Org security), and central office staff in ORS and ORA. Authorized users will receive an e-mail notification with a clickable link to BEN Reports when an award has been set up and the report is ready to be viewed online. To access the AIS Online Report in BEN Reports, follow the instructions below:

1. Go to New URL and log in with your PennKey and PennKey password.
2. Click the "AIS Online" link. The "**AIS Online**" link appears at the bottom of the page, under the "Sponsored Programs" section. The AIS Online parameters page will appear.
3. Enter any or all of the Parameters under Query Options and click "Run Report". A page will appear with the Accounts that match your parameters.
4. Click on the Account for which you want to generate the AIS. The AIS Online Report for that account, PI, and date combination will appear.



Questions?

If you have any questions, please contact us at ais-prob@lists.upenn.edu.



Penn
UNIVERSITY of PENNSYLVANIA

Office of Research Services

Information Regarding Changes to the NIH, AHRQ and NIOSH Submission Process

Beginning with **due dates on or after January 25, 2011**, NIH, AHRQ and NIOSH will eliminate the error correction window from the application submission process. Eliminating the error correction window will ensure consistent and fair deadlines for all applicants and better align these agencies' application submission processes with the submission processes of other federal agencies.

All applications submitted after 5 p.m. local time of the applicant organization on the due date will be subject to the NIH late policy and may not be accepted for review. This now includes resubmissions of applications that were submitted prior to the deadline, but were called back from the Commons for correction. In addition, any post-submission application materials will be subject to the new policy detailed in the NIH Guide Notice NOT-OD-10-115.

The error correction window originally was implemented in December 2005 as a temporary measure to facilitate the transition from paper to electronic submission of grant applications. The window allowed applicants an opportunity after the deadline to correct missing or incorrect aspects of their applications, identified by NIH system-generated errors and warnings displayed to the applicant after submission.

The elimination of the error correction window does not affect the two-business-day application viewing window (i.e. the time an applicant has to view the electronic application image in eRA Commons upon NIH's receipt of an error-free application). Applicants still will be able to view their application and reject and submit a corrected application **prior to the submission deadline**. NIH, AHRQ and NIOSH encourage applicants to submit in advance of the due date to take

advantage of the opportunity to correct errors and warnings and to review the application in the eRA Commons before the deadline.

Please note that NIH will continue to make accommodations for Federal system issues that threaten or prevent on-time submission of an individual application, if appropriately documented and verified by NIH support staff. Moreover, NIH still will determine and implement contingency plans on an as-needed basis for widespread system issues and natural disasters.

The Office of Research Services is not changing its policy of requiring a final application to be submitted to ORS in final form 3 business days prior to the Sponsor deadline, but is advising Principal Investigators that this will not necessarily provide for a full two day application viewing window. In order to ensure that PIs can take advantage of the application viewing window and possible resubmission, it is recommended that the final application arrive in ORS 5 business days prior to the sponsor's deadline. You will also need to consider any school specific internal deadlines as well.

In reviewing recent deadlines, 22% of all NIH system to system proposals were resubmitted and only 28% of the original submissions met the ORS deadline. In fact, 11% arrived less than 5 hours prior to the deadline. With this change in policy, submissions past the ORS deadline run even a greater risk of not making the Sponsor's deadline if a resubmission is necessary.

ORS remains committed to serving the faculty and processing applications in a timely and first-come, first served manner. Please feel free to contact me or your Pre-award contact if you have any questions regarding the change in NIH, AHRQ and NIOSH policy.



- ▶ BEN Knows
- ▶ Searching BEN Knows
- ▶ Browse by Topic
- ▶ BEN Helps
- ▶ FastFacts
- ▶ Financial Systems

Below are some frequent topics/issues asked of BEN Helps...enjoy the review!

BEN Knows

<http://www.finance.upenn.edu/benknows/>

- Invoice Information is Cutoff When Image is Printed
 - *Active Advisory*
<http://www.finance.upenn.edu/ben/benfin/advisories.shtml>
- How To Review and/or Edit a Requisition Before Approving
 - *BEN Knows*
http://www.finance.upenn.edu/benknows/browse_topics/requisitions_def.shtml#approving
- Export data from BEN into an Excel spreadsheet
 - *BEN Knows*
http://www.finance.upenn.edu/benknows/browse_topics/reporting_printing_def.shtml#export
- Reversing Journal & Encumbrance Entries
 - *BEN Knows - Journal*
http://www.finance.upenn.edu/benknows/browse_topics/journals_def.shtml#reversingjournal
 - *BEN Knows - Encumbrance*
http://www.finance.upenn.edu/benknows/browse_topics/encumb_def.shtml#reversing
- Identify data that appears on various reports
 - *BEN Financials Report Documentation*
<http://www.finance.upenn.edu/ben/benfin/documentation/reportdoc/quickv/index.shtml>

FTD Fishing for Feedback

Have you been to a BEN Financials or Payroll training class within the last 6 months? If so, we're looking for feedback and suggestions.



Now that you've settled in and actually have had a chance to use what you learned, we'd like to know:

- Did the class you attended prepare you for your job?
- Looking back, do you wish you learned more about a particular subject and less of another?
- How could Financial Training have better prepared you for the "real world"?
- Do you think additional subject matter should be added to our course offerings? If so, what would the topic be you would like to see offered?

Send us an email with your thoughts, suggestions, and ideas:

training@exchange.upenn.edu

Or call any one of the FTD staff members to discuss your ideas over the phone or to set up an in-person meeting:

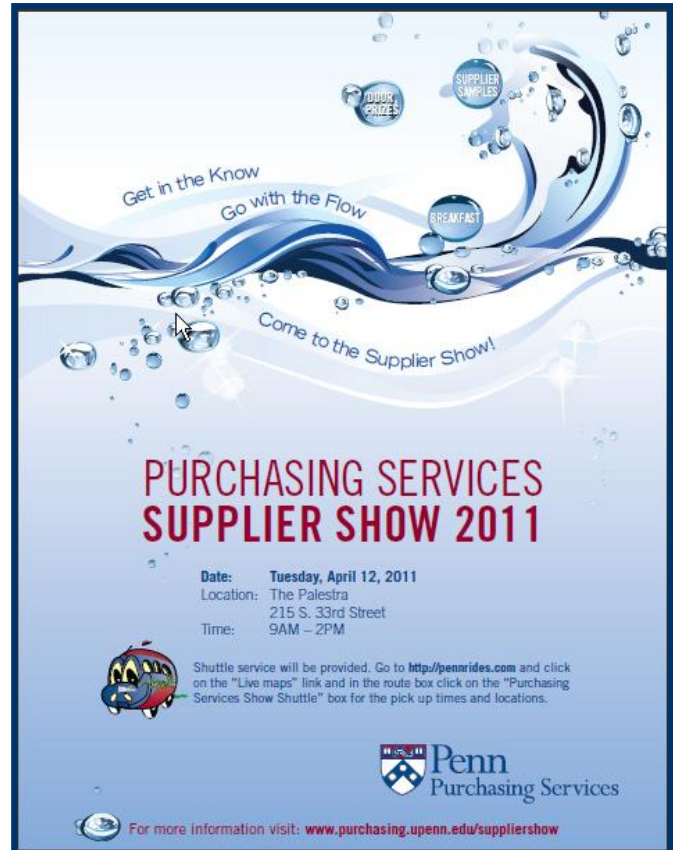
- Jim Horstmann: 573-6717
jhorstma@upenn.edu
- Joe Mullock: 573-8988
jmullock@upenn.edu
- Barbara Murray: 898-1733
murrayb@upenn.edu
- Paul Weidner: 898-1447
weidnerp@upenn.edu

PURCHASING SERVICES SUPPLIER SHOWCASE

Purchasing Services Supplier showcases have been updated for the following suppliers on their latest product information and Penn specific promotions:

- Spectrum Chemicals
<http://www.purchasing.upenn.edu/showcase/Suppliers/SpectrumChem/>
- Advanced AV
<http://www.purchasing.upenn.edu/showcase/Suppliers/AdvancedAV/>
- Docusense
<http://www.purchasing.upenn.edu/showcase/Suppliers/DocuSense/>
- Lab Safety
<http://www.purchasing.upenn.edu/showcase/Suppliers/LabSafety/>
- Neta Scientific
<http://www.purchasing.upenn.edu/showcase/Suppliers/Neta%20Scientific/>

To visit all the Penn specific supplier showcase pages click [here](#).



Travel Advisory

NEW MILEAGE REIMBURSEMENT RATES FOR 2011

Effective January 1, 2011 the mileage reimbursement rate for personal vehicles being used for business purposes is **51¢ per mile**. This rate should be in effect for the entire calendar year.

Please note: Mileage reimbursement rate for moving will be **19¢ per mile**.

From	To	Standard Mileage	Moving Mileage Only
January 1, 2011	December 31, 2011	51¢ per mile	19¢ per mile
January 1, 2010	December 31, 2010	51¢ per mile	16.5¢ per mile

FOR THE LATEST TRAVEL NEWS

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



Strengthening IT Skills in Fiscally Tough Times

Are you looking to strengthen your IT group while still working within tight budget constraints? Do you have IT staff that may be planning to attend a 3-5 day training class involving travel? ISC's Office of Technology Training Services may be able to help.

We coordinate on-campus technical training in higher-end technical topics. By coordinating a class of people from across campus, we are able to negotiate a discount off the regular course price. Past discounts have amounted to \$1,000/student/class in technical topics such as VMWare, Juniper Firewalls, UBUNTU, Oracle, and MAC OS Support.

Additionally, having class on campus removes the need for travel and hotel expenses. If you have a subject/course you'd like us to explore bringing to campus, please contact Terry Settles at 573-3102 or learnit@isc.upenn.edu



Technical Tips...at Your Fingertips

Improve your technical skills with new online workshops. Human Resources is offering a series of webinars that'll teach you tips and shortcuts for programs like Microsoft Word, Excel and PowerPoint.

Meant for those who already know the basics of working with these programs, the workshops will help you improve your skills and learn more in-depth techniques. You'll look at real-life scenarios so you can more easily grasp and retain the advanced features of the programs.



Not only do the webinars offer practical tips, but they're also convenient—you can access them right from your own desktop. Even though you're not in a classroom, these real-time webinars allow you to interact with the instructor if you have questions.

For details about webinars, visit our [online course catalog](#).

Quarterly Quiz

Instructions: The following 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 2, 2011**

The Winner will receive a one year

Faculty Club Membership

1. What is the mileage reimbursement rate for personal vehicles used for business?
2. Name three enhancements to Role Rapid Entry?
3. What are the date, time and location of the Purchasing Supplier Show?
4. Name the object code(s) no longer able to be entered in BEN Deposits?
5. Which department receives all Foreign National paperwork for new hires?

Last Quarter's Winner:

Shanesha Revell, Financial Administrative Coordinator
Undergraduate Division, Wharton

Congratulations!

Did You Know...

Payroll		
Form Name	Format	Comments
2014 W-4		Employee's Withholding
Overpayment Calculation	Word 97-2003*	
Required forms for Foreign National Students/Scholars	Webpage	Listing of Forms that are required for Nonresident Aliens
FNIF	PDF	Foreign National Information Form
City Wage		

...There is a webpage link on the Comptroller's Office Document/Forms section that lists the general forms required for hiring a Foreign National, a.k.a. a Non-Resident Alien at Penn.

<http://www.finance.upenn.edu/comptroller/forms/#Payroll>

March 13th
2:00 a.m.

