Dear Colleagues,

What a busy few months it has been!

In an effort to align academic, financial, and capital plans across Harvard, the University asked all schools to submit a five-year financial plan. SEAS revised its own long-range plan and submitted it to the Central Administration. Subsequently, Harvard’s Executive Vice President and the Central Administration Finance staff met with SEAS’ Executive Dean and SEAS Finance staff to discuss the five-year plan.

Exchange 2010 has been set up to serve as the e-mail and calendar solution for SEAS. To date, all staff have been migrated to the e-mail and calendar system and faculty members are in the process of being migrated.

The Accounting, Budget, Procure-to-Pay, and Research Administration offices have moved from Pierce Hall to the Northwest Annex.

These are just the most noteworthy activities in Finance and IT in recent months. This issue of the newsletter contains some specific information about policy and procedure. We encourage researchers especially to read about the updated Human Subject Payment Policy and the NSF Data Management Plan Requirement. Staff members are encouraged to read about the streamlining of Financial Systems User Access requests and attaching documents to requisitions in iProcurement.

With the holiday break just days away, I want to take the opportunity, on behalf of the Finance and IT staff, to extend our warmest wishes to the SEAS community.

Happy holidays!

Harry Dumay, PhD MBA
Chief Financial Officer/
Associate Dean for Finance and IT Operations

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**Accounting**

**Payroll Reminders**

- All hourly staff should enter their time through January 1st before leaving for winter recess.

- It’s almost W-2 time. If you moved within the last year, make sure to update your home address though PeopleSoft. In PeopleSoft select, Self Service>Personal Info>Home & Univ. Address.
E-Mail & Calendaring Systems Project Update: (Exchange 2010)

As of the last week in November, all SEAS staff have been migrated to Exchange. We thank all the staff for working with us to complete this so smoothly! December's focus for the migration team has been with faculty on a one-to-one basis to schedule and complete as many migrations as possible before the winter break. Based on faculty feedback, SEAS has increased the server-based email quota to from 2 GB to 5 GB for faculty members.

We will resume with faculty migrations when we come back from the break.

Student migrations will also begin in January with the focus on G1s and G2s during J-Term before classes start. The remainder of the student migrations will resume in February.

IT Tips

Winter is a good time to:

- Shut down your computers & printers at night to conserve energy. 
  [Link to sustainability information]
- Be on the lookout for E-Mail Spam/Phishing -- When in doubt DO NOT open, click or respond. Please contact us if you require assistance: help@seas.harvard.edu
- Purge old files and e-mail in order to conserve central file system space and resources.
- Pull the plug or turn off computer/monitor/printer/fax and copy machine when not in use and especially during the break.

IT Contact information

- IT.seas.harvard.edu (Intranet: [Link to IT intranet page])
- help@seas.harvard.edu
- x5-9050

Finance

Accounting

Financial Systems User Access

The process for requesting user security access to Harvard’s financial systems in Oracle, GMAS (sponsored research) and iProcurement (Procurement) has been streamlined into a single form and one email address financeuser@seas.harvard.edu. This form has links to GMAS and iProcurement information. Accounting staff will review submitted access forms and process approved requests on a daily basis. Requests for Sponsored Research and Procurement systems access will be forwarded to staff on those teams. The “Request for Access to Harvard University Financial Applications” form is on the Finance section of the SEAS intranet, under “Finance Forms”.

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Human Subject Payment Policy

What should you do when conducting research with human subjects and you need to pay them? On one hand, there may be a need to maintain privacy and even anonymity, on the other hand the IRS makes certain documentation requirements to organizations when they are issuing payments. To balance both of these needs, Harvard has modified the policy around the payment of human subjects and this will take effect on January 1, 2011. The full policy which has a higher threshold for cash payments is located with other Finance policies along with a decision tree to simplify the process for end users.

Payroll

The payroll section of the SEAS intranet website has been updated to include the 2011 University Payroll Schedule as well as a new Distribution Deadline Calendar.

In addition, a new color coded 2011 Biweekly calendar that includes pay dates and holidays has been added to help track staff payroll as well your own paychecks.

The payroll overview has been updated to include additional information regarding payroll's key concepts.

Budget

The SEAS Budget team has finished the November monthly reports for all Budget Managers. These reports include:

- Final FY10 Budget and Actual Information
- FY11 Budget and Actual Information July-November

We have officially begun the FY12 Budget planning process. Our Budget Managers’ Kickoff Meeting was held on December 16th. The overall budget process, timeline, and methodology for gathering and inputting data were presented. In addition, we are asking Budget Managers to do a second quarter review of the status of their FY11 budgets so that we can forecast the School’s year-end position. See our intranet for the timeline for the upcoming budget season.

Procurement and Payables

Attachments can be submitted online with Requisitions and Payment Requests

iProcurement provides you the option of attaching documents to your requisitions and payment requests and sending them electronically to our team for processing. Once processed, the documents are stored electronically with the requisition or payment request. Using attachments helps speed up processing time and saves on the cost and effort associated with storing historical documents. See our intranet for more details or email Procurementhelp@SEAS.harvard.edu

Reminder – Business meals attendees required

When submitting a reimbursement request business meals please include the names of the attendees and their Harvard affiliation in addition to the required business purpose information.
Enterprise and National Car Rental merge – Business and Personal discounts available

Enterprise Rent A Car has acquired National Car Rental. As a result of this change, our renewed agreement gives Harvard travelers discounts with both companies. We now receive flat one-way rental rates on Compact through Full Size 4 door rentals. This is a helpful feature for those who find themselves needing to rent one way. This new program can be used for both business and personal use.

Harvard has new account numbers which can be used at either brand (Enterprise or National). The new account number for business use rentals is XZHARVB. This number will ensure that the insurance is included in the rate. The new account number for personal use rentals is XZHARVP. No insurance is included for leisure/personal rentals.

Research Administration

NSF Proposals to Require Data Management Plan (Effective January 18, 2011)

For faculty who anticipate seeking NSF funding, please note that proposals submitted on or after January 18, 2011 will now require the inclusion of a Data Management Plan. According to the most recent NSF Grant Proposal Guide: “All proposals must describe plans for data management and sharing of the products of research, or assert the absence of the need for such plans.” More specifically, “proposals must include a supplementary document of no more than two pages labeled ‘Data Management Plan.’ This supplement should describe how the proposal will conform to NSF policy on the dissemination and sharing of research results (see AAG Chapter VI.D.4), and may include:

1. the types of data, samples, physical collections, software, curriculum materials, and other materials to be produced in the course of the project;
2. the standards to be used for data and metadata format and content (where existing standards are absent or deemed inadequate, this should be documented along with any proposed solutions or remedies);
3. policies for access and sharing including provisions for appropriate protection of privacy, confidentiality, security, intellectual property, or other rights or requirements;
4. policies and provisions for re-use, re-distribution, and the production of derivatives; and
5. plans for archiving data, samples, and other research products, and for preservation of access to them.”