Dear Colleagues,

Looking back over Fiscal Year 2010, I am struck by the volume of incremental work that was accomplished by both Finance and IT staff, including:

- the transition to a new chart of accounts;
- the continued automation of many processes including shipping and receiving;
- the handling of a $7.6M increase in sponsored research activity;
- the continued deployment of SharePoint to facilitate office productivity and security

It is a credit to the staff that most of the back-office work to make these improvements possible has been unnoticed.

As the first quarter of Fiscal Year 2011 ends, we have many important updates to share with you. Even though we trimmed and cut, this still ended up being a rather lengthy newsletter and we apologize for that.

I encourage everyone to read about the ongoing E-mail and Calendaring Systems project.

Faculty and faculty assistants should pay attention to all Research Administration policy updates particularly the new interim portfolio distribution, the information on current-use gift processing, and the changes in the 60-day policy in Procure-to-Pay.

Information about the extra personal day for HUCTW employees, shipping and receiving, and budgeting are especially important for staff.

We appreciate your continued feedback.

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

Announcements

Outgoing/Incoming & Reorganization

- Outgoing: Grace Shin left SEAS Research Administration last Friday to take another position within Harvard. Our thanks to Grace for her service to SEAS Finance.

- Incoming: Joanna Curry joined Procure To Pay as Senior Procurement Specialist on September 27.

  Robert Plosker will join Accounting as Payroll Manager on October 12.

  Matthew Preston will join Accounting as Associate Director of Budget on October 12.

- Reorganization: Rebecca Hegarty will be switching her role from payroll to senior financial analyst once Robert is on-board on October 12.
IT Operations

E-Mail & Calendaring Systems Project Update: (Exchange 2010)

After some August scheduling adjustments by the project consultants, the Exchange project schedule is back on track. The building, configuration and initial testing of the back-end Exchange 2010 infrastructure will be complete by the end of September. Once the final end-to-end testing is complete, the systems will be ready for user migrations beginning in October.

**Early Adopters:** Currently we are finalizing the list of 50 Early Adopters who will be the first users migrated and will provide representation from across SEAS. If you would like to be considered please let us know by sending a quick email to help@seas.harvard.edu.

Following the early adopters, migrations will begin in earnest for all SEAS staff. The project team will be in touch with each staff unit by early October to schedule training and unit group migrations. Your attention and cooperation will be much appreciated.

Please continue to clean your e-mail accounts. (Thanks to those who have already done so!) Instructions can be found at: [https://intranet.seas.harvard.edu/IT/announcements/exchange-preparing-your-mailbox](https://intranet.seas.harvard.edu/IT/announcements/exchange-preparing-your-mailbox)

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**IT Tips**

Fall is a good time to:

- Shut down your computers & printers at night to conserve energy. [https://intranet.seas.harvard.edu/offices-services/facilities/sustainability-at-seas](https://intranet.seas.harvard.edu/offices-services/facilities/sustainability-at-seas)
- 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.

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**IT Contact information**

- IT.seas.harvard.edu (Intranet: [https://intranet.seas.harvard.edu/it](https://intranet.seas.harvard.edu/it))
- help@seas.harvard.edu
- x5-9050

Finance

**Accounting**

**Current-use Gift Processing**

SEAS received $4M in current-use gifts during FY10, the majority of which (78%) was to support faculty research. Given the large amount of activities in this sector, the Accounting Office often receives questions about the processing of gifts. This office will continue to collaborate with the Recording Secretary’s Office and SEAS’ Senior Management to set up and maintain oversight for gifts in compliance with Harvard University gift policy. A draft policy covering the solicitation, processing, spending, and monitoring of gifts is being reviewed by SEAS’ leadership and will be disseminated as soon as it is finalized.
Look for more information in the upcoming months.

Payroll

HUCTW Floating Holiday Award - For FY 2011, the HUCTW contract called for the award of 1 extra Personal Day for employees covered by the contract (see sample calculation) that can be used as time off with pay if used prior to June 30th 2011.

Budget

The Budget Office will be producing FY11 First Quarter reports for Budget Managers. These reports will contain:

- Final FY10 Budget and Actual Expense results
- FY11 Budget and Actual Expense information for July -- September 2010.

We will be doing a Q1 budget check-in with Budget Managers and will be in touch regarding the format of the check-in sometime in mid-October. In addition, Harvard's Office of Budget and Financial Planning has asked all Schools to produce a multi-year financial plan that is due in late October. As a result, SEAS is revising our multi-year financial plan. Accurate information from Budget Managers about FY11 spending projections will be very helpful in that process.

Procure To Pay

Reminder -- Equipment Inventory Worksheets Due September 30th (today)

If your group has not already done so, please return your bi-Annual Equipment Inventory by September 30th to sjones@seas.harvard.edu Thank you very much for your assistance in this matter.

Online Receiving In iProcurement

When you receive your shipment, log into iProcurement and receive online. There is no need to send us the packing slip. It is fast and stops the annoying reminder emails generated by the system telling you an invoice has arrived but your shipment has not yet been received. For instructions on "How to Receive and Return Items in iProcurement" visit the SEAS' Finance/Procurement and Payables/iProcurement Intranet site.

NOTE: SEAS' Procure2Pay procedure requires you to set your preferences to always require receiving for all orders placed. Never uncheck this box when ordering. It ensures that you receive your order before paying the vendor and is proof of receipt of your order for audit needs. For assistance email Procurementhelp@SEAS.harvard.edu.

Ship To And Deliver To Addressing In iProcurement

When creating an iProcurement requisition set your deliver-to building as H86073 - 9 Oxford Street. This location can be saved in your preferences. It will be the default for every order. This allows all deliveries to come to the 9 Oxford Street loading dock, get processed, tracked and then delivered by SEAS Shipping and Receiving staff. (The only exception to this are SEAS faculty or staff working at
Rowland Institute. Your orders are shipped directly to your site at 100 Edwin Land Blvd. Your deliver to building is X04555.)

When entering "Attn of Name/Dept" and "Attn Room/Floor" please be sure to enter your full name and dept/lab/room and floor. This tells Shipping and Receiving where to bring your packages once they are shipped to the 9 Oxford St loading dock. Enter this information once and click "set attention lines as default". The information will be automatically entered for all future orders. Need help? Send an email to Procurementhelp@SEAS.harvard.edu.

Crown Healthcare Apparel Service For Lab Coat Rental And Laundering

The University has awarded Crown Healthcare Apparel Service preferred vendor status. This means better pricing and service to the community for all lab coat rentals and laundering service. Please contact Procurementhelp@SEAS.harvard.edu for information on establishing service for your group.

Wire Transfers Restriction Enforced For US Currency Wires

Central Administration is enforcing an existing policy which only allows wire transfers in amounts greater than $1000 for US currency transactions. Foreign currency requests will continue to be processed in any amount.

60 Day Exception Requirement no longer needed

Harvard has reviewed its policy on employee reimbursements and concluded that it no longer needs to enforce the 60-day exception requirement. As you may know, according to that requirement, employees who were seeking reimbursements 60 days after an expense was incurred needed to obtain a signed exception from the unit Financial Dean.

As a result effective immediately, SEAS' travel office will no longer require you to obtain a 60-day exception form if you are seeking reimbursements for expenses that are more than 60-day old. You can submit these reimbursement requests directly.

However, please note that nothing has changed with regard to the 90-day rule. Because of IRS regulations, expenses that are more than 90-day old are not eligible to be reimbursed through the travel office. If an employee is deemed eligible to be reimbursed for 90-day old expenses by the Financial Dean, the payment to this employee will be considered income and will be taxed at the employee's applicable tax rate.

Given that the 60-day rule is being discontinued and to ensure that no employee's reimbursement misses the cut-off date because of transaction time, SEAS is asking you to submit all reimbursement requests to the Procure to Pay Office (Hera Daldalian and Noemis Ortiz) no later than 85-days after the expense occurred.

Research Administration
New GMAS Home Page

Check out the new release of GMAS (http://www.gmas.harvard.edu). GMAS users are now able to
see up to the last 20 projects viewed, the project link will go directly to the segment page, and there will be an expanded news section and a link to release notes. As always, if you have any questions about GMAS navigation, please contact SEAS Research Administration Office. We are here to help.

Online Training

There are several online training courses in sponsored administration. They are available through Eureka, Harvard's web-based learning management system (http://vpf-web.harvard.edu/osp/training/online_courses.php). You can launch any course by clicking on the course name link; you will be prompted to enter your HUID and PIN information and then be redirected to the course.

Interim portfolio distribution

During our search to fill vacant position, please check the Interim Portfolio Distribution List (PDF) (https://intranet.seas.harvard.edu/finance/research_admin) to see who your portfolio manager is.

OSP Policies update

Criteria and Procedures for Provost's Review of New Projects or Grants -- In addition to SEAS and OSP review, certain proposals also require provostial review. Questions have arisen about the criteria and rationale for such reviews. Please see the full statement for answers. Please note that the criteria apply to both federal, and non-federal proposals.

Indirect rate on Non-Federal sponsor -- Wondering how decision is made on the indirect rate when preparing non-federal or industrial proposal? See the full Statement of Harvard University Principles for the Application of Indirect Costs to Non-federal Sponsored Awards. Essentially, the sponsored research administration community at Harvard has agreed on a set of principals that aim to ensure that:

a) the University gets reimbursed the full indirect cost to which it is entitled
b) various sides of the University do not enter into conflicting agreements with the same sponsor and
c) we have enough flexibility to adjust to legitimate sponsors' guidelines.

NIH to Eliminate Error Correction Window for Proposal Due Dates On or After January 25, 2011

Beginning with due dates on or after January 25, 2011, NIH will eliminate the error correction window from the application submission process. 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 via Grants.gov. 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.

Beginning on January 25, 2011, 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. For more information, please refer to NIH Notice No. NOT-OD-123 (http://grants.nih.gov/grants/guide/notice-files/NOT-OD-10-123.html).