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*An electronic newsletter for users  
of Harvard University financial  
systems, policies, and procedures.*

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# FAD e-News

## WorldTravel Partners' Management of HTC Takes Off [Back](#)

With balloons and a formal ribbon cutting ceremony, the new Harvard Travel Center (HTC) opened on September 5<sup>th</sup>.

While the week of Labor Day is normally slow, the nineteen WorldTravel Partners (WTP) agents on staff have experienced an unusually high volume of calls.

Some Harvard callers have waited up to ten minutes to speak with an agent. Now that opening day jitters are behind them, HTC staff are working hard to stabilize the operation and answer your calls as quickly as possible.

As an alternative to calling the Travel Center, give its online booking tool, ResAssist, a try.

The URL is:

<http://www.worldtravel.resassist.com/harvard.htm>

Or, click on the ResAssist icon on the Harvard Travel Center home page (<http://www.travel.harvard.edu>)

To log on for the first time, enter the first eight digits of your Harvard ID number and the password *changeme*. The system will walk you through the rest of your reservation.

ResAssist also allows you to update your travel profile on line. Harvard employees as of August 7<sup>th</sup> were loaded into the ResAssist database.

If you are an employee hired after August 7<sup>th</sup>, or if you support one, you can get a login by following these steps:

1. Go to the Harvard Travel Office web site at: <http://www.travel.harvard.edu>
2. Click on the *ResAssist* icon, then click on the *Request a Login* hotlink.
3. Complete the form and click *Submit Request*.

Result: Your login will be created within 24 hours.

Any changes you make in ResAssist will update your profile at HTC as well. *Central billing requests on ResAssist are not yet available but will be soon.*

Comments or feedback about the Harvard Travel Center should be directed to Jack Healey (6-8686) or Priscilla Campbell (6-4599).

## WVER Project Update [Back](#)

The pilot for the Web Voucher Expense Report project has begun!

After a kickoff meeting on August 24<sup>th</sup>, approximately fifty pilot users of "WebEx" began to successfully process reimbursements.

AP and Travel have heard from a few folks not associated with the pilot who are anxious to begin using the new process. A school-by-school rollout and training plan is

now being determined. Look for a communication from your local financial office regarding when your school will begin to use WebEx.

**Reprint Unapproved Web Voucher Link**

There is a new link on the WV main menu in the Web Voucher production system: the [Reprint Unapproved Web Voucher](#) option. This feature was implemented to allow users to reprint the confirmation screen as long as the voucher has not yet been approved. It was added to support the new reimbursement process now in pilot, and should be disregarded by other users.

**Quick Reminder Regarding the Non-Employee Reimbursement Form (NERF)**

NERFs, with the web voucher approved in the system and the voucher number noted on the form, should be sent to the Travel Office at 365 Holyoke Center for processing.

NERFs must include a business purpose, signature of the reimbursee, and original receipts of \$75 or greater.

You can download NERFs from the Forms area of ABLE (under Web Voucher). The definition of a non-employee versus an independent contractor is on the second page of the NERF.

## Scheduled System Outage this Weekend

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A reminder that this coming weekend is the third weekend of the month, and thus is reserved for regularly scheduled system maintenance.

The financial applications (General Ledger, Budget Tool, STAR, Web Voucher, and Accounts Payable) will be down from 10 p.m. Friday, September 15<sup>th</sup> through 6 a.m. Monday, September 18<sup>th</sup>.

HUDINI and AWS2 will remain available throughout the weekend. Please call the Helpdesk at 496-2001 with any questions.

## HELPLINE Up and Running

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In July, Risk Management and Audit Services (RMAS) rolled out a new confidential compliance HELPLINE at **1-877-694-2ASK**.

RMAS established the HELPLINE to assist the Harvard community with questions or concerns they may have about the University's policies, procedures, and business practices.

HELPLINE is designed to make getting information easy. RMAS recognized that in a large, decentralized workplace, it is often challenging for employees to get the information they need to do their job.

HELPLINE is equipped to handle a variety of inquiries either through resources within RMAS or outside departments. HELPLINE addresses everything from regulatory compliance to business policy to conduct questions. For example:

- What is the University's policy on sexual harassment?
- What is a reasonable accommodation if someone has a disability?
- What should employees do if they think they may have a financial conflict of interest?
- What is the University's policy on cost transfers to sponsored research funds?

The University encourages faculty and staff to call for two reasons.

First, the University values doing the right thing. Faculty and staff should be proactive and seek guidance when they are unsure about University policies and practices.

Second, the University supports stewardship. Faculty and staff must be accountable for their actions and able to support their business decisions. If an employee is confronted with an issue that raises concerns about business practices, they should phone the HELPLINE.

HELPLINE is active 24 hours a day; employees can call at anytime, from anywhere. The system has a confidential voicemail box, which stores the caller's message. The caller will be asked to leave their name, telephone number, and a brief description of the nature of their call.

RMAS will respond to the call within 2 to 3 business days. First, RMAS will contact the caller and request further information. Then, RMAS will either directly answer the caller's question or refer the question to someone within the University who can answer it.

Again, you can reach HELPLINE at **1-877-694-2ASK**

## HR Project Update

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In August, the HR Project team made its first large outreach effort, convening a series of meetings with its Design Review Advisory Group (DRAG).

This group is comprised of representatives from across the University, diversified by tub, function (HR, payroll, academic affairs, IT, etc.), and level (from Dean and VP to staff assistants).

DRAG was formed to ensure the full involvement, participation, and buy-

in of the HR, payroll, and benefits communities.

DRAG is charged with reviewing Project plans and assumptions in order to alert the team to potential gains or pitfalls and to offer a preview of end user concerns.

DRAG members are also asked to take Project information back to their departments. A quick reference card intended for distribution to all interested staff was distributed during the meetings. For a copy, please e-mail:

[askhrproject@harvard.edu](mailto:askhrproject@harvard.edu)

The purpose of the August meetings was to provide the context, background, and vision for the HR Project, as well as a glimpse of the Oracle 11i human resources system.

The Project's preliminary scope and implementation plan were presented, and meeting attendees were asked in breakout groups for their feedback.

Response to the meeting was positive, and the team's understanding of vision, scope, and implementation was endorsed.

Key feedback points included:

- Understanding of the necessity to replace the current HR, benefits, and payroll systems
- Endorsement of a phased implementation approach
- Anticipation of better reporting capabilities
- Positive response to the Oracle HRMS demonstration
- Concern about logistics of the interim period, when Central Administration will be on the new system while tubs will not

- Concern about the future of the Turn-Around Document (TAD) currently used to process payroll
- Concern about coordination of the HR Project with other system and policy initiatives
- Concern about the culture change represented by time collection for non-exempt employees

A comprehensive report of DRAG feedback and project team responses was written and sent to DRAG members. For a copy, please e-mail Robin Pearce at [robin\\_pearce@harvard.edu](mailto:robin_pearce@harvard.edu).

## Accounts Receivable End User Survey Results [Back](#)

About 250 financial administrators from across Harvard are expected to use the new Accounts Receivable system going live in January. Our thanks to the 61 users who took the time to tell us about their jobs and training needs.

By skipping what most people already know and can do, we can make sure the training is appropriately paced and focussed on what's new to learn. Here is a summary of the findings.

AR users are:

1. Highly PC-literate.
  - 94% use their PCs 50% of the day or more.
  - 90% use Windows 95 or 98 and a web browser. 80% use MS Office applications.
2. Already knowledgeable about Harvard's financial operations and systems.
  - About 80% already have basic Oracle navigation

skills from using GL or HUDINI.

- 94% say they have an excellent or working knowledge of the chart of accounts.
3. Supported by their departments in attending training and developing job-related skills.
    - 100% of survey respondents answered affirmatively to this question. This contrasts sharply with an assessment done at the beginning of ADAPT, in which many users described working in a "training void"; training was neither provided nor encouraged.
    - Over 90% attended Project ADAPT training. Of those, 90% found it effective. Suggestions for improvement included more audience segmentation by skill level or role so classes could move more quickly, and more opportunities to learn advanced features after working with the applications for a few months.
    - 90% preferred instructor-led, hands-on training to learn the AR system, followed by web-based training (53%), clinics or tutoring (47%), and paper-based self-study materials (33%).
    - For most people, processing AR transactions consumes less than 25 percent of their time. They are willing to invest between ½ to 1½ days to learn the new systems and processes.

When asked about what aspect of working with computers is most challenging, respondents said:

<b>Working with new HU financial systems</b>	29%
<b>Working effectively or productively with desktop applications</b>	27%
<b>Generating financial reports</b>	12%
<b>Getting data in local or shadow systems in synch with data from central systems</b>	8%
<b>System performance, slowness or crashing</b>	8%
<b>No real problems or challenges</b>	8%
<b>Managing multiple toolbars and windows</b>	4%
<b>Other (e.g., multiple logins cumbersome)</b>	4%
<b>Total</b>	100%

## Last Call

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All users of the fiscal and sponsored budget tools, AWS2, HUDINI, General Ledger, InfoMaker, the PCard Settlement System, STAR, and Web Voucher are asked to respond to a web-based survey regarding your use of these systems and your learning and support preferences. The survey will be held open until September 30 to get all possible responses.

The survey has twenty questions (less if you don't use some systems) and should take about 15 minutes to complete. It is available at:

<http://www.zoomerang.com/survey.zgi?4B7J68D8H2GJCC50HJTBKF5S>

All survey respondents are eligible to win a prize, as described on the home page of the survey. Thanks in advance for your participation!

## About this e-News

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The Financial Administration publishes this semi-monthly electronic newsletter for users of Harvard University's financial systems, policies, and procedures. Generally, the e-News is published on or about the 12<sup>th</sup> and 26<sup>th</sup> of each month.

It contains:

- updates on projects underway to build or improve University financial systems;
- information about new University financial policies, procedures, and forms;
- reminders about upcoming deadlines and cut-over dates;
- tips and tricks for working more easily or productively.

We welcome questions and suggestions for improvement from readers. If your questions are of general interest, we will answer them in future issues.

Please send comments, questions, or suggestions for improvement by email to us at:

[fad\\_communications@harvard.edu](mailto:fad_communications@harvard.edu)

*Please note that our next issue will cover the upgrade to Release 11 of the Oracle financials in mid-October. It will be published on Monday, October 2<sup>nd</sup>.*