

Harvard Systems

Harvard Training Portal: <https://trainingportal.harvard.edu/>

PeopleSoft – is Employee Self-Service (entering hours, viewing paychecks, etc.)

- PeopleSoft system: <https://peoplesoft.harvard.edu/>
- Harvard Training Portal: PeopleSoft Overview (FAS):
https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours00000000010642?returnurl=common%2Fsearchresults%2Fpeoplesoft%2FALL

Grants Management Applications Suite (GMAS) – University’s system of record for proposals, awards, financials, and documentation related to sponsored projects. Enables the proposal and request development, approval, and submission processes. Supports the end-to-end grant life cycle process (submitting the proposal > proposal being awarded > life of the award > eventual award closeout). Is integrated with University financial and compliance systems.

- GMAS system: <http://gmas.harvard.edu/gmas>
- GMAS information: <https://gmas.fss.harvard.edu/>
- Harvard Training Portal: GMAS Basics and Requests:
https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000003409?returnurl=common%2Fsearchresults%2Fgmas%2FALL

Harvard Analytics and Reporting Tool (HART): HART is Harvard’s reporting and analytics system for administrative data, including Finance, Research Administration and Library.

- HART System: <https://hart.biprod.huit.harvard.edu/analytics>
- Job Aids:
<https://wiki.harvard.edu/confluence/pages/viewpage.action?spaceKey=HART&title=Job+Aids>
- HART Tools Online Course (University Wide):
https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000024542?returnurl=common%2Fsearchresults%2Fhart%2FALL

Effort Certification and Reporting Tool (ecrt) – not something most administrators have access to but in case it comes up. This is the effort certification system that PI’s and Research Administrators have access to. They go here quarterly to certify projects and annually to certify other personnel effort.

- ECRT system: <http://ecrt.harvard.edu/ecrt/>
- OSP information on Effort Reporting & Salary Certification:
<https://osp.finance.harvard.edu/effort-reporting-salary-certification>
- Harvard Training Portal: ecrt Basics Training:
https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000008123?returnurl=common%2Fsearchresults%2Fecrt%2FALL

Procurement Systems

If you're having access issues – reach out to Jason Green

- **Concur:** <https://key-idp.iam.harvard.edu/idp/profile/SAML2/Unsolicited/SSO?providerId=https://us.api.concursolutions.com/saml2>
 - This is the system that reimburses employees* out of pocket expenses as well as reconciles [Corporate Card \(Citibank\)](#) expenses
 - *Harvard Temps, LHTs, Students, External Postdocs, and Teaching Fellows are not considered employees are therefore reimbursed via Non-Employee Reimbursements in Buy-to-Pay
 - They need to be set up as a vendor in B2P in order to be reimbursed
 - Concur Training: <https://travel.harvard.edu/concur-training>
 - Concur Guide for Delegates (how to get set up as a delegate): https://travel.harvard.edu/files/procurement-travel/files/concur_delegate_1210117.pdf
 - Harvard Training Portal: Processing Employee Reimbursements with Concur (FAS): https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours00000000007647?regId=regdw000000000191047&returnurl=common%2Fsearchresults%2Fconcur%2FALL
- **Buy-to-Pay (B2P):** [HCO Overview](#)
<https://solutions.scquest.com/apps/Router/SAMLAUTH/HarvardFullSuite>
 - B2P is our preferred purchasing system. Harvard prefers for requisitions (RQs) to be created to generate Purchase Orders (POs). Which in turn can be invoiced against by vendors.
 - B2P is also used for [Non-Employee Reimbursements](#) and [Payment Requests](#) (when a PO hasn't been created)
 - Harvard Training Portal: Buy-to-Pay Shopper Essentials: https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000019502?regId=regdw000000000671995&returnurl=common%2Fsearchresults%2Fbuy-to-pay%2FALL
 - Harvard Training Portal: Buy-to-Pay Requestor Essentials: https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000019503?regId=regdw000000000667208&returnurl=common%2Fsearchresults%2Fbuy-to-pay%2FALL
 - Harvard Training Portal: Getting Started with Buy-to-Pay: https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000019501?regId=regdw000000000667206&returnurl=common%2Fsearchresults%2Fbuy-to-pay%2FALL
 - HCO Overview on Non-Employee Reimbursements (NERFs): <https://hco.cfa.harvard.edu/payment-requests>
 - Processing a Non-Employee Reimbursement Request in B2P: https://b2p.procurement.harvard.edu/files/b2p/files/b2p_processing_a_non-employee_reimbursement.pdf?m=1596995693
- **Purchasing Card:** [HCO overview](#)
 - How to Obtain a PCARD (local administrator: Jason Green): <https://cardservices.harvard.edu/activation-purchasing>
 - Gets reconciled in [Oracle](#)
 - Reconciled weekly by updating the coding & business purpose in Oracle
 - Download a copy of the sweep for your card (just for that week)

Updated 02/23/2022

- Attach the receipts to the sweep cover sheet
- Send to Jason Green with cc: to whomever approves the accounts you are coding to (Theresa or Becky for 31460, Jason for 31450 or 31470, Peg Herlihy for Astronomy 31430)
- Should be sent to Jason by Tuesday at 5 PM each week as the sweep occurs on Thursday
- Harvard Training Portal:
https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours000000000003085?regId=regdw000000000125969&returnurl=common%2Fsearchresults%2Fpurchasing%20card%2FALL

Other Trainings/Presentations Worth Taking/Reviewing:

General

Understanding Harvard's Chart of Accounts (33-digit coding):

https://finance.fas.harvard.edu/files/fas_finance/files/chart_of_accounts_june_2014.pdf

Sponsored Awards

Introduction to Sponsored Projects (University-wide):

https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours0000000003078?regId=regdw00000000026210&returnurl=common%2Fsearchresults%2Fsponsored%20project%2FALL

Financial Oversight of Sponsored Funding: What Researchers Need to Know (University-wide)

https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours0000000003101?regId=regdw00000000026215&returnurl=common%2Fsearchresults%2Fsponsored%20project%2FALL

Cost Principles and Direct Costs on Sponsored Awards (University-wide)

https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours00000000018601?returnurl=common%2Fsearchresults%2Fsponsored%20project%2FALL

HCO's Research Administration website is split into Pre-Award (proposal stage) and Post-Award and has lots of information there

- Pre-Award: <https://hco.cfa.harvard.edu/research-administration/pre-award>
 - Overview of a Proposal Process:
https://hco.cfa.harvard.edu/files/hco/files/how_do_i_start_a_proposal_1.pdf
- Post-Award: <https://hco.cfa.harvard.edu/research-administration/post-award>
 - Includes Cost Transfer Policy (i.e. moving costs from one award to another)
 - General Terms & Conditions for common sponsors (NSF, NASA, and STScI)
 - These are just the general ones – each individual award's terms & conditions supersede the general ones
 - Individual award's terms & conditions can be found in GMAS under "Sponsor Notices" on the left navigation – if you don't have access – just reach out to your Research Administrator to pull that for you
 - Sponsored Travel Policies
 - Reporting Templates & Deadlines (again general based on typical sponsor requirements)
 - Prior Approval Requests (typical for common sponsors)
 - What type of stuff do we need to go back to the sponsor and ask if it is OK to do (no cost extensions, some budget changes, effort changes, early terminations, etc.)

Travel and Purchasing (General + Sponsored)

Travel and Reimbursement Overview (University-wide)

https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours00000000003089?returnurl=common%2Fsearchresults%2Ftravel%2FALL

Federal Travel Regulations (University-wide)

https://trainingportal.harvard.edu/Saba/Web_spf/NA1PRD0068/app/me/learningeventdetail/cours00000000003087?regId=regdw000000000026208&returnurl=common%2Fsearchresults%2Ftravel%2FALL

- HCO Created a Travel Reimbursement Powerpoint as well that gives an overview on Concur/Travel policies: https://projects.iq.harvard.edu/files/hco-meeting-minutes/files/lunch_learn_-_concur_10-07-2019.pptx
- HCO Travel Website: <https://hco.cfa.harvard.edu/procurement/travel>
 - Which has lots of good resources (per diem, food/alcohol split calculators, policies, etc.)

Risk Management & Audit Services (RMAS) Audit Team Presentation to the HCO

- RMAS came in February 2020 and presented to us about what they look for as auditors on sponsored awards: https://projects.iq.harvard.edu/files/hco-meeting-minutes/files/hco_lunch_and_learn_02.20.20.pdf

Research Administration Logins (yellow highlighted are the most common)

- **Research.gov** (the NSF award portal – both pre- and post-award)
 - Instructions on how to register for NSF can be found here:
https://www.research.gov/common/attachment/Desktop/Single_ID_Help.pdf
 - The role you want to request is: Other Authorized User (OAU)
 - Harvard's DUNS number is: 082359691
 - This then gets submitted to Harvard's OSP for them to confirm that you are legit and can be associated with Harvard so the link on the institution is made.
 - Having your own NSF ID allows you to log in under your ID (vs. your Faculty/PI's) and also (more importantly IMO) lets you create a ScienCV account and maintain C&Ps and Biographical Sketches in NSF formats for your personnel.
- **NSPIRES** (NASA Solicitation and Proposal Integrated Review and Evaluation System – just pre-award)
 - This is NASA's submission portal for proposals
 - Register for NSPIRES here: <https://nspires.nasaprs.com/external/aboutRegistration.do>
- **STGMS** (Space Telescope Grants Management System – both pre- and post-award)
 - <https://stgms.stsci.edu/stgms/>
 - This is the STScI (Space Telescope Science Institute) portal
 - If this is your first log in to STGMS or you forgot your password, click 'Forgot Password' on the Login screen.
 - <https://ssoportal.stsci.edu/idp/profile/SAML2/Redirect/SSO?execution=e2s1>
- **Grants.gov**
 - Can be used to submit NSF proposals but not as popular as Fastlane or Research.gov
 - How to Register for Grants.gov
<https://www.grants.gov/web/grants/applicants/registration.html>
 - Your [role](#) will be a EBiz POC (most likely)
- **Proposal Central**
 - Used for some non-federal sponsors (i.e. Simons Foundation)
 - How to Register: <https://docs.proposalcentral.com/RegUser.pdf>