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MIT Mechanical Engineering Support Staff Training Guide

Please direct questions/suggestions to Sucharita Ghosh or
Anna Churchill. This presentation was originally created by:
Juliette Pickering
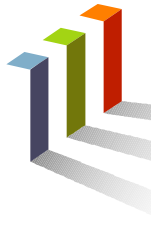Senior Administrative Professional
Office of the Department Head

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Table of Contents

MITMECHE

Table of Contents

Department of Mechanical Engineering
Massachusetts Institute of Technology

MITMECHE

Table of Contents

MIT's Mission

- Solve the world's greatest technological challenges.
- Educate the next generation of engineering leaders.

Your Role

- Assist faculty and students to achieve their goals.
- Each faculty member has slightly different needs, your role is to learn what your faculty's needs are and assist them.
- This can include serving as:
  - Lab Manager
  - Financial Planner
  - Writer /editor
  - Event Planner
  - Travel Agent
  - Teaching Assistant
- MIT recognizes that your job is demanding and has many resources to help you to do your job.

Resources

- Being a technology oriented organization, most of MIT's training resources are online.

- In addition to online training, you will find that MIT has a very customer-oriented culture. This training will contain contact numbers for staff who are experts in various subjects. If you have questions or run into difficulties, do not hesitate to contact them.

- You will be paired with an experienced support staff member who has volunteered to be available to answer questions and assist you in your first months at MIT.

Structure of this Training

- In the past, new staff have been provided with a binder containing information about MIT policies and resources.

- Faced with a large amount of information it can be hard to know where to start.

- This training is designed to give you a guideline to tell you what training to do every day for your first 10 days at MIT.

- It is hoped that once you complete this 10 day training, you will have a complete overview of your role and knowledge of how to get things done at MIT.

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Getting Oriented- People to Meet With

The following people will help you get oriented on your first day. Make sure to schedule meetings with the following people:

- Each of your faculty supervisors

- Sucharita Berger Ghosh, Administrative Officer
  sbghosh@MIT.EDU (617) 253-4038, 1-104

- Anna Churchill, Personnel Administrator
  achurchi@mit.edu   (617) 324-5390, 1-104

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Getting Oriented

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- Obtain a key to your office from Anna Churchill or Sucharita Berger-Ghosh (see previous slide for contact info). Locate and set up your personal work space.

- Review the New Employee Orientation and Onboarding Website:

  http://welcome.mit.edu/
  Complete the items under the tabs *Before you Start* and *Your First Days.*

- When you meet with your faculty supervisors, ask to visit each faculty supervisor's lab and meet graduate students / research group members.

- Review the MIT Map at http://maps.mit.edu/mymaps/

- Take a campus tour. Tours leave from the building 7 lobby (Bldg. 7 Rm. 121) daily at 11 am and 3 pm.

- Identify your faculty supervisors' offices. Locate mailrooms for your faculty offices and mailroom codes by contacting mail services at: Phone: 617-253-6000   Email: mailsvc@mit.edu .

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Obtaining Certificates for your Computer

- Our IS&T representative will likely meet you at your desk to help set up your computer.

- MIT certificates need to be downloaded onto your computer in order for you to access MIT websites intended for use by MIT staff, students and faculty.

- Information on obtaining certificates may be found at this website: http://ist.mit.edu/certificates

- Obtain your certificates at this website: https://ca.mit.edu/ca/

- You will need to do this process for each web browser that you intend to use to access MIT secure websites.

- Periodically you may be asked to update your certificates.

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MIT Profile

To create your MIT Profile

- Go to Atlas at https://atlas.mit.edu

- Click on the tab titled Self Service.

- Click on each link under the heading titled My Profile.

- These include:

  - Name and Home Address

  - Ethnicity/Race/Gender/Veteran Status

  - Work Address and Phone

  - Education History

  - Emergency Contact

- Complete the forms under each link.

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ATLAS - https://atlas.mit.edu/atlas

- ATLAS is a website with links to most of the online resources you will need to use as an MIT employee.

- Consider making ATLAS your home page.

- Review the tabs at the top of the Atlas home page.

- The tabs you will most often use are:

  - Self Service
  - Inboxes
  - Buying
  - Manage Money
  - Campus

- You will learn more about the tasks you will perform in ATLAS later in this training.

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Time Sheet

- Each Friday complete your online time-sheet by going to ATLAS at: https://atlas.mit.edu
  - Click on Self Service
  - Click on My Time
  - Click on Timesheet
  - Complete Timesheet

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People to Meet With:

Contact the following people and arrange meetings with them:

■Jared Embelton, Academic Administrator Undergraduate Office

jarede@mit.edu (617) 253-2305

■Ellen Parilla, Administrative Assistant Undergraduate Office

ellenf@MIT.EDU (617) 253-2231

■Heather Theberge, Administrative Assistant Undergraduate Office

htheberg@MIT.EDU (617) 253-1507

■Leslie Regan, Academic Administrator Graduate Office

lregan@MIT.EDU (617) 253-2291

■Una Sheehan, Administrative Assistant Graduate Office

oona@MIT.EDU (617) 253-2291

■Amy Shea, Administrative Assistant Graduate Office

■amyshea@mit.edu (617) 253-1790

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Course Management

- Find out from your faculty supervisors what classes they will teach and in what semester. Find out if they will be using text books and what text books they will be using. Find out if they will have a final during final exam week.

- By May 1 for Summer and Fall- or Dec. 1 for IAP (January Independent Activities Period) and Spring, you will need to ask the book store to stock the text books for classes and put a reserve on the books at the library. This request may be placed via the following website: https://tip.mit.edu/

- Let the Undergraduate Academic Administrator know if there will be a final exam during exam week (this requires a special exam time and room be scheduled).

- The Undergraduate Academic Administrator reserves classrooms for classes. If you have a question about classrooms reserved for MechE Classes, please contact them directly.

- A full listing of courses offered in Mechanical Engineering may be viewed at:
  http://student.mit.edu/catalog/m2a.html

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Stellar & Gradebook Online Training

- MIT has a course management system called Stellar & Gradebook that allows you to easily set up a website for the classes taught by your faculty.

- This website allows you to post a class schedule, course materials, assignment and track grading.

- Take the online training in Stellar& Gradebook:

  Go to Atlas- https://atlas.mit.edu/atlas/Home.action

  Click on SELF SERVICE

  Click on MY TRAINING- MIT LEARNING CENTER

  Click on COURSE CATALOG

  Click on ADMINISTRATION

  Click on ACADEMIC ADMIN. AND STUDENT INFO SYSTEMS

  Complete the following online training

  - Stellar Overview
  - Gradebook Overview

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Creating a Listing of Research Group Members

- Each of your faculty members will likely have a research group and laboratory.

- Each research group is made up of graduate student research assistants (RAs) and may include postdoctoral researchers (Postdocs), visiting scientists/scholars, research scientists, and undergraduate researchers (UROPS).

- Meet with your faculty supervisors and make a listing of each of your faculty supervisor's research group members. Include the following information in your list:

    - Name

    - Type of researcher (RA, Post-Doc, Visiting Scientist/Scholar, Research Scientist, UROP)

    - Contact phone number and office address (Obtain from MIT online directory)

    - Account number that stipend is paid from.

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Graduate Student Appointments

- About a month before the beginning of each term you will need to reappoint the graduate students who are working in your research group so that they may receive their stipend.

- At that time, meet with each faculty supervisor to review the graduate students in their group and what research account their stipend should be charged to.

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Graduate Student Appointments

- Our department has set up a web-form to make the reappointment process easy. Again, the reappointment should be done about a month before the new term begins.

- To re-appoint your students go to the Mechanical Engineering Website:

    - http://meche.mit.edu/

    - At the top right hand side of the page click on Find Resources.

    - Click on the link titled RA Appointments.

    - You should see a listing of your faculty supervisors there. (If not please contact Harris Crist, Webmaster bhcrist@MIT.EDU (617) 452-3076)

    - Click on View Students

    - You will see a listing of students in your faculty supervisor's research group. Check this list against the research group list to make sure that all the students are listed.

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Graduate Student Appointments

- Click on each student's name.
- Complete the web-form to appoint them.
  - If the student is a full time RA the % RA support should be 100%.
  - If the student is a partial TA and partial RA then the %RA support and %TA support should add up to 100%.
  - If the student's stipend is split across multiple accounts the % Distribution should add up to 100%.
- Once you have updated the appointments, a submit button will appear at the bottom of the page that lists all of the students in the group.
- Submit the appointments.
- Once the appointments are submitted, they will go to the Mechanical Engineering Research Administration Services Office (RAS) for approval. If information about the appointment changes after you submit the appointment, call the RAS office at 617-253-5904.

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Academic Appointments for Non-Student Researchers

- Your faculty supervisor may decide to hire a researcher to assist with their research program. This may be a post-doctoral associate, post-doctoral fellow, a visiting scholar or a visiting scientist.

- These are usually researchers who have completed their Ph.D. and would like to continue their research at MIT.

- The distinction between a post doctoral associate and a post doctoral fellow is that a post-doctoral associate is paid by MIT while a post doctoral fellow usually is funded by a fellowship.

- For questions on what kind of appointment to submit or on the appointment process contact Anna Churchill or email:
  me-academic-appointments@mit.edu.

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Academic Appointments for Non-Student Researchers

- If your faculty tells you that they are going to hire a postdoctoral researcher you will need to submit the paperwork to appoint them:
    - Go to the Mechanical Engineering Website   http://meche.mit.edu/
    - At the top right hand side of the page click on Menu.
    - Still on the right hand side click Find Resources.
    - Click on the link titled Academic Appointments.
    - Complete the web-form.
    - Upload supporting documents including a letter from your faculty supervisor requesting the appointment and a CV belonging to the candidate..
    - For postdoctoral appointments you must also upload a mentoring plan. For additional information on the mentoring plan click on this link: https://postdocs.mit.edu/sites/default/files/images/MIT_Post_Toolkit_mentoring_plan.docx

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Visiting Student Appointments

- Sometimes your faculty will invite a student at another university to visit MIT to work in their lab. To submit the academic appointment for a visiting student:
    - Go to the Mechanical Engineering Website   http://meche.mit.edu/
    - At the top right hand side of the page click on Menu.
    - To the left, click on Find Resources.
    - Click on the link titled Visiting Student Appointments.
    - Complete the web-form.
    - Upload supporting documents including a letter from your faculty supervisor requesting the appointment and a CV belonging to the candidate, undergraduate transcript, graduate transcript (if applicable), letter of reference, form from the provost's office (Which can be downloaded by clicking on this link: https://web.mit.edu/iso/iso/visiting/VS_Student_Request_2015.pdf

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Visiting Student Appointments

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- After you have completed the department forms, the MIT International Students Office will need the student to complete additional paperwork.

- Once the visiting student has been approved by the department, notify the student to create an MIT email address at http://web.mit.edu/register .

- 48 hours after they have created their email address they need to go to the international student's office website to submit additional documentation. Instruct them to go to:http://web.mit.edu/iso/students/i20_ds2019_application.shtml

- The student will submit the following documentation through the website:
    - Passport information.
    - Letter of enrollment at their home university.
    - Invitation letter from our department.
    - Address information.
    - Financial information (51% of funding can't be from personal or family funds)
    - Medical certification form. (proof that insurance meets federal regulations.)

- If the student has questions about this process he or she can call the International Students Office at (617) 253-3795 .

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VISA Issues and Academic Appointments

- It may take some time to process VISAs for international students and scholars. Please try to submit your appointment forms AT LEAST 75 DAYS in advance of the appointment becoming final.

- VISAs for postdoctoral researchers and visiting scientists are processed in our department by Anna Churchill.

- Visas for visiting students are processed by the MIT International Students Office.

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Student Advising and Registration Day

- Faculty may serve as advisors for undergraduate students. Ask your faculty member if they advise undergraduate students. A listing of students advised by your faculty member may be obtained from the Undergraduate Academic Administrator.

- Faculty serve as advisors to the graduate students in their research group.

- On registration day (the first day of the Fall and Spring Terms), your faculty supervisors will need to meet with their graduate and undergraduate advisees. Check the date for registration day on the MIT academic calendar at: http://web.mit.edu/registrar/calendar/

- A week or two before registration day ask your faculty supervisors if they would like you to set up these meetings.

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Thesis Committee and UROP Advising

- Thesis committee members- Your faculty will likely serve on graduate thesis committees for graduate students who are not in their research group. It would be good to have a listing of all graduate student thesis committees that your faculty serve on. Ask your faculty to provide you with this information.

- UROP advisors- Undergraduate Research Opportunity advisors give undergraduate students an opportunity to work in their lab on a specific research project that usually lasts a semester. You will want to keep a list of any undergraduate students who are doing UROPs in your faculty supervisor's lab.

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Accounts and Purchasing- People to meet with.

The staff in the Research Administration Services Office manage all of the research accounts for the department. One of them will be assigned to each of your faculty supervisor's research accounts. Please schedule a time to meet with them:

Tonie Stephenson, Senior Financial Officer

tostephe@mit.edu (617) 324-6612

Darryl Adams, Financial Assistant

darryla@mit.edu (617) 324-6639

Nagelore Jean-Caidor, Financial Coordinator

najelore@mit.edu (617) 324-1583

Khusbu Patel, Financial Officer

kpatel86@mit.edu   (617) 253-4332

Daniela Stoudenkova, Financial Officer

danielas@Mit.edu, (617) 324-3874

Katrina Walker, Financial Coordinator

walker@mit.edu (617) 324-4269

Joe Williams, Financial Officer

joew2588@mit.edu, (617) 253-9713

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29

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Introduction to Research Accounts and Purchasing

- Your faculty members will each have a portfolio of accounts. These will include research accounts and discretionary accounts.
- A research administrator in the Mechanical Engineering Research Administrative Services Office (RAS) will be assigned to manage each faculty member's accounts. Call or email Darryl Adams to find out which research administrators manages each of your faculty supervisors' accounts.
- Set up a meeting with your research administrator(s) to review the accounts.
- Ask your research administrator for a listing of accounts for each faculty member.
- Review with your research administrator, the listing of research group members that you developed on day 2.
- Ask your research administrator for a listing of all staff currently being paid on each research accounts. (DACCAs) Compare this to your research group list.
- Ask your research administrator to authorize you to spend on your faculty member's accounts.
- Research account numbers usually begin with a 6 and they are to only be used to purchase things for a specific research project.
- Discretionary account numbers usually begin with a 2 and can be used to buy any work related item.
- Before you buy any item make sure to check with your faculty member to find out which account should be used.

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Making Purchases Using E-Cat

- MIT has a number of on-line catalogs you can use to order supplies using only your MIT account numbers. These can be found using E-Cat.

- To access e-cat go to https://atlas.mit.edu/ and click on the tab labeled BUYING.

- Then click on the link for eCAT[3] (Electronic Catalogs).

- Click on the tab labeled PLACE DEPARTMENTAL ORDER.

- Choose a vendor that you would like to order from.

- Place your on-line order.

- ECAT will take you to a CREATE REQUISTION screen where you will be asked to complete fields for MATERIAL GROUP and G/L ACCOUNT. These can be selected from a drop down list and are asking you to describe the purchased items. The COST OBJECT field is where you insert your account number.

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Example Create Requisition Screen

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Making Purchases Using E-Cat

- Click on submit requisition. Keep a PDF copy of your requisition for your records. Your order will be placed and you will receive it by mail. Keep the packing slips for your records. Your account will be charged for your order.

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Requisitions

- Sometimes you will need to order an item from a vendor who is not in the e-cat system. To do this you will need to submit a requisition in order to generate a purchase order number.
- Typically, the vendor will then submit a bill directly to accounts payable listing this purchase order number. (If the vendor mails you the bill instead, write the PO number on it, sign it and forward it to accounts payable NE49-4064)
- Accounts payable will then issue a payment to the vendor using funds from the account that you specified when you submitted the requisition.
- To submit a requisition complete the following steps:
    - To access e-cat go to https://atlas.mit.edu/ and click on the tab labeled BUYING.
    - Click on external outside vendors.
    - Complete form.
    - Attach vendor quote or invoice.
    - Submit form

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Request for Payment

- Sometimes your faculty member or a research group member may purchase a work related item from personal funds and will need reimbursement.

- A request for payment needs to be submitted for the employee to be reimbursed.

- A request for payment may also be submitted in order to request a paper check for VISA processing or other purposes.

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Request for Payment

- To submit a request for payment:
    - Go to https://atlas.mit.edu/ and click on the tab labeled BUYING.
    - Click on Requests for Payment.
    - Click on Reimbursement.
    - Search for Payee name, then select payee.
    - Complete form. Cost object= account number.
    - Click on save and continue.
    - Attach receipts.
    - Submit request for payment.

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Example Request for Payment form

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Purchasing Online Trainings

Go to Atlas- https://atlas.mit.edu/atlas/Home.action

Click on SELF SERVICE.

Click on MY TRAINING- MIT LEARNING CENTER.

Click on COURSE CATALOG.

Click on ADMINISTRATION.

Click on FINANCIAL ESSENTIALS.

Complete the following online trainings

■Requisitions Online Training

■Introduction to Accounts Payable

■Procurement Overview

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Booking and Submitting Travel Reimbursements

- Each faculty member has a corporate travel credit card to use for travel expenses. Ask your faculty members to provide you with the travel credit card number, security code and expiration date so that you can use it to book travel reservations.

- MIT's approved travel agents are The Travel Collaborative (https://vpf.mit.edu/site/sourcing_procurement/smartbuy/preferred_suppliers/travel_collaborative) and OT&T Travel Management (https://vpf.mit.edu/site/sourcing_procurement/smartbuy/preferred_suppliers/ot_t_travel_management). You may use them to help you make travel arrangements.

- Travel reimbursements are processed through the Concur online travel reimbursement system.

- Travel purchases made on the travel card automatically appear in the Concur online travel reimbursement system.

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Concur Online Training

- Ask each of your faculty supervisors to make you an expense delegate in the Concur on-line travel reimbursement system.

- In order to submit a travel reimbursement on behalf of someone else, you must be authorized to be an expense delegate for them. The instructions to do this can be found on page 3 of this link:

  http://vpf.mit.edu/site/content/download/13750/54640/file/Concur_Travel_and_Expense_Delegate_Set_Up.pdf

  Send your faculty supervisors this link if they don't know how to designate you as an expense delegate. Or you can email our contact in the Travel Office for assistance.

- Review the appropriate Concur User Guide from the Travel Office:

      For submitters: http://vpf.mit.edu/static/pdf/Concur_2.0-Guide_for_Submitters.pdf

      For approvers: http://vpf.mit.edu/static/pdf/Concur_2.0-Guide_for_Approvers.pdf

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Travel Reimbursement Quick Start

Quick Start- Basic Steps to Submit a Travel Reimbursement

▪Go to Atlas https://atlas.mit.edu/

▪Under the buying tab select travel.

▪Click on Concur Travel Expense.

▪At the top of the screen there is a line which reads "you are administering for yourself". Click on yourself.

▪You will see a drop down list and you should be able to select your faculty members from this list. If not, they have not made you an expense delegate yet.

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Travel Reimbursement Quick Start Continued

- Under the expense tab you will be able to select NEW EXPENSE REPORT.
- Complete the report header sections of the report and click next.
- Under new expenses select an expense type. Complete the expense details.
- Attach a receipt.
- You can click on the button labeled ADD CHARGES to view any outstanding charges on the travel card. Select those charges related to this expense report and import them.
- If you want to pay for the expense using more than one account click itemize, and specify the percentage of the expense to be charged to each account.
- Click save.

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Travel Rules

Some additional travel reimbursement rules:

■Alcohol must be itemized and should be charged to a discretionary account rather than to sponsored research.

■First class travel must be itemized if charged to a research account. The difference between a business class ticket and the first class ticket should be charged to a discretionary account.

■Flights may need to be US carriers if the account charged is sponsored by a Federal Agency. Check with the Research Administrative Services Office (RAS) before charging a government sponsored account.

■If a third party organization has asked your faculty supervisor to do an invited lecture, all or part of the travel expenses may be reimbursed by the organization which has invited them.

- In this case, the inviting group should be approached for reimbursement.
- The travel card should not be used if a third party organization is going to be reimbursing the travel costs.
- Try to find out who is reimbursing travel charges before you use the travel card.
- If the inviting organization is reimbursing travel costs then the faculty member should use personal funds for travel, or the third party organization should make the travel arrangements for the faculty member.
- If the travel card is accidentally charged for travel costs that are to be reimbursed by a third party organization, then they need to be paid by an MIT account (usually the faculty member's discretionary account.)   When the 3rd party organization reimburses the charges, then the check should be signed over to MIT and sent to the travel office with a copy of the expense report to reimburse the account charged for the travel.

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Travel Office Contact

Chrissy Mullin, Senior Accountant, Travel
ccopson@mit.edu
617-324-7202

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SAP

- SAPWeb and SAPgui are computer programs used to manage MIT finances. SAPWeb was created to provide staff with a more user friendly interface to complete the most common SAP tasks.

- Links to the main SAPWeb functions can now be accessed through the ATLAS interface.

- You will use SAPWeb for most things. You will likely only use SAPgui for to generate reports used for financial review and control on your faculty accounts.

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SAP - Online Training

Go to Atlas- https://atlas.mit.edu/atlas/Home.action

Click on SELF SERVICE

Click on MY TRAINING- MIT LEARNING CENTER

Click on COURSE CATALOG

Click on ADMINISTRATION

Click on FINANCIAL ESSENTIALS

Complete the Following Trainings:

- SAP Basic Skills
- SAP Financial Reporting

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Financial Review and Control

- A key component of your role is to review your faculty supervisor's accounts on a MONTHLY basis to make sure that you have receipts and packing slips for all expenses charged to the accounts. At MIT this is called Financial Review and Control (FRC).

- So, for example, you should submit your FRCs for January by the end of February. You will sign a certification that you have completed your FRC and send it to Janice McCarthy in the RAS office.

- You will need to notify any research group members who are authorized to spend on accounts to provide you with their receipts and packing slips for purchases.

- To complete financial review and control you will use SAP to print the month's Summary Statements and Detail Transaction Reports for each of your accounts. (How to do this is described in the on-line training SAP Financial Reporting)

- There is also an online tool at frc.mit.edu to help identify high risk transactions and complete frc's

- Review the expenses on this report and make sure that your have receipts and packing slips for all of these expenses.

- Keep all of your receipts as follows: For credit card purchases- 5 years. For non-credit card purchases 3 years past the end date of the grant.

- For questions on Financial Review and Control contact your RAS research administrator.

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49

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Online Training- Financial Review and Control frc.mit.edu

- IS&T Knowledge Base website
  - *FRC application FAQ http://kb.mit.edu/confluence/x/ysswCQ*
  - *FRC Application Training Guide http://kb.mit.edu/confluence/x/ScwwCQ*

- VPF website (Financial Accounting & Reporting area)
  - *FRC Policy* and *Quickguide*

- For technical assistance
  - helpdesk@mit.edu
  - 617-253-1101

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Features of FRC Tool

- The tool selects & highlights in yellow the transactions that DLCs should focus on during monthly review

Document Date	Document Number	Line Item Text	PO Number	Transaction Detail	Actual Amount	Document Review	Visual Review	Issue Identified	Resolved	Reason	Comments	Review Item	High Risk
1/8/15	0106037341	TR SC#202370186 105401WIKLUND-CREDLY			($25.00)	○ DR	○ VR	○ IS	○ RES	Select a reason... ˅		R	H
1/8/15	0106037341	TR SC#202370186 105401WIKLUND-CREDLY			$25.00	○ DR	○ VR	○ IS	○ RES	Select a reason... ˅		R	H

- These yellow highlighted transactions fall into two categories:
  - High-Risk
  - 10% random sampling

High Risk Transactions

- *All charges to blanket POs (number begins with '55') and Contract POs (number begins with '57')*

- *All Internal Billing postings – Document Type SI*

- *Journal Vouchers – Document Type SA, FY, FS*

- *Unallowable GL Account Postings*

- *Equipment GL Account Postings*

- *All lines that are over $2,500*

- *All lines in Fabricated Equipment Cost objects*

Features of FRC Tool

- Option to select:

  Document Review, Visual Review or *Issue Identified*

Document Review	Visual Review	Issue Identified	Resolved
⦿ DR	⦿ VR	⦿ IS	⦿ RES

- All yellow highlighted transactions must be Document Review (DR)
- For all others, Visual Review (VR) is sufficient
- Transactions marked as Issue Identified (IS) will remain until marked as Resolved (RES)

Features of FRC tool (contd.)

- As transactions are reviewed & saved, they are removed from the list leaving a running list of all transactions still requiring review

- Data will remain in the tool for a rolling 6-month period

- Activity for a new month will automatically appear once month is 'closed'

- Web-based evidence of FRC
  - empty inbox = 'signoff' sheet

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Contacts for Questions

- Financial Review and Control is very important because MIT could be fined if we use research funds in ways not allowed under the research grant.

- Once you complete the Financial Review and Control training please make an appointment with your Research Administrator in the MechE Research Administration Office (RAS) to discuss any questions or concerns that you may have.

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Department Finances - People to Meet With.

The department has financial staff dedicated to department accounts administration. Please schedule a time to meet with them to learn about what they do:

- Caroline Johnston, Financial Administrator

  carolin@MIT.EDU (617) 253-2239

- Joan Hutchins, Financial Assistant

  hutchins@MIT.EDU (617) 253-7332

- Colleen D'Amico, Financial Assistant

  cdamico@MIT.EDU (617) 253-2251

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Journal Vouchers

- Journal vouchers are used to transfer funds from one account to another.
- Journal vouchers may be created by going to ATLAS at:
    - https://atlas.mit.edu/atlas/Home.action
    - Clicking on the tab labeled MANAGE MONEY.
    - Click on the link to CREATE A JOURNAL VOUCHER.
- Complete the on-line training titled Introduction to Journal Vouchers:

    Go to Atlas- https://atlas.mit.edu/atlas/Home.action

    Click on SELF SERVICE

    Click on MY TRAINING- MIT LEARNING CENTER

    Click on COURSE CATALOG

    Click on ADMINISTRATION

    Click on FINANCIAL ESSENTIALS

    Complete the following online training

    - Introduction to Journal Vouchers
- For questions about journal vouchers contact: journal-vouchers@mit.edu or 617-253-2764.

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Procurement Card

- You may need an MIT corporate credit card to purchase items not available through e-cat. This is called a procurement card or procard.

- Call or email Joan Hutchins to request an MIT procurement card.

- There are strict restrictions on what can be purchased with the procurement card. A listing of what you cannot purchase using the procurement card can be found at this website:

http://vpf.mit.edu/site/sourcing_procurement/policies_procedures/procurement_card/responsibilities

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Procurement Card Verifying

- For every credit card holder there needs to be another person to verify the expenses and assign them to an account.

- Typically, support staff are responsible for taking on this role for credit cards held by their faculty supervisor.

- Verifying credit cards requires that you obtain receipts for all charges, and apply the charges to the appropriate account using your web-based procurement card inbox.

- Your procurement card inbox may be accessed using the following steps:
  - Go to Atlas@mit.edu
  - Click on Inboxes
  - Click on procurement card inbox

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Massachusetts Institute of Technology

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Procurement Card Online Trainings

Complete Procurement Card Online Trainings:

Go to Atlas- https://atlas.mit.edu/atlas/Home.action

Click on SELF SERVICE.

Click on MY TRAINING- MIT LEARNING CENTER.

Click on COURSE CATALOG.

Click on ADMINISTRATION.

Click on FINANCIAL ESSENTIALS.

Complete the following online training:

- Procard Cardholder Online Training
- Procard Verifier Online Training

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Massachusetts Institute of Technology

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Media Team- People to Meet With

Set up meetings with the following staff persons:

■Mary Beth O'Leary, Communications Officer

olearymb@MIT.EDU (617) 324-4224

■B. Harris Crist, Webmaster

bhcrist@MIT.EDU   (617) 452-3076

■John Freidah, Multimedia Specialist

jfreidah@MIT.EDU (617) 324-4876

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Large Event / Conference Planning

- The MIT Events Office is available to help you with larger events and conferences. This office can assist you with on-line registration for conferences.

- MIT has an online planning guide to assist you. Review the event planning guide at:

  http://web.mit.edu/eventguide/basicevent/index.html

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Large Event / Conference Spaces

- Event space is located at the:
    - MIT Faculty Club https://mitcatering.mit.edu/
    - MIT Endicott House.

    http://www.mitendicotthouse.org/

    - MIT Silverman Skyline Room, Winter Garden and Lecture Hall- 6th Floor Media Lab. To book send an email to: eventspace@media.mit.edu

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Massachusetts Institute of Technology

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Large Event / Conference Spaces

- Nearby Hotels:
  - Boston Marriott Cambridge
    - www.**marriott**.com/hotels/travel/boscb-boston-**marriott**-**cambridge**
  - Residence Inn Marriott
    - http://www.marriott.com/hotels/travel/boscm-residence-inn-boston-cambridge/
  - Royal Sonesta Boston
    - https://www.sonesta.com/us/massachusetts/cambridge/royal-sonesta-boston
  - Le Meridian Cambridge
    - http://www.starwoodhotels.com/lemeridien/property/overview/index.html?propertyID=3253&PS=LGEN_AA_DNAD_CGGL_TPRP
  - Hyatt Regency Cambridge
    http://cambridge.hyatt.com/en/hotel/home.html?src=agn_smg_hr_ppc_google_ss_propertyspecific_bosrc_hyattregencycambridge&fund=fs&keywordtype=brand&mckv=sCNJDrt2H_dc|pcrid|11994362007|mtid|3944cfd18966|
  - Hotel Marlowe
    - http://www.hotelmarlowe.com/

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Massachusetts Institute of Technology

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Conference Rooms

- The department has a variety of conference rooms for meetings. Several of these may be reserved using the department website via the following steps:
  - Go to the MechE. Home page.
  - Click on the tab titled MechE resources on the right top side of the page.
  - Click on the link titled Resource Reservations.
  - Click on the link titled Enter the MechE Resource Reservation System.
  - Put in your first name as login and password.
  - On the left hand side of the screen there will be a link titled Bookings. Click on this and it will give you a listing of conference rooms and the schedule for booking them.
- In addition, conference room 5-020 may be booked by writing on the paper calendar hanging outside the door.
- Conference rooms in the Hatsopoulos lab may be booked by contacting Sean Buhrmester at fatsean@mit.edu 617-324-7456 .
- The Given Lounge may be booked by contacting Laura White at whitela@mit.edu (617) 252-1490.
- A listing of conference rooms held by other departments may be found at:

  http://web.mit.edu/registrar/classrooms/reserve/other_space.html

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Reserving Classrooms for Events and Meetings

- Classroom space may be reserved for one time events such as thesis committee meetings or thesis defense.

- Classroom space may be reserved through the MIT Schedules Office by completing a web-form and submitting it to them at the following link:
  - http://web.mit.edu/registrar/classrooms/reserve/depts/index.html
  - Click the link for the semester in which you are reserving space.
  - Fill out the web-form.

- You can view pictures of all of the classrooms on the classroom inventory visual room finder page.

  http://registrar.scripts.mit.edu/visualroomfinder/

Department of Mechanical Engineering
Massachusetts Institute of Technology

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MIT Alcohol Policy

- Any on-campus events where alcohol will be consumed must be registered with the events office.

- This involves obtaining an event registration form at the information center office Bldg. 7 Rm. 121 and completing it.

- This form requires multiple signatures so please give yourself adequate time before the event to complete it.

- The sponsor of the event must be a faculty member. Additionally the event sponsor must sign off on an event sponsor form, which may also be obtained at the info center office Bldg. 7 Rm.121.

- A licensed bartender must be employed to serve alcohol at events on campus.

- Most caterers offer bartenders. Alternatively, a bartender may be hired by using Premiere Bartending Service - www.premierbarservice.com .

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MIT Audio Visual

- Our IS&T representatives are normally available to assist you in setting up AV for presentations etc... Please contact them several days in advance of your presentation at   me-help@mit.edu.

- MIT also has an audio visual department available to assist with any AV requests you may have.   They also store a wide array of audio visual equipment to meet any need. However, they do usually charge a fee for their services payable by an MIT account. MIT AV can be contacted at the following website:

   http://studentlife.mit.edu/av

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Commencement

- In May, the events office will open registration for commencement.

- Check with your faculty supervisors to see if they will be walking in commencement, if they will need guest tickets, and if they will need to rent their regalia or if they own their regalia.

- If they will be attending, register them for this event and reserve regalia for them.

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Website

- The Mechanical Engineering Website is: http://meche.mit.edu/ Review the website to learn more about the department. The *People* section of the website has photos of faculty and staff which may help you to get to know people.

- Harris Crist is the department's webmaster and responsible for department website design. If you have questions about the website contact him directly.

- Each faculty and staff member has a profile page. To edit your profile page, follow the following steps:
  - Log into the website using Touchstone by the "Edit My Profile" link in the footer, or through the "Resources" link in the slide-out menu.
  - After returning from Touchstone, you will see links to the edit pages of you, and your faculty supervisors. Going to these pages will allow you to edit the page.

- Faculty members often have their own websites, which describe their laboratory and research program in more detail. Locate websites for your faculty supervisors' labs. You may be required to update and edit your research group's website. A good resource for assistance with this is http://ist.mit.edu/web/reference .

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Communications, Branding, Templates and Printing

- Mary Beth O'Leary is the department communications officer and she writes content for the website, designs departmental newsletters, writes articles for the MIT News Office, and manages department social media.

- If your faculty supervisor would like coverage of a news item you should contact Mary Beth. She can also help you publicize events that your faculty supervisors are coordinating.

- John Freidah is a media specialist who is producing videos for the department to highlight faculty and student research discoveries.

- MechE templates for letterhead, and business cards can be found on our website at https://meche-res.mit.edu/resources/templates/.

- Additional business card and letterhead templates can be found at http://web.mit.edu/graphicidentity/downloads-stationery.html

- Special print jobs may be done at MIT Copy Tech located in Bldg. 11 Rm. 004. However there is a charge for Copy Tech services so you will need to provide them with an account number to charge.

- http://copytech.mit.edu/location-hours/main-campus

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Information Services & Technology

- In addition to our IS&T representatives, MIT has an entire IS&T department. They are responsible for computer services and telephone services on campus.

- The IS&T help desk can assist you if you have computer or phone problems and our IS&T representatives are not available.

- MechE's IT team can be reached at me-help@mit.edu. The help desk may be contacted at: helpdesk@mit.edu   617-253-1101

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Laboratory Safety

- Each department has extensive lab safety training required for persons working in laboratories.
- When new researchers join your research group they will be required to take appropriate safety training.
- The staff person who oversees this for our department is Daniel Herrick, Environmental Health and Safety Coordinator.
- Make an appointment to speak with Daniel Herrick to discuss Environmental Health and Safety Basics. He may be reached at herrickd@MIT.EDU (617) 253-2338
- If you have any lab safety concerns, Daniel Herrick is the person to contact.
- New researchers should be referred to Daniel Herrick for instructions on what safety trainings to take.
- Review the department's safety website at:
- http://mecheehs.scripts.mit.edu/home/

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Facilities Service Requests

- If you have a need for facilities- repairs, cleaning, pest-control, new keys or security access etc… you can submit the request via ATLAS.

- Follow the following steps to submit your request:

- Go to https://atlas.mit.edu/

  - Click on the link titled Campus.

  - Click on the link titled Service Requests- Create Request.

  - Choose the kind of request.

  - Complete the service request form.

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Parking

- The department's parking coordinator is Janice McCarthy. She acts as a liaison with the MIT Parking Office and helps coordinate parking sticker renewal.

- If your faculty supervisor has a question about his or her parking sticker contact Janice McCarthy.

- If you need a guest parking pass you can obtain one yourself via ATLAS. Go to https://atlas.mit.edu
  - Click on Campus.
  - Click on Parking.
  - Click on Reserve Visitor Parking.
  - Complete the visitor parking form.
  - The website will generate a parking pass which you can save as a PDF and email to your guest. Your guest will need to put the PDF on their dashboard when they park at MIT.

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Faculty Annual Review

- Every year faculty are required to submit documents to support their annual performance review.

- These materials are due by mid-January, and include:

  - Annual Report

  - Faculty Personnel Record (FPR)

  - Curriculum Vitae (CV)

  - Copy of most significant paper from the calendar year.

- Materials will need to be submitted to Marion Gross, Faculty Affairs Administrator. Please contact her for copies of the forms for the annual report at meg@mit.edu. Ask your faculty supervisors for the most recent versions of their faculty personnel record and CV.

- Prior to the mid-January deadline, you will want to meet with your faculty supervisors to review these documents and update them.

- Note, your faculty member may be asked for the FPR, CV and copies of papers at other times of year to help support awards nominations and other important HR functions. You should make an effort to update these regularly.

Department of Mechanical Engineering
Massachusetts Institute of Technology

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eFPR

- The School of Engineering Dean's Office is wanting all faculty in the School of Engineering to migrate eventually to a web based eFPR. You will need to complete and update the eFPR for your faculty members.

- The eFPR can be accessed at the following website https://efpr.mit.edu/

- Note: you will need to ask your faculty supervisors to give you access to their eFPR.

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Research Centers / Laboratories

- The research administrative services office (RAS) manages the finances for research grants given to individual researchers within the department.

- However, sometimes MIT receives a large grant to start a research center or laboratory involving multiple faculty members, sometimes from many different departments. These grants are managed within the research center or laboratory.

- Your faculty supervisors may have accounts managed by one or more of these research centers.

Department of Mechanical Engineering
Massachusetts Institute of Technology

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Research Centers / Laboratories

- Examples of some research centers that Mechanical Engineering Faculty often have accounts with include:
    - KFUPM- Contact is Kate Anderson – Assistant Director

        kateand@MIT.EDU (617) 324-6543

    - ISN- Contact is Maureen Caulfield- Financial Assistant

        mcaulfie@mit.edu (617) 253-0663

    - CMSE- Contact is Susan Dalton- Assistant Director

        sdalton@MIT.EDU   (617) 253-7632

    - S3TEC- Contact is Keke Xu, Administrative Assistant

        kekex@mit.edu (617) 253-2201

- You may be required to submit FRCs to these centers as well as to RAS. They may even require that you provide them with copies of all of your receipts for purchases made on their accounts.

- If your faculty supervisor has research accounts within centers, contact the center and ask them what kind of backup and documentation they will require from you. If you are unsure whether an account is managed by RAS or a Research Center, ask your RAS administrator.

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OSP, Grant Management, Submitting Grant Reports and Proposals

- The MIT Office of Sponsored Programs (OSP) is a central office which manages the grant application process and the grant management process.

- RAS works closely with the OSP to manage your faculty's research grants.

- You may be called upon by RAS to work with faculty and students to make sure that grant reports are compiled and completed on time. However, RAS will be more actively involved in working with your faculty member in the grant application and extension process.

- OSP has created a comprehensive series of trainings which explain in detail about grant management at MIT. It would benefit you to take these trainings to learn about the grant management processes.

Department of Mechanical Engineering
Massachusetts Institute of Technology

Grant Management Online Training

- Take the OSP STARweb Trainings:

  Go to Atlas- https://atlas.mit.edu/atlas/Home.action

  Click on SELF SERVICE.

  Click on MY TRAINING- MIT LEARNING CENTER.

  Click on COURSE CATALOG.

  Click on ADMINISTRATION.

  Click on SPONSORED PROJECTS AND PRACTICES.

  Complete the following online training

    - STARweb 1: Overview
    - STARweb 2: Cost Principles
    - STARweb 3: Direct Costs
    - STARweb 4: Proposal Process
    - STARweb5: Project Start Up/Monitoring
    - STARweb 6: Cost Transfers
    - STARweb7: Salary Distribution
    - STARweb8: Equipment & Sponsored Program

Department of Mechanical Engineering
Massachusetts Institute of Technology