Business Process Advisory Group – October 14, 2016 – INSCC Room 110

Attending:

Angela Simmonds, COS  Anna Alindogan, FBS
Ashley Hsia, FBS  Brian Allen, BIOCH
Carl Larson, FBS  Cole Sims, FBS
Craig Merritt, FBS  Danny Trujillo, NURS
Dave Bardsley, PHARM  Dean Church, FBS
Denny Cushing, FBS  Diana Sperry, BIOCH
Fred Ericksen, IA  Frederic Hon, HU
Glendon Mitchell, FBS  Hedy Hu, FBS
Holly Cox, ECE  Jake Pickett, SOM
James Steffan, MBM  Jared Olney, PED
Jeff Johnson, FBS  Jenn Green, CFA
Jennifer Long-Pratt, FBS  Jim Turner, EIHG
John Levandowski, FBS  Jolene Snyder, FBS
Jordan Burr, FBS  Joshua Nutter, CHEM
Judy Chan, FBS  Julie Woodward, FBS
Kay Willden, BIOCH  Kaylee Vo, FBS
Ken Erickson, FBS  Kori Wetsel, FBS
Kristie Thompson, OSP  Kristin Gelegotis, RBGA
Kristy Green, CA  Linda Jensen, OPHTH
Lois Barlow, SOM  Lynn Dixon, CE
Marcia Cook, CSME  Maria Nielsen, FBS
Mark Patterson, FBS  Martha Knowlton, SEIS
Marv Hawkins, USS  Michelle Addison, MUSIC
Neha Kataria, NBA  Niloofar Bakhti, EHSL
Nora Ishihara, KUED  Robert Allen, FBS
Robert Goodman, RBGA  Rose Simper, ED
Sandra Jones, UNFA  Sandy Drollinger, PHS
Sara Wilson, METE  Scott Patten, FBS
Shelley Kruger, PI  Stacey Oliver, FBS
Stephanie Muranaka-Astle, FBS  Sterling Moore, CE
Susan Krantz, CCTS  Tami Garff, PI+AT
Tanis Garcia, COMP  Taralyn Poulson, FBS
Terrie Parker, CMES  Theresa Ferrone, KUED
Tiffany Baires-Nielson, COE  Utahna Miller, DESB
Victoria Medina, MPA
**Last Meeting Follow-up**

A new version of ePAR has been released.

**Contract Management Software System Announcement**

*Total Contract Manager* (TCM) has been implemented by the Purchasing department. TCM is a central repository for all procurement related contracts. TCM provides electronic access to your department contracts, features a quick search function, as well as reporting capabilities. TCM also has the ability to preset notifications in advance of a contract expiration date to allow sufficient time to finalize a new contract.

Please read this [news post](#) regarding TCM.

Please send your contracts to Purchasing using [this form](#).

**Shopper Training for New PCard Applicants**

UShop training as a shopper is now required for all new PCard applicants. This requirement became effective August 15, 2016. This will help PCard users know of options available when making a purchase.

**Chip Cards Coming in November**

PCards will now have the new chip card technology. The new cards will start arriving in November.

**Sending Invoices to AP**

Invoices should now be sent to Accounts Payable. The vendor can send the invoice directly or the department can send it to AP via campus mail or email (preferred). Emails should be sent to ap@admin.utah.edu. [Click here](#) for Presentation, this is covered on pages 22-32.

**Invoice Approvals**

Invoice approvals are done in UShop using established approval workflow. Invoice approvals work like requisition approvals.

- Approval against invoice, not PO
- Approval by Account Executive or Approved Alternate
- Approve or Reject only –No dollar amount required

[Click here](#) for Presentation, this is covered on pages 34-37.
LPO’s are now PO’s

What do we use today instead of LPO’s?

- Just plain UShop POs
- Manual Distribution POs
- Print & Carry POs

Click here for Presentation, this is covered on pages 2-20.

Print & Carry – Print PO’s for approved local suppliers

Local Vendors have been set up for “Print & Carry” PO’s. This is created in UShop, printed and carried to the approved local vendor. This is only for specific local vendors identified in UShop. Click here for Presentation, this is covered on pages 13-20.

Manual Distribution

Manual Distribution occurs when no reliable address or contact has been provided for sending POs.

- Reasons for Manual Distribution configuration include:
  - No response from supplier regarding contact information
  - Multiple salespeople servicing the U
  - Supplier does not have means of receiving electronic POs
  - Supplier requires orders to be agreed upon in-person

Click here for Presentation, this is covered on page 10.

Employee Reimbursements

An electronic form is being created to replace the Payment Request form used for Employee Reimbursements. This form will use GFA workflow, allow attachments and will be paperless. The reimbursement to the employee will be on the next scheduled paycheck.

Open Discussion

Amazon purchases can now be made in UShop. UShop Shoppers and Requisitioners must be set up to use Amazon in UShop. Read this article about this fantastic opportunity and a link to sign up.

Next BPAG Meeting —December 9, 2016