

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

Attending:

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

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