



Quarterly Newsletter  
for Financial &  
Business Services at  
the University of Utah

# Momentum

July  
2012



## In this issue

New Associate Director **P.2**

Free WiFi at other  
Universities **P.3**

Phishing Fraud **P.6**

Small Business  
Spotlight **P.7**

Elevator Construction **P.10**

## Environmentally Preferable Purchasing

### *Little Decisions Make a Big Difference*

*Contributed by Matthew Boerke – EPP Intern, Office of Sustainability*

Each year, the University of Utah and its affiliated organizations spend approximately \$13M on personal computers and laptops. The institution spends over \$100K on office paper alone. Our collective purchases not only affect our budgets but also have a lasting impact on people and the planet. Therefore, the Office of Sustainability has added a position to coordinate a project examining Environmentally Preferable Purchasing (EPP) at the University of Utah.

Our existing EPP Guidelines encourage employees to buy socially and environmentally responsible products when price and functionality requirements are also met. However, due to our university's decentralized buying process, many faculty and staff are either unaware of our EPP guidelines or do not know how they can use their purchasing power to make the campus more sustainable.

As a result, this project has three goals:

- 1) By speaking with PCard holders, departmental buyers and key stakeholders, we will outline our current EPP procedures. Then, we will identify ways to assist campus buyers to purchase more environmentally friendly products in the future.
- 2) We will use the expenditure data collected to benchmark and set purchasing goals based on financial, environmental, and operational considerations.
- 3) Our final report will foster discussion to adopt campus-wide EPP policies in order to meet the targets published in the University's Climate Action Plan.

We will collaborate with individuals from University Information Technology, Purchasing, General Stores, Office of Sustainability, Energy Management Office, Environmental Health and Safety, the Campus Store, and others to guide the end result of this project. Look for an update and deeper analysis of the actual data in the next Momentum newsletter.

If you have questions or comments, please contact me at [M.Boerke@Utah.edu](mailto:M.Boerke@Utah.edu) or 801-585-9352.



The University of Utah is a member of the [Association for the Advancement of Sustainability in Higher Education \(AASHE\)](#).

Their website is another good resource for sustainable purchasing in Higher Education.

*Note: you will need to set up a free registration to access this site.*

## Environmentally Preferable Purchasing, continued...

### *Incorporating environmental and social factors into purchasing choices- via the Office of Sustainability*

Individuals at the U who make purchasing decisions, whether faculty, staff, or students, must follow existing university policies and procedures to be careful stewards of financial resources.

In most cases, that still leaves plenty of opportunity to choose environmentally preferable products and suppliers over comparable products with fewer environmental or social attributes.

How do you judge a product by characteristics other than price? Quality and durability are measures that can distinguish similar products that may not be "apples to apples" when one is judged to last longer or perform better.

Research shows that increasing numbers of consumers wish to buy ecologically friendly products, but face several challenges in doing so. The five main barriers identified in a [2007 survey](#) include:

- lack of awareness;
- negative perceptions;
- distrust;
- high prices; and
- low availability.

Fortunately, there are many resources to help you overcome these barriers. The [Find Green Products](#) section is a good place to start for tips and ideas.

## Notable Changes

### **New Associate Director, Purchasing**

Glendon Mitchell, C.P.M., CPPO

Glendon joined the Purchasing team in May 2012 and will work with the PCard program, Small Business program, efforts to identify procurement savings opportunities (commonly called strategic sourcing), Request for Proposals and University and State of Utah relations. He previously worked for Salt Lake County as Associate Director in Contracts and Procurement.



His experience also includes working as a Purchasing Agent at the State of Utah Division of Purchasing. Private sector experience includes work as a buyer for a grocery distribution company and purchasing and management for a retail chain. He is one of three individuals in the State of Utah with professional certifications from both the Institute of Supply Management (Certified Purchasing Manager) and National Association of Governmental Purchasing (Certified Public Purchasing Official). Glendon looks forward to working with you on your procurement needs and can be reached at 801-587-3784 or [gmitchell@purchasing.utah.edu](mailto:gmitchell@purchasing.utah.edu).

# Momentum

July  
2012

## **COMPUTERS, SUPPLIES AND PERIPHERALS**

### **STATE OF UTAH CONTRACTS – ‘PC STORES’**

*Contributed by Glendon Mitchell; Associate Director, Purchasing*

Effective **July 1, 2012**, the State of Utah has awarded new contracts for computer supplies and peripherals. Two new suppliers have been added to a group of four contract providers while one of the former suppliers was not awarded a contract.

Users should review the contracts online at: [www.purchasing.utah.gov](http://www.purchasing.utah.gov) prior to using these new contracts as there are some changes from the prior agreements.

One of the notable changes is the exclusion of software purchases as separate software contracts exist. Complete copies of the contracts may be viewed at: [www.purchasing.utah.gov](http://www.purchasing.utah.gov) then State Contracts.

The information for the four contract suppliers is located in the sidebar to the right.



## **Traveling? Access Free, Secure Wi-Fi on Partner Campuses**

*Contributed by Jessica Wishnie-Stokes, University Information Technology*

The University of Utah now offers traveling students, faculty, and staff the advantages of Eduroam — secure wireless Internet access while visiting participating campuses.

When traveling, use your University of Utah ID (uNID) and password to access wireless Internet at other eduroam schools, including: the University of California system, Cornell University in New York, Tulane University in Louisiana, and many more worldwide.

Visit [The Eduroam Website](#) for maps listing participating institutions and more information.

Before you travel, set up your laptop, tablet and phone. For instructions, visit the [UIT Website](#)



**En Pointe Technologies**  
Contract #MA258  
*Randy Everett*  
866-457-1381  
[E-mail](#)

**Gov Connection**  
Contract #MA259  
*Kirby Welch*  
800-800-0019  
X75546  
[E-mail](#)

**SHI**  
Contract #MA257  
*Dan Pressley*  
801-230-9584  
[E-mail](#)

**Valcom Salt Lake City**  
Contract #MA256  
*Trent Eckman*  
801-262-9277  
801-716-4402  
[E-mail](#)

If you have questions regarding the purchasing of computers or related items, please contact Bob Tiney

801-581-6596  
[E-mail](#)



## Financial & Business Services

University of Utah



**Campus Store**  
801-581-6326  
[Website](#)

**General Stores**  
801-581-8671  
[Website](#)

**Purchasing**  
801-581-7241  
[Website](#)

**Travel Agency**  
801-587-9005  
[Website](#)

# Process Spotlight

### Automation of Sales Tax Reporting

A new Sales Tax Reporting tool has been developed and is currently being tested. When testing is complete, the tool will replace the current manual process departments use to submit sales tax to General Accounting each month.

This automation will improve the quality of the Sales Tax process; eliminating risks associated with the current manual process as well as saving 15 hours of manual data entry and review each month. If you have any questions about the Sales Tax Reporting tool or sales taxes in general please [contact Tax Services](#).

### Keep it on campus – Purchasing Apple Products

*Contributed by Perry Hull, Accounts Payable*

Many of the reimbursements we receive in this office are for Apple products purchased by employees at the Apple Store in Gateway or Fashion Place. Although some items, like phones, are not available at the Campus Store, many items for which we reimburse, such as MacBooks and iPads can be purchased right here on campus using a Campus Order.

There are many advantages to purchasing from Campus Store, but what about price? To answer this question I enlisted the help of Auxiliary Services, who helped obtain pricing information for thirty-six individual Apple items which appeared on the reimbursements we processed. For each item, Campus Store pricing was identical to the price when purchased directly from the Apple Store, and in some cases the Campus Store price was lower. In no case was the Campus Store more expensive.

Each employee reimbursement we process for purchases at the Apple Store includes sales tax, while purchases made from Campus Store are tax exempt. Other obvious advantages are: support of the UKIC (U Keep It On Campus) initiative, reduced driving across town, Campus Store purchases are electronically charged directly to your department – reducing paperwork while increasing efficiency, and the Campus Store even provides a delivery service! Although there is currently not a mandate to require that departments use Campus Store for these purchases, please encourage individuals to explore this option.



# Momentum

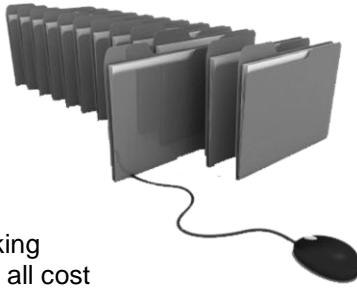
## P.A.M. Initiative

### **PAM Update**

*Contributed by Bob Turner, P.A.M. Project Manager*

The PAM initiative is in full swing in the following areas:

#### **Recent accomplishments:**



- Grants and Contracts Accounting has begun booking Accounts Receivable and recognizing revenue on all cost reimbursable (non-Letter of Credit) new and outstanding invoices. They will be posted to account 15300 (Accounts Receivable) located on the balance sheet in the Management Report.
- The project team has established a set of approximately 30 budget categories to budget and track research project dollars. This will better align to sponsor categories, facilitating a more efficient award setup process and more consistent fiscal management. The new categories will be visible with go-live of the PeopleSoft Grants Suite scheduled for December 2012.

#### **Projects currently underway:**

- The PeopleSoft Grants Implementation Team is finishing up the Design phase. Detailed business processes, system modifications, and reports are being designed and documented. GCA, OSP and others are in the process of standardizing and cleaning up data to get ready for the implementation go-live of the PeopleSoft Grants Suite.
- Future delivery of electronic management reports as they will work after the implementation is still in the planning and production stage. The plan is to discontinue the paper copy report and implement an online report. Areas under study are the use of a summary report for review sign-off and a simple way to print off the reports for departments that still want a paper copy.
- Creation of a new in-quarter payroll reallocation process is in the planning stage. This would include a Quarter-to-Date Effort Distribution Report similar to the PAR reports. The goal is to have this available by the 2<sup>nd</sup> quarter of FY13.
- We are reviewing several post award processes for opportunities to streamline and reduce the overall administrative burden to researchers across campus.

*The Project Administration and Management (PAM) project is a campus initiative to provide high quality support to researchers, facilitate and enable the growth of research, and establish a means for accurate decision-making for researchers, staff, and administrators.*

*Watch for future updates and progress reports as we move forward with this initiative.*



# Purchasing Card

## Fighting Phone and Phishing Fraud –

Contributed by Brandon Hunt, PCard

When a merchant has a breach in security or if unusual activity occurs on a PCard account, the JP Morgan Fraud department may contact cardholders to verify the validity of recent charges. We appreciate your caution in giving out card information. We also realize the necessity of cooperating with authorized bank representatives in resolving questions on certain transactions.

### Phone Calls

If you receive a call asking for identifying account information and are unsure if the call is authentic, simply disconnect the call and immediately call the customer service number located on the back of your card or the Fraud Department number, which is 1-888-297-0778 and explain the situation. You may also contact our PCard program, at 581-7241 for information on your account activity and status.



### Phishing

Fraudulent emails (phish) and websites can be very sophisticated, and may look identical to JPMorgan Chase emails and websites. Fraudsters can even tamper with the sender information in an email to make their phish look even more legitimate.

## ***Fraudsters use various tactics when phishing, here are some common things to look out for:***

### Awkward greetings

A phish may address the customer with a nonsensical greeting or may not refer to the customer by name.

### Typo

This isn't because fraudsters don't know how to spell – it's so the phish won't be blocked by email filters.

#### *Examples:*

"Acessed" "Our SSL security severs has..." "fradulent"

### Incorrect grammar

Another tactic used to bypass email filters.  
Example: "Our SSL security severs has..."

### Misspelled company name

Another tactic used to bypass email filters.  
Example: "JPMorgenChaseBank (s)"

### Strange or unfamiliar links

Although a link looks official, notice what happens when a mouse cursor hovers over it. The link's source code points to a completely different web site. Remember that you can always type a URL into your web browser instead of clicking on a link.

### Compelling or urgent language

An urgent need to communicate with you for your own security, or a request to update your information immediately.

#### *Examples:*

"We recently contacted you after noticing an issue on your online account, which has been accessed unusually."

"Our security department has requested information from you to verify your identity for your online banking."

July  
2012

# Momentum

## Small Business Spotlight

*Contributed by Randi Ruff, Small Business Liaison*

### **Valley Services, Inc.**

Valley Services was incorporated as a non-profit in 1992 to develop an affirmative business enterprise providing professional maintenance services and competitive employment careers for individuals with mental illness and behavioral health challenges. At least 70% of the jobs are filled by challenged workers. Rehabilitation for many employees is achieved through working in a normal work environment. Company operations are provided in Salt Lake, Tooele and Summit County. Valley Services provides a valuable civic service to our community by hiring employees who are challenged. Through employment these individuals gain independence and self-sufficiency, gradually requiring less need for public and medical assistance. Employment empowers disabled workers to take increasingly greater control of their lives and to enjoy improved self-image and participate in the everyday activities of life. The benefits of employment extend far beyond the individual, enhancing the lives of family members and the larger community. The corporation is directed by an independent board of directors composed of local business executives and community leaders. New businesses are evolving and self-sustaining through customer revenue.

*Products/Services Offered: Custodial, building maintenance, painting, bio-hazard clean up, grounds, snow removal, dietary, catering, vending, document imaging/shredding, and employment service.*

Valley Services, Inc. is a certified Small Disadvantaged Business 8(a) through the Small Business Administration, and also a Member of Utah Supplier Development Council.

### **Universal Systems, Inc.**

Universal Systems, Inc. started in the PC business in 1989. Since then Universal has evolved into a full service organization, committed to users of high quality computer equipment at cost effective prices. Since its beginnings, Universal's revenue has consistently increased each year. From production members to sales representatives, the dedicated professionals at Universal work as a team to make this growth a reality, by providing quality products and the highest level of service to every customer. Universal prides itself on excellent service that lets the customer know they are the top priority. Universal is constantly pushing the envelope in technology as well as service ensuring clients maintain their leadership role in the ever changing computer industry.

*Products/Services Offered: Computer hardware and software.*

Universal Systems is a Small Minority-owned Businesses, and also a Member of Utah Supplier Development Council



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City, UT 84106

801-484-9151

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[www.usicomputer.com](http://www.usicomputer.com)

Contact Bob Tiney in the  
U of U Purchasing  
Department for  
assistance

801-581-6596

[E-mail](#)



July  
2012

# Momentum

## FBS Community

Financial and Business Services is proud of all our employees who enroll in college-level or professional development courses to improve their work skills and their lives. General Stores has chosen this publication to highlight the accomplishments of two of their long-time employees.

### **General Stores & Receiving – Momentous Achievements**

*Contributed by Jim Davis, Stores & Receiving*

Suzanne Bradley, who is an office assistant and has worked for General Stores for over 15 years, earned her associate's degree in Business Management from Salt Lake Community College this year. She was able to accomplish this while raising a family and working full time at General Stores.

Eric Christensen, who has been a warehouseman and is currently a vehicle operator and has worked for Central Receiving for over 15 years, earned his Bachelor's degree in Information Systems from the David Eccles School of Business at the University of Utah this year.



### ***Are you wondering about the District Staff Excellence Awards?***

**The winners will be announced by Vice President Combe at the awards luncheon on July 19!**

***Please join us in congratulating the following FBS employees for their length of service:***

#### **5 Years**

Pam Holland (August 27); Associate Accountant,  
Payables Production

#### **25 Years**

Clifton Grindstaff (July 1); Manager,  
Support Services

#### **35 Years**

Barbara Nielsen (September 6); Associate  
Director, Compliance Accounting and  
Reporting

# Momentum

July  
2012

## \$Y\$ Happenings

### Auto-Numbered Forms

Contributed by Carl Larson, Financial Solutions

Auto-numbered forms are used by Financial & Business Services. Using auto-numbers ensures that each form is unique. After a transaction, it is easier to do research on that transaction if the user has a number for the submitted form.

Auto-numbered forms are created in Adobe Acrobat Professional using JAVA to create the auto-numbered feature. Because scripts written in JAVA react differently to browsers and the multitude of different computer configurations on campus, sometimes the forms do not provide a number. Consider the following if auto-numbered forms are not working for you.

### Operating Systems

Auto-numbered forms will work on both Windows and Macs. Keeping the operating system updated with the latest updates is critical for the forms to work. Windows 7, 64 bit, does not work with the forms as delivered from Microsoft, but will work if all the latest patches are applied.

### Browsers

Auto-numbered forms will work with Internet Explorer, Firefox, Safari and Google Chrome. Using the latest updates of these browsers is very important. Clearing cache and cookies is another way to keep your browser running smooth. Google Chrome has worked very well with the auto-numbered forms.

### Pop-Up Blockers

Pop-up blockers can also prevent the forms from opening. Adding [\\*.utah.edu](http://*.utah.edu) to your allowed sites in your pop-up blocker configuration will solve this issue.

### JAVA

The auto-numbered forms will not work unless JAVA is installed on your computer. Keep your JAVA installation up-to-date.

### Adobe Reader

Adobe Reader (or professional) must be installed for the auto-numbered forms to work properly. It is recommended to use the latest version for your operating system. The form must be set to open inside the browser for the auto-numbering to work properly.



If you have any questions, Ask Us!



Look for the Lifesaver icon to report any System concerns!

A *training module* is available that gives more detail about these topics!

There are step by step animations of how to set up your computer, along with other useful information about using the Auto-Numbered Forms.

[Access the presentation here!](#)





# IMPORTANT MESSAGE



## Mail Distribution During Elevator Construction

Contributed by Jane Bushnell, University Print & Mail Services

The Park Building elevator construction project scheduled for Monday, July 16 through mid-September 2012 will impact both United States Postal Service (USPS) and campus mail delivery to the various floors of the building.

The following protocol has been established to manage mail distribution during this period.

### Delivery Protocol:



- A secure lock box, with department specific key access, will be installed on the first floor, just outside of the ACS entrance.
- Campus mail will deliver all inbound mail to the lock box between 10:30 and 11:00 a.m. each day, at which time they will pick up all outbound mail from the same box.
  - All outbound mail will be processed and distributed to campus the following morning.
- Direct delivery service from USPS will be postponed until the elevator project is complete. The USPS will route all Park Building mail to campus mail for sorting and distribution with the regular campus mail delivery run. All mail received from the USPS will be delivered the morning after it is received.

Over the next few weeks, a Campus Mail service team member will be contacting each department to issue a key, provide lock box training and answer any questions.

Please feel free to contact me at 801-581-6003 or Juan Sosa at 801-580-7792 with any questions prior to or after training.



## Communicating with U



## FBS Serves U

- Commitment to Communication
- FBS Training
- FBS Regulations
- Mission, Vision & Values
- Momentum Newsletter
- Org Chart

## Tools for U

