Agenda Items

Guest Speakers

Patty Brophy – Travel Services – *An overview of the UK Travel Services Program was presented, including the objectives of the program, the current UK travel vendors, the Concur On-Line Booking Tool and the benefits of using the UK travel, as well as the recent policy changes regarding airfare reimbursement. The power point and the "dashboard" documents are attached as handouts and include a great deal of helpful travel information, including cost comparisons, airline tickets, hotels, rental cars and insurance. The Travel Services Office is a great resource for travel issues and concerns, especially for unusual circumstances. Patty is always willing to assist departments in any way she can. The TRIP module (electronic submission of travel vouchers) will be coming in the fall. If any department wants to be included in the pilot program of TRIP, please contact Mary Fister-Tucker.*

Megan Lucy – Faculty Hiring – IES Requirement – *Effective July 1, 2015, all full-time faculty hires are required by the Provost to go through HR IES.*

1. **Procurement & Travel**

   a. FY15 Year-End Close Guidelines – *A spreadsheet of the major year-end deadlines for the college was included in the handouts. Also in the handouts were some year-end reminders that were extracted from the Fiscal Year End Training document, which can be found in its entirety at: http://www.uky.edu/EVPFA/Controller/files/YearEndTraining.pdf and a helpful sheet on accruals is also included in the handouts. There is no change in the accrual procedures from what was done in the past couple of years.*

   b. BPE Form & Guidelines – *The BPE form was revised on April 2, 2015, to reflect the new travel policy regarding cost comparisons. A BPE is no longer required for failure to secure a valid cost comparison, as the reimbursement will be based upon historical airfares as explained in BPM E-5-1. Remember to refer to the form and college guidelines on the Business Center web site (under College Forms).*

   c. Procurement/Purchasing Notes – *Included in the handouts is an overview of some Purchasing reminders, some upcoming changes in the SRM shopper training, and some information about punch-out catalogs.*

   d. Advance Approval Form – *With the recent revisions in the discretionary policy (in February 2015), the college updated their advance approval form. The most significant change was the removal of professional dues and memberships, which no longer require discretionary funds if the membership is appropriate for the individual's position and duties and if it benefits the university. This revised form should be used; all previous versions may be discarded. This form is also under "College Forms" on the business center's web site.*

   e. SAP/BW Training Plan – New Procedures – *The SAP quick reference guide for the new procedures was included in the meeting handouts. It can be accessed through the business center's web site, under FAQ's and Quick Reference Guides. The group was reminded that all training plans in the college should be submitted using these guidelines. No one should send their training plan directly to the Provost Budget Office or to the EAG training team. They should all be submitted to Chris Shotwell. Contact Kim King if you have questions about training plans.*

2. **HR & Payroll**

   a. Affordable Care Act – *This federally mandated program is effective July 1, 2015. All eligible employees (with a combined FTE of .75 or greater) will be contacted by email and a letter to their home informing them of the open enrollment during the month of June to sign up for health insurance. STEPS employees are the largest group of affected individuals. However, all departments should make sure that all FTE's for their employees are up to date. There will be town hall meetings relating to this beginning June 1.*

   b. Cell Phone Allowance Forms for FY16 – *All cell phone allowance forms for FY16 are due in to Christine Tawasha by May 22, 2015.*

3. **Other**

   a. New Staff Introductions – *Mary Hammons has joined the Vet Sciences department; and Maggie Chaparro*

NEXT MEETING: Wednesday – August 12, 2015 @ 9:00 am (Gorham Hall, Good Barn)

has joined the Plant & Soil Sciences department.

b. FY16 Meeting Schedule – *A list of upcoming UG meeting dates was included in the handouts.*
c. Sign-In Sheet
d. Relay meeting info to other departmental staff

http://acsg.uky.edu/AgBusOff/

COLLEGE OF AG ADMINISTRATIVE USER'S GROUP

May 20, 2015
9:00 am

E.S. Good Barn, Gorham Hall

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UK TRAVEL SERVICES

Travel Services Program Training

Patty Brophy
Director, Travel Services

phone 257-1284
patty.brophy@uky.edu
www.uky.edu/travel

Objectives of UK Travel

1. To provide duty of care - tracking of UK travelers, and provide assistance to them while traveling

2. To provide cost savings, efficiencies and flexibility for UK travelers when arranging travel

3. To provide data to the University to enable the realization of cost savings and revenue enhancement benefits

4. To provide data to Lexington's Blue Grass Airport to improve air service for the community

UK Travel Vendors

AAA Corporate Travel Services
- UK's lead full-service travel agency (air/hotel/car)
- Arranges business and personal travel
- Administers Concur online booking tool
- Consolidates travel data
- Contact - (859) 323-5354 (campus number)

Avant Travel
- UK's second full-service travel agency (air/hotel/car)
- Arranges business and personal travel
- Contact – (859) 233-0000

UK Travel Vendors

Concur Online Booking Tool (administered by AAA)

- 24/7 online booking tool for air, hotel, rental car

- Industry leader in customized booking systems

- First time users: go to www.uky.edu/travel, click "Concur", click "First Time Users", register and build traveler profile

- Returning users: login at www.concursolutions.com

- Help Desk (877) 463-0543

Caution with International Air: Simple roundtrips to major international cities are easy on Concur, but multi-destination travel/travel to obscure locations is best handled by a AAA agent.

Booking through UK Travel

Traveler Profile

- Collection of data about traveler, used to build travel records with AAA, Avant and Concur

- Keep profiles updated – especially credit cards and cell phone numbers

- Profiles also required for travel arrangers who use Concur

- AAA and Concur profiles created on Concur

- Avant profiles created manually (contact Avant)

Booking through UK Travel

Payment for Business Travel Airline Tickets
- Preferred method - UK Procurement Card
- Optional method - personal credit card

Payment for Combined Business/Personal Tickets
- Required method is personal credit card
- Airfare cost comparison required for business travel only – must be secured through Concur, AAA or Avant on day ticket is issued (see BPM E-5-1)
- UK reimburses lesser of either actual fare paid or business travel cost comparison airfare

Booking through UK Travel

Payment for Hotels

- Preferred method - UK Procurement Card

  - Hotel guarantee (for late arrival) – procard can guarantee reservation for anyone

  - Hotel payment – procard must be in name of guest, unless prior arrangements (before guest arrives) have been made with hotel to authorize payment with another procard

- Optional method - personal credit card

Booking through UK Travel

Payment for Rental Cars

- Preferred method - UK Procurement Card if card is in renter's name

- Optional method - personal credit card

- Additional insurance for domestic rentals not reimbursable (only reimbursable for international)

- Motor Vehicle Record required for all drivers on UK business (see Risk Management's website)

Booking through UK Travel

Service Fees

- AAA and Avant agent-assisted fees
  - $29 domestic ticket
  - $39 international ticket
  - $5 hotel or car with no air in record

- Concur
  - $9 domestic/international ticket
  - $5 hotel or car with no air in record

- Service fees will not be voided or refunded for cancelled tickets, hotels or cars.

Booking through UK Travel

Service Fees (cont'd)

- Air service fee is incurred each time a ticket is issued (or re-issued).

- On Concur, if a credit card is declined during auto-ticketing, the reservation is processed by a AAA full service agent for the higher $29/$39 service fee - could also result in higher airfare if traveler is unable to be contacted for new card.

> **To avoid a higher fee/airfare,** ensure credit card is valid in profile before beginning a Concur reservation.

Benefits of UK Travel

1. AAA Corporate Travel Services and Avant Travel – dedicated 24/7 full-service travel agencies for air, hotel and rental car arrangements

2. Concur Travel - 24/7 online booking tool (AAA)

3. Risk management tracking – visibility of travelers during emergencies

4. Consolidated travel data for realization of cost savings, spend analysis, vendor negotiation, air service improvement.

Benefits of UK Travel

5. Competitive airfares - guaranteed lowest fare in the market at time of ticketing

6. Delta & United discounts – *available only through UK Travel*

7. American Airlines free ticket program

8. National, Enterprise, Hertz, Avis rental car discounts

9. Use of procard to purchase airline tickets

10. Ticket voids – until 11:00 p.m. next business day

11. Downgrades - ticket reissued if fare drops

Benefits of UK Travel

12. Quality control for lower fares, waitlist clearings, schedule changes

13. Group travel – usually for 10+ flying together

14. AAA's/Concur's unused ticket credit management

15. AAA's Service Recovery Program with Delta

16. AAA's program with FlightStats for flight status change notification

17. Complimentary $200,000 accidental/death insurance

Alternate Travel Vendors

An alternate vendor is any travel vendor other than UK's AAA, Concur, or Avant Travel. Examples – ABC Travel, Delta.com

- Ticket must be purchased with personal credit card.

- Airfare cost comparison must be run from Concur on same day as ticket is purchased, showing similar travel parameters (or for business travel parameters only, when combining business with personal travel). For complex international, AAA or Avant can be used for comparisons. (BPM E-5-1)

FY14 total ticket count – 13,237
- 12,858 (97%) tickets through UK Travel
- 379 (3%) tickets through alternate vendors

Airfare Comparison for Drivers

1. Provide airfare cost comparison from Concur if one-way mileage to destination is 400 or more miles (BPM E-5-1). Run cost comparison 3 weeks before travel (consistent with when flyers buy airline tickets).

2. Prepare "Travel Air vs. Auto Cost Comparison" worksheet (found on Forms site).

3. Request reimbursement for either the air expenses or auto expenses from worksheet, whichever is less.

Travel Policy Changes to E-5-1

- **Business Class Allowed** when travel requires uninterrupted flight service of 8 hours or more. Fee-based seat assignments are also acceptable to allow additional comfort.

- **Seat Charges** related to securing a confirmed seat assignment will be reimbursed.

- **Invalid Cost Comparisons** do not require an exception request for approval. Submit voucher to A/P, and historical airfares will be researched for the lowest fare traveler would have been eligible to receive. Reimbursement may be reduced.

UK Travel Services Program Benefits, Impact & Opportunities

Program Benefits for Traveler

- AAA Corporate Travel Services & Avant Travel – 24/7 support for air, hotel, rental car arrangements, and travel issues enroute; quality control for lower fares, waitlist clearings, schedule changes; $29/$39 service fee for domestic/international tickets
- Concur – 24/7 online booking tool for air, hotels and rental cars; administered/supported by AAA; $9 service fee for tickets
- Risk management – visibility of travelers and assistance during states of emergency
- Guaranteed lowest fare in the market at time of ticketing
- Delta & United discounts on all domestic and some international tickets
- American Airlines free airline tickets – distributed to campus
- National, Enterprise, Hertz and Avis rental car discounts
- Use of UK procurement card for University business travel airline tickets
- Ticket voids until 11 p.m. next business day after ticket is issued – saves airline change fees
- Ticket automatically re-issued for cost savings if fare drops
- Group travel for 10+ flying together – guaranteed space, negotiated ticket price, flexible rules, $20 service fee per ticket
- $200,000 accidental/death flight insurance from AAA and Avant
- Travel data collection – provides management tool to departments; improves vendor negotiations and air service at Blue Grass Airport; analyzes cost savings/lost savings, travel spend, and travel trends

Program Impact FY 2013-2014

Savings through UK Travel Ticket Pricing*	$ 625,938
Other Delta Contract Savings	14,947
American Airlines Free Tickets	11,440
Rental Car Contract Savings	9,660
AAA & Avant Contract Savings	20,695
Voids - 464 Voids @ Airline Change Fee	92,709
Total Program Savings	**$ 775,389**
Service Fees – AAA/Avant Agents	(210,810)
Service Fees – Concur	(52,537)
Total UK Travel Program Impact	**$ 512,042**

UK Travel vs Alternate Vendor Tickets FY 2013-2014

	Air Sales	Tickets		Avg. Price
UK Travel Domestic	$ 5,350,662	11,284		$ 474
UK Travel International	1,856,089	1,571		1,181
UK Travel Business Class	17,101	3		5,700
Total UK Travel	**$ 7,223,852**	**12,858**	**97%**	**$ 562**
Alt. Vendors Domestic	$ 144,659	286		$ 506
Alt. Vendors International	120,170	93		1,291
Total Alternate Vendors	**$ 264,766**	**379**	**3%**	**$ 699**

Additional Benefits through AAA and Concur

- Unused ticket credit management – system to ensure credits do not expire
- AAA's Delta Service Recovery Program – helps to offset expensive last minute airline changes and bookings
- Fly America compliant itineraries identified on Concur by small American flag – applicable to tickets purchased with federal grants
- Partnership between AAA and global FlightStats – provides instant communication to UK travelers of any changes affecting travel itinerary to include schedule changes or flight status

Program Opportunities

Lost savings of $20 per ticket for not using Concur for all domestic tickets	$ 130,860
Lost savings ≥ $250 Difference between airfare paid & lowest offered airfare (UK Travel does not require traveler to purchase lowest fare)	$ 148,860
Lost savings by not purchasing all tickets through UK Travel	$ 51,837

* During FY 2014 Delta Air Lines provided discounts on tickets purchased valuing $136,361 ($103,251 on tickets originating from Bluegrass Airport), United Airlines provided discounts on tickets purchased valuing $11,580 ($6,525 on tickets originating from Bluegrass Airport). In addition to these savings, the overall UK Travel Program average ticket price of tickets originating from Bluegrass Airport (excluding Allegiant Airlines), was $91.45 less than the average ticket price for all Bluegrass Airport tickets (excluding Allegiant Airlines). The *Savings through UK Travel Ticket Pricing* amount above is calculated based on the Delta and United Airlines discounts and the overall savings on the average ticket prices paid for flights from Blue Grass Airport of $91.45, net of the related contract discounts.

COLLEGE OF AGRICULTURE, FOOD & ENVIRONMENT
FY15 YEAR-END CLOSING SCHEDULE
(MAJOR DEADLINES)

Due Date	Type	Business Transaction
5/22/2015	Req/ PO	Shopping carts/requisitions for equipment and supplies on price contract and will be delivered prior to July 1.
6/1/2015 (noon)	Travel, SPV, DR	Travel vouchers, SPV's and DR's related to expenses incurred prior to June 1 are due to Business Center.
6/1/2015 (noon)	Pro Card	Pro card edits for April transactions are due by noon.
6/1/2015 (noon)	JV	JV's for services and corrections for all activity posted prior to June 1 are due to Business Center.
6/1/2015	Req/ PO	Shopping carts/requisitions for small dollar purchases for commodities.
6/18/2015	JV	JV's for services and corrections for all activity posted June 1 - June 15 are due to Business Center.
6/18/2015	Travel, SPV, DR	Travel vouchers, SPV's and DR's related to expenses incurred June 1 to June 15 are due to Business Center.
6/26/2015 (noon)	Cash Receipts	Cash transmittals for **gifts** on hand through June 26 are due to **Office of Advancement**.
6/30/2015 (noon)	Vacation Accrual	All vacation and temporary disability leave taken June 30 or earlier must be entered in SAP.
6/30/2015	Cash Receipts	Cash transmittals for **gifts** on hand through June 30 are due to **Office of Advancement**.
7/1/2015 (11:00am)	Cash Receipts	Cash transmittals for (**non-gift**) cash on hand through June 30 for Lexington locations are due in Treasury Services by 11:00am.
7/1/2015 (noon)	Pro Card	Pro card edits for May transactions are due by noon.
7/1/2015	JV	JV's for services and corrections for all activity posted June 16 - June 30 are due to Business Center.
7/2/2015	PO/Goods Receipts	Online confirming/receiving for all goods and services received prior to or on June 30 must be posted by 4:30 pm.
7/2/2015 (noon)	Travel, SPV, DR	Travel vouchers, SPV's and DR's related to expenses incurred June 16 to June 30 are due to Business Center by noon.
7/5/2015	Ledger Sheets	Online June preliminary ledger sheets and detail transaction reports available for viewing.
7/8/2015	Pro Card	Pro card edits for June transactions are due. This is the last day to edit and post old year pro card transactions.
7/8/2015	JV	All JV corrections to June ledgers (excludes capital projects and grants) are due to Business Center.
7/12/2015	Ledger Sheets	June ledgers after corrections available to campus.

University of Kentucky Fiscal Year End

For the Year Ending June 30, 2015

Preparing for Year End (cont'd)

➤ Be sure ALL employees are aware of deadlines
  ○ Faculty and administrators know to turn in travel receipts immediately
  ○ Custodians need to reimburse imprest accounts for all old year expenses
➤ Contact sub-contractors and other vendors to stress importance of prompt receipt of invoices
  ○ Notify them early that invoices through May 31 must be received by the University by June 30 and June invoices by July 30. If not final billing, the June invoices should be in by July 11th
  ○ Follow up promptly if not received
  ○ Late invoices can imply lack of financial management; departments must stress the importance to the institution
  ○ Have clinical trial billings and revenue current thru May 31
  ○ Estimates may be necessary (but not for grants)

Purchasing

- Receiving
  - July 2 – cutoff for purchases received by June 30. Be sure to have personnel available to receive in SAP!
  - Z_MMEBAN can assist in managing requisitions
- Encumbrances
  - Z_MMOPEN identifies open purchase orders.
  - Contact Purchasing to release encumbrances on open orders
  - Open regular encumbrances will carry forward to new year
  - Contact your business officer if you have general questions about encumbrances
- Invoices for purchase orders
  - Forward to Accounts Payable immediately if department receives

Other Information

- Clearly mark documents as OLD YEAR or NEW YEAR
- All old year documents MUST have June 30 as posting date
- Don't put old year and new year transactions on the same journal voucher or PRD
- Use SAP transaction KSB1 to review transactions on cost centers
- To review transactions on grants, use the BW ledger report "PI summary – GL account detail" with drilldown capability or the SAP transaction S_ALN_01000003
- Be patient with new year transactions – they may not be processed as promptly as usual while old year is open
- A full list of SAP transactions is available at http://myhelp.uky.edu/rwd/HTML/TCodes.htm

Other Information (cont'd)

➤ New capital project establishment forms must be received in General Accounting by June 24

➤ Non-recurring budget transfers must be posted by appropriate budget officer by July 10

➤ Overdrafted restricted gift cost centers will be cleared to central area cost centers by GA on July 20. Your dean will appreciate it if you clear them before that date.

➤ Cost center balances through period 13 for restricted gifts, renewal and replacements, etc. will be carried forward on July 17 and period 14 balance will be carried forward on August 14

➤ July close tentatively scheduled for August 5

➤ More information is available for each OT department on the Office of Treasurer web site:
http://www.uky.edu/EVPFA/Controller

Accruals

Please be aware that we need to ensure that all revenues and expenditures are recorded accurately and in the year they were earned or incurred. Accruals are one mechanism that allows us to ensure we are able to record all revenues and expenses appropriately. Below is some general information regarding accruals:

Expense Accruals:
- *Accounts Payables* – used when goods or services are purchased and received before July 1, but for which payment has not been made to the vendor by June 30.
    - Ex: Travel for an employee is completed on June 28, but reimbursement to the employee will not be made until sometime in July.
    - Accruals will be automatically set up based on invoice date for all transactions received in Accounts Payable by July 30 and on PO's when receiving is done by July 2.
        - **Pro Cards:** If the charge does not show up on OLD YEAR for editing but for which the goods have been received before July 1, a payable should be requested.
        - **SRM:** If no invoice has been received by July 30, a payable should be requested.

- *Prepaid Expenses* – used when goods or services are purchased and paid for before July 1, but for which the good or service will not be used until after June 30.
    - Ex: Registration for a conference is paid on June 25, but the conference will not be held until August 15.
    - Prepaid expenses should be recorded regardless of fund source but only when the amount exceeds $5,000.

Revenue Accruals:
- *Accounts Receivables* – used when goods or services are provided before July 1, but for which payment has not been received from the customer by June 30.
    - Ex: Lab testing service provided on June 25, but payment from the customer is not expected until July 15.
    - Accounts receivables should be recorded regardless of amount or fund source.
    - An aging of the accounts receivables should be provided and reviewed to determine if write-offs are necessary

- *Deferred Revenues* – used when revenues are received before July 1, but for which the goods or service will not be provided until after June 30.
    - Ex: Revenue from customer for attendance in a workshop is received on June 25, but the workshop will not be held until July 25.
    - Deferred revenues should be recorded regardless of amount or fund source.

In order to request one of these accrual entries, send an email to Kim King along with the following:
- ✓ description of the item that needs accrued
- ✓ account number and G/L the accrual needs to be posted to
- ✓ amount
- ✓ vendor, PO#, etc
- ✓ brief description as to the need for the accrual
- ✓ any supporting documentation (copy of invoice, PRD, TV, estimate, etc)

UNIVERSITY OF KENTUCKY
REQUEST FOR EXCEPTION TO BUSINESS PROCEDURES

1. For complete instructions, refer to Business Procedures Manual Section E-1-2 prior to requesting an exception.
2. Exceptions cannot be granted for laws, contract provisions, or restrictions imposed by donors and sponsors.
3. Fill out form completely, attach documentation, and obtain required signature(s). Examples of documentation - airline ticket receipt, or copy of contract requiring payment at time of service when requesting pick-up of checks for speakers.
4. Email form to: Treasurer@uky.edu . Alternatively, it may be faxed to: (859)257-4805

Date: _____   **Request for:** Exception ☐   Blanket Exception ☐

Department Name: _____   **Department #:** _____

WBS Element (if applicable): _____

Exception is requested for the following policy (check all that apply):

Travel Related (Business Procedure E-5-1)

Traveler Name:_____UK Person ID:_____Amount Requested: _____

1. Airline ticket purchased through alternate vendor must be purchased with personal funds ☐
2. Reimbursement amounts for foreign lodging is limited to federal per diem rate (advance approval required) ☐
3. Reimbursement request must be submitted to Accounts Payable and paid within 60 days of travel return date. ☐
4. Other travel (describe):

[ ]

Note: Cost Comparison Non-Compliance Exceptions are not necessary for failure to secure valid cost comparison as reimbursement will be based upon historical airfares as explained in BPM E-5-1.

Other:

5. Payroll charges may not be transferred after retroactivity date ☐
6. Checks must be mailed (if check pick-up is requested, include the person's name who will pick it up in the justification) ☐
7. Other (describe): ☐

[ ]

Justification for Request (explain why exception should be granted/why policy was not followed):

[ ]

a) **Include scanned copies of travel voucher and all documentation when requesting exception after travel has occurred.**
b) **If requesting approval for a preventable situation, include department procedures put into place to prevent a recurrence.**

Contact Information:

Name: _____

Email Address: _____Phone Number_____

Approval(s):

Traveler signature: _____   Date_____

Business Officer (signature):_____(printed)_____   Date_____

Administrative, Provost, EVPHA or EVPFA (when required): _____   Date_____

Office of the Treasurer: _____   Date_____

Collier, April R

From:	List of UK Campus Business Officers - IRIS Communication <UKBUSOFCRCAMP-L@LSV.UKY.EDU> on behalf of Beck, Ronda <ronda.beck@UKY.EDU>
Sent:	Thursday, April 02, 2015 2:03 PM
To:	UKBUSOFCRCAMP-L@LSV.UKY.EDU
Subject:	Exception Form
Attachments:	Request for Exception.pdf

The exception request form has been revised. Please delete any copies you have saved on your desktop and use the attached form or the one now loaded on the e-forms page. . It is also linked within BPM E-1-2. It has been updated to assist with timely processing for certain travel non- compliance issues.

TRAVEL POLICY
Travel policy was updated in January. Changes included the following language: Failure to submit a valid cost comparison may result in your reimbursement being reduced to the historical lowest airfare in the market. **Therefore, there is no longer a need to submit an exception request when there is not a valid cost comparison**. Our Director of UK Travel Program has the ability to pull up historical fares and will make the determination on the amount to reimburse. This is for all instances where a cost comparison is needed and individual failed to secure a valid cost comparison as defined in policy:

- When used an alternate vendor
- Determining reimbursement limit when driving over 400 miles
- Combining personal with business travel

Questions can be directed to Mary Fister.

****
****

To self enroll to this list serve, follow instructions below.

Send e-mail to LISTSERV@lsv.uky.edu with the following text in the message body:

subscribe UKBUSOFCRCAMP-L *Yourfirstname Yourlastname*

The subject line should be blank as well as the rest of the body of the email. We encourage you to forward this to anyone in your area who needs to keep informed about business procedure updates and SAP financial news.

New Format for Shopper Training through *my*UK

Persons who register for SRM Shopper Training through *my*UK will soon complete a different course format. The revised format will consist of a four-part module of "mini-courses" as follows:

- SRM_SHO_300 Shoppers Introduction
- SRM_SHO_301 Punch-out Catalogs
- SRM_SHO_302 Free Text Carts
- SRM_SHO_303 Supplementary Information

Each course is smaller and will more effectively promote the learning process. The entire module can still be taken in one sitting if the employee prefers.

The new module is currently being loaded into *my*UK Employee Self-Service for training and should be available in late May. Related information on the Purchasing website will be updated concurrently with the loading of the new module.

Notes For OFFICE MAX Purchases

➢ All Office Max orders (for supplies and furniture) should be placed through the SRM purchasing system.

➢ Procurement cards should **never** be used to purchase Office Max items on-line. Nor should they be used at the local store except in very rare extenuating circumstances (for example: an item for which you can't wait until the next business day is needed to complete a job).

Extension for Requirement of VWR e-Catalog

After meaningful discussions with various University departments, the requirement to transition to the SRM e-procurement system for laboratory purchases from VWR International has been extended until **August 1, 2015**. End-users who currently use the University procurement card for purchases from VWR or Fisher Scientific may continue to do so during this time to allow for processing of Training Plans and completion of the Shopper curriculum through *my*UK Employee Self-Service.

After August 1, all purchases from VWR or Fisher Scientific will be restricted from the procurement card. VWR purchases will be required through the SRM e-catalog (or ECC Requisition for areas that have not transitioned to SRM).

Update on *my*UK Shopper Catalogs

Additional e-catalogs are planned for loading to the *my*UK Shopper tab along with VWR and the forthcoming catalog for Fisher Scientific-exclusive items.

Online e-catalogs for both Steelcase and Herman Miller furniture are currently under development and scheduled to be available in early summer. The catalogs will house full furniture lines from each supplier. See April 2015 Purchasing Newsletter for more details.

COLLEGE OF AGRICULTURE, FOOD & ENVIRONMENT
ADVANCE APPROVAL REQUEST

Date of Request: _____

Dept Number: _____

Dept Contact: _____
(Dept Contact Name & Phone Number)

Select Type of Expenditure:

☐ Alcohol*

☐ Sporting/Event Tickets*

☐ Gifts to Friends/Donors
Select category below:
    ☐ Appreciation*
    ☐ Memorial*
    ☐ Special Occasion*

☐ Meals/Refreshments/Special Activities *(>$1,000)*:
Select category below:
    ☐ Departmental Social Event*
    ☐ Faculty Orientation/Reception
    ☐ Planning/Administrative Meeting
    ☐ Public Relations Activity*
    ☐ Retirement*
    ☐ Student Orientation/Reception
    ☐ Workshop/Conference
    ☐ Other _____

Estimated $ Amount: _____

Cost Center/WBS: _____

Date of Activity: _____

Location of Activity: _____

Purpose of Activity:

[   ]

REQUESTED BY:

_____
Chair/Director   Date

APPROVED BY:

_____
Ag Business Center   Date

APPROVED BY (as required):

_____
Dean, College of Ag   Date

* Indicates discretionary funds are required for this expenditure

1. On the myUK Launch Pad, click on "myHelp" at the lefthand side of the screen.

Launch Pad	Employee Self Service	Enterprise Services	my UK	myR
IRIS Systems				

IRIS Systems

◄│►│

Related Links ▬

LaunchPad

- Active Directory Accounts
- myHelp
- IRIS Project
- Business Warehouse
- Campus Management
- Faculty Effort System
- Grants Management
- Human Resources/Payroll
- Materials Management
- Plant Maintenance
- Finance

From here you can select a syst

IRIS

Training Sandbox

2. Click on "Training Plan Request Form".

myHelp Home	myUK	IRIS Training	IRIS Home

Training Plans

Training Sandbox

Reports

T-codes

WBT Courses

Budget Help

BW Help

FES Help

IRIS myHelp

myTraining Center Information

Access Requirements

Course Evaluations

IRIS Transaction Codes

IRIS/BW Reports

IRIS Wednesday Presentations

Training Plan Request Form

Training Sandbox Request Form

3. In Section 1, enter chris.shotwell@uky.edu in the empty box (shown below) and then tab to the next section.

1. Approver/Area Security Officer

Based on the submission guidelines stated in the **Form Instructions** section above, enter the appropriate e-mail address in the field below.

Refer to the table below for the appropriate e-mail address. This is the address the form will be sent to when submitted.

A training plan for SLCM access ONLY must be submitted directly to IRISSupport@uky.edu by the employee's designated College Contact.

chris.shotwell@uky.edu   ✕

UK Department Number begins with...	Approver/ASO Delegate	E-mail Address
H* or G*	Patrick Ballard	patrick.ballard@uky.edu
1* or 3* or 9*	Anthony Russell	anthony.russell@uky.edu
4*	Toni Smith	toni.smith@uky.edu
7* or 8* (Excluding 7H* and 81* - See below.)	Susan Wang	susan.wang@uky.edu
7H* (College of Medicine)	Trish Polly	trish.polly@uky.edu
81* (College of Ag, Food, and Environment)	Chris Shotwell	chris.shotwell@uky.edu

4. In Section 2, you will enter today's date in the date box and then select the appropriate employee category for the user. You may add optional notes in the "Comment" box (normally utilized for removal of a user's access or roles, but can be used for other purposes).

2. Reason for Training Plan

Enter the start/effective date and select the appropriate reason for submitting this training plan. Additional comments and/or special instructions can be noted also.

Start/Effective Date: (mm/dd/yyyy)

◉ Brand New UK Employee

○ Current Employee - New Position

○ Current Employee - Same Position - New/Additional Access

○ Rehired/Reinstated Employee

○ Access Removal ONLY (List all access to be removed in the **Comments/Special Instructions** field below and do not select anything in the **4. Course Selection** section.)

○ Other (Explain in the **Comments/Special Instructions** field below.)

Comments/Special Instructions: (Maximum length = 500 characters)

5. In Section 3, enter the <mark>department business officer</mark> in the "Requestor Information". Any requests received that have not been submitted by the department business officer will be returned. Also enter all employee information in this section.

3. Requester and Employee Information

Complete all requester and employee information. Any training plan received with incomplete information will be returned for re-submission. Again, the Requester **must** be the employee's Business Officer or designated College Contact.

Requester Information
Name:

E-mail Address:

Employee Information
Name:

Link Blue ID: (i.e. jdoe222)

Person ID:

Personnel Number:

Position Number:

Position Title:

UK Dept Number: (i.e. 3J510)

E-mail Address:

6. In Section 4, you will select each course/role selection that the user needs, using the drop-down menus when necessary and paying close attention to the notes in red. Any questions about which courses are needed should be directed to Kim King in the Ag Business Center. NOTE: There are many more courses than appear in this screenshot.

4. Course/Role Selection

Select the appropriate course(s)/role(s) required for the employee's job responsibilities.

General Courses

☐ **SOR** Statement of Responsibility **(One time requirement for all users!)**

☐ **UK_100** IRIS Awareness & Navigation

Business Warehouse (BW) Courses

BEx-Web Reporting Courses:

Please choose the appropriate BEx-Web Reporting Course: ⌄

☐ **BI_BOBJ_200** Business Objects for End Users

Financial (FI) Courses

☐ **FI_200** Finance Overview

7. In Section 5, you will click on the "Submit" button to submit the training plan to the Ag Business Center for approval and processing.

5. Training Plan Submission

Please verify that **all** sections of this form have been completed accurately, and then click on the SUBMIT IRIS Training Plan Request Form button below.

Any training plan received with incomplete information and/or insufficient approvals will be returned for re-submission.

Once IRIS Training has received and processed this training plan request, a confirmation e-mail will be sent to all employees listed on the form.

Caution: The **RESET Form** button will clear all fields and selections.

| SUBMIT IRIS Training Plan Request Form | RESET Form |

8. The user will receive an email notification when the training plan has been approved by the EAG training team.

AG USER GROUP
MEETING DATES FOR FY16

August 12, 2015

November 11, 2015

February 10, 2016

May 18, 2016

❖ **All meetings will begin at 9:00am and will be held in Gorham Hall, E.S. Good Barn, unless otherwise notified.**

❖ **Please make arrangements for at least one person from your department to attend every meeting.**

❖ **Any topics you wish covered at these meetings should be emailed to Kim King or Le Anne Herzog.**