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Purchasing Newsletter – June 2018

End of Fiscal Year 2017-18 Approaching

Just a reminder that the end of the Fiscal Year is quickly approaching. The Purchasing Year-End Memo, available on our [website](#), conveys procurement deadlines related to end of fiscal year closing. If useful, a larger document, FY 2017-18 Closing Schedule, as issued by University Financial Services is available on the [UFS website](#) and encompasses all business transaction types for the entire University.

A document is available on the Purchasing website for [Frequently Asked Questions \(FAQs\)](#) for procurement-related activities associated with fiscal year-end closing. SAP reports ZMM_BA_RPT (Business Analysis Report) and Z_MMEKPO (Open PO Report) are available to assist with reviewing purchase orders or open encumbrances. Step-by-step help guides are available for each report on the Purchasing [website](#).

For goods and services physically received during the current fiscal year, the most important factor is that Goods Confirmations are created in a timely manner as outlined in the Year-End Memo. Otherwise, the purchase order will transfer to FY 18-19 funds. Review and closing of open/unused encumbrances is also key to year-end best practices.

Email UKPurchasing@uky.edu for additional information of a general nature or SRMHelp@uky.edu for questions specific to e-procurement or Shopping Carts. You can also request closing of PO encumbrances via either email address.

Forthcoming Vendor Self-Service Application

A new web-based, onboarding application soon will be available for new vendor registration and updates. The University has contracted with PaymentWorks to provide a customized platform for vendors to register to do business with the University. Vendors will also be able to update address and profile information as needed. The new web-based platform will replace the current paper-based University Vendor Application process. PaymentWorks utilizes Single Sign-On (SSO) capability allowing departmental end users to login directly to the application using their UK ID and password. Departments will be able to initiate an invitation to a vendor to register as well as see status of their vendors as they progress through the onboarding process. The platform will be synchronized with the University's vendor database allowing users to perform real-time vendor searches for existing vendors.

More information, including learning opportunities, on the new platform will be forthcoming later in June. The transition to PaymentWorks as the University's vendor onboarding application is planned for July 1.

Healthcare e-Catalog For Office Depot

A new Office Depot e-catalog specifically for hospital areas and departments is now available within the Supplier Relationship Management (SRM) system. The e-catalog contains items specifically approved for hospital users and based on the healthcare formulary. By using the e-catalog in SRM, order placements and invoicing are electronic; procurement card and related

card edits are not required. Departments will also have access to line item reporting for ordered items.

Training for the Shopper role is online within myUK. Completion of a training plan is the first step to receive the Shopper role. Access to the Training Request Plan and related information is available [here](#). A learning session is planned specifically for hospital users who order office supplies; more information will be forthcoming soon for hospital end-users.

Additional Office Depot Account Representative

In addition to Keith Hughes, Office Depot provides a second sales representative to service the University's account. Tom Handorf is also available to assist with questions on orders, products, delivery, etc. for the University. Tom can be reached via email at tom.handorf@officedepot.com or phone (513) 814-2175. Keith Hughes (keith.hughes@officedepot.com) continues to be the primary account representative for the University.

New Purchasing Staff

Two new employees have joined the Purchasing staff:

Aaron Stevens is now employed with the Hospital Purchasing staff as a Contracting Officer I and located in Pav A-Chandler Medical Center. Aaron previously worked for Materials Management within the hospital. He can be reached at 257-8892, email ast278@uky.edu.

Oliver Whitehouse has transferred to the Purchasing Division from the College of Arts and Sciences. He is employed as a Price Contract Coordinator Senior and serves as a team member to Contracting Officers. Oliver is available at 257-9103, email whitehouse.o@uky.edu.

Upcoming System (SRM) Outage

Information Technology Services (ITS) will conduct technical maintenance on the Supplier Relationship Management (SRM) system that will require SRM to be offline and unavailable during Friday, June 22nd @ 5:00pm until Monday, June 25th @ 8:00am.

Outage Window: 06/22/2018 5PM to 06/25/2018 8AM
Services Impacted: SAP SRM Shopping Cart, PRD, Goods Confirmations.

Uniform Guidance Information

Several sessions remain available for information on Uniform Guidance requirements for federal and state sponsored projects. Uniform Guidance takes effect July 1 and applies to purchases against federal or state funded projects. Remaining staff-oriented sessions are below:

- June 11, 9:00 a.m. WT Young UKAA Auditorium
- June 20, 9:00 a.m. Plant Science Building Auditorium
- June 26, 2:00 p.m. 220 Multi-Disciplinary Science Building

For those who cannot attend, an informational PowerPoint file is available [here](#). Uniform Guidance for federal and state grant purchases takes effect July 1.

Changes In AP Quick Reference – PRD To Shopping Cart

A Purchasing Listserv communication was distributed during May relating to change of purchase methods for the below product categories from that of Payment Request Document (PRD) to SRM Shopping Cart/SAP Requisition. Based on further review of the changes and their

implications for federal Uniform Guidance requirements and related business processes, the use of the PRD will be made available along with that of SRM Shopping Cart/SAP Requisition throughout the month of June. Departments may use either method for processing these purchases until July 1. Additional information will be made available later in June. For questions in the interim, parties can email UKPurchasing@uky.edu.

Awards - Employees	Recruitment Expenses
Awards - Students	Research Subject Payments
Editing publications or articles	Speaker, visiting or Guest Lecturer
Entertainment	Training services performed by individuals
Honoraria	Travel - Guest Expenses
Proofreading publications or articles	Writing publications or articles

New Customs Broker for Overseas Shipments

CJ International now serves as the University's official customs broker, replacing the former brokerage under Walter Meuter Inc. Sandy Rice (srice@cjinternational.com) and Shannon Alexander (salexander@cjinternational.com) are the account representatives assigned to the University's needs. They can also be reached by phone at (502) 380-8400. As the University's customs broker, CJ International is authorized to act on behalf of departments in conducting overseas shipments (inbound or outbound). They also serve as the University's freight forwarder.

University Surplus – Expanded Checkout Hours

University Surplus has expanded its hours for faculty and staff to review and checkout available items for their departments. The facility is now open Tuesday, Wednesday, and Friday from 8:00 a.m. to 11:30 a.m. / 12:30 p.m. to 4:00 p.m. for University employees to review available items. University Surplus is located in the Reynolds Building on Scott Street.

Purchasing Frequently Asked Questions

Question: How do I handle transactions involving demonstration equipment and/or other no-charge (free) items?

Answer: From time to time, departments may benefit from no-charge (free) line items on a supplier quote or a supplier may offer to provide equipment on a demonstration basis prior to purchase. Although these may seem insignificant, they represent tangible transactions that carry accountability.

For no-charge (free) line items on a quote/order: Enter the line item description as you normally would for any purchase. Since SRM Shopping Carts/SAP Requisitions will not accept zero dollar line items, enter the price as \$.01. Place an internal header note on the Shopping Cart/Requisition that the order contains one or more no-charge items. The Purchasing Buyer can mark the item as free (\$0.00) during purchase order conversion.

For demonstration equipment: Suppliers occasionally may offer to provide demonstration equipment to a department as part of try-before-you buy sales efforts. This is typically more common within scientific and technical areas with the equipment being on premises for an extended time. The steps for entering into a demonstration equipment transaction are the same as for a standard purchase. Obtain a demonstration quote or other documentation from the supplier and enter a Shopping Cart/Requisition. Indicate in the header notes area that the order is for demonstration equipment. The supplier terms should also include how long the equipment will be on demonstration loan, where it will be located, who is responsible for delivery/pickup costs, and a statement that item(s) are covered by the supplier's insurance. As indicated above, use

\$.01 cost for the item(s) on the order. The Purchasing Buyer will process a no-charge purchase order for the demonstration order. Keep in mind if a department decides to proceed with full purchase of equipment currently on demonstration loan, this does not avoid the purchase requirements based on the Kentucky Model Procurement Code or other regulatory provisions.

Self-enroll to Receive Purchasing ListServ Notifications:

Follow these instructions to self-enroll to the Purchasing ListServ and receive procurement-related updates and news. Send e-mail to LISTSERV@lsv.uky.edu with the following text in the message body:

subscribe UKPURCHNEWS Yourfirstname Yourlastname

The subject line should be blank as well as the rest of the body of the email. You may unsubscribe in the same manner, by changing "subscribe" to "unsubscribe" and following the remaining directions.