CAMPUS BUSINESS OFFICERS  
March 13, 2014  
President’s Conference Room  
Sikes Hall

The Campus Business Officers Group met on Thursday, March 13, 2014, at 8:30 a.m. in the President’s Conference Room, second floor, Sikes Hall. Present: Steve Crump, Associate Comptroller, presiding; Tony Dickerson, Student Affairs; Regina Taylor for Christina Bedenbaugh, Engineering & Science; Jimmy Barnes, Business & Behavioral Science; Stanley Richardson & Kathy Gibson, Research; Valerie Jones for Leigh Dodson, Agriculture, Forestry & Life Sciences; Jacqui Stephens, Architecture, Arts & Humanities; Regina Carroll, Health, Education & Human Development; Melissa Kelley, Public Service Activities; Chris Wood, Academic Affairs; Amanda Powell, CCIT; Tammy Crane, Cooper Library; Erin Thomas, President/Board/Finance; Sharon Littlejohn for Graham Neff, Athletics; Jessica Holbrooks for Mike Sultan, Advancement, and Cathy Tillett, Director Internal Audit. Absent: Todd Barnette, Facilities.

Staff present: Virginia Baumann, Budget Director; Clint Carlson, Director Related Organizations; Scott Pigeon and Penni Douglas, Procurement Office; Roberta Elrod, Director, Grants & Contract Administration; John Mueller, Customer Service-Human Resources; Beverly Leeper, Cost Manager; Amy Goodin, Enterprise Risk Manager; Kathy Dively and Jake Kransteuber, Office of the VP for Fin and Ops.

I. Welcome & Introductions (Steve Crump)
Steve welcomed business officers and asked newcomers to introduce themselves. Cathy Tillett introduced Janet Lollis who is the Admin in her office. Valerie Jones representing CAFLS, Jessica Holbrooks representing Advancement, and Jake Kransteuber in the Office of the VP for Fin & Ops introduced themselves.

II. FY15 Internal Audit Plan Requests (Cathy Tillett)
Cathy Tillett invited business officers to send requests for areas they would like internal audit to review in FY15. She will also be sending emails to Deans and Vice Presidents asking them if there are any areas they would like audited. Cathy requested business officers send her their recommendations by the end of the month.

III. Demo of buyWay$ New Look & Features (Scott Pigeon)
In March buyWay$ will have a new look which has been named Phoenix. The Phoenix Layout will allow users to configure any site page as their homepage. Main Menu Options will be located on the left side of the screen. The Menu Search feature will allow users to search for specific screens and functions. The User Menu is located in the top banner. Other new user options are the ability to bookmark pages, an action item list, notifications to alert you of activity or something that requires attention, a quick view of your cart, and a quick search feature. Details are in Attachment 1 as well as a buyWay$ Quick Reference Guide.
IV. Procurement Update (Scott Pigeon)
The Procurement update is posted at: www.clemson.edu/cfo/procurement under the Announcements section on the left hand side of the screen. The Update includes the following items: 1) Ricoh Print Shop: Ricoh has opened an on-campus print shop for digital printing needs. 2) P-Card and Personal Charges: Accidental personal charges on the p-cards will be considered as an Unauthorized Procurement. 3) Requisitioner Certification Training FY2014: All Requisitioners are required to complete training by March 15th. 4) buyWay$ New Interface: Beginning March 26th buyWay$ customer interface will receive a quality feature laden update. 5) Old/Dated Invoices: VWR has outsourced their Acct Receivables. Departments are being contacted related to invoices that have not been paid. 6) Managed Print Service Update: All devices on campus have been tagged. Ink and toner for these machines will be provided by Ricoh. Ink/toner will be purchased by the University for devices not yet tagged and any other devices that have been exempted. 7) Amazon Prime: Membership can be purchased if it justifies the expense. Prime membership purchased by the University cannot be used for personal benefit. 8) Airline—Coach Travel: State law requires that state employees travel in the lowest cost manner. Procurement will revise/clarify the language “coach or tourist” in the travel policy. See Attachment 2 for details.

V. Budget Update (Virginia Baumann)
State Budget: The House approved $1 million in nonrecurring funding for student career opportunity programs (on-campus internships) for Clemson E&G Budget. The House also approved $3 million in nonrecurring funding for agriculture and natural resources research equipment for PSA. In addition the House also included a 1.5 percent cost of living pay increase for state employees and an increase in the cost of health insurance for state employees which would mean a co-pay increase for state employees. The budget now goes to the Senate for approval.

2015 Budget Development: Personal Services Planning has begun. Full budget development will begin on March 24. Budgets and worksheets will be due back on April 25. The budget load will begin on May 15. Business officers will be receiving packages on March 24th. Packages will have recommendations and what business officers should plan for next fiscal year.

VI. Other Matters
Pooled Fringe Rates (Beverly Leeper): The proposed pooled fringe rates have been approved as submitted. The rates are posted on the Comptroller’s website.

Security Review (Steve Crump): Security review was completed in February.

Year End Close (Steve Crump): The closing dates for the fiscal year-end schedule are being identified. Steve anticipates that the 2014 Fiscal Year End Schedule will be confirmed and presented at the April meeting.

There being no further business, the meeting was declared adjourned at 9:10 AM.

Approved: Steve Crump
Associate Comptroller

Attachments
1) buyWay$ Update & Reference Guide
2) Procurement Update
Beginning in March 2014, buyWays will have a new look, called Phoenix. You can switch to the Phoenix layout now or wait until March, when buyWays will be automatically updated. If you want to take a look at the Phoenix Layout row, go to your Personal Settings in your user Profile, you will see a drop down menu next to the User Interface Style containing Classic (which is your current layout) and choose Phoenix (for the new layout).

Switch to the Phoenix layout here

Switch back to the Classic layout here
Phoenix Layout

1. **Homepage** - The homepage is the page that will default upon log in. Any site page can be configured as the homepage. Clicking on the homepage icon will return you to the homepage from anywhere in the application.

2. **Main Menu Options** - On the left side of the screen are the main menu options. The menu options displayed depend on the permissions granted to the individual user. Each menu option contains sub-menu options. To select a sub-menu item, simply click on the item and you will be taken to the appropriate area of the site.

3. **Menu Search** - The Menu Search feature is located below the main menu options on the left side of the screen. This feature allows you to search for specific screens and functions in buyWays by typing in keywords.

4. **User Menu** - Access to your personal user information and functionality is located in the top banner. Your name is displayed with a drop-down icon to the right. Selecting your name displays menu options including access to your user profile and the link where you logout.

5. **Bookmarks** - The Bookmark feature allows you to save commonly used pages as bookmarks for quick access. You create and access bookmarks by selecting the icon.

6. **Action Items** - Action Items are tasks that require some action on your part. The Action Items list (located in the top banner) displays all action items assigned to you. The number of action items is indicated to the right of the menu.

7. **Notifications** - Notifications are designed to alert you when an activity has taken place or something requires your attention. Notifications can be sent by email but several of them can be accessed from the Notifications menu (located in the top banner) in buyWays. The number of notifications is indicated to the right of the menu.

8. **Cart Preview** - Cart Preview allows you to get a quick view of the active shopping cart without having to access the cart in the application. From the Cart Preview you can review the item list, delete an item from the cart, access the active cart or checkout. Clicking on the shopping cart icon will display the item list with basic information such as item image, name, quantity and price.

9. **Quick Search** - The Quick Search feature allows a variety of searches, such as contracts, purchase order, requisition, invoice number, supplier invoice number, etc., to be performed from anywhere in the application. Available searches depend on the user’s permissions.
1) Getting Started
LOGIN to BUYWAYS
- Click the buyWays Faculty/Staff icon on the Procurement Services Home page
- Login to buyWays using your Novell user ID and password
- New Users should complete the New User Request Form located here: http://www.clemson.edu/cfo/procurement/buyWays/newuser.html

2) Profile Set Up
UPDATE PERSONAL INFORMATION
- Click on your name at the top right of the screen, and then View My Profile
- Click on the link to the information that you want to modify
- Review/Edit any information
- Click Save before clicking on another tab (all pages may not have Save)
- Review the User Profile guide under the buyWays User Guides for additional instructions on updating your profile default settings

3) Shopping – Creating a Cart
HOSTED SUPPLIER CATALOGS
- From Shopping Home page
- Use the Shop bar at the top, enter search term, then click Go
- For more search options click on the advanced search
- Click the Add to Cart option, or Order From Supplier for desired item
- Click on View Cart, to open cart, or CheckOut, if punchout supplier
- Follow Submit Active Cart instructions below at #5

EXTERNAL (PUNCH-OUT) CATALOGS
- From Shopping Home page
- In the punch-out catalogs area, click supplier’s icon to begin punch-out session
- Search in supplier’s site for items and add to supplier’s shopping cart
- Follow supplier’s site instructions for returning the item(s) to your active cart
- Follow Submit Active Cart instructions below at #5

Clemson FORMS
- From Shopping Home page
- In the Clemson Forms section (at the bottom) click on the appropriate form
- Read form Instructions / Complete required fields
- Select from Available Actions, Add and Go to Cart to enter one item
- Select Add to Cart, if you have more than one line item to continue adding items using the same form. After entering the last item, select Add and Go to Cart
- Click Go
- Follow Submit Active Cart instructions below at #5

4) Modifying an Active Cart (not all steps in this section are required)
REMOVE ITEMS FROM CART
- Open Active Cart
- Click Check box to the right of Ext. Price of items that you want to remove
- Select Remove Selected Items from For selected line items drop down menu
- Click Go

APPLY CONTRACT TO ITEM(S)
- When using a form
  - After selecting a supplier
  - Click select contract
  - Choose applicable contract #
  - Click Ok
- For punch-out item, catalog or non-catalog item already added to the cart
  - Click Select price or contract, under Unit Price, before clicking Proceed to Checkout
  - Choose applicable contract #
  - Click Ok

CHANGE PRODUCT QUANTITY
For Catalog items only already added to cart
- Modify number in Quantity field
- Click Save

For Form Quantities and Amounts Already Added To Cart
- Click on the product description of item to open the form
- Modify the quantities and/or amounts
- Select Save in the drop down menu and click GO
- Close the form window - continue with Step # 5 below

For Punch-out Items – NOT available for all punch-out suppliers
- Click Modify Items (above Product Description field)
- Modify quantity
- Click Checkout / follow supplier’s check out procedures
  - OR-
- Remove items from cart
- Return to supplier’s punch-out site to add necessary quantities

MODIFY ACCOUNTING CODES AT THE HEADER
- Click Proceed to Checkout
- Click Accounting Codes tab on top
- Click Edit in the Accounting Codes box (the top codes is the Header level)
- Enter the appropriate code in the corresponding box
  - OR- Click Edit, then, Click Select profile values, Select a CU value or Select from your code favorites for pre-saved values
- Click Save

SPLITTING ACCOUNTING CODES AT LINE
- Click on Accounting Codes tab
- Click Edit at line (this will apply to the line and override the Header values)
- Click Add split
- Select % of Qty, % of Price, Amount of Price, or Amount of Qty
- Click Select profile values or Select a CU value or Select from your code favorites to choose pre-saved values for accounting codes
- Enter correct % or amount beneath the price/quantity drop down menu for each chart string
- Click Save to confirm changes

ADD INTERNAL NOTES AND/OR ATTACHMENTS
- Click Proceed to Checkout
- In the Internal Notes and Attachments section, click Edit button
- Add a note
- Click Save
  - OR-
- Click add attachment
- Click Browse to find attachment
- Choose attachment
- Click Save

ADD EXTERNAL NOTES (TO SUPPLIERS)
External notes and attachments are for Clemson forms or non-catalog items only
- Click add attachment
- Click Browse to find attachment
- Choose attachments
- Click Save

5) Submit or Assign An Active Cart
- Once lines/items have been added to cart and modified if necessary
- Click Proceed to Checkout button at the top, and review order for accuracy
- Click Assign Cart to Requisition and select assignee, (add note to requisitioner if needed)
- Click Assign
  - OR-

For Requisitions - skip previous steps, and click Submit Req for Approvals

6) Tracking a Requisition
FIND A REQUISITION
- Click Orders and Documents Icon (on the left)
- Click Search Documents
- Click my requisitions OR Select Requisition from the drop down menu
- Select a date range
- Click Go
- Filter the search (at the left) by Supplier, Prepared By, Approved By, etc.
- Click the Requisition Number
- View the summary detail, approval status or history and add comments if needed
(7) Withdrawing a Pending Requisition

WITHDRAW ENTIRE REQUISITION
- Click Orders and Documents icon (on the left)
- Click Search Documents, then my requisitions
- Click the Requisition Number link
- In Available Actions drop-down menu, select Withdraw Entire Requisition
- Click Go
- In the message box, type your reason
- Click Withdraw Entire Requisition

WITHDRAW A LINE
- Click Orders and Documents icon (on the left)
- Click Search Documents, then my requisitions
- Click the Requisition Number link
- Check the appropriate checkbox to the right of item price
- In For selected line items drop-down menu, Select Withdraw Selected Items
- Click Go
- In message box, type your reason
- Click Withdraw Line Items

(8) Receiving - Creating a Receipt

CREATING A RECEIPT
- Click on the Notifications tab at top right, click to see all notifications
- Click on PO number that you want to receive
- From Available Actions drop-down menu, choose Create Qty or Create Cost Receipt and click Go
- The receipt will automatically be populated with the PO information
- Enter Packing Slip # (required), and/or Notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select Complete at the top or bottom of the page

CREATING A PARTIAL RECEIPT
- Click on the Notifications tab at top right, click to see all notifications
- Click on PO number that you want to receive
- From the Available Actions drop-down menu, choose Create Qty or Create Cost Receipt and click Go
- Review and modify pre-populated quantity and amount
- If line item(s) have not been received, click Remove Line
- Enter Packing Slip # (required), and/or Comments (when necessary)
- Review all line level data for quantity and cost accuracy
- Select Save Updates and Complete at the top or bottom of the page

CREATING A RECEIPT WITH RETURN/CANCELLED
- Click on the Notifications tab at top right, click to see all notifications
- Click on PO number that you want to receive
- From the Available Actions drop-down menu, choose Create Qty or Cost Receipt and click Go
- For one of the lines that was previously received, enter a quantity and change Line Status to Returned or Cancelled
- Review line level data
- Select Complete at the top or bottom of the page
- Must correct supplier for directives on physically returning items

DELETING A COMPLETED RECEIPT (Can only be done if an invoice has not been completed)
- From the search icon (magnify glass at top right), Select Receipt Number
- Type in the Receipt number, and enter
- Click Reopen Receipt (at the top)
- Click OK
- Add appropriate comments (required)
- Click Add Comment
- Modify Quantity, Amount, Date or packing slip no.
- Click Complete -OR-
- Click Delete box
- Click OK

DELETING A DRAFT RECEIPT
- Click Accounts Payable icon (on left), then click View Draft Receipts
- Click Delete box beside the drafts you want to delete

(9) Invoicing – Creating an Invoice

CREATING A COMPLETE INVOICE
- Select Orders & Documents icon (on the left)
- Click on Search Documents
- Select Purchase Order from drop down, or click on my purchase orders
- Click on PO number, to open Purchase order
- Choose Create Invoice from Available Actions drop-down menu
- If you need to add attachments, choose hold for pickup, etc., then, click on View Detailed Manual Entry (at left, above Simple Manual Entry)
- Enter required fields (Invoice #, Invoice date, and County) and click Save
- Ensure line quantities and amounts match the supplier’s Invoice quantities and amounts
- Modify tax when necessary in the top (header section)
- Click Review box at top right corner
- Click add attachments (in Notes/Attachments box) to attach a scanned copy of the supplier invoice when possible
- Click Complete (a Create box will display to continue creating Invoices)

VERIFY PAYMENT OF A COMPLETE INVOICE
- Refer to the Payment Information box on a completed invoice to view payment date, status, method and record number

(10) Modifying a Purchase Order

CANCEL A PO OR PO LINE
- From the Shopping Home page, under Internal Request Forms
- Choose PO Change Request form
- Read form Change Instructions
- Enter required fields (in bold)
- Select Add and Go to Cart and Click Go
- See instructions for Submit an Active Cart at #5

INCREASE QTY OR PRICE ON PO
- Option 1 -- follow cancel instructions above and create a new PO to increase total purchased value,
- Option 2 -- create a new order for the difference referencing the original PO number in Internal notes section

(11) Approve/Reject a Pending Requisition

APPROVE via EMAIL
- Set up Email Approval Code under my profile, User’s Name, phone, etc., enter approval code and click Save (Must be setup prior to receiving email notice)
- Open Approval Email
- Review Requisition details
- Click Take Action, then Select an Action
- Enter Email Approval Code, then click Submit

APPROVE In buyWays
- Click on Action Items, at top right
- Click on Requisitions to Approve
- If multiple folders, click on the one you want to take action on
- Review the items, ship to address, Accounting Codes, notes etc.
- Select Approve, or select check box, and then choose Approve/Complete Step and Go, In the Available Actions drop-down menu

REJECT A REQUISITION
- Click on Action Items, at top right
- Click on Requisitions to Approve
- Click on requisition number to view the complete requisition
- From Available Actions select assign to myself, click Go
- From Available Actions, select Reject Requisition
- Click Go
- Reject Line Reason box appears - type in your reason for rejecting the item(s)
- Click Reject Line Items
- Select Approve/Complete Step in the Available Actions drop-down menu
- Click Go

For additional approver options view the Approval Training document on the Procurement Services Training website:
http://www.clemson.edu/cfo/procurement/buyWays/training.html
Procurement Services Information  
CBOG March 13, 2014

This update is posted at: www.clemson.edu/cfo/procurement under the Announcements section on left hand side of screen.

Old Information:
1. **Ricoh Print Services – Print Shop:** As part of the contract for mail services on campus, and in conjunction with the Managed Print contract, Ricoh has opened an on-campus print shop for all your digital printing needs. Ricoh has the contract for all digital printing and should be your first call. Ricoh also has the contract for stationery and business cards (replacing Ink4 on this contract). You can find more information about this contract/service here - http://www.clemson.edu/campus-life/campus-services/print-smart/documents/announcement093013.pdf Clemson should no longer be using Ink4 for stationery and business cards!!!

2. **P-Card and Personal Charges:** Accidental personal charges on p-cards that occur when using a PayPal or Amazon account for both business and personal purchases is still an Unauthorized Procurement under SC law. Please see Decembe: CBOG notes for further information and tips to avoid these situations.

3. **Requisitioner Certification Training FY2014:** This required annual certification is available online for all Clemson University employees with the role of Requisitioner in buyWay$. Click here and follow the link under the Training Guides for Requisitioners and Invoice Handlers section. This training and quiz is REQUIRED and must be completed by March 15, 2014 in order to keep your Requisitioner Role active. If you have any questions or problems with the power point or quiz, please email cubuyWays@clemson.edu or reply to jtonkin@clemson.edu. To date, 209 out of 300+ Requisitioners have completed the training.

New Information:
4. **buyWay$ New User Interface:** Beginning March 26th, buyWay$ customer interface will receive a quality, feature laden update. Please remind your requisitioners and frequent shoppers to stop by one of our upcoming workshops, by registering via http://www.clemson.edu/hrtraining/ at both Barre Hall or ASB HR Training Labs, now through the 28th, and experience the smart user-oriented changes.

5. **Old/Dated Invoices:** VWR outsourced their Accts Receivable and the company is discovering unpaid invoices. There is no statute of limitation in the State of SC for unpaid invoices so be on the lookout for old invoices (as old as 1-2 years) where we ordered items and received them but never paid for the items. These may cause budget errors, but Clemson is obligated still to pay for good we received. Basically, if the charfield is still open, the invoice passes and all is good. If when the BSR is reconciled, someone may question the old invoice.

6. **Managed Print Service Update:** As referenced in a message distributed on February 17th and 18th, Ricoh has completed the “tagging” of devices on the main campus and surrounding areas and going forward, the University will no longer be purchasing ink/toner for these devices. The only ink/toner that is still allowed to be purchased are for those off campus locations that are yet to be tagged (i.e. RECs, Extension offices, etc..) and other devices that have been exempted by the Procurement Director from the program (i.e. plotters, specific large volume production devices, etc...). Please reference the detailed announcement here for more details.

7. **Amazon Prime:** As Clemson is responsible for shipping costs on our purchases, users continually look for ways to save money and the Amazon Prime “membership” is one people are choosing. While nothing prohibits purchasing a membership if you can justifies the expense, this service can be potentially intermingled with personal Amazon accounts equating to individuals receiving a personal benefit when Clemson pays for a Prime membership. All users are encouraged to be aware of the matter and put necessary steps in place to monitor and limit the usage of Amazon Prime where controls over personal purchases cannot be established.

8. **Airline – Coach Travel:** The current University travel policy uses a potentially dated term by noting that travel by airfare must be in “coach or tourist” class. We will look to revise/clarify this policy in the future, but in the meantime, travelers should be reminded the intent of this policy comes from State law that requires we travel in the lowest cost manner available. Clemson should not be paying for upgrades for more legroom or other coach+ tickets.