Welcome
Talking uShop
Today’s Agenda

- Lowe’s Home Improvement Catalog
- Staples - Pcard Orders in uShop
- Staples - Email Confirmations
- Access Change
- Data Dictionary - Julia Shook
- Travel System - Laura Gore
New Catalog: Lowe’s Home Improvement

- Find the store nearest to campus
- For quickest delivery - Always choose “View - In Stock Products”
- Options are available for Shipping - All are NO Cost
- Invoicing
Catalog Updates:

Staples

- Pcard is the default payment option in uShop for catalog orders
  - Contact Susan or the Pcard team if you need assistance entering your card information in your uShop Profile
Catalog Update:

Staples

- Staples Pcard orders
  - DO Not require receiving in uShop
  - DO Not require a Receipt to be attached in WORKS
  - ALL Pcard transactions must be reconciled in WORKS no matter if they are uShop orders or other vendors
Catalog Update: Staples

- Order shipment emails
Access Changes:
Shoppers

Beginning Wednesday, August 17, all shoppers will be able to use document search to find all documents in their department!

*How to find your department in uShop - View My Profile*
Access Change: Ownership

- The 16.2 upgrade now allows the requestor to be changed on POs
- Email Susan Suits to request the owner be changed on an order
- New owner must be in the same department and have equivalent fund/org access in Banner
- When is this applies:
  - Employee leaves the University
  - Employee changes departments
Data Dictionary

Julia Shook

- Data Dictionary
  - All revenue and expenditure accounts
  - Definitions for each account
  - ACT 105 - Detailed documentation and training
- Location: http://uncw.edu/genaccoun/fundandaccount.html
- Link is also on the uShop Home page
- Click the link “The DATA DICTIONARY IS HERE!”

Talking uShop is coming!

August 16
9:30am - 11:00 am
Cameron Hall Room 105
Join us in person OR Join by live webinar
Click HERE to register for the webinar

Questions about purchasing? Check the Purchasing Website for answers.

Data Dictionary (Account Code Guide)
uShop User Guide
uShop Quick Reference Guide

Banner Accounts

NEW! The DATA DICTIONARY is HERE! (updated 8/3/16 - now includes 2nd tab of recent account additions and changes)

To request new banner account to be established, an email should be submitted to Julia Shook at shook@uncw.edu. Once the request is submitted and approved, Julia will enter the account into Banner and it will be ready for use.

WORKS Account List now available for Purchasing Card Reconcilers, with this supporting documentation.
UNCW Travel & Expense Management
Laura Gore

- A new system is coming soon!
- Ellucian (Banner) Travel & Expense powered by
UNCW Travel & Expense Management

- The system will provide an electronic routing process for check requests and travel expenses
- This system is cloud based
- To access the system you will use a link in MySeaport
UNCW Travel & Expense Management

Advantages

- Electronic Check Requests
- Encumbrance of Travel Expenses
- Expansion of Allowable Expense on the Visa Travel Card
- Easy Receipt Capture
UNCW Travel & Expense Management

Features

- Simple user interface
  - 1-Click expense type selection using the Expense Bar
UNCW Travel & Expense Management
Homepage
# UNCW Travel & Expense Management

**Features - Email Approvals**

<table>
<thead>
<tr>
<th><strong>Action Required</strong></th>
<th><strong>Chrome River</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Report for</td>
<td>Susan Suits</td>
</tr>
<tr>
<td>Report Name</td>
<td>Test Expense</td>
</tr>
<tr>
<td>Submit Date</td>
<td>06/29/2016</td>
</tr>
<tr>
<td>Expense Dates</td>
<td>06/29/2016 - 06/29/2016</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>495.00 USD</td>
</tr>
</tbody>
</table>

**Business Purpose**
Attend conference

**Account Summary**

<table>
<thead>
<tr>
<th>172000</th>
<th>Controller</th>
<th>Accounting Department</th>
<th>Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>495.00</td>
</tr>
</tbody>
</table>

**Expense Summary**

<table>
<thead>
<tr>
<th></th>
<th>Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>495.00</td>
</tr>
</tbody>
</table>

**Financial Summary**

<table>
<thead>
<tr>
<th></th>
<th>Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Expense Report</td>
<td>495.00</td>
</tr>
<tr>
<td>Less Company Paid</td>
<td>0.00</td>
</tr>
<tr>
<td>Less Personal</td>
<td>0.00</td>
</tr>
<tr>
<td>Amount Due Employee</td>
<td>495.00</td>
</tr>
</tbody>
</table>

**Buttons**
- ACCEPT
- RETURN

To take action on these expenses, take either of the following steps:
- Click on the ACCEPT or RETURN button as appropriate and add any comments to the new email that opens.
- OR FORWARD this email to approve@chromefile.com or return@chromefile.com with any comments at the top of the forwarded message.
UNCW Travel & Expense Management
Features - Online Approvals
UNCW Travel & Expense Management
Timeline

- Stay tuned for training dates - Swoop, Travel and Accounts Payable Websites
- Training will be in October
- GoLive - November 1st
It’s your turn....

- Feedback is a gift and I like gifts!