Welcome
Talking uShop and Year End Forum
Todays Agenda

- Adobe Cloud Products - New Procedure
- P-Card for Staples
- WORKS Update
- Year End Presentation
- Your Turn
Adobe Contract Changes

Adobe Software Order Form

Q. What account code should I use?
A. Use 945262 PC/Mac Software

Q. I want to buy more than 1 type of license. How do I add lines to my order?
A. To add additional Adobe products, when in your cart click “add a non-catalog item”. You may also use a second (or third, etc.) Adobe Software form.

Q. I would like to “Work-at-Home” and need a copy of the software to install on my home computer?
A. You can use remote desktop to access the software on your work computer at no cost. For installation on a home computer, order a copy of the media (DVD) in addition to the license for the software. Note in Comments: This DVD is for home computer.

Q. How will I know when the order is shipped?
A. The requestor will receive an email from CJA. If you have not received an email within two weeks check the requestor’s SPAM folder for the email.

Q. How do I schedule installation?
A. Forward a copy of CJA’s license certificate to both TAC@uncw.edu & Tami Mansur, munsur@uncw.edu. Include names of the users who are getting the new licenses.

Q. When should I create the receiver in uShop?
A. The quantity receipt should be created as soon as the confirming email has been received by the requestor. Do not wait until installation is done by IT.

Q. Who will track the software licenses and media?
A. It is up to each department purchasing licenses and media to track those licenses and media.
Adobe Contract Changes

For questions contact:
Robert Bisanar - Purchasing Services
   Extension 2-4069
   bisanarr@uncw.edu

Tami Mansur - Information Technology
   Extension 2-3805
   mansurt@uncw.edu
Staples Ordering by Purchasing Card

- Beginning the afternoon of March 14, Staples ordering in uShop will default to purchasing card at checkout (Final Review) for all Senior Requestors that currently have a purchasing card.
- P-Card requisitions will require some approvals just as regular orders.
- P-Card purchase orders will start with the letters “CC” and will not post nor encumber funds in Banner.
- P-Card purchase orders will not require receiving.
Staples Ordering by P-Card

- P-Card numbers will be entered into Senior Requestor’s Profiles on the weekend of March 12, 13
- Cards will have a default name in your profile
- Users with one card - “First Name’s Pcard”
- Users with Multiple Cards - “Card 1 (xxxx)”, Card 2 (xxxx), etc
- You can rename your cards and will be responsible for making additions and changes to your card numbers, expiration dates, removal of deleted cards, etc as needed
Staples Ordering - Users without P-Card

- Users who currently do not have a purchasing card will continue to order using uShop as well, however your purchase orders will post to Banner, continue to have the PO encumber, and REQUIRE receiving

- We encourage ALL users to acquire a P-Card
  - For information on how to acquire a P-Card contact Kim Reardon 2-3849
  - Amazon in uShop is coming and will require payment by P-Card
  - As other vendors are added to uShop, their payment by P-Card may be required
Managing Cards in the User Profile

- Go to “View My Profile”
- Default User Settings - Payment Options
- Click on the card name - to make edits to the card name, number, expiration date or to change the default card
Managing Cards in the User Profile

- Make your changes then click “Save” or click “Remove” to delete the card
Placing a Punchout Order with P-Card

- Create your cart as usual
- Proceed to Checkout
- Use the Funds and Accounting Codes you anticipate reconciling your transactions to in PACS or WORKS (coming soon)
- P-Card info will appear in the Billing Box
- Card Security Code will show but will not be required for Staples orders

*Place your order - Approvals will be triggered in workflow just as any other uShop order.*
Choosing a Different Card

- Users with multiple cards can change the card being used on the Final Review Screen
  - Click Edit beside the Cardholder Name
  - Use the dropdown menu to choose a different card by the card name in your profile
  - Or you can add a new card
  - Click “Save”
Non-Catalog Ordering from Staples

- P-Card cannot be used on Non-Catalog orders for security reasons
- Card numbers cannot be transmitted by fax or email
- At checkout for non-catalog orders, users with P-Cards will have to “Unassign” the card
  - Click edit by the Cardholder Name
  - In the open window, click “Unassign”
Reconciliation for PACS

- Charges made to the purchasing card via uShop will require reconciliation in PACS, just as all other charges.
- Since there will be no receipt for the purchase please send the packing slip to purchasing with your monthly P-Card statement.
- For questionable charges contact Staples and if you need assistance contact your P-Card team.

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<th>Unit Price</th>
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<td>407811</td>
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For more information, visit [http://www.staples.com](http://www.staples.com) for the Black Business Suite FAQ.
Final Helpful Advice

- Be aware of your transaction limits - $2500 single and $5000 monthly (unless already higher) will be the minimum for all users and will be updated prior to March 14
- Contact the P-Card team if you determine you will need to adjust your limits
- Don’t mix carts!
- Using P-Card is strongly preferred, but if you have a business reason not to use your card you can unassign the card. A Banner PO will be issued and receiving/invoicing will be required
- Unassign the P-Card for non-catalog orders or special business reasons
  - If you forget - I got you covered! Your requisitions will be returned by the system, if you order more than $2500 or use the P-Card on a non-catalog orders with this message:

  Your requisition has been returned for one of the following reasons: You have placed an order over your P-Card single transaction limit or have placed a non-Catalog order on a P-Card.
WORKS Update

- WORKS is Bank of America’s reconciliation system that is replacing PACS
  - Transactions will be fed into Works beginning April 10\(^{th}\)
  - Reconciliation in Works will begin on April 25\(^{th}\)
  - Users group started testing the system last week
  - Training for card coordinators, Budget/Transaction approvers will begin April 4\(^{th}\)
  - Reconciled transaction feeds will be processed in Banner weekly beginning May 2\(^{nd}\)
  - During June more frequent feeds to Banner will be done

Contact your P-Card Team with any questions:
Kim Reardon ext. 2-2349
Dian Smith ext. 2-3153
Amanda Rose ext. 2-4249
Questions

- Feedback is a gift and I LIKE gifts!
Up Next - Year End Information Session

- Thanks for joining for the Talking uShop Forum
- Send questions, concerns or comments to:
  - Susan Suits at suitss@uncw.edu
  - Or call at extension 2-3400