

September 30, 2016

## Excellence in Procurement Award goes to CU for the Second Year

The [National Procurement Institute](#), Inc. (NPI) has announced the University of Colorado as one of the recipients of their 2016 Achievement of Excellence in Procurement (AEP) awards.

The AEP awards are presented at NPI's annual meetings each fall. The award program was established in 1995 as part of a national program to benchmark organizational excellence in public procurement. Submitting institutions are evaluated according to criteria on productivity, professional certifications, e-procurement, innovation, and leadership.

NPI works to establish cooperative relationships among its members and to develop efficient purchasing methods and practices in the areas of governmental, educational, and institutional procurement. The mission of NPI is to facilitate the educational and professional development of its members.

## New Video: Looking up Finance System Roles

If you have access to the PeopleSoft Finance System, you now have the ability to look up Finance System roles for yourself and for others. (This includes looking up CU Marketplace roles, which are identified in the Finance System.)

There are many reasons that you might want to look up role information, but the most common is that you have a new hire in your department. You want the new hire to have the same access as someone else ... but you don't know exactly what that means or which roles to request.

There's a new how-to video to help you learn how to do this. It's called [Looking up Finance System Roles](#).

Other recent videos to watch include:

[Looking up CU SpeedTypes](#) – find out who's listed as fiscal staff, what SpeedTypes are active for your Org or your Project ... and other useful information.

[Looking up Payments in the Finance System](#) – find out the status of NR and PA forms in the PeopleSoft Finance System.

[Looking up Study Subject Payments](#) – look up SSP forms in the Cognos Reporting System.

Got feedback on the videos? Email [FinProHelp@cu.edu](mailto:FinProHelp@cu.edu).

## Reminder: PSC Town Halls

Get up to date on Procurement Service Center news and events at a PSC Town Hall. The town hall series concludes with a webinar in case you can't attend a town hall on site.

You can [select your session and register now](#).

Questions? Contact Denise Nakamichi at [denise.nakamichi@cu.edu](mailto:denise.nakamichi@cu.edu).

## Procurement Card Tips

Here are a few tips in response to frequently asked questions or common issues with Procurement Card use and reconciliation.

Marketplace First! If you can buy it through CU Marketplace, do it. The Marketplace is our preferred procurement method. The Procurement Card provides a mechanism for purchases that cannot be reasonably accomplished in the Marketplace.

That includes office supplies! You should obtain office supplies for your department through the Staples catalog in CU Marketplace. If an urgent need in the department necessitated an office supply purchase on the Procurement Card, you need to explain the situation in Comments on the expense line in Concur.

It's OK to use your Procurement Card to pay Amazon.com and Paypal (and other online vendors) – but remember that for Amazon and Paypal, you'll need to set up a separate account containing your business information. Then, for Paypal, you must verify the Procurement Card information with Paypal customer service before Paypal will process your payment.

You asked for more detail on Procurement Card and Travel Card transactions in the notifying email from Concur. Now you have it! For more information see the [September 22 newsletter](#).

Keep in mind that Procurement Card reports and travel/reimbursement reports have different approvers. To change the approver (Approving Official) on a Procurement Card, please complete and submit the AO update form.

Submit all Procurement Card charges within 60 days of the transaction date. This includes fraudulent transactions, disputed transactions, and transactions that are waiting for a credit.

As a best practice, each Procurement Card cardholder should submit only one expense report per month. (Exceptions: Cardholders who have more than 60 transactions within a month; and, cardholders with transactions during fiscal year-end, when submitting more than one report may be necessary.) Fraudulent charges and credits should not be placed on a separate report – combine them with other expenses from the month. You should not create separate reports for separate expense types (including official functions). If you have transactions that are over 45 days old, you can simply add them to your regular monthly report.

## Upcoming PSC Events

PSC Town Halls

Tuesday, Oct. 11 (1:00-2:00 p.m.): CU System

Wednesday, Oct. 12 (9:00-11:00 a.m.): CU Colorado Springs

Thursday, Oct. 13 (1:00-3:00 p.m.): Anschutz Medical Campus

Tuesday, Oct. 25 (1:00-3:00 p.m.): CU Denver

Wednesday, Oct. 26 (1:00-3:00 p.m.): CU Boulder

