**Pieces of Procurement - 12/5/17 - Clayton Hall**

**Session Descriptions**

**Auditorium - Room #128** - Maximum capacity: 503

Two different sessions will be held throughout the day in this room; both are exclusive to Concur and our new Travel Management Company (TMC). One session will be an introduction presentation and the other will be an open discussion.

**Session Title: Concur / UD Travel Management Company (TMC) - Presentation**

**Session Description:** A combined session introducing Concur, a Travel and Expense Management tool, and our new Travel Management Company. This session is being held at three different times: 8:30 – 9:30, 11:00 – Noon, and 1:45 – 2:45

**Session Title: Concur/ TMC Open Forum**

**Session Description:** This session will be an open discussion, an opportunity for questions about Concur, our new TMC, and how the two will work simultaneously.

**Room #123** - Maximum capacity: 40

Three different sessions will be held throughout the day in this room.

**Session Titles: A-110 Uniform Guidance: Ask Procurement and OCM**

**Session Descriptions:**

**A-110 Uniform Guidance** - OMB Circular A-110 ("A-110") "Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations" currently sets the standards for procurement in support of Federal awards and other agreements. 2 CFR 200 “Uniform Administrative Requirements, Cost Principles, And Audit Requirements for Federal Awards” (a.k.a. Uniform Guidance) replaces A110 as the standard effective FY18. Learn how current procurement related policies and procedures at UD are being impacted by these requirements today and how they will be impacted even further in the future. This session will be of particular interest to Research Administrators and was originally presented at the UD Research Administration Conference held back in June.

**Ask Procurement** - This is an open session where several representatives from different areas of Procurement, i.e. Buyer, Purchasing Assistant, Accounts Payable Analyst, Credit Card Administrator, our Systems Analyst for Webforms and our Procurement Web Developer will be on hand to answer specific questions in a one-on-one environment.

**Office of Communications and Marketing** – Not sure of the best or most current UD logo to use? Thinking you need a giveaway item for an event? Considering working with a vendor to redo your department website? Wondering how to design a brochure to promote your unit?
Learn about the processes, practices, and policies that apply to use of the UD brand and the role that the Office of Communications and Marketing plays in protecting and enhancing the brand and reputation of the University. Whether materials are created in-house by an employee or a student, or by an outside vendor, this workshop addresses the standards for producing materials that represent UD across all delivery mediums, i.e. print, environmental, and digital. Before starting a project, hear about the processes for using UD marks, the required reviewers, approved vendors, and workflows/check points for working with communication or marketing-related partners/businesses.

**Room #124** - Maximum capacity: 40

Two different sessions will be held throughout the day in this room.

Session Titles: *Timeline to Buy and Facilities Procedures*

Session Descriptions:

**Timeline to Buy** - This session will explain step-by-step procedures to submit a valid Purchase Order Requisition and a Purchase Order Amendment webform. This presentation will explain the circumstances under which a requisition is required and will review/demonstrate what to do when the vendor is new to UD, what the documentation requirements are, account and purpose code entry, required approval levels, and more. In conclusion, you will see what a purchase order looks like from the vendor’s perspective following the successful completion of a webform requisition to a purchase order generated by PeopleSoft.

**Facilities Procedures** - The Maintenance & Operations (M&O) group, the Planning and Project Delivery (PPD) group, and the Sustainability, Energy and Engineering (SEE) group from Facilities, Real Estate & Auxiliary Services (FREAS) will cover the following topics to help you improve the execution of projects and requested work:

- Aspects of Requesting Service
- New/Relocated General and Lab Equipment Data Sheets
- How to Get a Project Started

**Room #121** - Maximum capacity: 40

Two different sessions will be held throughout the day in this room.

Session Titles: *Req to Payment and Webform Updates*

Session Descriptions:

**Req (Requisition) to Payment** – This session will explain the step-by-step process of getting invoices paid starting with requisition and ending with vendor payment.

**Webform Updates** - *Procurement Web forms – Tech update*
Step through enhancements in the latest version of PO Requisition, PO Amendment, Vendor Payment, and Payment to Individual webforms. A closer look at Payment Activity.

Room #125 - Maximum capacity: 117

Two different sessions will be held throughout the in this room.

Session Titles: **Credit Card Basics & Violation Policy and Reimbursements**

Session Descriptions:

**Credit Card Basics & Violation Policy** - This session will cover the different types of credit cards and their purchasing ability. It will also cover the new violation policy. What is the violation policy and how does it affect me?

**Reimbursements** - This session will cover how to complete a reimbursement and what information should be included.