

The University of Memphis College of Arts and Sciences

Administrative Associate Handbook

2023

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About the College of Arts & Sciences

The College of Arts & Sciences is comprised of 24 academic units, the ROTC, and multiple research centers, including two Centers of Excellence.

Providing over a quarter-million credit hours of instruction annually, the College is responsible for the lion's share of the University of Memphis' undergraduate curriculum, and awards nearly 1100 students BAs and BSs every year.

While one of its primary missions is to provide a strong general education in the humanities, the social sciences, mathematics and the natural sciences, the College of Arts & Sciences also focuses on strengthening the breadth and depth of its departmental major programs.

Mission Statement

The College of Arts & Sciences is the heart of the University of Memphis, an urban research university. The College provides quality undergraduate and graduate education by training students to think critically about their course of study, themselves, and the world around them. Through programs of basic and applied research, the College's faculty and students increase knowledge and address the complex issues, local and global, facing all citizens.

The College of Arts & Sciences offers broad liberal arts experiences to the candidates for its own Undergraduate and Graduate degrees, as well as to the students of other colleges of the University. The college is divided into three grand divisions that include the Humanities, Natural Sciences, and Social Sciences.

CAS Dean's Office

https://www.memphis.edu/cas/

107 Scates Hall Memphis, TN 38152 901.678.5454

CAS Divisions:

Humanities

- <u>English</u>
- <u>History</u>
- <u>Philosophy</u>
- <u>World Languages and Literatures</u>

Natural Sciences

- Biological Sciences
- <u>Chemistry</u>
- <u>Computer Science</u>
- Data Science
- Earth Sciences
- <u>Mathematical Sciences</u>
- <u>Physics and Materials Science</u>

Social Sciences

- <u>Anthropology</u>
- <u>Criminology and Criminal Justice</u>
- Political Science
- <u>Psychology</u>
- School of Urban Affairs and Public Policy
- <u>Sociology</u>
- <u>Social Work</u>
- <u>City and Regional Planning</u>
- <u>Public and Nonprofit Administration</u>

Interdisciplinary Program:

- <u>African and African American Studies</u>
- Environmental Studies
- Interdisciplinary Programs
- International and Global Studies
- Legal Thought and Liberal Arts
- ROTC: <u>Aerospace Studies</u>, <u>Military</u> <u>Studies</u>, <u>Naval Science</u>
- Women's and Gender Studies

Facilities, Institutes, and Centers

There are several research facilities, institutes and centers within the college offering undergraduate and graduate research opportunities. Please contact individual centers for additional information on its research.

- Benjamin Hooks Institute
 for Social Change
- <u>Center of Applied for</u> <u>Psychological Research</u>
- <u>Center for Community</u> <u>Criminology & Research</u>
- <u>Center for Earthquake</u> <u>Research and Information</u> (CERI)
- Chucalissa Indian Village and Museum
- <u>Design Collaborative</u> (<u>University of Memphis</u>)
- East Asian Studies Institute (EASI)
- <u>Ecological Research Center</u>
- Edward J. Meeman Biological Station
- <u>Institute for Intelligent Systems</u>
- Interdisciplinary Studies Center
- <u>The Marcus W. Orr</u> <u>Center for the Humanities</u> (MOCH)
- <u>Public Safety Institute (PSI)</u>

Other Research Units

- Institute for Gambling Education and Research
- Integrated Microscopy Center

The Administrative Associate role varies based on departmental needs. The overall objective of this position is to support the daily operations of your office performing tasks including, but not limited to:

- serving as the first point of contact,
- scheduling meetings and travel arrangements for faculty and staff,
- managing and reconciling budgets,
- facilitating the hiring process,
- submitting Human Resources documents,
- processing reimbursements,
- maintaining confidential documents,
- supervising student workers,
- inventorying office equipment,
- coordinating departmental events,
- ordering supplies and office equipment,
- facilitating repairs, as well as,
- other duties as assigned.

This handbook serves as a guide of the Administrative Associates responsibilities. Hopefully, it will help you acclimate to your role within the College of Arts & Sciences.



CAS Communications Meetings

Each month there is a CAS Communications meeting for all CAS business and administrative staff, which offers information on various campus updates, CAS updates, new trainings, deadlines, and events. These meetings are usually held on the 1st Wednesday of each month. You will receive a notification regarding the meeting's location. There is a shared folder with resources distributed during these meeting. For more information and the link to the shared folder, contact the Director of Administration, Jessica Abernathy (jmabrnth@memphis.edu)

CAS Communication OneDrive Folder: <u>OneDrive Folder</u>. For easy access, add the OneDrive folder to your browser's favorites folder or bookmark it.

Focus on Finance

It is strongly recommended that you attend the monthly Focus on Finance meetings hosted by Human Resources. These meetings give updates and trainings pertaining to all things Human Resources including Accounts Payable, IT, and Payroll. These meetings are typically held on the 3rd Tuesday of each month. To be added to the Focus on Finance list serv, email Danny Linton (<u>dmlinton@memphis.edu</u>). The following link holds past meetings: <u>https://www.memphis.edu/focus/minutes.php</u>.



New Employee Post Orientation Tasks

There is a list of required tasks that new employees need to complete, which include FERPA, Title VI, Online Confidentiality, and Customer Service trainings. You may find these training under the *Employee Tab* of MyMemphis in the upper right side of the page, beneath the WorkforUM section. Please make sure new employees complete these tasks.

Learning Curve

There are numerous training opportunities for faculty/staff offered by HR. You can access these trainings via myMemphis or at Learning Curve. Listed below are some trainings specific to the administrative role.

- Banner/Financial
 - o B & F Systems Overview Training
 - Banner Navigation: Admin Pages (Beginner)
 - o Budget Basics (When Available)

• TigerBuy/Purchasing

- o TigerBuy Training: Requestors (Purchaser)
- o P Card Program Basics (Purchasing Card Training)

• eContract Trainings

- o Extra Compensation eContract
- o Graduate Assistant Appointment eContracts
- Part-Time Faculty eContract
- Student Employment eContract
- o Temporary Employee eContract
- WorkforUM
 - WorkforUM General Training (Beginner)
- Customer Service Training
 - o Professionalism

Human Resources:

CAS Representative - Ryan Hall (rlhall3@memphis.edu) / x.3573

Website: <u>https://www.memphis.edu/hr/</u> HR Services: <u>https://www.memphis.edu/hr/services.php#dm</u> HR Calendars: <u>https://www.memphis.edu/hr/calendars.php</u> Focus on Finance & HR: <u>https://www.memphis.edu/focus/index.php</u> UofM Policies: <u>https://www.memphis.edu/policies/index.php</u> Learning Curve Trainings: https://bf.memphis.edu/training/login.php

Business & Finance

Office of Financial Planning and Analysis: <u>https://www.memphis.edu/budget/index.php</u> Business and Finance Forms: <u>https://www.memphis.edu/bf/forms/index.php</u> Foundation Access Authorization Form: <u>https://www.uofmfoundation.org/forms</u>

Registrar:

Dates & Deadlines: <u>https://www.memphis.edu/registrar/calendars/index.php</u> FERPA Compliance: <u>https://www.memphis.edu/registrar/faculty/ferpa.php</u> Forms: <u>https://www.memphis.edu/registrar/forms/faculty.php</u>

Tiger Copy & Graphics

Website: <u>https://www.memphis.edu/tigercopy/</u> Order Form: <u>https://www.memphis.edu/tigercopy/pdf/order.pdf</u>

UMTech

Portal: TigerHelp Self-Service Portal

Physical Plant WORQ Orders

Physical Plant: <u>https://www.memphis.edu/pp/worq.php</u> WORQ Request Form: <u>WORQ Request form</u>

Accounts Payable

Accounts Payable: <u>Accounts Payable - Accounting - The University of Memphis</u> Accounts Payable Resources & Presentation: <u>Resources & Presentations - Accounting - The University of</u> <u>Memphis</u>

Shared Services Shared Services – University Travel: <u>University Travel - University Travel - The University of Memphis</u>

PolicyTech

PolicyTech –<u>User Guide</u> | PolicyTech site: <u>https://memphis.policytech.com/?public=true&siteid=1</u>

Safety Resources

- In an emergency, <u>University Police Services</u> **901. 678.HELP** (**4357**) or local law enforcement (9-1-1) should be contacted prior to submitting a concern or complaint.
- Call **901. 678.HOME** (4663) if you would like a Tiger Escort. This service is available from dusk until dawn, seven days a week.
- At UofM Lambuth call 731.412.9413 for security, police, or an escort.
- **Everbridge Mobile App**: As of June 15, 2023the University moved from LiveSafe to the Emergency and Mass Notification System known as <u>Everbridge</u>.

Mental Health Resources

If a student is experiencing a crisis emergency during business hours (Monday to Friday 8:00-4:30) please call **901.678.2068**, visit 214 Wilder Tower, or enter our <u>virtual waiting room</u> between 10:00-3:00. If this is after business hours, please call **901.678.4357** (**HELP**).

- Counseling Center: 214 Wilder Tower, M-F 8:00am-4:30pm, 901.678.2068
 - *This is open to all students taking at least 6 credits. No counseling fees.
 - Walk in Hours: Monday to Friday 10:00 am 3:00 pm. For telehealth, <u>click here></u> to visit our virtual waiting room and for in person appointment visit Wilder 214.
- Psychology Service Center: Psychology Bldg. Rm 126, 901-678-2147
 - Serves undergraduates, graduates, faculty, staff, and the community.
 - Does not accept insurance, only self-pay at the rates below:
 - For students: \$12 fee/per hour
 - Faculty & Staff: \$14/per hour
 - Community: sliding scale based on income.

Submit a Report/Concern on Campus

The University of Memphis is committed to responding appropriately to concerns and complaints. Please use this <u>site</u> to inform the appropriate department of the issue, find University resources, and connect local crisis resources.

- Concerns regarding unusual behavior or distressed <u>Students of Concern</u> will be forwarded to the Dean of Students.
- General <u>non-academic Student Misconduct</u> will be forwarded to the Office of Student Accountability.
- Reports of <u>Hazing</u> will be forwarded to the Office of Student Leadership and Involvement and the Office of Student Accountability.
- Reports of <u>Academic Student Misconduct</u> will be forwarded to the Office of Student Accountability.
- Complaints about <u>Sexual Misconduct</u>, including Sexual Assault, Sexual Harassment, Stalking, and Domestic/Dating Violence are investigated by the Office for Institutional Equity.
- Complaints of <u>Discrimination</u>, <u>Harassment</u>, and <u>Retaliation</u> are investigated by the Office for Institutional Equity.

Please note that confidential resources are available on campus and in our local community for students wishing to remain confidential while also seeking assistance:

Memphis Campus

- University Counseling Center (counseling@memphis.edu): www.memphis.edu/counseling/
 - o 214 Wilder Tower, 901.678-2068
- University Student Health Center, <u>www.memphis.edu/health/</u>
 - o 901.678.2287
- Shelby County Rape Crisis Center, <u>www.shelbycountytn.gov/index.aspx?NID=737</u>
 - o 901.222.4350
- Family Safety Center, <u>www.familysafetycenter.org</u>
 - o 901.222.4400
- Memphis Crisis Center, <u>www.memphiscrisiscenter.org/?page_id=602</u>
 - o 901.274.7477
- Here4TN.com, <u>www.here4tn.com</u>
 - o 1.855.437.3486

Lambuth Campus

• Wo/Men's Resource and Rape Assistance Program, <u>www.wraptn.org</u>, 1.800.273.8712

Employee Assistance Program

The Employee Assistance Program (EAP) is available to all full-time employees and their eligible dependents. You do not have to be enrolled in a health insurance plan to take advantage of this program. It is provided through the <u>State Tennessee Employee Assistance Program</u> which is administered by Optum.

The EAP can assist with many work-related and personal issues including:

- advice about financial questions to dealing with a stressful work situation
- to how to overcome a serious emotional problem

All services are kept confidential in strict accordance with federal and state laws. For mental health/substance abuse situations, you will receive up to five free visits with an Optum-approved counselor.

Any time you plan to use a provider for mental health and/or substance abuse, you should first contact Optum at 1. 855.HERE4TN (1.855.437.3486) to obtain the benefit paid at the highest level. The Optum specialist will help you in identifying the best resource to assist with your personal situations.

In addition to EAP services, Optum provides mental health/substance abuse services to BlueCross BlueShield and CIGNA participants. Contact Optum for a referral to an approved service provider.

Campus Recreation

The University of Memphis' R. Brad Martin Student Wellness Center offers individual and household membership to current UofM faculty and staff. Full-time staff who are benefit-eligible qualify for payroll deduction of membership fees.

Membership fees (minimum 3 months):

- Individual: \$18 per month
- Household: \$36 per month

Employees and adult household members 26 years or older must provide two current forms of identification to the membership office to verify that you have the same address.

Acceptable forms of identification include:

- Driver's license
- Utility bill
- Lease/mortgage agreement
- Bank statement
- Credit card statement
- Phone bill
- Or other official documented dated with two months (no personal mail accepted)

To enroll, visit: https://www.memphis.edu/campusrec/membership/faculty-staff.php

Work-Life Balance Resources

The University of Memphis supports the wellness of all faculty/staff and students. To learn more about different programs to ensure a positive work-life balance, please visit <u>Work-Life Balance Resources</u>.

Here you can find information related to:

- Employee Perks such as discount programs and tuition assistance
- Campus Life and Resources
- Health and Wellness such as campus dining and medical insurance information
- Family and Childcare such as FMLA and University Housings/Rentals

Student Health Center

Medical Services are available to all students, faculty and staff. A current University ID must be presented for admission. Students may be seen between the Fall and Spring or Spring and Fall semesters for an access fee. Additional service fees may apply. Faculty and Staff must present a current University ID and will be seen until 3:30 p.m. Monday-Friday. Faculty and Staff are charged an access fee.

Go to <u>Student Health Services</u> to log in to MyPatientPortal allows patients the ability to complete the paperwork required to be treated by our medical staff. If you need assistance signing into the MyPatient portal to select an appointment time, please call the Student Health Center at 901.678.2287.

Located at 200 Hudson Health Center, Memphis TN 38152.

University, Employee & Professional Resources

For information regarding University resources, employee resources and professional development, visit <u>https://www.memphis.edu/aa/resources/university_resources.php</u>.

This section will introduce you to the budgeting process at the University of Memphis. There are many resources and trainings to assist with departmental budgeting offered via <u>Learning Curve</u>. Please refer to the Office of Financial Planning and Analysis for budgeting updates.

What is the purpose of a budget?

The University's budget is a plan used as a control mechanism to match anticipated and actual revenues and expenditures. It is also necessary to control actual costs.

Who is responsible for monitoring the budget?

The <u>Office of Financial Planning and Analysis</u> is responsible for the development and implementation of the University's budget throughout the academic and administrative areas. However, each department's Financial Manager, Business Officer or Administrative Associate is responsible for accurately reporting financial transactions as well as budget adjustments.

When is the budget reviewed?

- Spring Budget Cycle:
 - Reviewing and adjusting the budget **before the final University budget is approved by the Board of Trustees and put into effect for July 1**st.
- Fall Budget Cycle:
 - Reviewing and adjusting the budget **based on Fall enrollment and any other changes that may have occurred since the Spring review.**
- Year-Round Review:
 - Financial Managers and Designees should frequently monitor their department budget outside of the Spring and Fall budget cycles.

Why is it important to understand the budget?

- To monitor actual revenues and expenses compared to the expected amounts (budget)
- Maintaining an understanding of a department's accounts will help limit overexpenditures and keep revenue aligned with actual trends
- To better assist with the Fall & Spring budget review cycles where budget is aligned with actual revenues and expenses

The University provides the Board of Trustees and Tennessee Higher Education Committee (THEC) complete updates of the budget annually via the Spring and Fall Budget Cycles.

The University tracks two types of budgets in Banner (**Base/Future & Adjusted/One-Time**), and captures two types of budget adjustments, (**Permanent & Temporary**):

Two Types of Budgets:

1. Base/Future

a. Base budget is made up of funding that is recurring and is expected to continue year after year.i. Examples: recurring tuition and fees; sales and services

2. Adjusted/Current Year

- a. Adjusted budget is made up of recurring funded as well as any one-time funding
 - i. Examples: non-recurring income/revenue; conferences and workshops

Two Types of Budget Adjustments:

1. Permanent

- a. These budget adjustments are made to the Base/Future Budget for any permanent changes that will be recurring yearly or monthly.
 - i. Examples: Tuition rate changes, course fee changes, and change in salary

2. Temporary

- a. These budget adjustments are made to the Adjusted/Current Year Budget for any temporary changes or one-time charges
 - i. Examples: Funding a one-time event and increase to travel due to attendance of a non-recurring conference

Budget Cycles, Updates, and Adjustments

The University of Memphis' fiscal year (FY) begins on July 1st and ends June 30th

Cycle	TBR Budget	Banner Term	Adjustment Types	Effective
Spring	Original Base (Future)	Adopted Budget	Permanent	July 1st
Fall	October Revised	Adjusted Budget	Permanent & Temporary	Oct
Spring	Final Estimate	Adjusted Budget	Permanent & Temporary	May

FOAPAL

At the University of Memphis, each department maintains and manages its budget through the use of FOAPAL codes.

What is a FOAPAL?

- FOAPAL is the acronym that represents each element in the University's Chart of Accounts.
- FOAPAL information is needed on all financial transactions as this data is used by Banner to record and retrieve information for financial reporting purposes.
- To complete financial transitions, you must have the "FOAP" (fund, organization, account, and program).
 - Example: 110001(fund) 205000 (organization code) 74500 (account) 2620 (program) 129 (activity)
- The **FOAPAL string** is made up of the following:
 - **F** = **Fund Code**: a six digit code "110001' that identifies the source of the money; (e.g., E&G funds, designated, restricted or auxiliary)
 - **O** = **Organization Code** (**Org Code**): a six digit code that identifies the department spending the money; (e.g., English, Admissions, Payroll)
 - **A** = **Account Code**: a five digit code that identifies the type of expenditure; (e.g., salaries, travel, office supplies)
 - **P** = **Program Code**: a four digit code that identifies the general purposes of expenditures (e.g., instruction, research, and student services)
 - **A** = **Activity Code**: a X digit code that can be used to track a project or event within your budget (e.g., Grant Cost Shares, Physical Plant projects)
 - $\mathbf{L} = \mathbf{Location \ Code}$: currently not used at this time.

Another component to budgeting is an **Index** which is a six-digit University code that maps to the **FOAPAL**. The following section will go into further details regarding each element of the FOAPAL string.

Fund Codes

Fund codes are *six-digit codes* that identify the source of the money. Funds are classified into three main categories: Unrestricted - Education and General (E&G funds), restricted funds, and auxiliary funds. Each category can be identified by the beginning number of the fund code as explained below.

Fund Type	Description
Unrestricted Funds / Education and General (E&G) Funds	The University retains full control over these funds in achieving any of its authorized institutional purposes
Restricted Funds	Externally restricted funds that may be used only for the purposes established by the provider (e.g. grants, contracts, centers of excellence)
Auxiliary Funds	Self-supporting (break-even) enterprises that provide services to students, faculty, and staff

1. Educational & General (E & G)

 a. Unrestricted fund accounts begin with a 1XXXXX. E&G is funded with unrestricted revenue such as tuition and fees, state appropriation, unrestricted sales and services, indirect cost recovery (IDCR), and all other unrestricted funds.

2. Auxiliary Enterprises

Auxiliary enterprise fund accounts begin with a 3XXXXX. These are business-like operations that generate revenue from sales and services such as student housing, food services, bookstore, and parking.

3. Restricted

a. Restricted fund accounts begin with a 2XXXXX. Funded with restricted revenue such as sponsored research, federal financial aid, and private gifts with donor stipulations.

Components	Funding Source(s)	Banner Fund Code
Educational & General (E&G)	State appropriation, tuition & fees, sales & services of E&G activities, IDCR, Cost Share and other unrestricted.	110001 - 12XXXX
Auxiliary Enterprises	Business-like operations that generate revenue for their operations from sales & services; includes student housing, food services, bookstore, and parking.	3XXXXX
Restricted	Gifts, Grants, Contracts with external restrictions as to how the funds may be used; includes sponsored research, Federal financial aid & private gifts with donor stipulations.	2XXXXX

Organization Code or Org Code

Organization codes or org codes are *six-digit codes* that identify a unit of budgetary responsibility and/or departments within an institution, which are defined by the area of department responsible for spending the funds. Organization codes distinguish schools, colleges, divisions, and departments.

Example: 205000 is the six-digit organization code mapped to the English department.

Requesting Organization Codes

Organization Codes, or org codes, serve as identification in the Finance Program Guide. Each department, and in many cases some faculty members, have individual org codes. Most faculty are assigned org codes to manage grant funds. To request a new org code, fill out this form: <u>https://bf.memphis.edu/forms/tech/tech09.htm</u>.

To get to the full Org Code Request form, choose *Section I* in the pulldown window:

U THE UNIVERSITY OF	Organization Code Reques
MEMPHIS.	Request Hel Please allow a two-week minimum turnaround time after submitting form Submitting department: Route to office indicated in "Purpose of Request" section below
	a new organization code (COMPLETE SECTION I), an organization code name change (COMPLETE SECTION II), an organization code or reactivating an organization code (COMPLETE SECTION IV). The University of Memphis Operating Procedure No. <u>UM1303</u> provides form.
SELECT	~
SELECT	
SECTION I - REQUEST FOR NEW (
SECTION II - ORGANIZATION COD	
SECTION III - ORGANIZATION COD SECTION IV - REACTIVATE ORGAN	
You should now see the fo	ollowing form:
THE UNIVERSITY OF	Organization Code Request Request Help Please allow a two-week minimum turnaround time after submitting form.
	Submitting department: Route to office indicated in "Purpose of Request" section below.
II), an organization code rollup change (COMPL	organization code (COMPLETE SECTION I), an organization code name change (COMPLETE SECTION ETE SECTION III) or reactivating an organization code (COMPLETE SECTION IV). The University of wides additional information for completing this form.
SECTION I - REQUEST FOR NEW ORGA	NIZATION CODE V
SECTION I - REQUEST FOR NEW ORGA	NIZATION CODE
Proposed Organization Title:	
Principal Investigator/Financial Manager:	
Username, Banner U#, & Position Number: Reports To (Rollup Structure)	
Chair/Department Org Code and Org Title:	
VP/Dean/Director Org Code and Org Title:	
Provost/VP Org Code and Org Title:	
REQUESTOR INFORMATION	
Name of Requestor: Title of Requestor:	
Signature of Submitter	Date
FINANCIAL MANAGER	
confidential manner. I agree herein, as a consid information gained in the course of my employn position, including but not limited to alteration of	am aware that the data and materials to which I may have access are to be treated in a professional and eration of my employment, that I will not disclose or cause to be disclosed any such confidential lent at any time. I am aware that any breach of the confidentiality of this material or any abuse of my records, destruction of records or other similar acts, may result in disciplinary action or constitute a basis t it is my responsibility to attend instructor-led and/or online training.
Financial Manager's Signature	Date
PURPOSE OF REQUEST / REQUIRED APPRO	WAL
If Research Grant, route to Research Support (315 Admin Bldg).	Research Support Approval & Date
OR If Professorship, route to Provost's Office (360 Admin Bldg).	Provost Approval & Date
OR If Startup Funds, route to Dean of College.	Dean of College Approval & Date
OR If New Department, route to Financial Planning (151 Admin Bldg).	Financial Planning Approval & Date
ATTENTION APPROVING OFFICE	
If this change relates to a new institute, center, to this request. If "No," then obtain Provost Offic bfsas@memphis.edu for processing	or bureau, has the Provost Office been notified? Yes 🖸 No 💭 If "Yes," then attach approval/notification e approval before submitting this form. Upon approval, please email scanned form to

SECTION I – REQUEST FOR NEW ORGANIZATION CODE

- The *Proposed Organization Title* should be the department and the name of the individual for whom the org code is being requested.
- The *Principal Investigator/Financial Manager* is the individual for whom the org code is being requested.
- The *Username, Banner U#, & Position Number* is the individual for whom the org code is being requested.
- The *Chair/Department Org Code and Org Title* is the department's org code and the department's Chair or the department's name. *See image below for CAS information*.

				s	Organization Code Request Request Help Please allow a two-week minimum turnaround time after submitting form. Submitting department: Route to office indicated in "Purpose of Request" section below.
					name change (COMPLETE SECTION II), an organization code rollup y of Memphis Operating Procedure No. <u>UM1303</u> provides additional
SECTION I - REQUEST FOR NEW ORG	ANIZATION COD	Е ✔			
SECTION I - REQUEST FOR NEW ORGA	NIZATION CODE				
Proposed Organization Title:	CAS lesha Willia	ims			
Principal Investigator/Financial Manager:	lesha Williams				
Username, Banner U#, & Position Number: Reports To (Rollup Structure)	nwllams4	U00012345	001234		
Chair/Department Org Code and Org Title:	201000	Gary Emmert			
VP/Dean/Director Org Code and Org Title:	201000	College of Arts a	nd Science		
Provost/VP Org Code and Org Title:	200000	Office of the Prov	vost		

REQUESTOR INFORMATION

This is the information of the person filling out the request form.

FINANCIAL MANAGER

Financial Manger's Signature is the individual for whom the org code is being requested.

PURPOSE OF REQUEST / REQUIRED APPROVAL

Choose the purpose of the org code. This is important because you are required to get approval from that department. Follow the routing steps based on the corresponding instructions.

PURPOSE OF REQUEST / REQUIRED APPRO	VAL
If Research Grant, route to Research Support (315 Admin Bldg).	Research Support Approval & Date
OR If Professorship, route to Provost's Office (360 Admin Bldg).	Provost Approval & Date
OR If Startup Funds, route to Dean of College.	Dean of College Approval & Date
OR If New Department, route to Financial Planning (151 Admin Bldg).	Financial Planning Approval & Date

For questions regarding this form, contact <u>bfsas@memphis.edu</u>.

Account Codes

Account codes are *five-digit codes* that identify the type of transaction. The account code indicates the type of **revenue**, **expense**, or **transfer** that is being recorded.

<u>Revenue</u> is any income received through the sale of a good or service. The most common forms of revenue are tuition and fees, state appropriations, grants and contracts, and auxiliary operations.

Expense is a cost that is incurred when offering a good or service. The most common forms of expenses are salary, benefits, travel, and operating expenses such as supplies, printing and phone charges.

Transfer allows the university to move money between two or more funds. Transfers can be viewed as having the same effect as revenue and expense where money is transferred in and/or transferred out of an account. Futhermore, they are net to zero.

The full list of account codes can be found in the Finance Program Guide, which will be discussed later in this handbook. The image below shows the different account codes and their classifications.

Account Code	Account Classification
1XXXX	Assets
2XXXX	Liabilities
ЗХХХХ	Control Accounts
4XXXX	Fund Balances / Net Assets
5XXXX	Revenues
6XXXX	Salaries / Benefits
7XXXX	Expenditures / Departmental Revenues
8XXXX	Transfers
9XXXX	Fund Additions / Deductions

See the chart below for account codes and their classifications

Budget Pool Accounts

Accounts are either budgeted for in **individual account code** or **budget pool account** codes.

Account types **WITHOUT** budget pool accounts are allocated budget directly to the individual account codes (ex: Salary accounts).

There must be enough budget in the individual account to cover the expenses for that account.

Account types **WITH** budget pool accounts are allocated budget to these distinct budget pool accounts rather than the individual account codes (ex: Operating expense accounts).

There must be enough budget in the budget pool account to cover the expenses for all accounts within that account type (*Office of Financial Planning and Analysis, 2023*).

The image below shows account code, the associated account type, and whether it is a part of a budget pool account.

Account Code	Account Type	Budget Pool Account
61XXX	Salaries	N/A
62XXX	Employee Benefits	62000
71XXX	Travel	73000
74XXX	Operating Expenses	74000
751XX	Utilities and Fuel	75100
753XX	Allocated Charges	75300
754XX	Departmental Revenues	75400
78XXX	Capital Expenditures	78000
79XXX	Scholarships and Fellowships	79000
7AXXX	Depreciation Expense	N/A
7BXXX	Grant Related Expense Items	N/A
7CXXX	Other Non Operating Expense Items	N/A
7DXXX	Loan Fund Deductions	N/A

Program Codes

Program codes are *four-digit codes* that identify the general purpose of expenditures. These codes clarify how the money is being used or what function the expense supports. Program codes are grouped based on the Program Types as seen in the chart.

Program Type Code	Program Code	Program Type
10	1000-1999	Revenue
20	2000-2499	Instruction
25	2500-2999	Research
30	3000-3499	Public Service
35	3500-3999	Academic Support
40	4000-4499	Student Services
45	4500-4999	Institutional Support
50	5000-5499	Physical Plant
55	5500-5999	Scholarships and Fellowships
60	6000-6999	Transfers
70	7000-7999	Auxiliary Enterprises
80	8000	Depreciation Expense
99	9990	Nonprogram Transactions

College of Arts & Sciences

Activity

Activity codes are codes that *can be up to six-digits* and are used to track a project or event within a department's operating budget. Their main purpose is to subdivide activities for tracking multiple projects (Ex: Grant Cost Shares & Physical Plant projects). *The use of an activity code is optional for financial transactions.*

Location

Not currently used at this time.

Indexes

Indexes are *six-digit* University code that maps to the FOAPAL sting. They are shortcuts used to speed up data entry and improve accuracy during budgeting. They are mapped to a unique combination of chart elements to automatically pull in the fund, organization, program, and activity (if used).

Requesting Banner Indexes

If you need to request a new banner index code, please fill out the *Request for Banner Index* document on the <u>Business and Finance Forms</u> page, under the *Financial Reporting* section. Please refer to the instruction on page on filling out this form.

Note: You will need an org code for this request.

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Jpon receip	t of the index number, the re	quester s	hould submit a bu	dget revision f	orm to Financial	Planning (AD 151 or budget@	memphis
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Index 7	Type/Purpose:		· · · · · · · · · · · · · · · · · · ·					
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	IDCR			Fund:	110001	Prog:	2610	
	Faculty Start-Up Funds			Fund:	110001	Prog:	2630	
	Faculty Research Grant			Fund:	110001	Prog:	2620	
	Other			Fund:		Prog:		
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Organi	zation Code:	-						
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Form Instructions

A. General

- a. The *Index Title* will be the name that shows up in the Finance Program Guide. For example, if you look up Faculty Research Grant indexes, they will be labeled FRG recipient's name.
- b. Activity Dates is optional.
- c. *Sponsoring Department/Activity* is the recipient's department or the department.
- d. *Index Type/Purpose* put an "X" to identify the purpose. You do not need to change the fund or program codes.

B. Authorizations

- a. *Financial Manager* is the person for whom the index is being requested.
- b. Organization Code is their specific org code.

C. Source of Fund

- a. You will put an "X" to identify the source of fund. For research grants, select *General University Educational and General Funds*.
- b. If you have a fund amount that will be transferred to the fund, put in in the *Estimated Funding Amount* section.

D. Expense Purpose

a. Choose the option that best identifies the purpose of the expense. For Faculty Research Grants, put an "X" in the *Other (Describe)* field and provide the program code and name of the grant.

E. Miscellaneous

a. Provide the expense Index of the individual's the Department.

Once the form is completed, convert to a PDF, and email it to <u>bffin@memphis.edu</u>.



Request for Banner Index

Rev 7.1.21 Instructions:

Program:

Complete Sections A through E and submit this form to Financial Reporting in AD 275 or via email to bffin@memphis.edu. The Accounting Office will assign and create the index number, complete Section F, and return this form to the requester. Upon receipt of the index number, the requester should submit a budget revision form to Financial Planning (AD 151 or budget@memphis.edu)

3/20/2023				
FRG - Mindy Taylor			18	←Max is 35, incl spaces
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English	· ·		-	
Iesha Williams			-	
Administrative Associate I	Phone:	x;5449	_	
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Mindy Taylor				
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Date created:

Finance Program Guide

The Finance Program Guide is the online resource for all things finance at the University of Memphis. You can find index numbers, FOAPAL information, organization approval information, reports for monthly/semiannual review, listing of all accounts, rules classes, programs, and accounting and budget forms.

This guide can be found in myMemphis.

- Log into myMemphis
- Select the *Finance* tab
- In the *Banner Reference Information* section, select **Finance Program Guide**
- Here is a direct link: <u>Finance</u> <u>Program Guide</u>



Finding Departmental FOAPAL Codes

Departmental FOAPAL codes are stored in the **Finance Program Guide.** If you have an index, fund, organization code, you can look up the information directly. However, if not there are many ways to find FOAPAL information. Below is the easiest technique in navigating the Finance Program Guide to find FOAPAL information.

Once in the Finance Program Guide, look you the organization code by searching signatures.

Under the *SIGNATURES* sections:

- Select *signatures by name*.
- The *Authorized Signatures Search by Name* window will open with a name search bar, search your Chair's name.
- Select their name in the "Name Matches for _____" list.
- On the Authorized Signatures Results page, find your department in the Title column.
- The first column should be *Organization*, copy this code.
- You can now search for your department's FOAPAL using the organization code.

Banner

Banner is the University of Memphis' primary record system. When budgeting, there are two Banner functions you should familiarize yourself with, Banner Self-Service and Banner Admin Pages. Found under the *Finance* tab in myMemphis, it is essential to know which Banner function is used to complete the various budgeting and administrative tasks. This section will highlight some of these functions.

To request access to Banner, use the following form: Request for B&F System Access

Banner Self-Service (SSB)

Banner Self-Service is used to access all financial transactions some of which includes, running budget queries to pull actuals and budget data, approving and viewing documents, and making budget transfers. The image below shows the many functions.

Banner Self Service



Budget Queries

To run a budget query, complete the following steps provided by the Office of Financial Planning and Analysis:

How to Run a Budget Query Access Banner Self Service (SSB) Navigate to the Finance tab Click Budget Queries **Budget Query Column Display Options** Select Budget Status by Account and click Create Query Select the Operating Ledger Data columns to display on the report. Select the columns to display (see right) Enter Index/FOAP information and click Submit Query Adopted Budget Year to Date 🛿 Budget Adjustment 🔽 Encumbrances Adjusted Budget Reservations Adjusted Budget (Current Year) is a provided field in Banner > Temporary Budget Commitments Accounted Budget 🔽 Available Balance Save Query as: Base Budget (Future) is not provided and must be added using the Compute Additional Columns option Under the Compute Additional Columns for the query section, input the following calculation then click Perform Computation Formula to Compute Base Budget Column Compute Additional Columns for the query Operator Column 2 New Column Description Column 1 **Display After Column** ✓ FY21/PD14 Temporary Budget ✓ FY21/PD14 Temporary Budget ✓ Base Budget FY21/PD14 Adjusted Budget ✓ minus Perform Computation Note: Any calculated fields cannot be downloaded into Excel

Understanding the terminology:

Adopted Budget: The original adopted budget for that fiscal year. It does not include any budget revisions.

- **Budget Adjustment:** Budget adjustments are made to adjust the Adjusted/Current Year or Base/Future Budget based on updated information/estimates.
- Adjusted Budget: Adopted Budget plus all Budget Adjustments. Adjusted Budget is another term for Current Year Budget (they are used interchangeably between different reports).
- **Temporary Budget**: Temporary Budget includes the temporary budget adjustments that were made to the Adjusted/Current Year Budget.
- Year to Date: Actuals recorded as of the report date. These are actual financial transactions that have been recorded.

Encumbrances: Expenses that are expected to be paid during the fiscal year (ex: Salaries, Purchase Orders).

Available Balance: Available balance is calculated by subtracting the Year to Date (YTD) and Encumbrance amounts from the Adjusted Budget.

Commitments: Commitments are budgets that are for future obligations.

Transferring Departmental Fund in Banner Self-Service

To transfer funds between two accounts, complete the following:

- Log into myMemphis, go to the *Finance* tab.
- Under the Banner Self Service section, select *Finance*.
- Select, Budget Transfer.
- Complete the steps on pages 30 31
- ***Be sure to document the J# once the transfer is complete. This is how you can check the transfer in the future.

Checking Budget Transfers in Banner Self-Service

To check the status of budget transfers, complete the following:

- Log into myMemphis, go to the *Finance* tab.
- Under the Banner Self Service section, select Finance.
- Select, *View Document*.
- Change the *Choose type* field to *Journal Voucher*.
- Enter the J# in the *Document Number* field.
- Select *View Document*

Checking Invoice Balances in Banner Self-Service

To check invoice balances, complete the following:

- Log into myMemphis, go to the *Finance* tab.
- Under the Banner Self Service section, select *Finance*.
- Select, *View Document*.
- Change the *Choose type* field to *Invoice*.
- Enter the invoice # in the *Document Number* field.
- Select View Document

Banner Self Service

1	Banner Self-Service					
	S Personal Information					
	Student Student					
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	Employee					
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	S Budget Queries					
	S Encumbrance Query					
	Purchase Order					
	S Approve Documents					
	S View Document					
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Step 3: After you enter the Account codes, then click "Complete" one last time. You should receive a "J" number at the top. You are done!

Banner Admin Pages

Banner Admin Pages is where you can access budget and position information such as position budget and job reports, budget availability reports, and vendor detail reports. To access Banner Admin Pages, under the Finance tab in myMemphis, look for Banner Admin Pages in the left column.

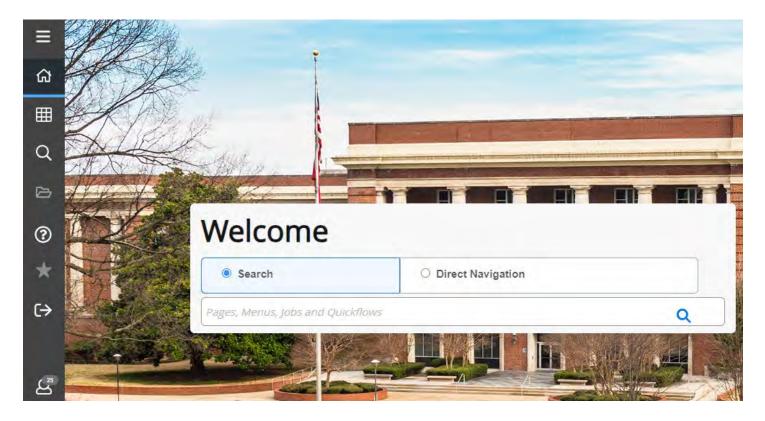
Banner Admin Pages

Admin Pages

Navigation Documentation (PDF)

Navigation Tutorial (from vendor)

Select Admin Pages, this should take you the Ellucian Application Navigator page.



Once you are on Ellucian Application Navigator page, you will need to navigate the Banner pages or screens, using specific report names.

Searching Banner Pages/Screens

Banner Admin Pages has many functions and uses specific strings of letter known as report names, to navigate screens. Some useful report names are as follows:

<u>Budget</u> FGIBDSR – Budget Summary FGIBAVL – Budget Availability Status FGITBSR – Trial Balance Summary (Foundation)

<u>Salary</u> NBAJOBS – Employee Jobs NHIDIST – Labor Distribution Data Inquiry NHIEDST – Employee Distribution Inquiry PHICHEK – Check Detail Inquiry

Positions NBAPOSN – Position Definition NBAPBUD – Position Budget NBIPINC – Position Incumbent List NBIPORG – Position List by Organization

<u>Grants</u> FRIGITD – Grant Inception to Date FRAGRNT – Grant Maintenance

Misc. PPAIDEN – Identification PEAEMPL – Employee FTMACCI – Account Index Code Maintenance FGIENCD – Detail Encumbrance Activity (PO's) FPIOPOV – Purchase Orders by Vendor

Report Name	When to Use
NBAPBUD – Position Budget	To look up base budget salaries
NBAJOBS – Employee Jobs	To look up individual base job/salary information including Job Labor Distribution
NBIPORG – Position List by Organization	To view all positions located under a specific OGR
NHIDIST – Labor Distribution Data Inquiry	To see all employees paid from a particular index by account code and to see all sources of pay for an individual (ex: GA's account code 61257 paid from department index)
FGIBAVL – Budget Availability Status	To view the REAL balance for your department Index (pending documents are included in the balance calculation)
FAIVNDH – Vendor Detail History	To see if a person/vendor has been paid (non salary payments)

Checking Departmental Budgets in Banner Admin Pages

Departmental budgets will need to be checked regularly. Here are some tips on how to complete this task.

Executive Budget Summary (FGIBDSR): a detailed view of your department's budget with a breakdown of transactions.

- Search using Banner screen keyword FGIBDSR.
 - The Chart field, Fiscal Year, and Commit Type should populate. The "Include Revenue" field should also be checked.
- Follow the instructions in the gray bar on the screen.
 - *Tip: Enter the Index, then hit enter. The Organization, Program, and Fund will populate.*
- Select *Go* in the top-right corner and proceed to the budget page.

Chart:	U	Fiscal Year: * 23	•••
Index:		Query Specific:	
		Account	
clude Revenue:	\checkmark	Commit Type: Both	
Accounts			
Organization:		Fund:	•••
Program:	•••	Account:	
Account Type:	•••	Activity:	•••
Location:			

- Find the index you are looking for and double-click it to select the field.
- In the top-right corner select *Related* (located on the blue ribbon) and then **Go**.



This should give you an overview of all the expenses applied to that index.

Organization Budget Status (FGIBDST): provides budget summary, organization encumbrances and transaction detail information.

- Search using Banner screen keyword FGIBDST.
 - The Chart field, Fiscal Year, and Commit Type should populate. The "Include Revenue" field should also be checked.
- Follow the instructions in the gray bar on the screen.
 - *Tip: Enter the Index, then hit enter. The Organization, Program, and Fund will populate.*
- Select Go in the top-right corner and proceed to the budget page.

× Ø ellucian	Organization Budget Status FGIBDST 9.3.6 (PROD)		AD	D 🖹 RETRIEVE	RELATED	* TOOLS	۵
Chart: *	· U	Fiscal Year: * 24	4	•••		Go	
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		Account					
Include Revenue:	\square	Commit Type: Bo	oth	-			
Accounts							
Organization:		Fund:		•••			
Program:		Account:					
Account Type:		Activity:)			
Location:							

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

See pages 36 - 37 for more detailed instructions

General Informatio	-			
In order to manage budgets, departments must review	w budget balances on a regular basis.			
Budgets are loaded at the line item level (Salaries) and in the p Budget adjustments are made at the pool account level for Tra means is that there will not be any YTD Activity in the pool ac Commitments: Purchase Orders in t	ravel and Operating expenditures. What this accounts (62000, 73000, 74000, 78000)			
Resource: Finance Program Guide https://b				
How to Check Budg Actions and Steps	Helpful Tips & Tricks			
1. Access the Organization Budget Status Form . This form	Type FGIBDST at the Search Block field on			
will show budget, actual activity, encumbrances, and available balances. It can also display detailed information on a specific transaction.	the Home Screen and press Enter.			
 2. In the key information area, the following information displays - enter the Chart, FY and Index Number you wish to review: Chart: U Fiscal Year: defaults to current fiscal year [may be edited] Index: enter Index Query Specific Accounts, Include Revenue Accounts: leave blank or as defaults Organization: enter the Org Code Fund: enter Fund Program: enter Prog Account: leave blank unless you want info on specific account Account Type: leave blank unless you want info on specific account type Activity: leave blank Location: leave blank Use the Go Button or Alt + PgDn or Down Arrow to load the budget information for the specific budget in the information related to the Index/Org code selected is 	If you wish to see all accounts related to the budget, including revenue, leave the Account field blank. Filling in the Account field displays budget information from that account, forward. In the Auto Hint/Status Line at the bottom of the page, the number of line items in the budget is displayed (i.e., 1/1) Go Button or Alt + PgDn or Down Arrow			
shown.3. Once the budget information loads, scroll through the information and see totals by line item. Choose to look	Related Menu Button:			
 at the following information: Budget Summary Information (links you to FGIBSUM) Organization Encumbrances (links you to FGIOENC) Transaction Detail Information (links you to FGITRND) 	These selections will be in the Related pull- down menu.			

Actions and Steps	Helpful Tips & Tricks
4. Selecting Budget Summary Information in the Related pu	Ill-down menu, will link to the Organization
Budget Summary Form [FGIBSUM]. This form displays tot	
	-
Revenue Accounts: if applicable	
• Labor Accounts: salary line items rolled into one total	
• Direct Expenditures: travel, operating and equipment	combined
Transfers Account: if applicable	
5. Selecting Organization Encumbrances [FGIOENC] from	When you link from one form to another
the Related pull-down menu, the Organizational	(i.e., from FGIOENC to FGIENCD), click on
Encumbrance List Form [FGIOENC] is displayed. This list	the X Button to return to the previous form.
contains all open departmental encumbrances and	
displays Encumbrance Number, Vendor/Description,	
Account, and Amount.	Once an encumbrance is paid, the
	encumbrance is removed from FGIOENC .
To view <i>details</i> of a specific encumbrance, <i>highlight</i> the line	This information remains part of your
item then click Query Detail Encumbrance Info [FGIENCD]	budget detail (see Transaction Detail
in the Related pull-down menu. This will take you to the	information in the next bullet point).
Detail Encumbrance Activity Form [FGIENCD], which	
displays all activity for a specific encumbrance. Information	
displays with the oldest activity at the top. After you have	
reviewed the encumbrance information, return to the	
Organizational Budget Status Form [FGIBDST] by clicking	
the X Button on the toolbar twice.	
6. Selecting Transaction Detail Info from the Related pull-	This lists a breakdown of all transactions in
down menu in FGIDBST, the Detail Transaction Activity	that account. Information displays with the
Form [FGITRND] is displayed. The following information	newest activity at the top.
will display:	Be sure to highlight the line item you wish
Account: Account	to view. Just put your cursor in the left-
	most field. Where the cursor lies is the field
Organization: Org code Program: fills in based on Index (Org code	in which you will dig further.
 Program: fills in based on Index/Org code Amount: transaction amount 	in which you will dig further.
 Increase(+) or Decrease(-): indicates if transaction is a debit or a credit 	
 Type: transaction type (i.e., PORD is Purchase Order 	
• Type: transaction type (i.e., PORD is Purchase Order Encumbrance)	
 Document: computer-generated reference number 	
 Transaction Date: transaction date 	
 Activity Date: date of transaction activity 	
 Description: contains the vendor name or other 	
• Description: contains the vendor name of other pertinent information	
Commit Type: defaults to U	
 Fund: fills in based on Index/Org code 	
 Activity: generally blank 	
Location: generally blank	

Trial Balance Summary (FGITBSR): an overview of your department's foundation funds.

- Search using Banner screen keyword FGITBSR.
- Change the COA field from U to F- foundation, enter FY and foundation fund then click "GO".
- Select Go in the top-right corner and proceed to the budget page.

Note: Fund balance should always be "credit". If you have "debit", fund balance it in deficit.

COA: * F	••• University of Memphis Foundation	Fiscal Year: * 24	
Fund:		OR Fund Type:	
Account:		OR Acct Type:	

Budget Availability Status (FGIBAVL): a summary of approved and unapproved budget transactions and pending documents included in the balance calculation.

- Search using Banner screen keyword **FGIBAVL.** The Chart field, Fiscal Year, and Commit Type should populate.
- Follow the instructions in the gray bar on the screen.
- Select Go in the top-right corner and proceed to the budget page.

× @ ellucian Budget Availabi	ity Status FGIBAVL 9.3.13 (PROD)			
Chart: * U		Fiscal Year: *	23	
Index:	•••	Commit Type:	Both	•
Fund:		Organization:		
Account:	•••	Program:		
Keys >				
Control Fund:		Control Organization:		
Control Account:		Control Program:		
Pending Documents:				

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

General Information

In order to manage budgets, departments must review budget balances on a regular basis.

As a supplement to the **FGIBDST: Organizational Budget Status Handout**, this information is provided so that you can check available budget balances for pool accounts more easily. The information contained in this document will help you determine what you have available to spend.

Resource: Finance Program Guide <u>https://bf.memphis.edu/spectrum/</u>

How to Check Your Available Balance:				
Actions and Steps	Helpful Tips & Tricks			
1. Access the Budget Availability Status Form . This form will show you available budget balances by organizational budget.	Type FGIBAVL in the Search Block field on the Home Screen and press Enter.			
 In the key information area, the following information displays - enter the Chart, FY and Index Number you wish to review: 	If you wish to look at your budget balances from the first expenditure code, enter 61103 in the Account field.			
 Chart: U Fiscal Year: defaults to current fiscal year [may be edited] Index: enter Index Organization: enter the Org Code Fund: enter Fund Program: enter Prog Account: enter a valid expenditure object code (REQUIRED!) 	Remember that salaries will display by line item, but travel, operating and capital expenses will show pool balances. You cannot view details from this form. In the <i>Auto Hint/Status Line</i> at the bottom of the page, the number of line items in the budget is displayed (i.e., 1) Go Button or Alt + PgDn or Down Arrow .			
Use the Go Button or Alt + PgDn or Down Arrow to load the budget information for the specific budget in the information area displayed at the bottom of the form. The information related to the Org code selected is shown. Control Keys : will fill in after information is loaded.				
 3. The following information is displayed for each account: Account: code for account or pool account Title: of account or pool account Adjusted Budget: Current operating expense budget for the specific <i>labor</i> categories (administrative, support clerical, support administrative, etc.) and pool accounts for <i>travel, operating</i> and <i>capital</i> expenditures. 	Please keep in mind that this form is updated <i>as</i> <i>data is entered</i> and will display both <i>approved</i> and <i>unapproved</i> transactions. Detailed expenditure data can be obtained through the Organization Budget Status Form [FGIBDST] which is updated <i>after</i> posting and approval processes are completed.			

How to Check Your Available Balance:

Banner ePrint

Banner ePrint is the system used to access PDF reports by date. Reports on financial data can be found under the **Banner Finance Repository**, while reports on positions are found under the **Banner HR Repository**. You can access Banner ePrint under the *Finance* tab in myMemphis.

Banner ePrint

- Banner Foundation Repository
- Banner Finance Repository
- Banner Student Repository
- Banner Financial Aid Repository
- Banner HR Repository

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To Navigate Banner ePrint

- A list of all reports (which are run monthly) can be found in the drop-down menu
- Click the PDF icon to see the most recent version of a report
- Click the Drill icon to see a list of all versions of a report
- Click the TEXT icon to download for an excel spreadsheet of the report

Banner ePrint	Select Report from Repository Banner Finance	Banner Finance Repository nwilams4	
erint	About Banner ePrint FAQ My ePrint	Change CAS Repository Heip Legou	1
anner Finance			
and some share of	Report	Description	Latest Date
PDF TEXT	FAROINV-Open Invoice Report	FAROINV-Open Invoice Report	Tue Jul 04, 2023 10:42am
PDF TEXT J	FGRACCI-Account Index Report	Account Index Report	Tue Jul 04, 2023 11:00am
PDF TEXT 3	FGRACTH-Account Hierarchy Report	Account Hierarchy Report	Tue Jul 04, 2023 11:00am
PDF TEXT 3	FGRACTV-Activity Codes Report	Activity Codes Report	Tue Jul 04, 2023 11:00am
PDF TEXT J	FGRBDSC-Organization Monthly Budget Status Report	Organization Monthly Budget Status Report	Tue Jul 04, 2023 11:07am
PDF TEXT 3	FGRCASH-Bank Interfund Account Control	Bank Interfund Account Control	Tue Oct 07, 2014 1:32pm
PDF TEXT J	FGRCGBA-Comparative Stmts of Rev/Expn/Chgs in Fund Bal	Comparative Stmts of Rev/Expn/Chgs in Fund Bal	Sat Dec 09, 2102 4:35pm
DF TEXT	FGRCTRL-G/L Subsidiary Ledger Control	G/L Subsidiary Ledger Control	Wed Jul 12, 2023 02:00am

FAROINV-Open Invoice Report

Some useful reports include:

Repository	Report Name	When to Use	
Banner Finance Repository	FYBR001 – Revenue Budget Estimate/Worksheet by Organization FYBR005 – Budget by Organization Current Year and Base FYBR006 – Budget Status by Organization FYBR018 – Base Budget Transfer Listing FGRODTA – Transaction Detail Report FGROPNE – Open Encumbrance Report	When reviewing revenues When reviewing expenses When reviewing revenues, expenses, and transfers To see changes made to the Base Budget To see a detailed list of all transaction types To see a list of open encumbrances	
Banner HR Repository	NYBR002 – List of Positions by Org with FOAPAL NYBR005 – Comparison Annual Salary to Base Budget NYPR001 – Labor Distribution by FOAPAL by Payroll	To view all positions and their base budget (filled and unfilled) To identify variances between annual salaries and base budget To review details of a payroll distribution	

Argos

Argos is a user-friendly tool that works by filling reporting requests through simple ad hoc queries and advanced dashboards. Access is limited so you will need to determine what access you need with your supervisor. Argos can be accessed by going on the *Employee* tab in myMemphis.

Employee	Finance	Workflow	Former Student
Repo	orts		
ar	gos	Č.	
Select I	the Argos client	after signing into	the Elauncher.
	use the Argos		t install the full Argos client above, which is supported on Chrome or

For your role, you will likely access the Budget Status by Organization which is a report that gives a breakdown of Budget, Actuals, and Available Balance by Fund/Org/Program/Account and can be found under *Finance* and then *General Ledger*.

Argos - University of Memphis		-	
File Edit View Tools Help	10 M		
Argos Serward Que	Copy Baste Delete Import Export	Share Security Lib	ary CO
Explorer Shortcuts	What are you looking for today?		
6666	what are you looking for today:		earch •
Tinance 🖸	Finance		0
🕨 🛅 Admin	Click here to set the description	7>	
Advancement AR Blackboard Employee	Name Accounts Payable Budget Fixed Assets Foundation General General	Author	Date Create
Evisions Contract General Ubrary	Grants and Contracts Grants and Contracts TTS Frocurement Research Accounting_Grants Research Support Queries		
LMS OIR	Security Shared Services FWM Budget Question-Staffing Costs - Actual	hkendall	1/4/2021 4:

Argos Report on Overexpended Budgets

- 1. Log onto myMemphis
- 2. Go to the Employee tab
- 3. Click on argos



- 4. Sign in with your University username and password
- 5. Depending on your browser, there may be additional screens to Allow or OK
- 6. Click on Finance folder

Finance

- 7. Click on General Ledger folder
 - 🛅 General Ledger
- 8. Click on Overexpended Budgets by Organization

\delta Overexpended Budgets by Organization

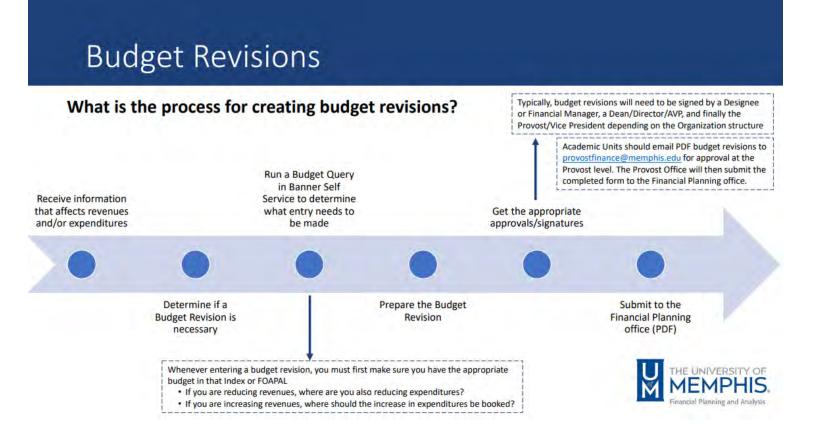
- 9. Click on Run Dashboard
- 10. Select the Fiscal Year
- 11. Then select the Org (click ctrl to select multiple orgs)
- 12. At the top of the page, click the drop-down box next to "Report Options"
- 13. Select Overexpended Budgets
- 14. Click the 💾 to save
- 15. Select the location to save, i.e.. Desktop
- 16. Then click Save
- 17. Click OK
- 18. An excel file will save to your desktop

Budget Revisions

Budget revisions helps maintain an accurate budget based on up-to-date information. You may need to do a budget revision to move funds to cover unexpected expenses or to align budgeting revenue with actual revenue collected.

There are two types of budget revision:

- A temporary or one-time charge should be reflected in the Adjusted/Current Year Budget through a Temporary budget revision (BD04 Form or BD4 online)
- A permanent change that will be recurring yearly or monthly should be reflected in the Base/Future Budget through a Permanent budget revision (BD02 Form)



Per the Office of Financial Planning and Analysis - The preferred method for preparing and submitting a budget revision is with SSB online – BD04. Most budget revisions are completed online. However, there are instances where an online budget revision cannot be used. Under these special circumstances, a paper budget revision will need to be prepared. **Please verify that an online BD4 cannot be initiated before submitting a paper budget revision.**

Do I need to submit an online form or PDF form?

		Budget Revision Forms		
	Forms	When to Use?	Submitted via Paper (PDF) or Online	 Forms BD02 and BD04 will
Finance	Permanent Budget Adjustment BD02 (Base)	Permanent changes or charges that will be recurring yearly or monthly	Paper (PDF)	need to be submitted in PDF format after all departmental signatures, to
	Temporary Budget Adjustment BD04 (Current Year)	Temporary changes or charges that are a one- time charge	Banner SSB (Online) UNLESS revenue, carryforward, or transfers between funds	FPRevisions@memphis.edu
Positions	NBAPBUD Permanent Position Budget Adjustment BD02 (Base)	Base position changes	Paper (PDF)	 Form BD4 is submitted via Banner Self Service (SSB) and follows the approval que in Banner
	Temporary Position Budget Adjustment BD04 (Current Year)	Current year position changes	Banner SSB (Online) UNLESS regular positions (account codes: 61110, 61210, 61310, 61312, 61610, 61630, 61635)	U THE UNIVERSITY OF

The Budget Revision forms can be found two ways:

1. The BD04 and BD02 forms which can be accessed through the following link:

https://www.memphis.edu/bf/forms/index.php#budget

2. Through Banner Self-Service Budget Transfer or Multiple Line Budget Transfer

Banner Self Service

Banner Self-Service
Personal Information
Student
盲 Financial Aid
Faculty and Advisors
Employee
🗁 Finance
S Budget Queries
S Encumbrance Query
Ø Purchase Order
Approve Documents
S View Document
🔗 Budget Transfer
Ø Multiple Line Budget Transfer
Ø Delete Finance Template
Sint Finance Self Service (Banner 9)

MEMPHIS

Budget Revision Guidelines

The following guidelines apply to all budget revisions:

- <u>BF4024 Budget Policy and Procedures</u>
- Budget Principles
- BF4000 Authorized Signatures

Signature Approval Chart

Budget Action Requested	Approval Requirements				
	Department Head	Dean or Director	V. President or Provost	President	
All Paper Budget Revisions	x				
Shifting budgets among or between departments	x	x			
Current year revisions which include travel, equipment, revenue accounts and ransfers to the fund groups	x	x			
Shifts involving fee remissions, part-time instructors, summer instructors, supplemental pay (overload and extra compensation) and graduate assistants.	x	x			
Providing increased revenues and expenditures when revenues are at least equal to expenditures and there is a normal direct relationship between revenues and expenditures.	x	x			
Permanent shift of base budget	x	x	x		
Current shifts among or between accounts under different Deans	x	x	x		
Shifts in the salary level of professional/administrative positions	x	x	x		
Re-budgeting of lapsed salaries	x	X	x		
Creation of new, regular positions on one-year appointments that will increase the total position count.	x	x	x	x	
Establishment of a new activity or a major change in the scope of an existing activity.	x	x	x	x	
Commitment of additional funding in future years.	x	x	x	x	
Shifts of funds among or between Provosts or Vice Presidential areas of esponsibility	x	x	x	x	
All revisions affecting individual salaries or personnel positions not specifically delegated to other levels.	x	x	x	x	

Finance Form Charts - (visit <u>Budget Revision Webpage</u> to download form)

Form	Finance Forms/Resources
SSB Online - BD4 MyMemphis	SSB Online Budget revisions are used to revise budget amounts between the following pooled accounts: Pooled positions (for example: Graduate Assistants, Student Assistants, Temporary Employees) Travel (pool acct code 73000) Operating (pool acct code 74000) Other (78000, 79000)
	Exceptions - Following is a list of budget revisions that are required to be on paper. See below for information on paper budget revision Form BD02 and BD0- Base Budget
	Revenue Carry Forwards
	 Single Position (acct codes 61110, 61210, 61310, 61312, 61610, 61630 and 61635)
	Transfer between different Funds Transfer between different Orgs (if security not granted) Plant Funds/Projects/R&R (Renewal & Replacements)
Paper BD04	Form BD04 is used to request a Temporary Current Year Budget Revision
Veb Version	 Funds moved between Index/FOAPALS using a BD04 will be a temporary move for the current fiscal year only The FOAPAL contains the Fund, Org, Account Code, Program and Activity numbers
Excel Version	Before starting the BD04, the requestor will need to know the FOAPAL where funds need to be moved to, removed from and the dollar amount The form should be submitted on one page in a portrait orientation
3D04 Instructions Web Form	A paper BD04 is required for these <u>Temporary</u> types of transactions:
BD04 Instructions Excel Form	Revenue
bD04 instructions excer Form	 Carry Forwards Transfer between different Funds (If you are unfamiliar with this process, please contact Financial Planning at ext. 2117 for assistance) Transfer between different Orgs Plant Funds/Projects/R&R (Renewal & Replacements)
Paper BD02	Form BD02 is used to request a Permanent Base/Future Year Budget Revision
Web Version	 Funds moved between Index/FOAPALS using a BD02 will be a permanent budget change The FOAPAL contains the Fund, Org, Account Code, Program and Activity numbers
Excel Version	 Before starting the BD02, the requestor will need to know the FOAPAL where funds need to be moved to, removed from and the dollar amount The form should be submitted on one page in a portrait orientation
BD02 Instructions Web Form	For these <u>Permanent</u> types of transactions:
BD02 Instructions Excel Form	Base Budget Pooled Positions Permanent Budget Change
	 Revenue Transfer between different Funds (If you are unfamiliar with this process, please contact Financial Planning at ext. 2117 for assistance) Transfer between different Orgs (if security not granted)

Position Form Charts - (visit <u>Budget Revision Webpage</u> to download form)

Form	Position Forms/Resources
Paper NBAPBUD Web Version Excel Version	Form NBAPBUD is used to request or adjust base funding for : New Permanent Base Position Re-classifications/Equity Increases/New Hires Promotions Base Salary Differentials Transfer Position To New Fund and/or Org
NBAPBUD Instructions Web Form	
NBAPBUD Instructions Excel Form	
Paper BD04 Web Version Excel Version BD04 Instructions Web Form	Form BD04 is used to request a Temporary Current Year Position Budget Adjustment • Fund Limited Positions (not base funded) • Current Year Reversals • Request New Limited Positions
BD04 Instructions Excel Form	
Reversal Calendars FY23 Reversal Calendars	 Reversal Calendar is used in conjunction with NBAPBUD form All Base Positions are funded at 100% Reversal Calendar is used to determine the Returned Salary amount for current year that will not be expended
Paper FP-02 Word Version	Form FP-02 New Position Details is used to request a new pooled position (except part- time instruction)

Examples of Budget Revision BD04 Web Form

User ID: afair Name: Angela	(e.p. jumth) Fair college of Education		Fiscal Ye	and in	2020	2		Date:	08/27/2019	
Index	Org Title for Index Title	fund	Dig	Account Code	Program	Activity	Temporary C Expense Disbjet Amount	Expense Dudget Amount	Budget Revisi Budget Amount	Berget Anount (*)
231505 Collo	ge Of Education	110001	230900	57013	3000		0	0	0	5,00
231505 Colle	ge Of Education	110001	230900	74000	3000		5.000	0	0	
				[0	0	0	1.14
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							0	0	0	(1997) 1997)
			· · · · · ·				0	0	0	1.1.1
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Space is inned-	0 10.000 requesting this revision is a -your response will be imded white to <u>UoM</u> Education for	o 225 characters			Enter ou R	Total	6,000	0 e nas been disa	0) Holiêd	5.00
Questio Who Why	ns: AccessLex Institute Participate in UoM E	ducation 15	55E stue	fy			escription: ex Institut		Edu LSSS	

Example of Budget Revision BD04 Current Year Position Budget

1	Name:						Fier	al Year:	-		Date:	
I		Sally Street					2	020			Septem	ber 20, 201
	Department:	Red Bird			Ì, I				ary Current Y			
	Index	Org Title or Index Title	Fund	Org	Account Code	Program	Activity	Expense Budget Amount (+)	Expense Budget Amount (+)	Revenue Budget Amount (-)	Revenue Budget Amount (*)	Position Number Employee Name
ĺ	213456	Red Bird Instruction	110001	230456	61210	2000		40,000			1.1	PosL54321 F Rabbit
ľ	213456	Red Bird Instruction	110001	230456	74000	2000			40,000			PosL54321 F Rabbit
		Net Change	U-K) (N-M)				TOTAL	40,000	40,000			
		Document Total 80,000	(J+K) + (M+	MI				Expe	ense	Rev	enue	

The College of Arts and Sciences has agreed to support the College of Engineering in the amount of \$5,000 with its production of "The History of Engineers". This is a series that will include world renowned lectures and presentations. How do I transfer the funds to Engineering?

1	Name:				Fiscal	Year:		Date:	1	-	
F	Cassandra Dir	widdie			20	17		May 26	2017		
ì	Department:										
Ŀ	College of Arts	s and Sciences						Tempora	ry Current Y	ear/This Fis	cal Year
1			-						t for BD04		
	Index	Org Title or Index Title	Fund	Org	Account Code	Program	Activity	Espense Budget Arnount (+)	Expense Budget Amount	Budget Amount (-)	Revenue Bodget Amoun (+)
I	219914	College of Arts and Sciences	110001	201000	74000	2025			5,000		
ļ	219917	College of Engineering	110001	240000	74000	2025		5,000		-	
ļ											
ļ		1	-	1	-	-			_		_
ļ	_		1.1								
		Net Change	_		-						_
		0 Document Total	(J-K)-(N-M)			TOTAL		5,000	5,000		
l		10,000	(J+K) + (M+N)	1				Expe	nse	Reve	nue

Last fiscal year, Dr. Brown had a conference entitled "The Great Society". There were many attendees and speakers. A revenue account was created and \$7,000 in registration fees was collected. After we paid vendors and catering, there was still \$2,452 remaining. However, I don't see those funds when I pull up the budget this fiscal year. What happened to the funds? What should I do?

					Fine	l Year:					Santi parti Granjar Dia
-	ame: assandra Dinwiddle	-)18	1	Date: Septemb	er 6, 2017	1	
De	epartment:						i i			1	
	ollege of Arts and Sc	lences		1						Year/This Flecal Year	
2					_		-	CipAna	Request for BDC	4 Budget Revision	n Reven
	, Indes	Org This or Bides This	Test	ora,	Code	Program	Author	Dedget Amount:	Designe Annormo Fil	Dandges Ambaans	Eudge Amour (4)
ľ	430110	The Great Society	127110	201000	74000	3100		2,452			
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t				12.201	1		2.71			1	
t		-		1		C				· · · · · · · · ·	-
+		Net Change	_						-		-
		2,452	GINTERN			TOTAL		2,452		-	-
Е		2.452	7					Expe	ense	Rev	enue

We have hired a new faculty member this semester. The faculty member negotiated a startup package of \$10,000. The Chair would like the funds to come from the department IDCR account. What should I do to transfer the funds to the startup account?

InterFund Transfer (BD04): InterFund Transfer (BD04) are current year transfer between two different Fund codes (unrestricted) that includes two additional lines with account code 82610 should be included on the form. Prior to Interfund Transfer, determine if a Transfer Voucher or Salary Redistribution is needed instead. Fund code 114000 (IDCR) can transfer funds out to non-114000 accounts; but not reverse**

Finance Permanent Budget Adjustment (BD02): This is used with account codes that are not single positions (example: 74000, 73000, 78000, 61257, 61410, etc.). It is also used to increase and decrease base budget and make permanent adjustments.

					Firm	Year:		Deter			Renormal
	ame: assandra Dinwiddie		-		-	18	Ĩ.	Date: Septemb	er 5, 2017		
_	epartment: ollege of Arts and Sc	iences		1						Year/This Fiscal Year 4 Budget Revision	
	Index	Dig 16a an Indiac fela	hand	-	Account Code	Cragoen	Activity	Expense Skapet Avroad (*)	Expense Eudgeit Amount (+)	Havenson Budget Amount (+)	Harr Dar Perr
	224305	English IDCR	114000	205000	74000	2610	1		10,000		
	222111	H. Morgan Startup	110001	205196	74000	2630		10,000			
	224305	English IDCR	114000	205000	82610	2610		10,000			
	222111	H. Morgan Startup	110001	205196	82610	2630	1		10,000		
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ŀ		0	(John served)			TOTAL		20,000	20,000	÷	
L		40,000	Lance Swini					Exp	ense	Rev	enue

Our revenue account has a base budget of \$20,000. Over the past three years we have earned about \$30,000 per fiscal year in revenue. This is due to an increase in registration for our annual international conference. How can I increase the base budget in this account?

				Permanent	Base/Futu	re Year Bud	get Revision ((BD02)		Samio Tensa Pomere
N	ame:	_				Year;		Date:		
c	assandra Dinwidd	ie			20	18		September 5, 2017		
	epartment:									
C	ollege of Arts and	Sciences	-						nt Base Budget/ Future Year	
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	410106	MCCC Conference	127120	209000	58360	3200				10,
	410106	MCCC Conference	127120	209000	74000	3200		10,000		
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+				-			_			_
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		0	(HACHNAM				Total	10,000	-	- 1
		20,000	4-81 + (MP4)				-	Expense	Reve	enue

To increase base budget due to an increase in registration fees collected.

Our department account has a base budget of \$120,000 in the master's GA budget (61257). However, we use about \$80,000 for Doctoral GA's (61258). How can I adjust the base budget to reflect this in my account permanently?

				_							Gute Fran Arbert
	ame:			r		Year:	1	Date:			
C	assandra Dinwiddi	9			20	18	l	Septembe	r 5, 2017		
	epartment: ollege of Arts and S	Sciences]				Pa	Permanent Base B quest for BD02 Ba		ion
1	Mark	Dig tille or Index Tille	nut	010	Account Code	(Transie)	Adato	Expense Except Amount (*)	Experient Biologet Amount H	Hevenue Bodget Arrount H	ION
я	210200	World Languages	110001	206000	61257	2000		1	80,000		
12	210200	World Languages	110001	206000	61258	2000		80,000	-	-	
22						_					-
	_										-
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17	_										t
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1		Nel Otsenue 0	Lieuran				Total	30,000	30,000		-
		Boourners Talle 60,000	-				100	Expe		Rey	venue

Additional Budgeting Resources

Tennessee Higher Education Committee (THEC): Website

Financial Planning & Analysis 901.678.2117 budget@memphis.edu

Grants and Contracts 901.678.3825 grants@memphis.edu

Accounting Office 901.678.2271 accounting@memphis.edu

Office of Financial Planning and Analysis PowerPoint: Budget Basics: A Beginner's Guide to Budgeting

The University of Memphis no longer supports direct billing. A faculty/staff travel card, or a personal credit card will be needed in order to pay for airfare, lodging, car rentals etc.

Chrome River is the new online expense management system for all faculty and staff, designed to streamline and automate the travel and non-travel reimbursement process.

To access Chrome River:

- Login to myMemphis
- Go to the *Employee* homepage
- Go down to *Chrome River Travel and Expense* (located on the right side, under the TigerPark section)

All travel must be approved by the appropriate authority of the department paying for the travel. Travel expenses incurred that are not properly authorized are the personal responsibility of the traveler.

Direct Deposit is mandatory to receive travel reimbursements. If you have not previously signed up for direct deposit for travel reimbursements, please complete the <u>Direct Deposit Payroll & Employee Reimbursement</u> <u>Authorization</u> form **prior** to travel.

Pre-approvals and expense reports will be submitted via Chrome River Travel & Expense application.

- Your pre-approval will serve as your request and authorization to travel.
- Travel card transactions must be expensed within 30 days of transaction date.
- Upon your return, the travel expense report should be submitted within 30 days to settle your claim.
- Review new travel policy for most recent travel changes.

For training watch the online training video: https://youtube.com/watch?v=JXxleYUkHGM&si=EnSIkaIECMiOmarE

For more information, please visit <u>Chrome River Travel & Expense - University Travel - The University of</u> <u>Memphis</u>.

For help with P-Cards, contact Procurement Specialist - Grace Ballard gobllard@memphis.edu | 901.678. 3853

What are Procurement Cards (P-Cards)?

P-Cards are physical MasterCard cards issued by US Bank for the purpose of establishing an efficient, costeffective method for purchasing and paying small dollar-value (under \$5,000) transactions, at the University of Memphis. The P-Card program was initiated by the Office of Procurement and Contract Services in hopes of facilitating timely acquisition of materials and supplies, flexible control ensuring proper usage, and streamlining data flow for accounting purposes.

Important Facts about P-Cards:

- Procurement and Contract Services is the university office responsible for managing the purchasing card program and the online system.
- P-Cards are not intended to avoid or bypass appropriate approval requirements and/or payment procedures.
- The University of Memphis values diversity and encourages departments to do business with Minority and Women-owned Business Enterprises (MWBE's), Disabled and Veteran owned businesses.
- Intentional misuse or fraudulent abuse must be reported to the Procurement and Contract Services department and/or Internal Audit.
- A Cardholder who makes an unauthorized purchase with the P-Card or uses the card in an inappropriate manner will be subject to disciplinary action including possible termination of employment at the University and criminal prosecution.
- Procurement cards are approved and available for use for all commodity purchases that are \$4999.00 or less unless it is noted in Card Restrictions.
- Each department is encouraged to have at least one person in their office with a p-card.
- If you have a P-card, we strongly encourage you to use it instead of the PO process where allowable.
- The cardholder is personally liable for ANY purchases made that are not in compliance with TN purchasing laws.
- Timeliness is very important! Be sure to check/work on your transaction list weekly/monthly to help with reconciling by the 30th of each month.
- The University business purpose of each purchase must be documented in the comments section.

Acquiring a P-Card

You must apply for a P-Card via the <u>Procurement Card Application Form</u>. When completing the application, be sure you do not list yourself as the cardholder and approver. You must have a financial manager and approver above you to complete the final review of transactions.

Helpful tips to complete P-Card Application:

- Name to go on card: Cardholder = you
- Financial Manager: the financial manager for your ORG
- Reconciler: person who adds receipts and account codes (might be you/cardholder)
- **Approver**: someone above you that approves your expenses (can't be you)

Standard Usage and Limits

- Standard Cardholder Spend Limits
 - Single Transaction Limit: \$4,999
 - o Monthly Limit: \$15,000
- When to use P-Card for purchases:

Single transaction amount	Use of P-Card
Less than \$500	Expected
More than \$500 and less than \$5,000 (including tax and delivery)	Strongly recommended
\$5,000 or more	Must be approved by Director of Procurement and Contract Services or designee, do not complete a split purchase if your total transaction is over \$4999.00- request approval

Roles and Responsibilities

Financial Manager

- A University official who must approve employee's request for a P-Card and delegates transaction authority to the cardholder
- Responsibilities for form approval:
 - Ensure appropriate employees are selected as card reconciler and card approver
 - o Provide accurate FOAP / Account number to cardholder for P-Card purchases
 - Notify Procurement and Contract Services upon termination or transfer of anyone with a P-Card role
 - Verify there is sufficient funds in budget

Cardholder

- Any authorized employee who uses the P-Card to execute purchase transactions for university business
- Responsibilities:
 - Ensure purchases are made in accordance with all university policies
 - Secure P-Card and account number
 - Obtain itemized receipts and attach in system
 - o Attach any necessary additional documentation in system
 - Include Business Purpose in Comments section of system
 - Ensure sales tax is not charged when possible
 - Approve transactions with all required documentation monthly by the 30th
- Transaction Disputes (legitimate purchase)
 - Try to resolve first with merchant
 - Use dispute button in US Bank system
 - o All documentation for final resolution must be uploaded to US Bank Access Online System
- Lost/Stolen Cards or Fraudulent activity
 - o Notify US Bank Immediately (available 24 hours) at 1-800-344-5696
 - Notify Procurement Card Administrator within 24 hours after reporting to bank- you have to report to US Bank first so they can send a new card
 - o Complete any necessary paperwork within timeframe specified

Card Reconciler (first approver)

- Verifies cardholder/trustee's charges and validate correct FOAP/account codes are used and present in system.
- Makes sure there is a business purpose- add a comment or use P Card meal form if meals are involved under each transaction.
- Reconciler can be the cardholder or final approver but cannot hold all three (3) roles
- Responsibilities:
 - Verify each transaction in US Bank's Access Online system includes itemized receipts/documentation
 - Reallocate charges to departmental FOAP/account codes as needed
 - o Report questionable purchases or fraud to Procurement and Contract Services department

Card Approver (final approver)

- Can objectively question all P-Card purchases made by cardholder/trustee.
- The approver MUST NOT be a subordinate in the direct reporting line for the cardholder. Also, the cardholder cannot be the final approver on his/her own card.
- Responsibilities
 - o Conduct final independent review of transactions and receipts
 - o Monitor P-Card transactions monthly to ensure compliance to policies and guidelines
 - o Review and approve each transaction in US Bank's Access Online system monthly
 - o Report questionable purchases or fraud to Procurement and Contract Services department

College of Arts & Sciences

Activation, Renewal, Suspension & Cancellations

Card Activation/Renewal

- Cardholder calls P-Card activation number or goes online to activate card
- Automated system will prompt cardholder for necessary information
 - When asked for 4-digit code, use the last 4 digits of your University Banner ID number (ex. U00001234)
 - o Billing address is listed on the sheet with the card zip code is 38111
- P-Card will automatically renew before expiration date
 - Procurement will notify cardholder by email upon arrival of new card
 - o Cardholder will sign updated Cardholder Agreement
 - o Additional training may be required if deemed necessary by Procurement and Contract Services
- To suspend or cancel your card:
 - Complete the Purchasing Cardholder Change form: <u>https://memphiscentral.etrieve.cloud/#/form/62/?focus=true</u>
 - Submit the form through the E-Trieve system. Once approved within your dept, it will then send the form to the Procurement and Contract Services Department, who will complete the request in the bank's online system for suspension or cancellation.
 - Reasons for suspension/cancellation include a leave of absence, change in employment or misuse as determined by the Office of Procurement and Contract Services for non-compliance with policies.

Proper Use & Policy Compliance

Suggested/Allowable Card Usage

- Advertising Fees
- Business meals (if approved)
- Books
- Computer peripherals (mice, keyboards, speakers, etc.)
- Conference registration fees
- Equipment less than \$5,000
- Lab supplies
- Online purchases of books or classroom materials
- Postage/shipping/courier services
- Surveys for research
- Training classes
- Web services for research

All purchases must be shipped and delivered to a university address

Business Meals Policy

- Business meal purchases require written approval from Department Head or higher. This can be a simple email request from you with your Dept Head or higher included.
- Cardholder must adhere to Purchase of Meals Policy (BF4002) and attach any required Purchasing Card Meal form with itemized receipts in the system.
- Food purchases of \$200 or more (faculty/staff groups) or \$500 or more (student groups) for on-campus events must be purchased through the University's food service vendor.

Business Meals-If approved

If you have been approved to use your P-Card for business meal purposes, please note the following:

- No alcohol may be purchased
- Itemized, detailed receipt must be provided along with the P-Card meal form
- Gratuity cannot exceed 20% of the subtotal (before taxes)
- More than one person must be present for business meal and list of attendees is needed

Card Restrictions

Items for non-university purposes	Breakroom supplies-coffee, creamer, plastic ware, napkins Consumables for employee use Employee parties/gifts/flowers Individual dues / memberships
Items on university contracts	Computer products Copy machines Moving services
Items requiring specific documentation	Meals Services that require contracts Hazardous materials Gift Cards

Restricted purchases

Alcoholic beverages – foundation funds only, limited permission

Animals - Tigerbuy

Cell phones, data plans, etc. for employees

Charitable Contributions- don't allow donations be to be added to your purchase

Purchases from out-of-country vendors

Travel-related expenses (food, lodging, and transportation)

Split Purchases- nothing over \$4999.00 without Procurement Card Admin Approval

Flower arrangements/gifts for past or departing employees

Additional Industry Restrictions

- Merchant Category Code (MCC) is an industry-provided code that categorizes all suppliers based on the goods and services sold.
- In addition to card limits, the P-Card is subject to certain MCC restrictions and will not be authorized at point of sale.
- Examples: gambling establishments, jewelry stores, and other types of merchants unlikely to provide goods or services with a legitimate business purpose.

Document Retention

- Electronic Retention
 - US Bank's Access Online system will maintain transactions and documentation for seven (7) years
- University-Funded Purchases
 - o Retain records for three (3) years after fiscal year-end
- Sponsored Program
 - Supporting documents must be retained for three (3) years after date of grant/contract final expenditure report submission. (Check with Grants Accounting for your specific grant information)

Sale Tax

Sales Tax Exemption

- Always ask the vendor if they honor TN sales tax exemption when making P-Card purchases (Some states will not accept a TN sales tax exemption)- TN Tax exemption letter taxaccounting@memphis.edu.
- University tax-exempt number is embossed on the face of the card, but most vendors need a Tax Exemption form.
- Amazon Purchases Amazon has a place to submit our certificate to allow exempt status or use our university business account.

Liability, Misuse & Monitoring

Liability

The P-Card is an institutional liability card. This means the university pays the monthly central P-Card statement in full directly to the Issuing Bank.

P-Card Misuse

- Common Violations
 - o Receipts / documentation missing
 - Failure to reconcile/approve monthly charges by the 30th
 - Use of P-Card for non-University or personal purchases
 - o Travel Violations
 - Failure to secure the P-Card from unauthorized use
 - Split purchases
 - Failure to include the business purpose/comment
- Consequences of P-Card Misuse
 - Improper or fraudulent use will result in disciplinary action, up to and including prosecution and termination of employment.
 - In all cases of fraudulent use, Internal Audit, Human Resources, Police Services, and respective Dean/Chief/Vice President/Vice Provost will be notified

"No Review" on Cardholder's Monthly Purchases

First Offense:

- Cardholder receives email warning from Procurement and Contract Services and copied to card administrator and card reviewer as part of month end reconciliation to include the following:
 - o Provide proof of review
 - Complete all required approvals and documentation before the next month's cycle close date or card will be suspended until complete

Second Offense:

- Cardholder receives email warning from Procurement and Contract Services and copied to card administrator and card reviewer that card will be suspended if all required approvals & documentation are not completed within 15 days of warning
- Department head (e.g., Dean, Director, Vice-President) is notified
- Card Reviewer and Cardholder must attend mandatory P-Card training together if not completed after 15 days
- Card will be suspended until training is completed

Third Offense:

• The card use is terminated

Misuse of Purchasing Card

First Offense:

- Cardholder receives email warning from Procurement and Contract Services and copied to card administrator and card reviewer
- Provide proof that funds were reimbursed to the University

Second Offense:

- Cardholder receives email warning from Procurement and Contract Services and copied to card administrator and card reviewer
- Department Head (e.g., Dean, Director, Vice-President) is notified
- Cardholder must attend mandatory P-Card training
- Provide proof that funds were reimbursed to the University. If training is not attended or proper documentation is not provided, the P-Card will be immediately terminated

Third Offense:

• The card use is terminated. In the event that the cardholder used the P-Card to make a personal purchase, a determination as to whether taxable income should be assessed will be made by the Accounting Office. In addition, the incident will be reported to Human Resources and the cardholder's department head for the pursuit of potential disciplinary action in accordance with applicable University and TBR policies and State statutes.

<u>Fraud</u>

If any cardholder uses the P-Card to make a fraudulent purchase, card privileges will immediately be terminated and a determination as to whether taxable income should be assessed will be made.

The incident will be reported to Human Resources, Police Services, Internal Audit and Legal Counsel, along with the cardholder's department head. In addition, termination of employment will be pursued and the filing of criminal charges in accordance with applicable University and TBR policies and State statutes.

Disputed Transactions

- If you determine there is fraudulent or erroneous activity on your P-Card, reach out to US Bank first at 1-800-344-5696 so they can turn the card off and reissue new card.
- Go into banking system and dispute the transaction. Bank should be sending you paperwork to complete if it was fraudulent. Complete forms and return to US Bank.
- If a credit is returned from the bank's investigation, you must approve the credit transaction, so it moves to the "final approved" status.
- If is fraudulent, you will not have a receipt to upload. Please add a comment to the transaction for auditing purposes.
- Do not dispute personal charges. Report the error to Procurement Card Admin and reimburse the University by completing the deposit authorization form and taking it to Bursar to pay. Upload the deposit authorization form and receipt from Bursar to the transaction in the bank system.

<u>Audit</u>

- The procurement card program does get audited internally and externally by the State of TN.
- Things they are looking for:
 - o Itemized receipts and supporting documentation (food form, agenda, etc.)
 - Date of Purchase
 - Subtotal of transaction
 - Total of transaction
 - Sales tax
 - Each individual item purchased
- Date on the receipt vs. date of transaction- sometimes a simple explanation can work this out if the dates are different.
- Business purpose
- Sales Tax
- Travel Related Expenses
- Split Purchases

Monitoring

Office of Procurement and Contract Services will continually monitor transactions and supporting documents to ensure compliance with university polices and P-Card Guidelines.

- Transaction Summary (Daily) This is to watch for fraud, compliance, and split transactions.
- **Declined Transactions (Daily)** This is to watch for non-compliant attempted purchases and possibly compromised cards.
- Fraud / Sales Tax Audit (Weekly) Spending by person by category and Sales Tax paid by cardholders. Persons paying Sales Tax are encouraged to seek refunds and/or to provide Tax Certificates to vendors.
- Approvals Audit (Monthly) Cardholders with missing Approvals are contacted to make corrections. Cards with repeated Approval non-compliance will be suspended.
- Approval Audit report is also used to check for Asset purchases between \$1,500 and \$4,999.

All faculty/staff positions are created, posted, and managed through the WorkforUM website. <u>Learning Curve</u> offers in-depth training on the WorkforUM site. This section will provide tips to use during the hiring process, how to compose offer letters, and Faculty summer compensation.

The internal WorkforUM site is found in myMemphis on the *Employee* homepage. For hiring, you will select *Internal Site*. Here you will be able to search/view existing postings and create new postings. You will also find detailed instructions on WorkforUM trainings under *My Links*. The following documentation is available:

- Part 1: Introduction to the System
- Part 2: Request to Fill Existing Positions
- Part 3: Request to Create a New Position
- Part 4: Requests to Reclassify/ Retitle an Existing Position
- Part 5: Tracking, Reviewing, & Processing Applicant Pools
- Part 6: Hiring an Applicant and Completing a Hiring Proposal
- Part 7: Changing a Position's Supervisor
- Part 8: Part-Time Faculty

Common WorkforUM/Hiring Errors

- Review Postings Before Public View, Not After
- Incorrect Rank on Faculty Positions (Use Faculty Retitle action)
- Check Online Org Chart for Accuracy
- Interviewing Prior to Pool Approval
- Attempting a Hire While Posting is Still Live
- Most staff jobs have defined posting close dates, meaning the system automatically shuts down the posting to new applicants at midnight on the final day
- Most faculty jobs are left open-ended for closing dates, meaning departments must remember to alert FAS when the posting needs to be closed
- 48 hours must lapse between the notice to close and the actual closing, to allow applicants with draft applications to finish applying
- All candidates who applied MUST be evaluated

Review the Posting Language...Before It Posts!

- When an orange side action is routing around for departmental and college level approvals, that is the time to review the wording and duties of a position description
- An alarming number of postings have had to be pulled in recent months because the hiring officials waited until the job posted to read what it said
- This is particularly troublesome if people have already begun applying to the posting

Interviewing No-Nos

- Prepare committees/rooms/schedules before marking applicants as Recommend for Interview
- IMPORTANT: Make sure you have clearance from OIE before beginning interviews (look for the "Approved for Interview" status)
- Each interview round must be conducted in a parallel format (All on Zoom, all in person, etc.)
- Avoid vague/personal/leading questions
- All interview notes/materials must be kept on file for FIVE YEARS

Part-Time Faculty

- Recruited in annual WorkforUM postings (postings on demand)
- Part--timers who have taught for your department within the last two (2) calendar years need not apply two (2) calendar years need not apply
- Appointment via eContract
- All candidates who have applied by the date you are reviewing the pool should be coded

Coding as "Hired" and "Not Hired"

- NEVER code an applicant as "Hired" ... only "Recommend for Hire"
- Once you code an applicant as Not Hired, you cannot undo this action...only a system administrator can revive these people from the dead
- Never code your backup candidates as Not Hired until you know for sure that the first choice has accepted your offer
- Don't forget to code everyone before the search concludes

Faculty Retitles

- When a faculty member leaves the University and his/her position is posted, if you know the new rank prior to posting, do your retitle action first and request its posting via that action
- If you do NOT know the new rank, once the hire is made and the rank decided, then do a retitle action following the seating of the hiring proposal
- Forgetting to do this results in faculty performance appraisals displaying an incorrect rank for the new faculty member

The Missing "Move in Workflow" Link

- When the Department Authority first sees an applicant pool, the Action > Move in Workflow link always appears
- Once the list of applicants starts having multiple people at multiple statuses, the Move in Workflow link can disappear (due to some statuses now being owned by other areas like OIE)
- To get your Move in Workflow link back, use the blue Saved Searches button above your list of applicants and to the left

Request to Fill Faculty Positions

Once you receive approval from the Dean and your department Chair to fill a faculty position you much request to fill the position. The process is as follows:

1. Log into myMemphis and under the Employee tab, locate the WorkforUM section. Here you will select Internal Site.

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	Review Existing Information/Create New Update Request	
	Existing Requests	 Internal Site Request to fill create new vectors fy positions Public Site View & apply for UotM job positings
	+ Request (10/18/17)	Guest access. Review applicant materials as search committee member Facility Evaluations Complete and neview faculty evaluations
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2. Select the three dots next to *Applicant Tracking System*. Choose "Position Management (Orange Side)" in the upper left-hand corner. Then select "Department Authority" from the user group drop down menu in the upper right-hand corner.

Position Management						Welcome, Jessica Abernathy logout
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Employee Records	 Classifications - 					Shortcuts -
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3. Under Positions, select "Full-Time Faculty & Academic Executive" from the Positions drop down menu.

Position Mana	gement		
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Inbox SEARCH	Staff, Administrative Executive, & Contract Coaches Staff, Administrative Executive, & Contract Coaches Actions Full-Time Faculty & Academic Executive Full-Time Faculty & Academic Executive Actions Part-Time Faculty Part-Time Faculty Actions Temporary Temporary Actions	Postings	Hiring Proposals

4. Type the position number you are looking for into the search bar and click search.

	Position Man	agement										Welco
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-	Home	Positions +	Classific	tations -								
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5. Once you have selected the appropriate position by double clicking, a new screen will appear. Select "Request to Fill" from the action items on the right.

No
User Group Department Authority
Shortcuts -
Pring Preview Pring Preview Pring Preview (Englayes View) * view supervisor * Reductor # U-Time Faculty & Acudemic Earculary * Request to Fill Position * Request to Cargo Position Supervisor

6. WorkforUM will then ask you to confirm your selection by choosing "Start".

Position	Management		
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Home	Positions -	Classifications -	
Positions	Full-Time Faculty & Academ	ic ExecutiveRequest to Fill Position 合	
-	1	osition Action on Professor Chair?	

7. Now that you have begun the request to fill, you are within the position and able to update the position details. Once you complete updating the details, save and continue.

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8. *Supplemental documentation* has its own section, and all required documentation such as the justification memo, hiring/recruitment plan, and in some cases a budget revision, should be uploaded and attached here. Save and continue.

HORAGEUM MENIFHIS		
Home Positions -	Classifications -	
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O Position Description		
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Supplemental Questions	Finance Current Year Position Budget Transfer	
O Applicant Documents	NBAPBUD - HR Position Budget Revision	
Action Summary	Document Type	
	Org Chart (New/Reclass)	
	Other (Any Action)	
	Budget Revision 1 (New/Reclass)	
	Budget Revision 2.(New/Reclass)	

Supplemental Documentation for Request to Fill

(Please attach documents in WorkforUM under supplemental documentation.)

- 1. Justification Memo
- 2. Hiring/Recruitment Plan
- 3. External Advertisement (if advertising externally)
- 4. Resignation Letter OR copy of Separation and Clearance form (ONLY if filling a position that had someone in it recently)
- 5. Budget Revision (ONLY if not enough funds in budget for salary, check NBAPBUD.)
- 6. Award Letter and Internal Budget (Grant funded positions ONLY)

Justification Memo guidance: Why are you asking for this position? Has someone resigned? What benefit is this position to the department? How will the position be funded?

Hiring/Recruitment Plan guidance: What are you doing to address diversity in recruitment? This does not need to be long; we would like to know what efforts are being made to recruit a diverse applicant pool?

Some items you could provide information on would be:

- · What institutions produce underrepresented doctoral degree recipients in your discipline that you will share the position advertisement with?
- Is your search committee diverse?
- Are you intentionally advertising to groups underrepresented within your discipline?
- · Are you planning to score all applicants with the same rubric?
- · Are you asking all candidates the same questions?

9. The next section will be the "Requisition Form." On this page, you must choose a date for the position to post. *If you do not include an end date for the posting it will remain open/posted until you contact HR and request that they close it. Save and continue.

Home	Positions -	Classifications •
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		B I S 8 T V 4 E E E E A
		Special Instructions to
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		employees only?
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		HigherEdjobs.com? Yes
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		Instructions to Applicant

10. Next, select any applicant documents you would like submitted with the application.

diting Action	Applicant Documents				
Position Description					
Supplemental Documenta .					
Requisition Form	Select the documents to be required with	this tem and this	e that may ope	ionally be attached. Document types marked "Not Used" cannot be attached to this item.	
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11. Finally, you will be brought back to "Action Summary" where you can review your changes before submitting.

Position Management		Websene Januar Aber Der Group Aggreiche Auflich
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FTE Status	Rul-Time Benefics Eligible	
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12. Check your information. If everything looks correct, select the "**Take Action on Action**" drop-down menu in the upper right corner and select "**Approve and submit to Approving Authority**."

Position Management	Welcome, Jessica Abernathy loggout
mananan 🕅 mananga	User Group: Disportment Autonmy
Home Positions - Classifications -	Shortcuts -
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Request to Fill Position: Professor Chair (Full-Time Faculty & Academic Executive)	Take Action Dr. Action V Konp. verking, or this Action remainson-actions Caracia Action forements Caracia Action forements Caracia Action forements Appendix Automotion Specific actions to Appendix Automotion
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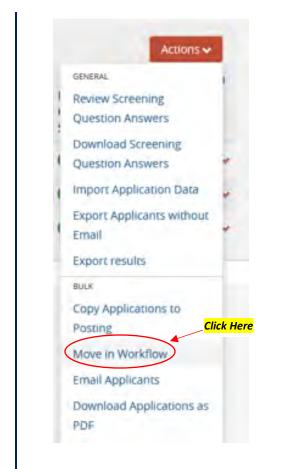
College of Arts & Sciences

Hiring Proposal

step by step process

Staff, Administrative Executive, & Contract Coaches Full-Time Faculty & Academic Executive Ad hoc Search Ad hoc Search Save this search? Selected records Advertised Title Advertised Title Advertised Title Advertised Title Associate Director of Education and Outreach Citk Here Posting: Associate Director of Education and Outreach Current Status: Released Postion Type: Hourly, Monthly & Administrative Executive Office: CAESER (240200) Cite Advertised Provide Authority	Home	Postings *	Pools -	Applicants -	Hiring Proposals -
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Click Her	e Last Name	First Name		Posting Number	Application Date			Document	Conversio Status



Selected Position

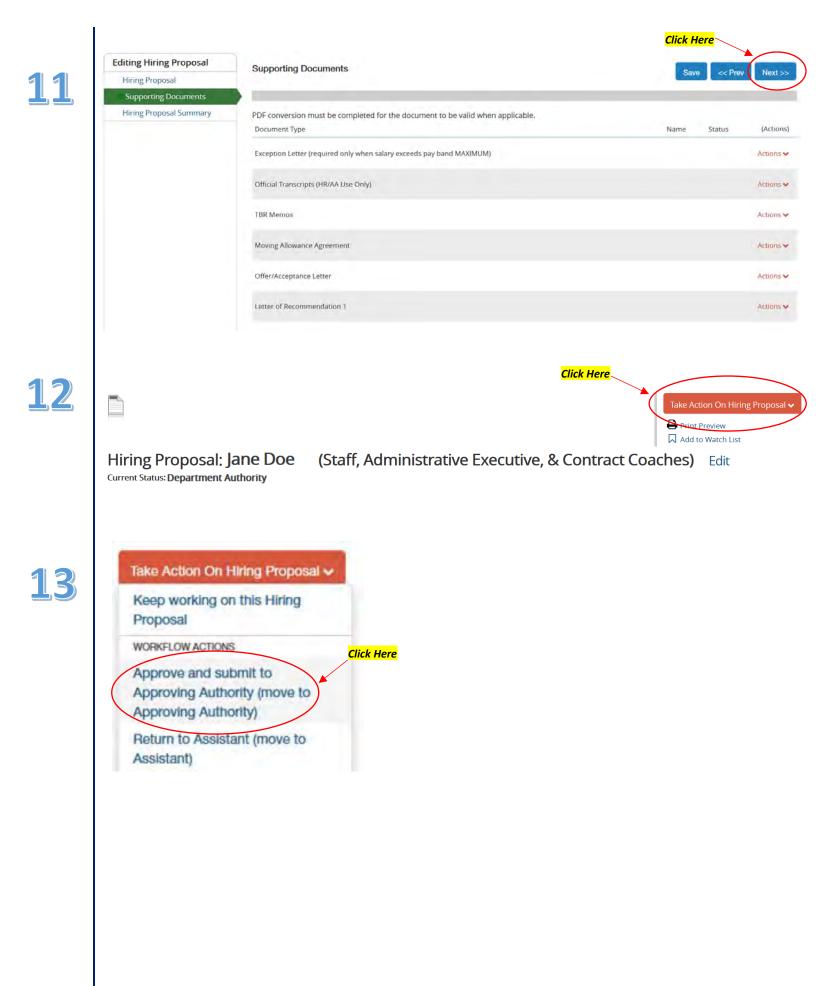
9

This Hiring Proposal is currently connected to the following Position:

Associate Director of Education and Outreach
 Select Position Description
 Click Here

To change the Position connected to this Hiring Proposal, please select an alternative Position using the Search below.

Editing Hiring Proposal	Hiring Proposal	
Hiring Proposal		
Supporting Documents		
Hiring Proposal Summary	 Check spelling Required Information Posting Information 	
	Posting Number HMAE1371	
	Campus Location Main Campus (Memphis, TN)	
	Prospective Employee	
	Preferred Salutation	
	Employee First Name	
	Employee Middle Name	
	Employee Last Name	
	Suffix	
	Employee ID Number	
	(HISTORICAL) Employee ID Number	
	Address	



Required Documentation for Request to Fill & New Position Requests

(Please attach documents in WorkforUM under supplemental documentation.)

- 1. Justification Memo
- 2. Hiring/Recruitment Plan
- 3. Budget Revision (Always required for new positions; also required with request to fill when not enough funds in budget to cover salary.)
- 4. Award Letter and Internal Budget (Grant funded positions ONLY)
- 5. External Advertisement (if advertising externally)
- 6. Resignation Letter OR copy of Separation and Clearance form (ONLY if filling a position that had someone in it recently)

Justification Memo guidance: Why are you asking for this position? Has someone resigned? What benefit is this position to the department? How will the position be funded?

Hiring/Recruitment Plan guidance: What are you doing to <u>address diversity</u> in recruitment? This does not need to be long; we would like to know what efforts are being made to <u>recruit a diverse applicant</u> <u>pool</u>?

Some items you could provide information on would be:

- What institutions produce underrepresented doctoral degree recipients in your discipline that you will share the position advertisement with?
- Is your search committee diverse?
- Are you intentionally advertising to groups underrepresented within your discipline?
- Are you planning to score all applicants with the same rubric?
- Are you asking all candidates the same questions?

Waiver of Search & Reclass

Requests for items below must be approved by the dean and provost *prior* to submitting a WorkforUM action. All items should be discussed with and approved by the dean before elevating for provost consideration.

- 1. <u>Waiver of Search form</u>: must attach applicant CV, draft offer letter, and justification (combine into one pdf document)
- 2. Reclassifications: To request a reclass please email a justification memo, excel spreadsheet of current vs. proposed duties, and a preliminary budget revision (how is your department covering the change in salary?) to <u>imabrnth@memphis.edu</u> for CAS Dean's office consideration.

To enter a reclass request in WorkforUM you must attach the following documentation under supplemental documentation:

• Justification memo with Dean and Provost signatures or an email documenting dean and provost approval.

Waiver of Search Requests

All requests to waive the University's search requirements, in whole or in part, must accompany a completed <u>Waiver of Search Form</u>. Incomplete submissions will result in delays in processing. Signatures from the Dean and Provost's office must be obtained before submitting the form via WorkforUM. You may review the full policy <u>GE2043</u> in PolicyTech.

All requests should be submitted through WorkforUM and be approved prior to OIE review. Failure to obtain all required approvals will result in delays in processing. OIE will review the action in WorkforUM and approve or disapprove the request within five (5) business days. The reason(s) for denial will be shared with the requesting department. If the department does not demonstrate an appropriate justification for a Waiver of Search, they will be required to recruit for the vacant position utilizing the regular recruitment process.

Waiver of Search Criteria: In limited circumstances, the University's interests are best served in foregoing the standard posting and search procedures. In such cases, a waiver of all or part of the regular search process may be granted. Below are the criteria that can justify a waiver of any part of the search process:

- a. Within the past twelve (12) months, the department conducted a search that yielded a diverse candidate pool, and the department wishes to select a candidate from the original pool for the opening in the same job title.
- b. Lack of available, qualified candidates as evidenced by at least two (2) failed searches in the past year.
- c. Emergency circumstances that are truly unique and cannot be resolved effectively through other means.
- d. Lack of planning will not be considered an emergency circumstance.
- e. The candidate is specifically named in a grant. The face page and portion of the grant which names the individual must be included with the waiver.
- f. The position would be filled by an accompanying spouse/domestic partner, whose appointment is necessary to recruit a successful candidate identified in a pre-existing search in the same or a different department, or to retain a current faculty member. Please attach an explanation of the necessity for the exemption and the programmatic needs justifying employment of the accompanying spouse/domestic partner. No appointments shall be made that violate the University's policy <u>HR5055 Nepotism and Personal Relationships.</u>
- g. The University recognizes that unique circumstances may occur outside the standard requests for a waiver of the search process other than those identified above. If the request for a waiver is based on other reasons, the requesting department should contact OIE prior to submission to discuss.

Electronic Offer Letters for Faculty

All faculty positions require an electronic offer letter to be completed in WorkforUM within the hiring proposal. **You will not need to write a letter as they are no longer mailed out nor attached as supplemental documentation.** Human Resources provides editable letter templates. These templates can be edited at the department, the dean, and the provost levels. To access the template, complete the following steps:

- 1. Look for the "Offer Letter" tab on the candidate's hiring proposal.
- 2. In the drop down menu, select the correct offer letter template for your hire.
 - Departments/deans will have 19 choices of potential letters templates to be created:
 - Tenure Track Offer Letter
 - One Year Offer Letter
 - Lambuth One Year Offer Letter
 - Post-Doctoral Fellow Offer Letter
 - Clinical Faculty Offer Letter
 - Grant-Funded Tenure Track Offer Letter
 - Grant-Funded One Year Offer Letter
 - Grant-Funded Lambuth One Year Offer Letter
 - Grant-Funded Post-Doctoral Fellow Offer Letter
 - Grant-Funded Clinical Faculty Offer Letter
 - Campus School Offer Letter
 - Middle School Offer Letter
 - Lipman ELRC Offer Letter
 - University Libraries Offer Letter Template
 - Grant-Funded University Libraries Offer Letter
 - Instructor Coordinator Offer Letter
 - Research Faculty Offer Letter
 - Grant-Funded Research Faculty Offer Letter
 - Chair Offer Letter
- 3. Once the correct template is selected, <u>you will need to edit the letter to reflect what needs to be</u> <u>stated</u>.
- 4. Certain fields from the hiring proposal, such as salary, are automatically populated into the letter.
- 5. Traditional signatures from the hiring authority are <u>NOT</u> needed.
- 6. Once the wording of the letter has been finalized, Academic Affairs will send the final version to the candidate, who may either accept or decline.
- 7. All parties will be notified when a response from the candidate has been received.

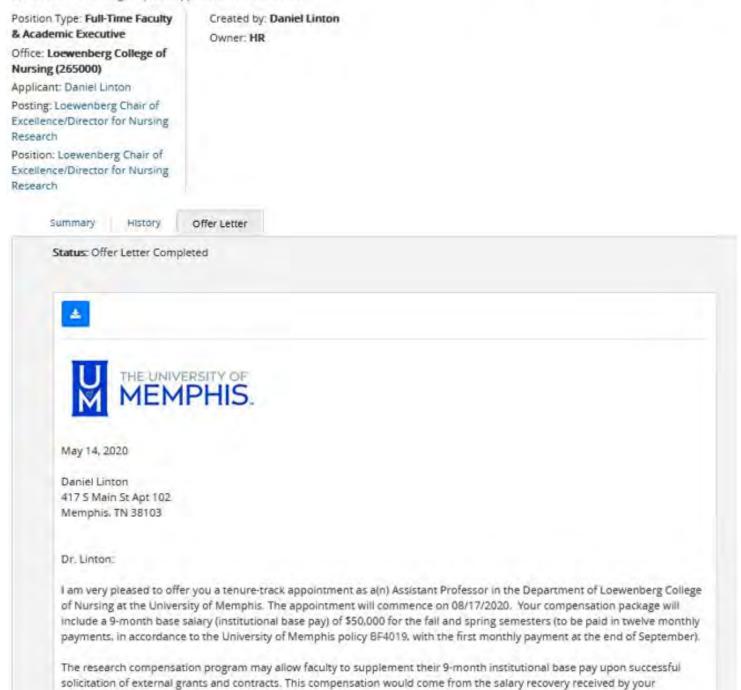
For additional help contact the following:

- Faculty Positions: Faculty Administrative Services facultyservices@memphis.edu
- Staff & Temp Positions: HR Business Partners hrbp@memphis.edu
- System Issues: Danny Linton <u>dmlinton@memphis.edu</u>
- Budget Issues: Susan Boyce or Grants & Contracts <u>dboyce@memphis.edu</u> or <u>grants@memphis.edu</u>
- Interview Pool Approvals, etc.: Institutional Equity <u>oie@memphis.edu</u>
- Anything: Danny Linton <u>dmlinton@memphis.edu</u>

Example Offer Letter

Appointment Form (Hiring Proposal): Daniel Linton (Full-Time Faculty & Aca

Current Status: Hiring Proposal Approved/Position Seated



department as the result of your externally funded research program.

Checking Employee and Employee Salaries in Banner

NHIDIST

- Labor Distribution Data Inquiry
- · View employees paid from department index by date and account code
- · Able to view salary charged (expenses) and salary encumbrances (future obligations)
- · Allows you to do basic or advance query, i.e., name, earnings code and employee class

Finance Document:	•••		Grant:		•••	
Number COA:	U		Fund:	110001		
	210700					
Hierarchy Roll Up:			Account	61410	•••	Student Assistants Hourly
From Date:	07/01/2022		Program:	2000		
To Date:	07/31/2022		Activity:		•••	
Category: *	Expenses	•	Location:		•••	
Ger Starreu. Compeu	Expenses Liabilities Encumbrances Accruals(Defer Pay) Payout(Defer Pay) Clearing Act Fringe Actuals	rch by name, press TAB from an ID field, enter your search criteria, and then press ENTER.				

College of Arts & Sciences NBIPORG

- Position List By Organization
- · View all positions located under a specific org code

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POSITION LIST BY OR	GANZATION								O Settings []
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XC1000	Additional Comp	Α.	07/01/2010		Р		1.0000	0.000	
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Contracts

Part-time Faculty eContracts

- Deadline 5th workday of the month per appointment guidelines
- Account Code 61253 for Fall and Spring semesters; 61256 for Summer
- Rate of Pay based on Arts and Sciences established three level pay rate. The three levels of pay rate is based on degree, longevity, and teaching experience. Pay rate increase is due to across the board increase.
 - o Level 1 meet minimum requirements for teaching
 - Level 2 terminal degree and/or several years (3-5) of experience and a strong teaching record at the UofM
 - Level 3 terminal degree and a strong record of teaching experience

Extra Compensation eContracts

- Deadline 5th working day of the month per HR guidance
- Eligibility– Work performed outside of and in addition to normal work schedule, duties and responsibilities (HR5011)
- Eclass Monthly paid employees AD, FA, FD (Hourly paid employees receive over-time; F9 faculty use the summer compensation portal)
- F9 faculty use the Extra Compensation eContract during the Fall and Spring Semesters
- Extra Compensation will need to be completed for FA and AD E-class positions who are teaching outside of their normal job duties. Compensation is to be based on CAS three levels for adjunct faculty/part-time instructor pay rates. Justification should be in detail explaining overload or explaining how job duties doesn't require teaching.

Faculty Summer Compensation eContracts

- The University policy on Summer Compensation for Nine-Month Faculty is HR5012
- The Home Department initiates contracts for faculty in their area
- The Maximum compensation allowable is 33 1/3% of annual base salary during the summer
- There is a two-step process: eContract approval and EPAF approval

Faculty Summer Compensation eContracts - Credit Instruction

- Maximum compensation allowable is 25% of annual base salary
- Courses auto-populate if the faculty member is already identified as the instructor of record
- Arts and Sciences has a \$7,000 payment cap per course
 - Annual base salary x 3.125% x # credit hours = payment
 - o Example: $90,000 \times 3.125\% \times 3$ credit hours = 8,437.50 CAP/ 7,000

Summer Credit Instruction Dates

Session	Job Effective Date (beginning)	Job Effective Date (end)	Pay Date(s)	Banner Job Change Reason	Banner Term Code
Pre Session	5/1	5/31	5/31	SCPRE	PRE
1st Session	6/1	7/31	6/30 and 7/31	SCIST	1ST
1st Teacher	6/1	6/30	6/30	SCITC	1TE
2nd Session	7/1	8/31	7/31 and 8/31	SC2ND	2ND
2nd Teacher	7/1	7/31	7/31	SC2TC	2TE
Full Session	6/1	8/31	6/30, 7/31, and 8/31	SCFUL	1
RODP	6/1	8/31	6/30, 7/31, and 8/31	SCROD	ROD
Law	6/1	6/30	6/30	SCLAW	LAW

Faculty Summer Compensation eContracts - Sponsored Programs (Grants)

- Maximum compensation is 90% of maximum summer compensation allowable
- Verify funding through FRIGITD screen in Banner Admin Pages or the internal budget in Cayuse
- Verify grant end date through FRAGRNT screen; payments should be processed prior to end date
- Work with your Grant Accountant

Graduate Assistant eContracts

- Deadline Based on Graduate School calendar
- Monthly summer contracts can extend from May 1st through August 31st
- Biweekly– summer contracts can extend from May 8th through August 11th or 25th
- Monthly and Bi-weekly contracts cannot overlap

Faculty Incentive Compensation

Purpose: To reward faculty for sustained research productivity and scholarly activities.

Who is eligible?

- Individuals eligible for Incentive Compensation hold faculty rank and are paid from EDUGEN positions. All faculty (including tenured, tenure-track, non-tenure track/clinical/research/instructors)
- Banner E-class FA or F9

Exception to policy:

• Position that are grant-funded by centers and chairs of excellence are considered EDUGEN positions.

Incentive Compensation:

• Form of non-guaranteed supplemental compensation based on 50% of salary recovery.

Policy - <u>**RE7006**</u> (Please review)

Faculty seeking Incentive Compensation must:

- Receive approval by their Chair and Dean to receive up to 50% of salary recovery.
- Obtain external funding for his/her base salary.
- Verify work performed by completing the effort certification and complying with BF4010 Certification of Effort.
- Initiate payment by completing the incentive payment request form.
- Meet or exceed all other expectations related to his/her faculty rank.

Process

Effort Certification:

- Effort Certification Reporting Webpage Step by Step Instructions & Training Videos
- Faculty must complete effort certification process to document work on sponsored projects before requesting incentive pay.
- BF4010 Certification of Effort BF4010 Certification of Effort
- Effort Certification User Guide
- Approvals are no longer needed. Certification is complete once effort form is certified.
- No longer able to make changes to effort form. Will need to click "Request Changes" button and send e-mail to Business Officer/Admin to request salary redistribution. Once salary redistribution is complete you are then able to certify your effort.
- Effort Certification now includes unrestricted/non-sponsored research for faculty.
 - Currently, the system is programed to capture non-sponsored research under program codes 2611 University Research and 2510 Center of Excellence.
- Effort certification is now completed monthly beginning February 1, 2023.
- Starting with the Spring 2023 Effort Periods, if required Effort Certification isn't complete in a timely manner 45 days after the end of the monthly Effort Period, a new process will be in place to move any non-certified effort back to the Department.



Effort Certification Quick-Guide for Certifiers

Banner Self-Service Effort Certification

- 1. Login to the mymemphis.edu portal.
- 2. Click on the **Employee** tab.
- 3. In the Banner Employee Dashboard channel, click on the **Employee Portal** link.
- 4. Click Effort Certification in the 'My Activities' section.

	t	
Approve Leave Report		
Electronic Personnel Action Forms (EPAF))	

- 5. Click on **Certify My Effort** tab. Highlight and double-click on the report period to be certified.
- 6. Verify effort percentages are correct per funding.
- 7. Click on the **Pay Period Summary** tab and verify pay period effort allocations are correct.
- 8. After you review the details, from the Effort Report tab
 - If all the information is correct, click the Certify button, review the certification statement, and click I Agree.
 - If changes are necessary:
 - click on the **Request Changes** button. An email window will open for you to request changes.
 - Email your departmental financial representative to initiate a Labor Redistribution. Provide details of the changes to be made.
- 9. At the top of the screen, click **Print** to print a copy of the effort report.
- 10. Sign out by clicking on the icon next to your name top right of the screen.
- 11. Once a report is certified, it will be completed and **locked**. A green checkmark will appear by your name in the **Routing Queue** when the report has been successfully certified.

Visit the Effort Certification website for more detailed information

https://www.memphis.edu/accounting/effort.php

Salary Redistribution

Note: Salary redistribution is moving to Banner Self-Service. Training will be coming Fall 2023.

You can find salary redistribution at the following link: Banner Labor/Salary Redistribution

Guidelines for F9 and FA Positions with Program Code 2000

The below guidelines apply to Faculty positions (F9 and FA) with program code 2000. Faculty positions with other program codes (2600, 3000, etc.), Staff positions (AD, CL, etc.) and Administrative Executive positions (AE) should continue to be processed with the current guidelines within Grants and Contracts Accounting.

Adding Restricted Labor Distributions (Ledger-5 or Cost-share)

When adding a grant or cost-share percentage of effort to a faculty member's labor record, the unrestricted University research percentage (program code 2611) should be reduced.

Example: A faculty member receives a new restricted research grant with 20% effort.

Current labor distribution:

 $\frac{210200}{110001} \frac{202000}{61210} \frac{60\%}{227600} - \frac{60\%}{110001} \frac{202000}{61210} \frac{61210}{2611} - \frac{40\%}{40\%}$

New labor distribution:

210200/110001/202000/61210/2000 - 60% 227600/110001/202000/61210/2611 - 20% 599999/222222/202110/61210/2603 - 20%

When adding a grant or cost-share percentage of effort to a faculty member's labor record and the new percentage will exhaust the unrestricted University research percentage (program code 2611), then the instruction percentage should be reduced. (The instruction percentage includes teaching and other departmental duties.)

Example: A faculty member receives another restricted research grant with 25% effort.

Current labor distribution:

 $\begin{array}{l} 210200/110001/202000/61210/2000-60\%\\ 227600/110001/202000/61210/2611-20\%\\ 599999/222222/202110/61210/2603-20\%\\ \end{array}$

New labor distribution:

 $\begin{array}{l} 210200/110001/202000/61210/2000-55\% \\ 599999/222222/202110/61210/2603-20\% \\ 588888/233333/202110/61210/2603-25\% \end{array}$

Process (cont.)

Helpful tools to verify effort:

- Grant internal budget
- Banner screen NBAJOBS, NHIEDST, NHIDIST

Salary Recovery Entry:

- Salary recovery budget entry is completed by Grants and Contracts Accounting.
- Budget is moved from below salary account codes to grant recovery account code.
 - Account Codes
 - 61110 61165
 - 61210 61265
 - Note: Below account codes do not apply to faculty incentive compensation.
 - 61310 or 61312 61365
 - 61610 61665

Salary Recovery Entry - Example: FGIBDST or FGIBDSR

DETAILT	RANSACTION ACTIV	ΠY	_	_	_							© Settings	🛾 beet 🛔
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			-										
Account	Organization	Program	Field	Amount		ncrease (+) or Decrease (-)	Туре	Document *	Transaction Date *	Activity Date *	Description	Commit Type	Fund *
Account 61265	Organization 210000	Prográm 2000	Field ABD	Arricent	3,316.00		Type BG4	Document * J0287608	Transaction Date * 02/22/2022	Activity Date *	Description HR BR Post/16151 Verwgopal D 54/943	Commit Type U	Fund *

Incentive Pay Calculation - Example:

EE Name	Dv Despak	Venugopa					
UID	U00596473	3					
Position Number	016151		1	1			
Encumbered Salary	\$110,532.3	6					
# Months paid out	8						
Enter Splits Here:	-			-	_		
Index	# months		Fall	# months	S	pring	Total
	charged	Percent	Amount	charged		Amount	Recovery
540943 - 227829	4	6%	\$3,315.97	4	6%	\$3,315.97	\$6,632
	0	0%6	\$0.00	0	0%	\$0.00	\$0
	0	0%	\$0.00	0	0%	\$0.00	\$0
	1			-			
			\$3,315.97	1	-	\$3,315.97	\$6,632
Fall 2021							
540943	\$1,657.99						
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Spring 2022		C					
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	\$0.00						
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	\$0.00						
	\$0.00				-		
	Total	\$1,657.99					
1	Grand Total	\$3,315.97					
		\$0.00	Amount Previ		-		
		\$3,315.97	Grand Total D	hue			
			This reflects t	he 50% for the	faculty Inc	entive Compen	ation
			The other 50%				

Incentive Compensation Agreement & Payment Request Form - Example:

The University of Memphis

Incentive Compensation Agreement & Payment Request FACULTY ONLY Notes: This form is not to be used for payments funded with stimulus funding.

	pal, Deepak Name (Last, First, M.I.)			2U00596473 Bann	ner ID
4.	's Home Department		nesheet Org		Position No For Payro	D. Suffix
Rank/Titl 5. E-Class (9 6. Incentive	or 12 month faculty):	F9_XFA	Earnin	ngs Code:	<u>680</u> Accou	unt Code: <u>61265</u>
based upon a ne the department	igotiated percentage (not to e with the need to reward facult	exceed 50%) of salar y for sustained product	y recovery, payable after uctivity. Before incentive p	each effort	aculty for sustained research and s certification period. The chair must in be made, the salary recovery m id for other departmental purposes	balance the needs of ust reimburse the
Begin Date:	09/01/2021	End Date:	12/31/2021		Negotiated Incentive Percentage	50 %
Prior to payment	nt of the incentive compension	ution, the following	amounts are to be sub	tracted from	m the salary recovery allocable	to each semester:
a. Requi	red allocation to reimburse	department for fac	ulty replacement costs	(e.g. tempo	orary instructor.)	\$0
b. Discr	etionary allocation to reimb	urse department fo	r faculty support costs	(e.g. travel	or summer compensation.)	\$0
c. Discr	stionary allocation to meet	other departmental	needs (e.g. graduate as	sistantship	os or equipment.)	\$0
	basis for costs of replaceme equest for following grant(s \$1,658.00		loads or other reassigned	d actividies):		
	, and Deans: We have read a nsation may be returned to the			ntive Compe	nsation. We understand that exce	sa payments for
Faculty Signatu	re D	ate Departmen	t Chair/Activity Head	Date	Dean/Director	Date
7. Payment F					emester of Effort	
	Organization/Account charge a sponsored progr		Amount	Fall	Contraction of the state of the	Payment Date*
aDept.Acc	Linfo_using account code	61265	\$_1,658.00	_X_		03/31/22

Request for Interim/Added Duties Form

This form should be used for the reasons outlined below in Policy <u>HR5010</u>. Please be advised for additional duties/interim appointments you need to obtain approval <u>BEFORE/PRIOR</u> to work being completed.

Temporary Added Duties: Salary increases associated with the assumption of additional duties <u>outside</u> the scope of the current position for a <u>defined period of time</u>, as determined by Human Resources. Temporary Added Duties assignments should not exceed twelve months unless an exception is approved by the AVP/Chief Human Resources Officer. This type of increase does not carry a change in title.

Interim Appointment: An employee assigned on a provisional basis to perform functions <u>of a vacant position</u> with greater responsibility and/or scope of authority. Interim assignments should not exceed twelve months unless an exception is approved by the AVP/Chief Human Resources Officer. Salary increases for these actions will be evaluated by Human Resources in conjunction with the department/division head.

College of Arts & Sciences



Please complete, save, & print this form. After signing, please scan and e-mail for approval routing. Please route only to the next office in the routing queue.

Employee Data	
Employee Name:	Employee U#:
Current Title:	Current Position Number:
Department/Division:	_ College/School:
Action	
Choose only one:	Effective Start Date:
Interim Appointment:NewExtension	Effective End Date:
Temporary Added Duties:NewExtension	Current Salary: \$ per hour (non-exempt) <pre>(complete one)</pre>
Vacant Position for Interim Assignment:	\$ per year (exempt)
	Additional Salary Amount: \$
	HR will approve final salary; department to provide budget info if paid from separate index

Justification

Please provide a statement of specific request and justification, including additional responsibilities to be assumed. Use additional pages if necessary. (NOTE: The employee will not change position numbers or job titles.)

DEAN APPROVAL	(Please print name) (Academic Affairs Or		(Signature)	(Date)
l request approva	l of the appointment	as specific above.	I understand all signatures are re	quired for final approval.
	(Please print name)		(Signature)	(Date)
Approval Signat	tures			
PROVOST/VICE P	RESIDENT			
	Approved	Disapproved		
PRESIDENT: Presi	idential approval only	, required if empl	(Signature)	(Date)
		required if emplo	oyee is a direct report to Provosi	or vice President.
		Disapproved		
	Approved		(Signature)	(Date)
HUMAN RESOUR	Approved			
HUMAN RESOUR	Approved		(Signature)	(Date)
HUMAN RESOUR	Approved	Disapproved		
HUMAN RESOUR AVP/CHIEF HR OF	Approved CES Approved	Disapproved	(Signature)	(Date)
	Approved CES Approved FFICER	Disapproved	(Signature)	(Date)

Bonuses and Incentives Forms

Bonuses and Incentives policies are outlined in HR5016.

Performance-Based Bonus

This is recommended for employees who exceed the expectations set forth on their position and established goals, have demonstrated continuous outstanding performance, have made significant contributions to the University's and department's mission or strategic plan and/or have provided consistent support to the department's objectives.

The Performance-Based Bonus may be up to \$15,000 or 10% of the employee's salary, whichever is greater. Requests for bonuses larger than \$15,000 or 10% of the employee's salary requires recommendation from Human Resources and approval from the President or designee.

Project-Based Bonus is a lump sum amount payable upon the successful completion of a special project or assignment of significance that is in addition to the employee's regularly assigned duties and may be awarded to an individual or group of employees to recognize and reward exceptional effort upon successful completion of a major project that is:

- · completed on time, at or under budget, and
- strategically important to the goals and performance of the division, school, department, or University.

The following criteria applies to Project-Based Bonus payments:

- The amount of the bonus may not exceed \$5,000 or 10% of the employee's salary, whichever is higher.
- The project must have a beginning and ending date along with a list of deliverables.
- Decision regarding the amount of the bonus payment should be dependent upon the nature and complexity of the project and the overall participation and contributions made by the employee(s).



Employee Bonus and Incentives Request

Please consult University Policy HR5016 before completing this form. Submit this completed form to hrservicecenter@memphis.edu or deliver to 165 Administration Building.

GENERAL INFORMATION

Employee Full Name: ______ Banner ID: ______

Department: ______ E-Class: ______ E-Class: ______

	J	υ	D.	Т	ιu	ie:	
_							-

PAYMENT INFO	ORMATION					
Index	Fund	Org	Program	Account (circle one)	Suffix	Earnings Code
				AD/AE/AM/CH: 61681 CL/S8: 61381 F1/FA/F9/FD: 61281	BN	613

TYPE OF BONUS (Complete one section/column ONLY; attach additional comments page if needed)

Performance-Based Bonus	Project-Based Bonus	Variable Compensation Plan Bonus
Bonus Justification:	Summary of Project:	Attach/upload a copy of the pre-established and approved Variable Compensation Plan. Bonus Period: From To Explanation:
	Project Dates: From To Deliverables:	
Amount: \$ (Not to exceed \$15,000 or 10% of employee's base salary, whichever is greater)	Amount: \$ (Not to exceed \$5,000 or 10% of employee's base salary, whichever is greater)	Amount: \$ (Amount must be in agreement with the stipulations included in the Variable Compensation Plan)

APPROVAL SIGNATURES

Department Head (Requestor): _			Date:
	Print Name	Signature	
Divisional Leader (Approver):			Date:
Human Resources (Approver):			Date:
President (Exceptions Only):			Date:

Hiring Bonus

To facilitate recruitment of employees whose skills are considered critical to the University's operations and strategic mission and/or for positions deemed difficult to fill. The following criteria should be followed when offering a Hiring Bonus:

- The employee must agree to work for the university for a minimum of one year from the effective date of hire.
- A longer term of service may be determined based on significance of the position and size of the hiring bonus offered.
- The employee must meet all pre-employment requirements and begin working before receiving the hiring bonus.
- A written agreement outlining the key objectives for the employee, the performance requirements, and the pay-back terms if the employee leaves the University prior to the pre-determined term of service must be signed by the employee.

Variable Compensation Plan Bonus rewards employees based on a pre-approved Plan created by the unit/department in collaboration with Human Resources. The amount of the bonus is established within each Plan and is based on employee's contribution, departmental objectives, pre-determined revenue generated amounts, targets achieved, etc. or a combination of any of the above.

Approvals: The above bonuses and incentives require recommendation from the department head, with **review** and **approval by the AVP/Chief Human Resources Officer and final approval by the President, Provost** or **Divisional Leader**, as appropriate.

Funding: In certain cases, funding may be requested from the University when departmental funds are not available. Such requests must be endorsed by the area Division Leader, recommended by the Executive Vice President/Chief Financial Officer and subject to approval by the President.

Variable Compensation Plan Bonus rewards employees based on a pre-approved Plan created by the unit/department in collaboration with Human Resources. The amount of the bonus is established within each Plan and is based on employee's contribution, departmental objectives, pre-determined revenue generated amounts, targets achieved, etc. or a combination of any of the above.

Approvals: The above bonuses and incentives require recommendation from the department head, with **review** and **approval by the AVP/Chief Human Resources Officer and final approval by the President, Provost or Divisional Leader,** as appropriate.

Funding: In certain cases, funding may be requested from the University when departmental funds are not available. Such requests must be endorsed by the area Division Leader, recommended by the Executive Vice President/Chief Financial Officer and subject to approval by the President.

Please consult University Policy HR5016 before completing this form. Submit this completed form to <u>hrservicecenter@memphis.edu</u> or deliver to 165 Administration Building.

GENERAL INF	FORMATION								
Employee Full	l Name:			Banner ID:					
Department:				Job Title:					
Position Num	ber:		E-Class:	Employmen	t Start:				
PAYMENT IN	FORMATION								
Index	Fund	Org	Program	Account (circle one)	Suffix	Earnings Code			
				AD/AE/AM/CH: 61681 CL/S8: 61381 F1/FA/F9/FD: 61281	BN	613			
HIRING BONU									
Gross Amoun	_ has been deemed	l as difficult to fi							
APPROVAL S	IGNATURES								
Department H	lead (Requestor): _	Print Name		Signature	Date	::			
Divisional Lea	ader (Approver):				Date	:			
Human Resou	irces (Approver):				Date	:			
TERMS AND	CONDITIONS								
I understand that	t:								

- 1. Funds will be paid within my first 60 days of employment.
- 2. In accordance with the job description, expectations will be established by my supervisor and my performance monitored via the performance appraisal process.
- 3. I must remain employed by the University for a minimum of one year from the effective date of hire (a longer term of service may be required based on the significance of the position and the amount of the hiring bonus. For faculty appointed on an academic basis, one year is defined as fall and spring semesters (nine months). For all other annual faculty and employees, one year is defined as twelve months. Should I voluntarily separate employment from the University prior to the completion of the commitment time, I will be liable to the University for the full hiring bonus amount paid and any payroll taxes withheld by the University in connection with the bonus.
- 4. I hereby grant the University and the State of Tennessee an express lien on all salaries, wages, and other sums payable to me for the purpose of securing all amounts due under Item 3 above in the event I leave prior to the committed length of service to the University. I authorize the University, the Board of Trustees, and/or the State of Tennessee to withhold all amounts due under this Agreement from any sum(s) payable to the me.

I agree with the terms and conditions listed above.

Employee:

Print Name

Signature

Date:

Hiring Bonus Request

THE UNIVERSITY OF MEMPHIS.

ne

Depending on the department's budget and needs, you will be tasked with hiring and supervising student workers or graduate assistants. This section will give you a brief overview of the hiring process.

Undergraduate Students Workers

Types of Undergraduate Student Workers

When hiring student workers, you need to determine whether your budget requires you to hire a Federal Work Study student (FWS) or Regular Student Employees (RSE).

Federal Work Study (FWS)

FWS is a federally funded, needs-based Financial Aid award created to help students defray the costs of postsecondary education. Under this program, students can only work for one department per semester. Financially, departments only cover 25% of the student's wages, while the federal government covers the other 75% of their wages.

Regular Student Employees (RSE)

Regular Student Employees positions are funded 100% by the department. Students are allowed to work for more than one department if they do not work over 25 hours a week from all pay sources. Students must be enrolled and remain enrolled at least half-time (6 credit hours for undergraduate/law students or 5 credit hours for graduate students) for fall and spring semesters.

For more information regarding student employment, visit the Scholarship Student Employment website.

Hiring Process

Student employment opportunities are advertised through the Handshake job board. You are required to fill out a request and provide an ad via the <u>Student Worker & Graduate Assistant Job Posting Request</u> form for Career Services to post the job. Below is an example of an ad:

Federal Work Study Student Required. The College of Arts and Sciences (CAS) is looking to hire a Federal Work Study Student Worker to help assist the Pre-Professional Advising department with Pre-Law tasks. This position requires an energetic, responsible individual who pays attention to details and can manage high trafficked environments. This position also requires that the individual work 15-20hrs per week. The duties and responsibilities will include, but are not limited to: Opening and closing the office (depending on shift); covering front desk; including directing visitors and answering the phones; attending Pre-Law student organization meetings and help to cultivate a new student group; serving as CAS Pre-Law student ambassador which requires attending various events such as NSO, Junior Preview Day, etc.; and completing research projects and tasks for the department and Deans staff at large. If you have any questions, please email Iesha Williams at <u>nwllams4@memphis.edu</u>.

Due to the volume of applicants, you may want to select "**Email a summary of all applicants once this job posting closes**" when filling out the job posting request form. This option will keep all the applications in Handshake until the closing of the posting. At that point, Career Services will email you an excel spreadsheet with all applicants. If you have any questions regarding your postings, you can email Student Employment at <u>stujobs@memphis.edu</u>.

Interviewing

If you are only hiring Federal Work Study students, it is best to check with Financial Aid to make sure that the student receives Federal Work Study before extending an interview. After selecting your candidates, contact them directly. It is best to call to schedule the interview, and then email to confirm with interview date, time, and department address. <u>All interviews must be in the same format, and you must ask</u> each candidate the same questions. Below are some interview questions:

- 1. What interest you about this position?
- 2. What qualities or skills do you possess that will make you a good fit for this position?
- 3. Do you have any administrative or office experience?
- 4. Tell us about a time you were given a task to complete but you did not have the tools necessary to complete the task. What did you do?
- 5. Describe a time you had to deal with a difficult customer and how you handled the situation.
- 6. What do you consider to be your greatest strength and weakness?
- 7. This role regularly interacts with faculty, students, and staff, and therefore customer service is key. Please provide an example of your customer service skills.
- 8. Do you have any questions for us?

Offer Email

Once the interviewing process is over and you've selected your hire, you must formally offer the position through email. This email should specify the salary and documents required by Human Resources. An example of an offer email is as follows:

Congratulations! We are pleased to offer you the Student Office Assistant position in the College of Arts and Sciences. This position pays \$10/hr. and will utilize work study funding. As a student worker you are not allowed to work more than 25 hours per week, and your hours are appointed on a semester basis. Contracts will be renewed based on funding availability and performance.

Below are documents required to be completed with HR before your first day of work:

- 1. Signed Student Employment eContract (You will receive electronically and must accept.)
- 2. Social Security Card
- 3. <u>Direct Deposit Authorization</u> (scroll to the Payroll Section)
- 4. <u>W-4 Employee's Withholding Allowance Form</u> (scroll to the Payroll Section)
- 5. Form I-9 Employment Eligibility Verification- must be completed with the HR I-9 Coordinator. Please contact HR Service Center at 901-678-3573 or <u>i9@memphis.edu</u> to schedule an appointment with the I-9 Compliance Coordinator.

The student must submit a biweekly timesheet via the myMemphis portal. Biweekly Payroll Periods

Please respond to this email if you accept.

If the student declines, move to on to your next candidate or restart the hiring process. If the student accepts, they will need to complete their contract and the documents required by Human Resource (the documents listed in the offer email) **<u>BEFORE</u>** they can start working.

Student Contracts

Student contracts are completed by the department's Administrative Associate or Business Officer. Contracts can be found in myMemphis by completing the following steps:

- Under the *Employee* tab, you will see a section called *eContracts and EPAF* (Linked here: <u>ECONTRACTS</u>)
- Select Student Appointments
- Select your Role (for Administrative Associates, you should select *Business Officer/Departmental Business Representative*)
- Select Start a new Student Appointment Contract
- Proceed with completing the contract

Upon completion, the student will be notified and required to sign the contract before they are allowed to work. **Please note, you will have to create a new contract for each semester.**

For more in depth training on eContracts, visit Learning Curve.



Graduate Student Worker

Per the Graduate School website:

Graduate students can be employed by your department, or receive scholarships, in exchange for teaching, research, and/or service for the UofM.

Academic units play large roles in the processes used to assign stipends and tuition assistance. GA and Student Worker eContracts include stipends and GA eContracts also include tuition and fee assistance. Departmental Graduate Scholarships provide tuition assistance with service requirements or without. We are providing resources below to assist with the creation and management of eContracts and Graduate Scholarships, such as a Banner Access form and a chart that helps break down the difference between the types of contracts for graduate students.

- <u>Banner View Only Access</u> (Fill in PDF form that needs to be completed, signed with supervisor approval then returned to the USBS office via email at <u>usbs@memphis.edu</u> SUBJECT LINE: GA BANNER ACCESS REQUEST)
- Reminder: If a student is hired to perform research and teaching functions, the effort should be split accordingly in the contract, with the appropriate % split going to a research program code and an instruction program code. If that student is receiving tuition assistance, that same % split should apply to the tuition portion.

F	requently Asked	Questions	
	Graduate Assistantships	Graduate Scholarships	Graduate Student Workers
Considered a GA?	Yes	No	No
Award type?	Tuition & USF and Stipend	Tuition & USF (partial or full tuition & USF)	Hourly or Monthly Pay
Considered an employee?	Yes	No	Yes
Service Component?	Yes	Optional	Yes
Will the central pool cover the Non- Resident tuition premium?	Yes (<u>for</u> Doctoral ONLY)	No	No
Can departmental GA Pool funds be used?	Yes	Yes	Yes
Is scholarship refundable to student?	N/A	No	N/A

3 Types of Graduate Student eContracts

Reminder:

If a student is hired to perform research and teaching functions, the effort should be split accordingly in the contract, with the appropriate % split going to a research program code and an instruction program code

If that student is receiving tuition assistance, that same % split should apply to the tuition portion The University of Memphis Foundation is a not-for-profit, tax-exempted department used to pay for various expenses on behalf of the University of Memphis. Foundation funds are comprised of donations from individuals, corporations, organizations, estates, and trusts. Foundation pays <u>reimbursements and invoices for</u> <u>services rendered</u>. Payments not covered by Foundations are salaries, cash awards to U of M employees or students, payments to foreigners or foreign organizations, or Tigerbuy purchases.

To have Foundation pay for an expense, you must complete a Foundation Expenditure Request form, found here: <u>https://www.uofmfoundation.org/forms</u>. Once the form is completed, send it to the appropriate Approver to be signed. An Approver is anyone in your department with clearance to sign off on financial documents, such as Chairs, Directors, Business Officers, and Admin Associates. When all signatures have been collected, the form must be email to the Foundation's office at <u>foundation@memphis.edu</u>.

Depending on what you are paying, provide the following documentation with the Foundation Expenditure Request Form:

- Invoices
- Sign-in sheets
- Menus
- Agendas
- Receipts

The Foundation Expenditure Request Form ask for the service provider/ payee's UID number. To find a vendor's UID number, complete the following:

- Log into myMemphis
- Select the *Finance* tab.
- Under the *Banner Admin Pages* section, click **Admin Pages**. (This will take you to the Banner homepage.)
- Search using **FTIIDEN**.
- On the Entity Name/ID Search page, vendors such be checked.
- Double click in the DETAILS field.
- Search for the company by name in the Last Name field (*Note: Sometimes the Banner system does not pick up words, so you may have to search with a "%" sign behind name, as seen below.*)

ID	0	Last Name	0	First Name	0	Middle Name	•
		chartwell%					

For more information please visit: https://www.uofmfoundation.org/faqs

See pages 97 - 99 for more details on completing Foundation Expenditure Request forms



Foundation

Expenditure Request

Name of Fund					Fund #			
Amount Requested <u>\$</u>								
Payee (as it should appear on	check)*							
	🗌 t	e t	ee		t t		-	ee
Individual	UID#	d if service p	erformed	or awards.	W9 form requ	ired if it's	a new ven	dor)
Organization	Tax ID (Re	quired)						
Address:								
To Pay Expenses for:								
Benefit to University:								
Individuals Involved:								
Date of Activity:								
t								
Mailing Instructions – check	one							
Direct Deposit								
Pick Up	Pick up by:				Ex	:t:		
Campus Mail	То:							
Mail Direct To): 							
Preparer (Name/Title/Phone/	Email) :							
Signature of Payee/Claimant:								
Signature of Approver:		Da	te	Nam	e/Title:			
Second Approval:]	Date		Nam	e/Title:			
Approval signature certifies that the estimation above.	expense has been r	eviewed and c	omplies w	ith the justi	fication noted i	n the "Bene	efit to Univ	versity"
<u>IMPORTANT NOTE</u> : The Four request is 7-10 business day If you h e et , p	ys after receip	ot by the					-	
				For Fo	undation Use	Only		
t ete t e t e h t								
Foundation@Memphis.edu								103

Instruction - Foundation Expenditure Request Forms

- 1. <u>Name and Fund#</u> line items-Please make sure the fund name and number (use only Foundation fund names and numbers, not University) matches.
- 2. <u>Amount requested</u> line item should add up to the invoice or original detailed receipts, if not please explain the difference in the comment line.
- 3. <u>Payee</u> line item should be the person who actually incurred the expenses or performed the services. Please indicate if the payee is a Student/GA, Faculty/Staff, or Non-Employee by checking the correct box on the form.
- 4. <u>UID line item</u> should be provided by the department with the exception of new vendors.
- <u>Tax ID line item</u>- If an individual performs professional services or receives an award, a social security number is required. Please submit information on a W- 9. If a company performs professional services, a tax identification number is required and should be submitted on a W-9. Please submit an expenditure request form and W-9 together for payment.
- 6. <u>**To Pay Expenses for**</u> line item should list items purchased or the type of services rendered.
- 7. <u>Benefit to University</u> line item should clearly define the University's business purpose. A popular University business justification we see is *"To Advance the University."* We prefer that this not be used. However, when using, provide sufficient detail into the business purpose and benefit in the comments section to explain how the expense benefits the University.
- 8. <u>Individuals Involved</u> line item should be whoever was involved in incurring and directing the expense to be paid. All food and meal expenses should list the names of attendees on the form or attach a list of attendees.
- 9. <u>Date of Activity</u> line item is the actual date the expense occurred or whenever the professional services were performed.
- 10. Location is where the event was held.
- 11. <u>Comments</u> line item is for additional details concerning the expense that cannot be found on other line items.
- 12. <u>Mailing Instructions</u> line item-Only check one box and fill in the address.

- 13. <u>Preparer</u> line item is whoever completes the expenditure request form. This person may be contacted for additional details if necessary. Please list the preparer's name, title, extension, and email address.
- 14. <u>Payee/Claimant</u> line item-Usually is the person who is requesting to be reimbursed. However, the Payee/Claimant and Approver cannot be the same person. The Payee/Claimant should indicate who in the department is incurring and/or directing this expense to be paid (i.e., the dean, faculty, staff, etc..). Please request the payee to sign as the claimant. If the payee is not available to sign the request, please write in the name of that person.
- 15. <u>Signature of Approval</u> line item is required for all expenses. If an approver is the listed as payee, a second approval signature is required from the payee's supervisor. Business officers (dean's designee) may not approve a reimbursement for the dean.
- 16. <u>Detailed receipts</u> are required for all expenditures. In addition, original invoices are required; statements and quotes are insufficient. It is the responsibility of the University official approving the request to ensure accurate and original documentation is submitted. For reimbursement requests, the receipt should show both itemized purchases and proof of payment (credit card or cash payment). The proof of payment alone (e.g. credit card slip) without itemized purchases is not sufficient.
- 17. Avoid putting **personal and business** items on the same receipt. If this occurs, please attach a calculator tape only showing the reimbursing portion.
- 18. Rush checks must be discussed with Accounting Staff.
- 19. The Foundation processes checks once a week and the normal turn-around time for an expenditure request is <u>7 to 10 working days from the time</u> <u>expenditures are received by the Foundation.</u>

All requests for reimbursements are University expenses and are not expenses of the Foundation. Payment from the Foundation is based upon the review and approval of the University official approving the expense on the request form. The Foundation does not approve the expenses for the University. Any situations we note of suspected or actual fraud by university employees submitting requests will be reported to the appropriate area of the University for whatever action the University deems necessary.

Tigerbuy

Tigerbuy is the online marketplace for eProcurement and can be found in myMemphis under the

Finance tab. In your position, you will be responsible for ordering supplies and office equipment; so, familiarity

with Tigerbuy is essential. Access is granted based on roles,

which are Requestor, Approvers, and Receivers. Your role will be either Requestor or Approver and in some cases both. Requestors are allowed to purchase items in Tigerbuy; whereas the Approvers role is to approve the purchase before it goes to Procurement. If you serve as the financial manager

Tigerbuy

Tigerbuy (Production)

More information related to Tigerbuy can be found on the Tigerbuy Web site. Tigerbuy (Test)

Vendor Performance Evaluation - For departments to leave feedback on vendors.

for your department, then you will have the roles of both Requestor and Approver, but you will not approve your own purchases. For access to Tigerbuy, training is required. You may schedule this training through <u>Learning Curve</u>.

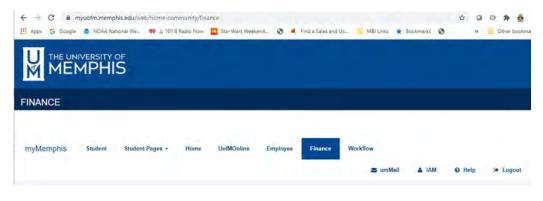
Tigerbuy Profile Setup

The instructions on pages 106 - 114 shows the process of setting up your user profile, which is necessary for payment and shipping. You must setup your profile before you can begin ordering and will need your department's FOAPAL information during this process.

How to - Tigerbuy Profile Setup

There are a few items in your Profile that <u>must</u> be set up, and a few others you may want to set up.

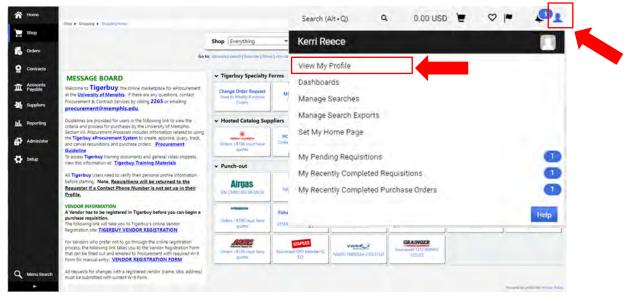
Log into My Memphis & go to the Finance tab:



Scroll down on the right-hand side to Tigerbuy and click on Tigerbuy (Production)



Tigerbuy opens on the Home screen. Click on the Person icon and choose View My Profile



Screen opens on User Profile and Preferences

User's Name, Phone Number, Email, etc. (Required):

My Profile 🕨 User's Name, Phone Number, Email	etc.			
Kerri Reece		User's Name, Phone	Number, Email, etc.	7
User Name kreece		First Name	Kerri	You must enter a phone number. The
User Profile and Preferences	÷	Last Name	Reece	number is entered with 10 digits, no
User's Name, Phone Number, Email, e	etc.	Phone Number	+1 901-678-3775 ext.	dashes (9016782265). Save Changes
Language, Time Zone and Display Se	ttings		International phone numbers must begin with +	and the number populates with +1
Early Access Participation		Mobile Phone Number		
Guided Tour Instructions			International phone numbers must begin with +	and dashes added (+1 901-678-2265).
Update Security Settings		E-mail Address *	kreece@memphis.edu 🛛	
Default User Settings	- 5 -		Reecegmentpristedu	Requisitions will not process in
User Roles and Access	- 31	Authentication Method	NetId 🗸	Tigerbuy if a phone number is not set
Ordering and Approval Settings		User Name *	kreece	
Permission Settings	- 22	User Name	Meece	up in the Requester's profile.
Notification Preferences	- 51			
User History	31	★ Required		Save Changes
Administrative Tasks	.5			

Language, time zone and Display (Required):

Kerri Reece		Language, Time Zone and Display Set	tings	?
Jser Name kreece		Select a Language	English 🗸	
User Profile and Preferences		Country	United States 👻	Complete first 4 colections for
User's Name, Phone Number, Email,	-	Currency	USD 🗸	Complete first 4 selections for
Language, Time Zone and Display Settings Early Access Participation	Time Zone	CDT/CST - Central Standard Tim 💙	language, country, currency, and time zone.	
Guided Tour Instructions Update Security Settings		Color Theme	v	
Default User Settings	1	Preferred email format	HTML 🗸	
User Roles and Access Ordering and Approval Settings	2	Access Training Content Configuration	Ves 💿 No	
Permission Settings Notification Preferences	2	Home Page	Default Override Shopping Home	Home
User History	5	Accessibility		
Administrative Tasks	3	Enable Accessibility Mode 🔘 Yes 💿 No		
		Help on mouse over 🔞	~	
		Enable Limited Animation O Yes No		

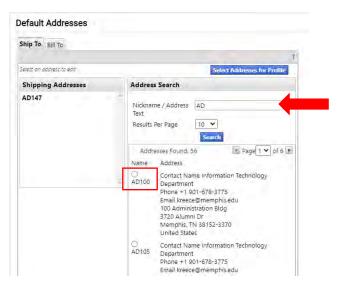
Default User Settings / Default Addresses (Required)

Shipping Addresses are official UOM buildings.

Kerri Reece		Default Addresses					
User Name kreece		Ship To Bill To		2			
User Profile and Preferences	5	Select an address to edit		Select Addresses for Profile			
Update Security Settings		Shipping Addresse	s				
Default User Settings	÷.	AD147					
Custom Field and Accounting Code D	efaults						
Default Addresses							
Cart Assignees							
Payment Options							
User Roles and Access	- 5						
Ordering and Approval Settings	1.2						
Permission Settings	>		7				
Notification Preferences	>						
User History	- 2						
Administrative Tasks							

Ship To Tab - Click Select Addresses for Profile.

Under **Address Search** enter the building abbreviation (campus maps) you are searching for and click **Search**. Find your room number and click in the circle to select line.



The shipping address (as it will appear when you create requisitions) will populate this area. Select **Default** box and **Save**. Your address will move to your profile box on left. Addresses are 2 lines: Line 1-Building and Room Number; Line 2-Street Address. If you do not find your room number, contact Procurement.

Default Addresses			
Ship To Bill To			2
Select an address to edit		Sele	ct Addresses for Profile Delete Address
Shipping Addresses		Edit Selected Add	iress ?
AD147	-	Nickname	AD147
		Default	
		Current Default Address	AD147
		ADDRESS	
		Contact Name *	Procurement Services
		Phone	+1 901-678-3775
		Email *	kreece@memphis.edu
	-	Address Line 1	147 Administration Bldg
		Address Line 2	3720 Alumni Dr
		City	Memphis
		State	TN
		Zip Code	38152-3370
		Country	United States
			Save

Bill To Tab – Click Select Addresses for Profile.

Click the arrow in the box beside **Select Address Template**. Select **Memphis Billto**. The Accounts Payable address will populate this area. **Save** it to move to profile box.

No address	es defin	ed in profile.		Default Addresses			
hip To Bill To			2	Ship To Bill To			
elect an address to edit		Sele	ct Addresses for Profile Delete Address	Select an address to edit		Sel	ect Addresses for Profile Delete Addr
No addresses defined i profile.	n			Billing Addresses		Edit Selected Add	iress
Billing Addresses Edit Selected Address Nickname Memphis Bi Default		? Memphis Billto	lto	Nickname Default	Memphis Billto		
	-			Current Default Address	Memphis Billto		
		Current Default Address				A D D R E S S	
	~	A D D R E S S Contact Line 1 Contact Line 2 Address Line 1 City State Zip Code Country	University of Memphis Attn: Accounts Payable 275 Administration Bldg Memphis TN 38152-3370 United States		¥	Contact Line 1 Contact Line 2 Address Line 1 City State Zip Code Country	University of Memphis Attn: Accounts Payable 275 Administration Bldg Memphis TN 38152-3370 United States Save

Default User Settings / Custom Field and Accounting Code Defaults (Required):

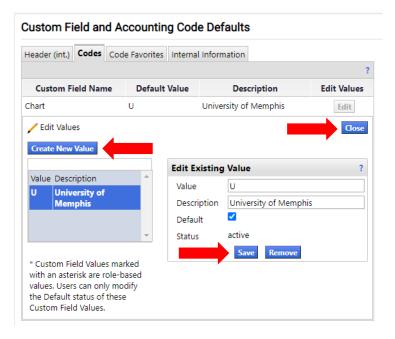
By setting up defaults, your requisition documents will populate with the required accounting information needed for a purchase. Please note Index numbers cannot be used in Tigerbuy. The Accounting Codes or FOAP for an Index number must be entered in the Tigerbuy requisition.

Select "Codes" tab to set up Profile Values information and defaults.

The Codes screen will show accounting codes (values) in the **Default Value** column after User sets up. You can set up values for Chart, and FOAP (Fund, Organization, Activity, Program) and Account.

Kerri Reece	Custom Field and	d Accounting	Code Defaults		2
User Name kreece	Header (int. Codes	Code Favorites	Internal Information	7	
User Profile and Preferences	Custom Field Name	Default Value	Description	Edit Values	
Update Security Settings	Account	74500	Supplies	Edit	
Default User Settings	Activity		No Default Value	Edit	
Custom Field and Accounting Code Defau	lts Chart	U	University of Memphis	Edit	
Default Addresses	Fund	110001	Undesignated E and G	Edit	
Cart Assignees	Organization	542000	Procurement and Contract Services	Edit	
Payment Options	Program	4650	Gen Admin and Logistical Services	Edit	
User Roles and Access	2				
Ordering and Approval Settings	5				
Permission Settings	3				
Notification Preferences	2				
User History	2				
Administrative Tasks	5				

Begin each line by clicking **"Edit"** to open the Value Creation screen. In this screen your profile code values set up will be shown on the left side. Selection is on the right side. **Chart** is set up first and only has one selection for the University.



Click Edit then Create New Value.

Select the **U Value** by checking the box shown. Click **Add Values** and your selection moves to profile box. Click on the **U** Value, information populates, click **Default** box and **Save.** This Chart value is set up and defaulted.

Click **Close** to go back to the Codes screen.

Fund is the next selection.

Custom Field and Accounting Code Defaults

Header (int.) Codes	Code Favorites	Internal Information	
			?
Custom Field Name	Default Value	Description	Edit Values
Account	74500	Supplies	Edit
Activity		No Default Value	Edit
Chart	U	University of Memphis	Edit
Fund	110001	Undesignated E and G	Edit
Organization	542000	Procurement Services	Edit
Program	4650	Gen Admin and Logistical Services	Edit

Custom Field and Accounting Code Defaults

Custom Field Name		efault Value	Description	Edit Values
ind	110	0001	Undesignated E and G	Edit
Edit Values				Close
Create New Value				
		Search For	Value	?
/alue Descripti		Field Name	Fund	
110001 Undesig E and G	nated	Value		
E and G		Description	Procurement	
		Results Per	5 🗸	
	Ŧ	Page		
			Search	
Custom Field Val narked with an as				
ole-based values.				
	efault			

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites Internal Information ? Custom Field Name Default Value Edit Values Description Fund 110001 Undesignated E and G Edit 🖊 Edit Values Close Create New Value Results Values Value Description Page Found Page 1 of 1 🖹 ? 110001 Undesignated E and G 1 5 🕶 Select Value Description Procurement and 127545 Contract Services * Custom Field Values marked with an Add Values Back to Search asterisk are role-based values. Users c only modify the Default status of these Custom Field Values.

Custom Field and Accounting Code Defaults

Una des (inte) Codos Conde Severites da

Custom Field Name	Default	t Value		Descrip	tion	Edit Values	
Fund	110001		Undesignated E and G			Edit	
🖊 Edit Values						Close	
Create New Value							
Value Description		Edit Ex	cisting	Value		?	
110001 Undesignated E	E.	Value		110001			
and G	-	Descri	iption	Undesign	ated E and G		
		Defau	lt	~			
1	-	Status		active			
				Save	Remove		
* Custom Field Values ma with an asterisk are role- values. Users can only me	base						

Click Edit then Create New Value.

Type the Fund number in the Value field or type the name in the Description field and click Search. Code information populates box.

Click Edit then Create New Value.

Type the Fund number in the Value field or type the name in the Description field and click Search. Code information populates box.

Code information populates box.

Click box to select code line and click **Add Values** for your selection to move to profile box.

Click on the selected fund value to edit it, select **Default** and **Save**.

Close screen to go back to the Codes screen to begin next selection.

All other codes are set up by this same process by line Using Edit, Create New Value, Search, Select, Add Value, Edit, select Default, Save, then Close.

Once you have your default set up, you can also add commonly used codes to save time searching for them.

You can also add Accounting code (FOAP) combinations and name them under **Code Favorites.** You will want to add your most used FOAP allocation and make it your default. You can also save frequently used allocations.

Kerri Reece		Custom Field and Accounting Code Defaults						
User Name kreece		Header (int.) Co	des Code Fav	orites Intern	al Information			
		_						
User Profile and Preferences						ns saved to your p		
Update Security Settings	100					button and enter Favorites are acces		
Default User Settings	× 1	checkout by editi				ault accounting co		
Custom Field and Accounting Code D	efaults	profile.						
Default Addresses		Add						
Cart Assignees		(Company)						
Payment Options		Accounting	Lodes				?	
User Roles and Access		Procurement				Edi	it Delete	
Ordering and Approval Settings	- 24	Chart	Fund	Organization	Account	Program	Activity	
Permission Settings	3.1	U	110001	542000	no value	4650	no value	
Notification Preferences		University of Memphis	Undesignated E and G	Procurement Services		Gen Admin and Logistical		
User History		() is in give				Services		
Administrative Tasks	- 2-	Travel				Edi	t Delete	
		Chart	Fund	Organization	Account	Program	Activity	
		U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	73200 Individual Out of State Travel	4650 Gen Admin and Logistical	no value	

Click **Add**. An Accounting Code box opens. Type in a name for your FOAP. Use the check bos to choose you Default allocation. You can type in the numbers, select from your profile codes (see additional Intructions), or select from a list of all the codes available. You can leave parts blank, depending on your needs. **Save** when you are finished.

Accounting Codes						? X
Nickname Travel	🗌 Default					
Chart	Fund	Organization	Account	Program	Activity	add split
U	110001	542000	73200	4650		_ ز
Select from profile values Select from all values	Select from all values					
		Sa	Cancel			

Notification Preferences (Best practice):

Users can make selections of various steps in the Tigerbuy workflow process to be notified of. A notification can be sent by email or as a notification # in the Banner Bell.

Click Edit Section to open the selection screen:

Kerri Reece	Notification Preferences: Shopping	, Carts & Requisitions	✓ Edit Section		
User Name kreece	The in-application notifications are not yet available	The in-application notifications are not yet available for all Email Notifications.			
User Profile and Preferences Update Security Settings Default User Settings User Roles and Access Ordering and Approval Settings Permission Settings Notification Preferences Administration & Integration	Prepared By - Cart Assigned Notice Prepared By - PR line item(s) rejected Prepared By - PR rejected/returned Cart Assigned Notice Receive PR and PO notifications for Carts Assigned to Me	None None None None			
Receipts Contracts Form Requests	PR submitted into Workflow PR pending Workflow approval PR Workflow Notification available PR Workflow complete / PO created PR line item(s) rejected	Email & Notification Email & Notification None None			

The Default for each item is No notifications. For each item that you want to receive notifications for choose "Override". The pulldown will appear and allow you to choose email, notification, or both. Save changes.

Kerri Reece		Notification Preferences: Shopping,	Carts & Requi	sitions	7		
User Name kreece		The in-application notifications are not yet available for all Email Notifications.					
User Profile and Preferences Update Security Settings	× *	Prepared By - Cart Assigned Notice 😡	Default	O Override	None		
Default User Settings	>	Prepared By - PR line item(s) rejected 🥥	Default	O Override	None		
User Roles and Access Ordering and Approval Settings	2 	Prepared By - PR rejected/returned	Default	O Override	None		
Permission Settings	5	Cart Assigned Notice 🕥	 Default 	O Override	None		
Notification Preferences Administration & Integration Shopping, Carts & Requisitions		Receive PR and PO notifications for Carts Assigned to Me	Default	O Override	None		
Purchase Orders	-	PR submitted into Workflow <	🔿 Default	 Override 	Email & Notification		
Catalog Management Accounts Payable		PR pending Workflow approval	🔿 Default	Override	None Email		
Receipts Contracts		PR Workflow Notification available	Default	O Override	Notification		
Form Requests		PR Workflow complete / PO created 💷	Default	O Override	Email & Notification		

Requestors often want to know when Purchase Requisitions are submitted and approved. You may also want to know When Purchase orders get sent and items shipped. Under Purchase Orders)

Purchase Orders		-	A around		
Catalog Management	PO Workflow complete	() Default	O Override	None	
Accounts Payable	PO sent to supplier	O Default	Override	Email	~
Receipts	PO sard to supplies to	O Deledit	. overice	Eman	
Contracts	PO Line Item Ship Notice	D Default	Override	Email	~
Form Requests					

Staples Punch-out

The approved purchasing vendors in Tigerbuy are listed in the Punch-out section. Each vendor has their own process, so be sure to reach out to Procurement if you need assistance purchasing from a vendor that is not mentioned in this book.

As Admin, you will need to make sure your department has all the supplies necessary to support workflow. **Staples Punch-out** is the primary source for supplies and select furniture. You can order mostly all office supplies and some furniture from Staples; however, items that are considered **personal** usages items such as, Kleenex, fans, heaters, etc. are **blocked**. There is also a **\$35 minimum** for all orders.



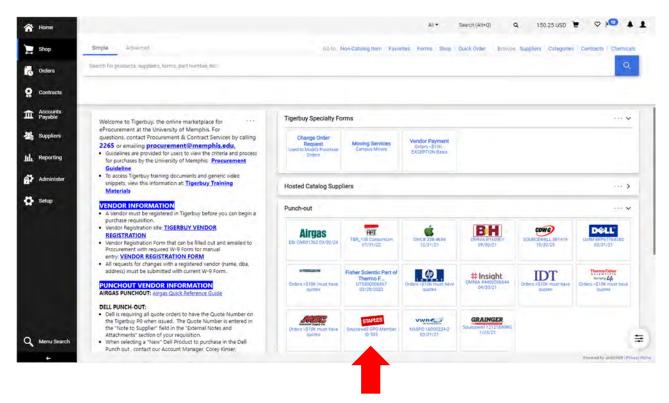
College of Arts & Sciences

How to - Make a basic Staples order

From MyMemphis, go to the Finance tab and choose Tigerbuy Production

		his.edu/web/home-cor tional We 🐢 2, 1013			d 🗿 🛋	Find a Sales and U	📖 🧧 MBI Links	🚖 Bookmarks	\$ 0	0 D »	* 👲 Other bookma	
		S S										
FINANCE												
myMemphis	Student	Student Pages 👻	Home	UofMOnline	Employee	Finance	Workflow	sil 🔺 iAM	• He	lp G	Logout	
						т	ïgerbuy					
							Figerbuy (Produ	iction)	tige	erb	ouy	
								n related to T	igerbuy ca	n be fou	ind on the Tig	erbuy Web site
							Figerbuy (Test)	anco Evaluat	ion - For d	opartmo	nte to logue f	eedback on vendor
							Diversity Suppli		1010	eparane	anto to leave l	Beddaen on Vendor

This will bring you to the shopping home page. Click on the Staples Punch Out Catalog button:



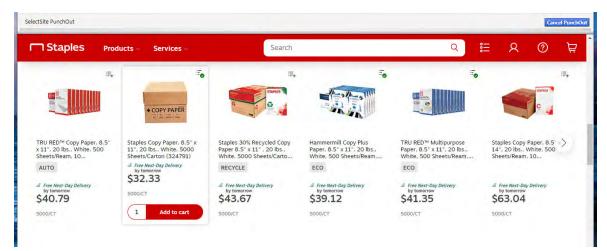
This brings up the Staples Catalog home page. You will see places to see past orders and create your shopping lists of frequently bought items. There is a search bar at the top.

۹ 🛱 ۹	() \
Dimpes 75%	
≡ Lists	View all
Storage and Organization 3 items	
Toners 275 Hems	
School Supplies 2 items	
	Storage and Organization 3 Items Toners 275 Items School Supplies

Use the Products menu at the top or scroll down to see product categories.



The catalog looks like any other shopping website. Choose items and add them to cart. Hover over an item to get quick add to appear or click on item to go into the item information.



*Important note: The catalog has been set up to show allowable product categories, however some items fall into an allowable category, but are not allowed on the P Card. It is your responsibility to ensure your purchases comply with all University policies and guidelines. *

Once you have chosen your items, go to your cart to get ready for checkout. The cart shows your items, quantities, and prices. You can adjust quantities or remove items from the cart.

Delivery			
200	Sharpie Permanent Marker, Fine Point, Black, 12/Pack (30001) Nem # 12532/k / MSP # 50001 I CM # 12552/k 2 Icco 2 O Delivery. O Pick up in store	€ 55 59 12/02	55.55 \$5.59
-	Staples Ream-Less Copy Paper, 8.5" x 11", 20 lbs., White, 2500 Sheets/Carton (20587) More = MISPT? MRR = 20557 CDL = 305797 ECO Polivery	@ \$28.50.2500/¢T	528.50 \$28.50

When all is as you wish, click **Submit order**. This is going to take your cart / order and send it back to your TigerBuy shopping cart to finish building your **Requisition**.

If you want to leave without brining your items into Tigerbuy, Click the blue **Cancel Punchout** button.

ples			Search	C		
	Item # 9057971 HER # 205871 EX # 90	5797		¹ . @ \$28.50 2500/ст	\$28.50 \$28.50	
	Order Sur	nmary 534.06				
	Total	\$34.09	Submit Order			

Your Tigerbuy Shopping cart now has all of your Staples items in it. You will still have several chances to edit your items and your order information.

You can give your cart a name, such as "new office" or "grant supplies" to help you recognize it.

							64.5	Estimate (150.25 USD)	
Search for products, suppliers, fo	má, part number, etc.						Q	Subtotal	15
2 Items							0.	Shipping Handling	
Staples Contract and Com	mercial Inc + 2 Items + 1!	50.25 USD							15
SUPPLIER DETAILS IN P Need to make changes? MODIF • Logitach C/25e 2 Megapixels • Canon PG-240CL-/CL-241 XL 8	VITEMS VIEW (TEMS Item Universal Webcam (960-001075	(s) was retrieved on: ! i)	5/14/202111:41:59 AM		Quick item l	summ list	ary /	Proceed To Check	out
ltem		Catalog No.	Size/Packagin g	Unit Price	Quantity	Ext. Price			
Logitech 091 Webcam (96	i5e 2 Megapixels Universal 0-001075)	IM11Y7737	EA	98.93	1 EA	98.93	🛛		
		JM11Y7737	EA	98.93		98.93 led iter			
Websam (96		M11Y7737 Q.	EA	98.93					

You have the ability to select items in your cart and perform action on them. Click the selection squares on the far right and pull down the menu to see available actions.

Simple Advanced	iers, Torms, part number, etc.						9	Estimate (150.25 USD) Subtotal Shipping		× 150,25 0.00
2 Items							-0	Handling		0.00
Staples Contract and	Commercial Inc · 2 Items · 1	50.25 USD						Move to Another Cart Add to Draft Cart or Pending PR/PO	>	150.25
Need to make changes? • Logitech 0925e 2 Mega	PO Purchase/Change Orders 2: 457 MODIPY ITEMS VIEW ITEMS frem pixels Universal Webcam (960-001075 41 KL Black/Tri-Color High Yalid Inir Car	(s) was retrieved on: 5	5/14/2021 11:41:59 AM					Add to Favorites Remove Selected Items Add to PO Revision		
item		Catalog No.	Size/Packagin g	Unit Price	Quantity	Ext. Price			_	
	ch C925e 2 Megapixels Universal im (960-001075)	IM11Y7737	EA	98.93	(EA	98,93	~~~~			
A ITEM DETAILS										
Commodity Code	880	Q								
Tavable										
	PG-240CL-/CL-241XL Black/Tri-Color ield ink Cartridge, 2/Pack	CNM5206B00 5	PK	51,32	1 PK	51.32				(

You can also act on lines using the ellipses button on the line:

ms, part number, etc.						۹	Estimate (150.25 USD) Subtotal	150
						0 *	Shipping Handling	0.
nercial Inc · 2 Items · 15	0.25 USD					🗆		150
ITEMS VIEW ITEMS Items niversal Webcam (960-001075)	s) was retrieved on:	5/14/2021 11:41:59 AM					Proceed To Checkout	
	Catalog No.	Size/Packagin g	Unit Price	Quantity	Ext. Price			_
ie 2 Megapixels Universal -001075)	IM11Y7737	EA	98.93	T EA	98.93	··· D Remove		
580	Q.					Moye to	Another Cart >	
1	nercial Inc - 2 Items - 15 Purchase/Change Orders 2: 4573 ITEMS VIEW ITEMS Items Inversal Webcamr (960-001075) ck/Tri-Oblor High Vield InJ. Car e 2 Megaprices Universal 001075)	nercial Inc + 2 Items + 150.25 USD Purchase/Change Orders 2: 4575 Pieasant Hill Rd, Men (TEMS VIEW (TEMS Item(s) was rehieved on: inversal Webcam (960-001075) ck/Tri-Oolor High Vield InV Carthdge, 2/Pacis (5206) Catalog No. catalog No. e 2 Megapreels Universal IM11Y7737 001975)	nercial Inc - 2 Items - 150.25 USD Purchase/Change Orders 2: 4575 Pileasant Hill Rd, Memphis, Tennessee 38118-7 (TEMS VIEW ITEMS Item(s) was retrieved on: 5/14/2021 11:41.59 Ab moresal Webcam (960-001075) ck/Tri-Calor High Vield (nk Cartridge, 2/Pack (5206B005) Catalog No: Size/Packagin g e 2 Megapixels Universal IM11Y7737 EA 001075)	nercial Inc + 2 Items + 150.25 USD Purchase/Change Orders 2: 4575 Pleasant Hill Rd, Memphis, Tennessee 381 (8-7516 United States (TEMS) VIEW (TEMS Item(s) was retrieved on: 5/14/2021) 11;41:59 AM moresal Webdom (960-00107) ck/Tri-Colice High Vield Ini/ Cartindge, 2/Pack (5206B005) Catalog No: Size/Packagin Unit Price 9 e 2 Megapixels Universal IM11Y7737 EA 98.93 001075)	nercial Inc + 2 Items + 150.25 USD Purchase/Change Orders 2: 4575 Pieasant Hill Rd, Memphis, Tennessee 38118-7516 United States I/TEMS VIEW [TEMS] Item(s) was retrieved on: 5/14/2021 11:41:59 AM inversal Webcam (960-001075) ck/Tri-Color High Vield InV Carthdge; 2/Pack (5200B005) Catalog No. Size/Packagin Unit Price Ouantity g e 2 Megapixels Universal IM11Y7737 EA 98.93] EA 001975)	nercial Inc + 2 Items + 150.25 USD Purchase/Change Orders 2: 4575 Pleasant Hill Rd, Memphis, Tennessee 381 15-7516 United States I/TEMS VIEW/TEMS Item(s) was retrieved on: 5/14/2021 11:41:59 AM Inversal Webd-001075) ck/Tri-Color High Vield Ini/ Cartholge; 2/Pack/ (520eB005) Catalog No: Size/Packagin Unit Price Quantity Ext. Price 9 e 2 Megapixels Universal IM11Y7737 EA 98.93] EA 98.93 001075)		ns, part number, etc.

When everything is ready to go, Click the blue **Proceed to Checkout** button.

You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section.

General	1	Shipping		1	Billing	# ···· ~		Draft	
Cart Name staples order		Ship To Contact Name I Phone +1 901-6	Procurement Serv		Bill To University of Memphis Attn: Accounts Payable			nable to proceed until addresse	ed.
Priority Normal	1	Email kreece@r 115 Admin Bldg	memphis.edu 9		275 Administration Bldg Memphis, TN 38152-3370		Required: Total (150.25		-
Prepared by Kerri Reece		3720 Alumni Dr Memphis, TN 3 United States			United States Billing Options	Bill to should be	Subtotal Shipping		150.
Check that	1	Delivery Option	s ×		Accounting <i>no va</i> Date	accounting	Handling		150.
your ship to is correct		Ship Via	Best Carrier-Best Way Ship Via for the following su unsupported and will not be					Place Order	
	_	Requested Delivery Date	Staples Contract and Comm no value Requested Delivery Date for following suppliers is unsur not be sent: Staples Contra- Commercial Inc	r the pported will	Delivery is editable fo catalog pu	or Staples	What's next fo	FOAPAL Approval 2 Bocker, Deborah Butts, Constance Chowdhury, Rezaul Curry, Ladonnal Davis, Karin	

Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.

Accounting Codes						Ø
Chart	Fund	Organization	Account	Program	Activity	
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	no value Required	4650 Gen Admin and Logisti Services	no value cal	
ntamal blatan and	Attachmanta	A .	Eutomol Notos	and Attachments		ø
Item		Catalog No.	Size/Packagin g	Unit Price Qu	antity Ext. Price	I.
Logitech C925e 001075)	2 Megapixels Universal Webcam (960	IM11Y7737	EA	98.93	1 EA 98.93	
	ð-				Override Ship To	
∧ ITEM DETAILS	Contraction of the second	0.000	-	internal bio	Ship To Delivery Options	
 ITEM DETAILS Manufacturer 	Contraction of the second	Contract	no value	Internal Not	Ship To Delivery Options Bill To	
∧ ITEM DETAILS	Contraction of the second	Contract. Taxable		Internal	Ship To Delivery Options Bill To Credit Card Info	
∧ ITEM DETAILS Manufacturer	LOGITECH VC		no value ×		Ship To Delivery Options Bill To Credit Card Info Accounting Codes	
 ITEM DETAILS Manufacturer Name 	LOGITECH VC	Taxable Commodity		Internal	Ship To Delivery Options Bill To Credit Card Info	
 ITEM DETAILS Manufacturer Name Manufacturer Part Number 	LOGITECH VC 960001075	Taxable	×	Internal Attachment	Ship To Delivery Options Bill To Credit Card Info Accounting Codes	
 ITEM DETAILS Manufacturer Name Manufacturer Part Number Sopplier Part 	LOGITECH VC 960001075	Taxable Commodity	×	Internal Attachment	Ship To Delivery Options Bill To Credit Card Info Accounting Codes Internal Note	
 ITEM DETAILS Manufacturer Name Manufacturer Part Number 	LOGITECH VC 960001075	Taxable Commodity	×	Internal Attachment	Ship To Delivery Options Bill To Credit Card Info Accounting Codes Internal Note Remove	~

If your order is ready, click the blue **Place Order** button. Under the button you can see the next step your order will take. Scroll down to see the entire workflow.

Sumn	nary Taxes/S&H PO Preview	¢omments.	Attachments History					
Gene	eral	1	Shipping	1	Billing	Ø v	Draft	
Gart /	Vame staples order		Ship To		Bill To		Total (150.25 USD)	~
Desc	ription no value		Contact Name Procurement Serv		University of Memphis		Subtotal	150.25
Prior	fy Normal		Phone +1 901-678-3775 Email kreece@memphis.edu		Attn: Accounts Payable 275 Administration Bldg		Shipping	0.00
Prep	ared by Kerri Reece		115 Admin Bldg 3720 Alumni Dr		Memphis, TN 38152-3370 United States		Handling	0.00
Prep	ared for Kerri Reece		Memphis, TN 38152-3370 United States					150.25
					Billing Options		Place Order	
			Delivery Options		Accounting no value			
			Expedite X		Date		What's next for my order?	~
							Next Step FOAPAL Approva	12
							Workflow	0
Requ	uisition has now	been s	submitted for app	roval.			Workflow Show skipped steps	0
•			submitted for appleted for appleted for appleted by a set of the s		incial manager	for approval.	Show skipped steps	•
•					incial manager	for approval.	Show skipped steps	0
ll go t	hrough the bud				incial manager	for approval.	Show skipped steps	
ll go t					incial manager	for approval.	Show skipped steps Oraft Active Karn Read	0
ll go t	hrough the bud	get che			incial manager	for approval.	Show skipped steps Draft Artire Kern Read Budget Auth Fullye FOAPAL Approval 2	
ll go t equisitic	hrough the bud	get che	eck and route to y		incial manager	for approval.	Show skipped steps	
ll go t equisitic	hrough the bud	get che	eck and route to y		incial manager	for approval.	Show skipped steps Draft Artire Kern Read Budget Auth Fullye FOAPAL Approval 2	

150.25 USD

2

4

You will now get a notification in the system, and an email if you have that set up:

Notifications	support@sciquest.com
Shopping, Carts & Requisitions	Your Requisition has Bee 1:24 PM CAUTION: This email originated from out
Your Requisition Has Been Submitted For Appr. May 14 3264167 - 150.25 USD Submitted By Kem Reece *	
UTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and trust the content is safe.	
3	
Re: REQUISITION SUBMITTED FOR APPROVAL # 3264167 Cart Name: staples order Prepared by: Kerri Reece	
Dear Kerri Reece,	
Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.	
View Requisition	
If you have any questions with regard to your requisition, please contact your SelectSite Support Team.	
Support Team Contact Information: Accounts Payable @ 1-901-678-3826 or	
accountspayable@memphis.edu For Procurement questions use the below information: +1 901-678-2265 procurement@memphis.edu	

Your approved requisition will flow through Procurement and Banner will create an Encumbrance on your budget and issue a PO number. Tigerbuy will then send the PO to Staples electronically.

When you physically receive the items, you will need to **Receipt** them in the system (see Receipting instructions)

Should you need to make a Return, please see Return instructions.

Receipting in Tigerbuy

Receipting is the process of verifying that the items purchased were received. This is completed in Tigerbuy in the Order tab on the far-left ribbon.

Simple Advanced				
Orders		Quick search	a	1
Search		My Requisitions		
My Orders		My Purchase Orders		ersity of
Approvals		My Invoices		g 2265
		My Receipts My Procurement Requests		by the
				formatio
	TION		_	

- Select My Purchases Orders, this will take you directly to the orders you have submitted.
- Select the order you are looking to receipt by the P0 Number.
- Select the three dots, you will be prompted to select from a pulldown menu. For receipting you can choose Create Quantity Receipt or Create Cost Receipt.
- All your items will automatically have *Received*, if an item has not arrived you can delete it and complete the receipt for the items you have.
- Select complete and you are done.

Log into My Memphis & go to the Finance tab:

← → C ■	myuofm.memphis.edu/	web/home-common	nity/finance				4 0	
H Apps G Google	NDAA National We	🗰 🐢 🗘 101.9 Radio	o Now 🔼 Star Wars Week	end_ 🕄 🛋 Find :	Sales and Us 🦲 MBI Links. 1	🖈 Bookmarks 📀	38	Cther bookn
			a non line index	and of a find		Contribute (
IVERSITY OF								
MPHIS								
ANCE								
myMemphis	Student Stude	ent Pages - H	ome UofMOnline	Employee F	inance Workflow			
myMemphis	Student Stude			Employee P	inance Workflow			

Scroll down on the right-hand side to Tigerbuy and click on Tigerbuy (Production)



Tigerbuy opens on the Home screen. Click on **Orders / My Orders / My Purchase Orders** on the left menu.

Home	Simple Advanced				AP	Sector of	Q 150.25 USC	o 👻 🗢 🍋 🎍
Shop	angle Actinities			HALLS MERCEDING	presen Pavornes Porna	shop Quick Groen e	acomae antibuiera rearedo	nes contacts unemica
Orders	Orders	Quick search	1					٩
Contracts	Search	My Requisitions						
	My Orders	My Purchase Orders My Involces My Purchase Orden	1					
T Accounts Payable	Approvals	My Receipta	Tigerbuy Specialty Form	15				
Suppliers		My Procurement Requests						
Reporting		No. of the second s	Change Order Request Used to Müdlify Purchase Orders	Moving Services Certaus Moves	Vendor Payment Orders <\$10K - EXCEPTION Brant			
Reporting	purchases by the Unive	rsity of Memphis: Procurement Guideline	Carro		Date: 1			
Administer		ning documents and generic video snippets, view erbuy Training Materials						
Setup	VENDOR INFORMAT	TION tered in Tigerbuy before you can begin a purchase	Hosted Catalog Supplie	rs.				0.44 \$
	requisition	TIGERBUY VENDOR REGISTRATION	Punch-out					···· v
	Vendor Registration For Procurement with requi REGISTRATION FOR	rm that can be filled out and emailed to red W-9 Form for manual entry: VENDOR M with a registered vendor (name, dba, address)	Airgas Esi chiro1362 09/30/24	HT TBR_105 Consortium 07/21/22	EWC# 338-4694 12/31/21	BH OMNIA R1 60901 09/30/21	CONC. SOURCEWELL 001419 10/30/23	DELL Usim RFP67764380 03/31/21
	PUNCHOUT VENDO AIRGAS PUNCHOUT: Air DELL PUNCH-OUT: • Dell is requiring all quo Tigerbuy P0 when issue		eranausoer Diders +S10K must here dudtes	Fisher Scientic Part of Thermo F UT5500004667 02/28/2022	Orbers > 510R must have guotes	# Insight OMINIA #4400006648 04/30/21	Onders-STOK must have cuotes	Crotes - STOR must have guotes
Menu Search	requisition. • When selecting a "New contact our Account M:	remainedes and attachments' section of your " Dell Product to purchase in the Dell Punch out ; anager, Corey Kinser, Corey, Kinser@Dell.com, He ig is up to date with the lowest price for a New	Didets >STOK must have cubtes	Staples Sourcevel GPO Member ID 535	NASPO 100002342 03/21/21	GRAINGER Soucemeil 121215WWG 1/25/23		

This brings up a list of your Purchase Orders in progress. The left menu contains filters that can help you narrow your search. Click on the PO number you want to receipt.

≡ Search Purchase Ord	lers							K Save As 👻	🖈 Pin Filters 📼	🛓 Export All 👻
Quick Filters My Searches	G	reated Date: Last 90 day	ys • Quick search			Q 😧 Add Filt	er • Clear A	II Filters		?
Supplier	>									🔅 20 Per Page 🕶
PO Status	٠.	PO Number 👻	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0 Owner	·	· P0280490	Staples Contract and Commercial Inc	1/14/2021 2:31:28 PM	Completed	3153481	Kerri Reece	Sent To Supplier	No Matches	342.62 USD
Prepared By	· .	· P0280489	Graybar Electric Co Inc 🛛	1/14/2021 2:30:11 PM	Completed	3153454	Varri Daata	Sent To Supplier	No Matches	2.498.11 USD
Current Workflow Step	>	P0200409	Graybar Electric Coline G	1/14/2021 2:30:11 PM	compieteu	3133434	Kent Reece	Sent to Supplier	NO Matches	2,496.11 030
Invoice Status	> "	• 3248303	W W Grainger Inc 🔍	1/14/2021 2:29:12 PM	Pending	3153434	Kerri Reece	No Shipments	No Matches	96.13 USD
AP Status	> -	- P0280488	Staples Contract and Commercial Inc 🔍	1/14/2021 2:26:27 PM	Completed	3137281	Kerri Reece	Sent To Supplier	No Matches	149.43 USD
Commodity Code	>	• 3248300	Staples Contract and Commercial Inc	1/14/2021 2:23:42 PM	Pending	3132986	Kerri Reece	No Shipments	No Matches	34.09 USD
Form Type	>	· P0280481	Staples Contract and Commercial Inc	12/3/2020 4:10:52 PM	Completed	3129961	Kerri Reece	Sent To Supplier	No Matches	70.43 USD
Item Type	>				and the second					
Matching Status	>									20 Per Page 🔻
Participant	>									
PO Type	>									

Your P0 opens. Click on the pull-down menu next to **Purchase Order** and Choose one of the Receipt options.

Status Sumn	nary Revisions 🕦 Confirmat	Add Comment Add Notes to History	hments
General Inform	ation	Cancel PO	1
PO/Reference	P0288657	Finalize Revision	
No.	F0200037	Create Quantity Receipt	
Revision No.	0	Create Cost Receipt	
inerioren rie.		Print Fax Version	
Priority	Normal	Send Test PO	
Supplier Name	Staples Contract and Comn		
	Inc	See configuration for this purchase order	

You don't need to enter anything on the top.

teceipt Narive	2021-11-09 kreece 01	Cartier	Other	•
Receipt No	To Be Assigned	Traciling No.		
Receipt Date	11/9/2021 📰	Flexible Text Field		
acking Silp No		Flexible Drop Down		
Supplier Name	Staples Contract And Commercial Inc	Attacluments	Add	
eceived by	Kerri Reece			
lecelpt Address	•	Notesi		
	Contact Name Procurement Serv Phone +1 901-678-3775 Email kreece@memplis.edu 115 Johnmi Bidg 3720 Alumni Dr Memphis, TN 38152-3370 United States		1000 characters remaining	

Scroll down to the Line Details. Enter the quantity of each item that you are receiving. The Line Status defaults to "Received".

Line Details								-	Draft
PO • P020	38657						÷0	Details	
Line Iten	nj.		Catalog No.		Quantity	Status		Creation Date	11/9/2021 10:27:31
1 Stap (257		s, Letter Size, Manila, 50/Box	541077	1 PK	4	Received	• 0 = 0	Source Supplier St	Man Iaples Contract and Commercial
A ITEM D	ETAILS O								
Contra	ict No.	na value		Previous Receipts				Received by	Kerri Re-
Attach	ments	Add		Hecepte	Y00001984			Total (5.75 USD)	
								Related Documents	
Notes								Purchase Order: P0288	657
		1000 characters remaining:		4					

If you have only received part of your order, you will want to remove the lines you aren't receiving. Use the trash can on the line or select multiple lines and use the trash can above to remove the lines from the receipt you are working on. (This has no effect on the order or PO)

Line De	stalis					
PO •	P0288657					80
Line	Item	Catalog No.		Quantity	Status	_
1	Staples File Folders, 3 Tabs, Letter Size, Manila, 50/Box	541077	1 PK	a	Received	• 0 m D

When all lines are correct, click Complete in the top right.

Quantity Receipt • 469165	-	Save Updates	Complete
Summary Durphents Attachments History			
Cine Dobais			_
00 + 00206657	en	Draft	

You will get a message that your Receipt has been created.

Receipt Created		
Summary		Next Steps
Receipt No	Y00001994 🖶	Create Qty Receipt
Created for the PO I	No(s) P0288657 🖶	Create Cost Receipt

Now your PO lines show which lines are received and if there are any returns. Accounting will not pay any invoice until the credit is received.

Status	SU	mmary Revisions 🕦 Confirmations Shipments	Receipts 6 Inv	olces Comments Attach	ments History		
-	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Pric
1	~	Staples File Folders, 3 Tabs, Letter Size, Manila, 50/Box (25775)	541077	PK	5.75	1 PK	5.7
-	DETA	LS 🕀					
				Supplier	Receiving	Invoicing	Matchin
				Sent To Supplier	Fully Received With Returns	none	No Matche
2	~	Sustainable Earth by Staples Desktop Stapler, Full-Strip Capacity, Black/Gray (40897)	327002	EA	6.48	1 EA	6.4
-	DETA	LS 🔶					
				Supplier	Receiving	Invoicing	Matchin
				Sent To Supplier	Fully Received	none	No Matche
3	~	Post-it Super Sticky Pop-Up Notes Dispenser for 3" x 3" Notes, Black, 12 Pads (DS330-SSVA)	653409	РК	17.09	1 PK	17.0
-	DETA	ls 🕂					
				Supplier	Receiving	Invoicing	Matchin
				Sent To Supplier	Fully Received With Returns	none	No Matche

If you discover later that you need to return something, you will go in and create a receipt with only the returned line(s) on it. (see separate Return instructions)

Summary Dumments Attactm	eents History							
Line Details							-	
PO · P0288657						00		Draft
P0 - P0200037						θU	Details	
Line item		Catalog No.		Quantity	Status		Creation Date	11/9/2021 10:43:05 A
1 Staples File Folders, 3 Tab (25775)	s. Letter Size, Manila, 50/Box	541077	1 PK	ø	Received	0.00	Source	Manu
(20170)					Returned		Supplier	Staples Contract and Commercial In

Returning Staples Items in Tigerbuy

If you receive a defected or the wrong item, you will initiate a return in Tigerbuy.

- Go to the Staples Punch-out
- Locate your recent orders
- You can search by order number or by selecting *View all*
- Locate the order containing the item you want to return
- On the far-right side of the page you will see *Return an item*
- Select it and proceed with the instructions





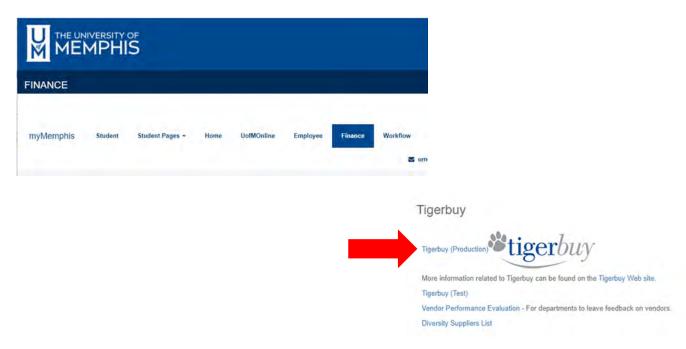
College of Arts & Sciences

How to – Make a basic Staples return

Returns are always a three-part process:

- 1. Communicating with the vendor to initiate the return process and get information on receiving credit.
- 2. **Internally processing** a return receipt in Tigerbuy, ensuring the invoice and credit are processed correctly.
- 3. Physically returning the item to the vendor if required.

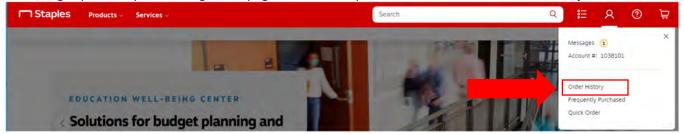
From MyMemphis, go to the Finance tab and choose Tigerbuy Production



This will bring you to the shopping home page. Click on the Staples Punch Out Catalog button.

Shop	Simple Advanced	õõ to.	Non-Catalog Item Favor	ites Forms Shop	Quick Order Browne	Suppliers Categories	Contracts Chemic
Orders	Search for products, suppliers, forms, part humber, esc.						c
Contracts							
Accounts Payable	Welcome to Tigerbuy, the online marketplace for	Tigerbuy Specialty Fo	orms				
Suppliers Reporting	eProcurement at the University of Memphis. For questions: contact Procurement & Contract Services by calling 2265 or emailing procurement@memphis.edu, • Guidelines are provided for users to view the criteria and process for purchases by the University of Memphis: <u>Procurement</u>	Change Order Request Used to Modify Purchase Driters	Moving Services Campus Moves	Vendor Payment Orders <\$10%- EXCEPTION Basis			
Administer	Guideline • To access Tigerbuy training documents and generic video snippets, view this information at: <u>Tigerbuy Training</u> <u>Materials</u>	Hosted Catalog Supp	oliers				
Setup	VENDOR INFORMATION • A Vendor must be registered in Tigerbuy before you can begin a	Punch-out					
	purchase requisition. • Vendor Registration site: TIGERBUY VENDOR REGISTRATION • Vendor Registration Form that can be filled out and emailed to Procurement with required W-9 Form for manual entry: VENDOR REGISTRATION FORM	Airgas Kai chardi 362 09/30/24	HET TBR_105 Consortium 07/31/22	'SWC# 338-6594 132/31/23	DM/14 P160701 09/30/21	SOURCEWELL 101419	LIDAM REPETTORASED 05/91/21
	All requests for changes with a registered vendor (name, dba, address) must be submitted with current W-9 Form, PUNCHOUT VENDOR INFORMATION AIRGAS FUNCHOUT: Algas Calck Reference Suide	Orders >\$10k mugt have quotes	Fisher Scientic Part of Thermo F., U1550006687 02/28/2022	Orders 101 must have guptes	# Insight OMNIA #4400006644 04/30/21	Orders > \$10K must have	Conters +S10K must have Quoted
Menu Search	DELL PUNCH-OUT: • Dell is requiring all quote orders to have the Quote Number on the "Tigetouy Po when issued. The Quote Number is entered in the "Note to Supplier" field in the "External Notes and Attachments" section of your requisition. • When selecting a "New" Dell Product to purchase in the Dell Punch out, contact our Accound Manager. Corey Kinser.	Ofders-STOR must have quotes	Sourceweil GPO Member - 10 535	NASP0 16000234-2 03/21/21	GRAINGER Souttativeli 121218/WG 1/25/23		

This brings up the Staples Catalog home page. Click on the person icon and choose Order History.



You will get a list of your previously shipped orders with pictures of the items you ordered. There are filters on the left and sort options on each column to help find your order. Once you find the order you need, click the **Return** link on the order line. Orders over 30-days are not return eligible.

Staples Products Se	ervices				Search		Q	E	R	0	Ä
	_								Work	llfe 🗸 📮	Chati
My Orders											
Quick search									Print	This Page	
By order number		Viewing 1-2 of	2 orders					Show:	25 50	75 100	
	Really.	Order #	Date =	Total	Status	POIR	Ship-to	Acti	ini		
Order number	#oply	190377726	03/17/21	\$68.35	Delivered	P0285342	AD115				
Advanced search Extransi all								Marco Roma	10		
By ship-to & ordered by	~						600 C				
By date range	~	189621969	02/11/21	\$72.29	Delivered	P0264336	AD147	Retu	ID.		
By total	~	6 - A		YER H.							
By accounting info	~									÷	
By item	~										
Clear att	Apply										

The top portion of the screen contains your information. Make sure your contact information is correct, especially your email. You can Edit this if needed using the red **Edit** link.

	the device processing and the second	-	In-Stock Hard San cizing Norm 51.	
Staples Products	Services	Smirth	q	
An Zome - Source Desizione Return an item Dener Jourizzio Contact Information 1 Antherity (C) Soli-OPS-375 S	Accounting informatio Budget Cense 795001500154200040 PC R0285342		Payment information Accounts Receivable	If at any time you'd like to Exit without saving anything, use the blue Cancel Punchout button in
Return Instructions Betwee down				the top right corner.
I Select item(s) and quantity to				
a manual and standard to				
2 Choose the appropriate reason				

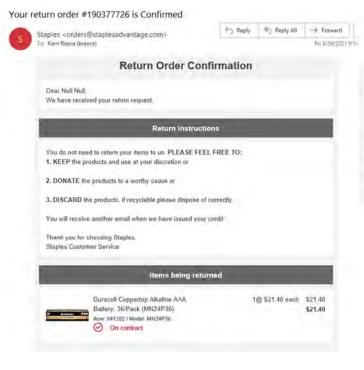
Enter the number of each item you are returning and click **Select reason for return** on each line to indicate your reason for the return.

Select item(s) to re-	tum		
25 coment AAA	Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36) Item: : 041302 Modell MN24P36 DN: 041302	O items Available for return: 1	Select reason for return
24 appendites da	Duracell Coppertop AA Alkaline Batteries, 36/Pack (MN15P36) Item: : 464050 Model: MN15P36 CMi 464050	0 items Ávailable for return: 1	Select reason for return
	Brother TN-420 Black Standard Yield Toner Cartridge Item: : BRT-TN420 Model: BRTTN420 CMI 869139	O items Available for return: 1	Select reason for return
			Pour di Scareti au le pouverti au Submit return
Select a reas			
Reason for return (req			
Ordered wrong ite			
Damaged			Then click Continue. Enter the
 Manufacturer's de 	efect		number of boxes you are packing
O Received duplicat	e-		the return in.
O Not as advertised			Click Submit Return when you are
O Product received	too late		finished with the lines.
O Dissatisfied with i	tem		
O Changed my minu			
	Cancel	Continue	

You will get a screen showing your return is in progress and that you will be getting an email.

Staples Prod	ucts Services	Statoly	۹ 🏥	R ()
				worktife 🗢 😡
Wy baters × Ordere 10037	126 -			
	s being processed	your mused and telland information at known me	emphy.add	
Return Information				
Return order#: 190377 Order date: March 17, 2 Name: KERRI REECE Phone#: 901-678-3775 Number of boxes to be	1021			
Humber of boxes to be				
Item(s) in your ret				
ltem(s) in your ret		Damagéd	-	\$21.40
Item(s) in your ret	VM Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36)	Dámagéd -07V: 1		\$21.40 Perfunci certais
item(s) in your ret	VM Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36)	11.049	Estimated refund total (pre-	Pefuno cetaus

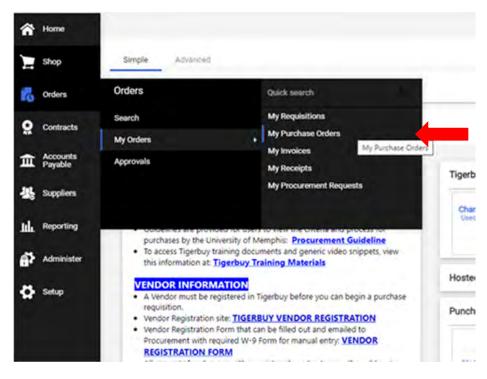
You will then receive a Return Order Confirmation email. This will contain your return instructions and refund information. You may be directed to return the item or dispose of it.



ORDER INFORMATION		
Return Order Date: March 26, 2021		
Order#: 190377726		
Customer ID: 1038101		
PAYMENT INFORMATION	REFUND INFORMATION	
	Merchandise Refund:	\$21.40
A/R: 521.4	Shipping:	FREE
Credit will be applied to your account	Tai Refund	\$0.00
the second se	Total Refund	\$21.40

Now you need to Process the return Receipt in Tigerbuy

Click on Orders / My Orders / My Purchase Orders on the left menu.



This brings up a list of your Purchase Orders in progress. The left menu contains filters that can help you narrow your search. Click on the PO number you want to return receipt.

≡ Search Purchase Orde	ers							🛤 Save As 👻	🖈 Pin Filters 📼	🛎 Export All 👻
Quick Filters My Searches	Cre	ated Date: Last 90 da	ys - Quick search			Q 😧 Add Filb	er = Clear A	II Filters		
Supplier	>									🗘 20 Per Page 🕶
PO Status	>	PO Number 💌	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
PO Owner	×	P0280490	Staples Contract and Commercial Inc	1/14/2021 2:31:28 PM	Completed.	3153481	Kerri Reece	Sent To Supplier	No Matches	342.62 USD
Prepared By	>	P0200490	staples contract and commercial inclu-	1/14/2021 2.5120 PM	compiereu	5139401	Kenn Neece	Sent to Supplier	No matches	542.02 030
Current Workflow Step	> "	P0280489	Graybar Electric Co Inc ®	1/14/2021 2:30:11 PM	Completed	3153454	Kerri Reece	Sent To Supplier	No Matches	2,498.11 USD
Invoice Status	>	3248303	W W Grainger Inc G	1/14/2021 2:29:12 PM	Pending	3153434	Kerri Reece	No Shipments	No Matches	96.13 USD
AP Status	>	P0280488	Staples Contract and Commercial Inc @	1/14/2021 2:26:27 PM	Completed	3137281	Kerri Reece	Sent To Supplier	No Matches	149.43 USD
Commodity Code	>	3248300	Staples Contract and Commercial Inc @	1/14/2021 2:23:42 PM	Pending	3132986	Kerri Reece	No Shipments	No Matches	34.09 USD
Form Type	>	P0280481	Staples Contract and Commercial Inc @	12/3/2020 4:10:52 PM	Completed	3129961	Kerri Reece	Sent To Supplier	No Matches	70.43 USD
Item Type	>	PULDUNDI	staples contract and commercian inclu-	12/3/2020 4.10.32 PM	compiciou	5129901	Nerri Neeve	Sent to supplier	No matches	1045 030
Matching Status	>									20 Per Page 👻

Your P0 opens. Click on the pull-down menu next to Purchase Order and choose Create Quantity Receipt.

Status Sumn	nary Revisions 1 Confirmat	Add Comment Add Notes to History	nments
General Inform	ation 🧳	Cancel PO	
		Finalize Revision	-
PO/Reference No.	P0288657	Create Quantity Receipt	-
Revision No.	0	Create Cost Receipt	
		Print Fax Version	
Priority	Normal	Send Test PO	
Supplier Name	TNY Staples Contract and Comn		
	Inc	See configuration for this purchase order	

You don't need to enter anything on the top.

Receipt Narive	2021-11-09 kneepe 01	Carrier	Other	•	
Receipt No	To Be Assigned	Tracking No.			
Receipt Date	11/9/2021 🔯	Flexible Text Field			
Packing Silp No.		Flexible Drop Down			
Supplier Name	Staples Contract And Commercial Inc	Attachments	Add		
Repeived by	Kerri Reece				
Receipt Address	÷	Notes			
	Contact Name Procurement Serv Phone +1 901-678-9775 Email Izeece@imemphis edu 115 Admin Bidg 3720 Alumni 0r Memphis, TN 38152-3970 United States		1000 characters remaining		

Enter the Quantity you are returning on each line and change Line Status to **Returned**.

. 0	P0288657						80
ine	Item		Catalog No.		Quantity	Status	
	Staples File Folders, 3 (25775)	Tabs, Letter Size, Manila, 50/Box	541077	1 PK	0	Returned	• 0 🖬 🗆
^							
	Contract No.	no value		Previous	Y00001978	9 I.	
	Attachments	Add		Receipts	Y00001984		
	Notes			Returned For			•
				A			
		1000 characters remaining		RMA No.			

You will want to remove the lines you aren't returning. Use the trash can on the line or select multiple lines and use the trash can above to remove the lines from the receipt you are working on. (This has no effect on the order or PO)

Summary	Comments Attachments History					
Line Details						
P0 · P0	288657					•
Line It	tem	Catalog No.		Quantity	Status	
	taples File Folders, 3 Tabs, Letter Size, Manila, 50/Box 15775)	541077	1 PK	1	Received	• <u>(</u>) = []

When all lines are correct, click Complete in the top right.

Quantity Receipt • 469165	Save Updates Complet
Sumitary Composité Attentionents Hataly	
Line Details	
	 Draft

You will get a message saying your receipt has been created.

 Receip 	t Created	
Summary		Next Steps
Receipt No	Y00001994 🖶	Create Qty Receipt
Created for the PO	No(s) P0288657 🖶	Create Cost Receipt

Change Order Request Instructions

Change Order Guidelines

- The Change Order Request form is a requirement of Procurement to revise a UOM Purchase Order that has been issued through Tigerbuy.
- The Change Order Request form is the communication, approval, and documentation of a revision or change required for a Purchase Order.
- Only one Purchase Order number is allowed in a Change Order Request Requisition.
- Requisitions containing a Change Order Request form cannot contain other forms or lines of purchase.

Change Order Request Form is located under Tigerbuy Specialty Forms on the Tigerbuy Home Shopping Page, shown below.

- The Change Order Request form does not perform a Purchase Order change.
- The form processes to Procurement in a Requisition.
- Procurement applies the change requested to the Purchase Order.

A Home					All • Search (Alt+Q)	Q 0.00 USC	× ∞ 100 ¥
Shop	Simple Advanced		Go to Non-Catalog	gitem Favorites Forms	Shop Quick Order E	rowse Suppliers Catego	rues Contracts Chemical
Orders	Siearch for products, suppliers, forme, part number, etc.						٩
Contracts							
Accounts Payable	Welcome to Tigerbuy, the online marketplace for eProcurement at ····	Tigerbuy Specialty Forms					
Suppliers	the University of Memphis, For questions, contact Procurement & Contract Services by calling 2265 or emailing procurement@memphis.edu , • Guidelines are provided for users to view the oriteria and process for purchases by the University of Memphis. Procurement Guideline	Change Order Request Vised to Mostly Purchase Orders	Moving Services Campus Mines	Vendor Payment Ordersi-STOK - EXCEPTION Basin			
Administer	To access Tigerbuy training documents and generic vides snippets, view this information at Tigerbuy Training Materials VENDOR INFORMATION	Hosted Catalog Suppliers	3				··· >
Setup	A Vendor must be registered in Tigerbuy before you can begin a purchase requisition. Vendor Registration site: <u>TIGERBUY VENDOR REGISTRATION</u>	Punch-out					··· •
	Vendor Registration Form that can be filled out and emailed to Procurement with required W-9 Form for manual entry: VENDOR REGISTRATION FORM All requests for changes with a registered vendor (name, dba, address) must be submitted with current W-9 Form.	Airgas Cal crewi 392 09/20/24	TER_105 Consortum 07/31/22	CWC# 530-4094 12/31/21	BH	SOURCEWELL DE1419	LIGHM 657937764300 03/31/27
	PUNCHOUT VENDOR INFORMATION AIRGAS PUNCHOUT: <u>Airgas Quick Beference Guide</u> DELL PUNCH-OUT: • Dell is requiring all quote orders to have the Quote Number on the Tigerbuy PD when issued. The Quote Number is entered in the "Note to	BIGHEADON Diskes S10X must have quotes	Fisher Scientic Part of Thermo F UT550006867 02/28/2022	Orders - S10K must have guidtes	# Insight OMNIA #4400006644 04/30/21	Ciders - 510k, must have guates	Dirdets -\$10k may failer Guides -\$10k must have guides
	Supplier field in the "External Notes and Attachments" section of your requisition. • When selecting a "New" Dell Product to purchase in the Dell Punch out, contact our Account Manager, Corey Kinser, Corey, Kinser(#Dell.com, He will insure U of M pricing is up to date with the lowest price for a New Product.	Orders -STOK must have quotes	Sourceweil GPO Member ID SSS	NASPO 16000234-2 03/31/21	GRAINGER Sourcewell 121218/WWG 1/25/23		

Change Order Form Process

The Change Order Request form goes through the same <u>workflow process</u> in Tigerbuy as a purchase which requires an Organization Requester and Approver, as follows:

- **Requester** starts process by filling out form.
- **Requester** adds form to a Tigerbuy Shopping Cart and the Product Description area will house the form with description shown.
 - In the shopping cart cost area, there should be no cost shown for a purchase order when cost is reduced on a P0.
 - There should be cost shown when a purchase order is being increased. This cost showing is the **additional** cost only that is added to a Purchase Order. The additional cost needs budget checking to ensure funds are available for the addition.
- **Requester** continues the process to the Requisition.
 - The **Account Codes** in a Change Order Request requisition must be the same as the Purchase Order to be revised.
 - Attachments can be added if needed for the purchase order revision. Procurement will add the attachments to the purchase order if needed with the revision.
- **Requester** places the Requisition containing the Change Order Request form.
- Requisition process checks budget for available funding.
- Organization **Approver** approves the requisition.
- Change Order Request Requisition processes to **Procurement**.
- **Procurement** opens requisition to review Change Order Request form for purchase order number and change requested.
- **Procurement** opens purchase order and applies change requested. All purchase order changes are applied in **both Tigerbuy and Banner**.
- **Procurement** Approves the Change Order Request requisition.
- Process is complete.

Using the Change Order Request Form

- Click Change Order Request icon to open form.
- For new Users to Tigerbuy, read the instructions printed in the form, shown below.

Use this form if you want to modify an existing Purchase Order (i.e., increase/decrease funds, cancel a PO, renew/extend an existing agreement, etc.) Attach supporting documentation, if necessary. Reference the Purchase Order Number on all documents related/attached to this Change Order Request.

All attachments and notes can be added in cart review.

- The Change Order Request form has 3 sections:
 - Action Bar
 - Supplier Info
 - General Info

	Supplier Info	3
Enter Supplier		
	or Supplier Search	
	Supplier Search	
	General Info	?
Non-Configurable Fields		
General Info Instructions	Use this form if you want to modify an existing Purchase Or cancel a PO, renew/extend an existing agreement, etc.) Atta necessary. Reference the Requisition Number on all docume Change Order Request.	ach supporting documentation, if
	All attachments and notes can be added in cart review.	
Form Type	Change Order Request	
Catalog No.	N/A	
Product Description		
	254 characters remaining expand clear	
Quantity	1	
Packaging (UOM)	EA - Each	~
Estimated Price	0.00	
Configurable Fields		
Manufacturer Name		
Manufacturer Part No		

1-Supplier Info

Enter Supplier-Enter Vendor from the Purchase Order to be revised. Vendor Information will populate this field.

2-General Info

Below is the list of boxes/fields designating required information:

Catalog No. No Entry Required

Product Description

Describe the change required. The change can be decreasing cost or increasing cost on a P0.

 Decreasing cost means reducing the cost on an Open P0 by closing a P0 balance, canceling an entire P0, cancelling a line on a P0, reducing unit cost or quantity on a line or lines. These are examples of a cost decrease description. Always specify the Line number that will require a revision. (For example, cancel line 2 not available, cancel entire P0 backorder too far out, close balance left on P0 due to discounts.) Increasing cost means adding more cost to a Purchase Order. When more cost is added to a P0, funds must be available in the budget for the additional cost. Increasing cost can be adding a new line or lines of purchase, increasing quantity or cost on an existing line. (For example, Line 3 increase quantity from 2 to 5, Line 1 increase unit cost from \$8.99 to \$10.99, add contract end date of 12/30/21 to description, add new line for Blue face masks, Item # 456789-300 units at \$3.50 each.)

Quantity

- For P0 decreases-No entry required.
- For P0 increases- Units for the additional unit cost need to be entered.

Packaging

- First box No entry required
- Second box Defaults to Each (EA). Packaging can be revised by clicking on arrow to view Unit of Measure list if needed with revision.

Estimated Price

- For P0 Decreases-No Entry Required.
- For P0 Increases -Unit cost for addition to P0 (This can be the new cost for a new line added, or it can be the difference between original cost and new cost if a line is increasing.

Manufacturer Name No Entry Required

Manufacturer Part No. No Entry Required

<u>Purchase Order #</u> P0 Number required for purchase order being revised.

Example of form filled out to revise a line.

Change Order Request	
	Supplier Info
Supplier	Alpha Building Corp more info select different supplier
Fulfillment Address	PO Purchase/Change Orders 5: (preferred) Shawn M Babb Sr 24870 Blanco Rd San Antonio, TX 78260-6674 US
	select different fulfillment center
Supplier Phone	+1 210-491-9925
Distribution	
The system will distribute purchase orders using the method(s) indicated below:	
Check this box to customize order distribution information.	
Fax	+1 210-491-9932
Manual	General Info
	General into
Non-Configurable Fields	
General Info Instructions	Use this form if you want to modify an existing Purchase Order (i.e increase/decrease funds, can documentation, if necessary. Reference the Requisition Number on all documents related/attach
	All attachments and notes can be added in cart review.
Form Type	Change Order Request
Catalog No.	N/A
Product Description	Line 3 increase cost from \$100 to \$125
	215 characters remaining expand clear
Quantity	1
Packaging (UOM)	EA - Each 🗸
Estimated Price	25.00
Configurable Fields	
Manufacturer Name	
Manufacturer Part No	
Purchase Order #	P0123466

Example of form filled out to close a P0.

Change Order Request	
	Supplier Info
Supplier	Townsend Door & Hardware set more info select different supplier
Fulfillment Address	PO Purchase/Change Orders 2: (preferred) 148 N Conalco Dr Jackson, TN 38301-3658 US select different fulfillment center
Supplier Phone	+1 731-935-8625
Distribution The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information	
Fax	+1 731-935-8633
	General Info
Non-Configurable Fields	
GeneralInstructions	Use this form if you want to modify an existing Purchase Order (i.e increase/decrease documentation, if necessary. Reference the Requisition Number on all documents rel
	All attachments and notes can be added in cart review.
Form Type	Change Order Request
Catalog No.	
Product Description	Close balance of P0321911. All invoices received and paid.
	196 characters remaining expand clear
Quantity	
Packaging (UOM)	EA - Each V
Estimated Price	
Configurable Fields	
Manufacturer Name	
Manufacturer Part No	
Purchase Order Number	P0321911

3-Action Bar-Top Right of Form

After the form has been completed, the Requester has options in the Available Actions list.

Change Order Request	Available Actions:	Add and go to Cart 🗸	Go	Close		^
	Course line la fa	Add and go to Cart			2	
	Supplier Info	Add to Cart and Return			1	
Enter Supplier	or	Add to Cart				
	Supplier Search	Add to Draft Cart or Pending PR/PO				
		Add to PO Revision				-
	General Info	Add to Favorites			?	
Non-Configurable Fields		Save				
GeneralInstructions		rence the Requisition Number on all doci				-

Add and go to Cart-The Change Order Request form goes directly into a Tigerbuy Shopping Cart. Requester can continue with the Tigerbuy process as described above.

Add to Cart and Return-The Change Order Request form goes into the shopping cart and a new Change Order Request form is ready for another change request for the same P0. When multiple lines of a P0 have changes, each change can be issued on a separate form. Each form will become a separate line in the shopping cart to process through Tigerbuy.

• This is not required to use separate forms. If the information for several lines can be communicated and understood in the Product Description box, Procurement will apply all changes from the information in one form.

• If a Change Order Request is not clear, Procurement will contact the Requester for clarification.

Click **Go** after selection has been made.

opping Cart 👻									۲
Simple Advance	d								
earch for products, sup	plans, forms, part number, etc.						Q	Details	`
								For Kerl Reece	
art Name	2021-05-18 kneece 02		Nole Source & Contractio	mden				Estimate (50.00 USD)	
								Subtotal	50.00
eacription								Shipping	0.00
Priority	Normál	C						Total	0.00 50,00 US
								Proceed To Ch	eckout
1 Item									
A Parker & Sons Ph	umbing LLC - 1 Item - 50.00	USD						When you a	are
SUPPLIER DETAILS	PO Purchase/Change Orders 6 : 32	88 Winbrook Dr. Memphis, Tennessee 3	8116-3644 United States					satisfied wit	
Contract	no value	PO Number	To Be Assigned					Cart, click F	roceed
Item.		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext Price		to Checkou	ut to go
Additional Work		N/A	EA	50.00	Oty: 1 EA	50.00		to the Draft	0
							-	Requisition	
A ITEM DETAILS									

Dell Punch-out

There are multiple vendors that offer computer equipment. The following instructions are for ordering through Dell Punch-out. When ordering computer parts, printers, or laptops, you will need to get a quote from your department's LSP. Once you get a quote, you may now proceed with placing your order.

1. On the Dell Punch-out page, click on the Quotes tab found in the top-left corner.

DELL	Technologi	es s	earch Dell Premier
Shop \sim	Deals 🗸	Account	
Quotes	Order Status	Recent Online Or	ders Custom Links 🗸

2. Type or paste the quote number from the LSP and verify that the information matches what you are being quoted.

	s Quote Number).	ase from the list below of set	arch for an eQuote (by er	neering the equote nam	ne, eQuote number, eQuote creato	ny or search for a Sales Quote
3000146792502			Q			
eQ	luote	Sales Q	luote			
Name	Number	Created	Authorized Buyer	Expires	Purchased	Subtotal Total Price
Roger Lexmark B	3000146792502	kprice4@memphis.edu March 7, 2023	Tiffany Carter	May 6, 2023	No	\$199.99

- 3. Select View Details
- 4. You should now be on the *Checkout* page. Select *Create Order Requisition*.
- 5. Select *Submit Order Requisition*, this will take you to the Tigerbuy Shopping cart.
- 6. Proceed with the order. Note: For equipment items over \$1,500 you will need have this item tagged (see next section). Make sure to use the correct account code.

Checkout

	· · · ·					
Shi	pping and Payment		Review		Requisition Initi	ated
Review and	confirm your order				Subtotal (1)	\$199.9
Terms of sale					Estimated Shipping	\$199.9
	rder, please be mindful that we will need anges in your ability to receive the order				Total	\$199.9
	arate agreement between you and Dell th agree to Dell's TERMS OF SALE and int				Submit Order Re	quisition
Order informatio	n					
Delivery Method	no charge delivery			Change		
tems Change						
tems		Quantity	Unit Price	Item total		
B	exmark Monochrome 2236dw Wireless, Duplex Irinter, 36 ppm (18M0100)	1	\$199.99	\$199.99		
M	lanufacturer Part# : 18M0100 ell Part# : AA510222					
D						

Subtotal (1): \$199.99

Tagging Equipment

Due to pricing, certain computer equipment and furniture must be ordered using specific account numbers, which can be seen in the chart below. Additionally, items purchased within a certain financial range, also requires tagging. Tagging is the process of Accounting providing a physical tag that labels the item as property of the University of Memphis. Items under \$1,500 are listed under the not tagged section. However, it's good practice to have all computer equipment tagged for accounting/inventory purposes.



The University of Memphis - Accounting Office Computers and Equipment Account Codes

	Not Tagged (Under \$	1,500)
Account Number	Account Title	Examples
74500	Supplies	IPad/Printer/Computer/AppleCare Chairs/Monitors/Wall Mounts USB Drive/Cables/Mouse
	Fagged Equipment - Single Item/All Con	nponents (Under \$1,500)
Account Number	Account Title	Examples
74504	Controlled Equipment under \$1,500	IPad/Printer/Computer Equipment tracking required by Grant

The University requires all office equipment and sensitive equipment (costing between \$1,500 and \$4,999) be tagged and maintained in the Fixed Asset System.

Tagged Equipment - Single Item/All Components (\$1,500 - \$4,999)					
Account Number	Account Title	Examples			
74510	Sensitive Equipment (\$1,500 - \$4,999)	Lab Equipment Copiers			
74511	Computers (\$1,500 - \$4,999)	Computers			

Account Number	Account Title	Examples			
78110	Office Equipment	 Office Equipment Copiers 			
78111	Furniture and Fixtures	Custom Furniture/Trophy Case Lockers			
78120 Operational Equipment		Athletic Equipment Air Compressor/Generator Yard Equipment			
78130	Instructional Equipment	 Audio Visual Equipment Lab Equipment 			
78190	Other Equipment	Forklift Heavy Equipment			
78195	Works of Art	Fine Art			

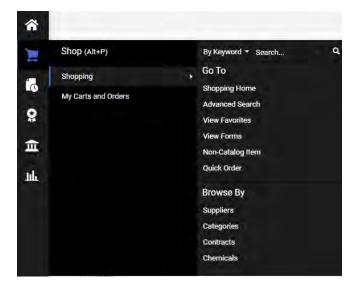
Ordering Non-Catalog Items

When ordering items not listed in Tigerbuy, you will need to follow a different procedure. Follow the instructions below:

- Locate the shopping tab in the far-left column of the Tigerbuy page
- Select Shopping
- Select Non-Catalog Item
- Search the supplier (If it is a supplier that is in the Tigerbuy system, the supplier's name and address should populate)
- Add the product description, quantity, and price estimate
- If this is the only item you are ordering, save and close. If not, select save and add another
- You can know view your item in your cart
- Make sure all information is correct. Select Proceed To Checkout
- If you have a quote or accompanying documents, select Attachments and upload the documents
- Go back to the checkout page, make sure all information is accurate
- Select Complete

Add Non-Catalog Item							×
Existing Supplier							
Select Supplier	Q						
ltem							×
Product Description *	Catalog No.	Quantity +	Price Estimate	Packaging			
				EA - Each	÷		
354 citeratoreni remarning							
Additional Details							Ŷ
Manufacturer Name		м	anufacturer Part No			Product Flags	
						🔲 🐠 Hazardous material	
						Select Agent	
						E Toxin	
						🔲 🖾 Energy Star	
						Citeren	
* Required fields						Sine Save And Add	Another Close

See pages 143 - 148 for instructions, (note these instructions slightly differ from the updates in Tigerbuy)



How to - Tigerbuy Non-Catalog Order

Purchase information for a Non-catalog order can be from a quote, agreement, or vendor communication. The Non-catalog process involves the Requester typing the purchase information into the form to fill a shopping cart.

← → C ≧ myuofm.memphis.edu/web/home-community/fin A O D # A 🔢 Apps 🕝 Google 🧕 NOAA National We... 💔 2/101.9 Fiadio Now 🧧 Star Wars Weekend... 🚱 💰 Find a Sales and Us... 📒 MBI Links 🌟 Bookmarks 🚱 ** Cther book THE UNIVERSITY OF FINANCE myMemphis UofMOnline Student Student Pages Hom Emole + Logout S umMail A TAM O Help

Log into My Memphis & go to the Finance tab:

Scroll down on the right-hand side to Tigerbuy and click on Tigerbuy (Production)



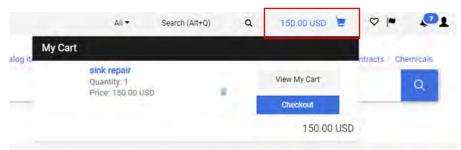
Tigerbuy opens on the Home screen. Click on **Go to: Non-Catalog item** at the top or **Shop / Shopping / Non-Catalog item** on the left menu.

A Home						Al • Search (Art+0)	Q 0,00 USE	a ka ka 🕈 1	
📜 Shop	Shop (Alt+P)	By Keyword Search Q.		Botto MohiČatalog	tem Favorites Forms	shop Quick Örder B	ruwse Suppliers Catego	ores Contracts Chimicals	
Orders	Shopping My Carts and Orders Shopping Settings	, Go To Shopping Home Advanced Search View Faccales View Forms			_			q	
Accounts Payable		Non-Catalog Item Duick Order	Tigerbuy Specialty Form	ns				··· •	
Suppliers		New Shopping Experience	Change Order Request Used to Mostly Putchase	Moving Services	Vendor Payment Oyders (STG) - EKCEPTION				
Administer		Browse By Suppliers	Olders -		Barry				
Setup		Categories Contracts Chemicals	Hosted Catalog Suppliers >						
	teriser in private states		Punch-out					v	
	Procurement with require REGISTRATION FORM	that can be filled out and emailed to 3 W-9 Form for manual entry: VENDOR ith a registered vendor (name, dba, address) urrent W-9 Form.	Airgas Es externa de auga	EET TBM_115 Cheadmann 127(31/22	SWC#338-464 12/21/21		5058/25WEL 083415		
	Tigerbuy P0 when issued.	INFORMATION Duick Biference Guide orders to have the Quote Number on the The Quote Number is entered in the "Note to mal Notes and Attachments" section of your	eresuppe Debin 4109 must here guiltes	Fisher Scientic Part of Thermo F., 1/759(0004867 02/28/2022	Original States	#Insight Demos practicitate (94:30/21	Dotes: 45109, must have gates	Order 1-5100 multimet outer	

Add Non-Catalo	og item						×
Existing Supplie À Parker & Sons	-	XQ	A Parker & Sons Plur	nbing LLC	Type in your Vendor or use the Search feature. A Vendor must be in the Tigerbu system to begin entry. (see end)		
Fulfillment Addre	ess			l l	✓ Distribu	ition Methods	~
PO Purchase/Cha	ange Orders 6 👷 - 328	8 Winbrook Dr, Me	mphis, Tennessee 3811	6-3644 Unite	ndizater	em will distribute purchase orders using the method(s) i helow: Check this box to customize order distribution information.	
Item]					~
Description *		Catalog No.	Quantity *	Price	Packaging		
		*			EA - Ea▼		
Additional Detai	ils	_					~
Manufacturer Nan	ne		Mamilacturer Part h	r.		Product Flags	
Type in your Item description and any other A Recycled Hazardous material Hazardous material Select Agent Select Agent Toxin For you have Quotes or other documents to attach, 							
	use the Add	l Internal A	ttachments b	utton.		Green	
Add Internal Att							Y
Required held	15-					Save And Add Another	Close

Click **Save** to send your item to the Cart or **Save and add another** to send the item to the cart and add another item. When entering information from a Vendor quote, **each line item from the quote must be entered separately**. This is required for accurate shipment, receipt of goods, and payment for each item from quote.

When you are sent back to the Home screen, navigate to your cart to finalize your Requisition.



Simple Advance	đ									
warch for products, sup	pkers, forms, part reimber, etc.					_	٩	Details For Kern Rece		~
art Name	2021-05-18 kreece 01		Sola Source & Contra	ct Order Thue				Estimate (150.00 USD)		~
escription				Organiz True - 1	ation Values			Subtotal Shipping	1 50.00 0.00 0.00	
ποστη	Normal							Handling Total	150.00	USD
	Umbing LLC + 1 Item - 150.0 PO Purchase/Change Orders 6: 32/	O USD 88 Winbrook Dr, Memphils, Tennessee 38	116-3644 United States							
Contract	no value	PO Number	To Be Assigned							
Item		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price				
			EA	150.00	1 EA	150.00				
sink repair										
 ITEM DETAILS 	2									
	>		Internal Note				- U I			
↑ ITEM DETAILS ↓	>		Internal Note	1000 main	o an providence		pend i clear			

Review your cart, Make the Sole Source box say True, and click Proceed to check out.

Your Draft Requisition will appear. Confirm all information, your items, and FOAP allocations. Errors will be noted on the right. Click **Place Order** to submit your Requisition for Approval.

Seneral	£	Shipping	1	Billing		ø v	Draft	
Cart Name Description Propriet Prepared for	2021-05-18 kreece 01 no value Normal Kerri Reece Kerri Reece	Ship To Contact Name Procurem Phone at 901-078-0775 Email kreece@memphis 115 Admin Bldg 3720 Alumni 07 Memphis, TX 38152-3371 United States Delivery Options Expedite	edu	Bill To University of Memphis Attr: Accounts Payable 275 Administration Bidg Memphis, TN 38152-3370 United States Credit Card Info No credit Card Info No credit card has been a: Billing Options			Correct these issues. You are unable to proceed until addressed Required: Account Total (150.00 USD) Subtotal Shipping Handling	150 0 150
		Ship Via Requested Delivery Date	Best Carrier-Best Way	Accounting Diate	no value		Place Order What's next for my order?	
Accounting Codes						1		
Chart	Fund	Organization	Account	Program	Activity			
a Inversity of Merristins	110001 Decempented Eland G	542000 Procurement Services	no value Regared	4650 Gen Admin and Lagussial Services	no value			
ternal Notes and At	tachments	1	··· External Notes and A	ttachments		1		
1 Item								
	umbing LLC · 1 Item · 150.00 USD							

You will get a confirmation that your Requisition has been submitted for approval.

Summary		Options
Requisition number	3270272	Print
Requisition status	Pending	Recent orders
Cart name	2021-05-18 kreece 01	Return to your home page
Requisition date	5/18/2021	
Requisition total	150.00 USD	
Number of line items	1	

If your Vendor is not in the Tigerbuy system, they will need to register. Please see the Procurement / Tigerbuy page https://www.memphis.edu/procurement/tigerbuy/ for current links & Instructions.

PROCUREMENT AND CON	ITRACT SERVICES
Staff Directory Contract Services	Tigerbuy and Bids Purchasing Card Travel Services
TIGERBUY	Home > Procurement and Contract Services > Tigerbuy
NEW SUPPLIER/VENDOR REGISTRATION	Welcome to Tigerbuy, our online marketplace for
BID CALENDAR	eProcurement
CURRENT BID OPPORTUNITIES	Tigerbuy Registration Letter 📆
VENDOR INFORMATION	Tigerbuy Training Classes & Registration
FAQS	New Vendors/Suppliers
TIGERBUY TRAINING CLASSES/REGISTRATION	» ENTER HERE

Procurement and Contract Services

115 Administration Building Memphis, Tennessee 38152-3370

Office: 901.678.2265 Fax: 901.678.2102

www.memphis.edu/procurement

Dear Potential Vendor:

The University of Memphis invites you to become a registered vendor in our eProcurement System, Tigerbuy. Registering with the UofM allows you to receive purchase orders, contracts, and bid opportunities related to procurement transactions.

Register with us online today at <u>https://bf.memphis.edu/tbuy/</u>. Go to the **TOP LEFT** of the page and select the option **NEW SUPPLIER/VENDOR REGISTRATION**. The registration will begin immediately in the first tab asking for your company name and tax identification number. **Complete all areas with the RED STAR next to it, as it indicates required information**.

After completing the first two tabs, a dialogue box will appear stating check your email to **verify** your email address. <u>Check your email</u>. Also check your **Spam** or **Junk** mail if not in your regular Inbox. Verification of your email address is required to complete the registration process.

Click on the link provided in the email, then **CONTINUE** to the remainder of the vendor registration sections. These sections include business <u>commodities</u>, <u>W-9 information</u> and <u>NAICS</u> (North American Industry Classification System) codes. See the following link for more information about NAICS codes: https://www.naics.com/search/.

Click the **NEXT** button at the top of each page to move to the next section. At the end, you will see the **FINISH** button to complete your registration.

Questions regarding registering can be directed to the office of Procurement and Contract Services at 901-678-2265, or by email to procurement@memphis.edu.

We look forward to your business connection to the UofM!

Sincerely,

Procurement and Contract Services

Policy & Statute Requirements

- Annual Inventory Confirmation is required. For details, please read the Equipment Inventory Policy.
- Once a year Accounting will send a Fixed Asset Inventory report of **capital assets only** by Organization to Equipment Reps and Financial Managers.
- It is essential that you maintain accurate and up-to-date records of your department's inventory.
- State and Internal Auditors verify Inventory Confirmations as part of their normal audit produces. Failure to complete Inventory Confirmations could be reported as an audit finding.

Fixed Assets Categories

- "Capital Equipment" is a single item costing \$5,000 or more.
- "Sensitive Minor Equipment" is particularly vulnerable to theft and has a cost between \$1,500.00 and \$4,999.99.
 - Examples of items that may be viewed as sensitive minor equipment include boats, boat motors, boat trailers, canoes, cameras, computers, audio and video equipment, microscopes, oscilloscopes, and other scientific equipment. This category is NOT included in Report this year.
- Controlled Equipment under \$1,500 is not included in Report.
- Report of all assets may be obtained from Banner ePrint Banner Finance Repository FYFR001 Fixed Asset Inventory Listing.
 - Per policy, "departments should take every precaution to safeguard ALL state property, regardless of cost." Therefore, we strongly recommend you take this time to inventory and confirm Sensitive Minor Equipment and Controlled Equipment (between \$0 \$4,999) as well. This report would be for your use only and should not be sent to Accounting as part of the confirmation process. Only the confirmation report of capital assets should be completed and submitted to Accounting.

Annual Inventory Confirmation Process

- 1. Print a copy of the Confirmation and read instructions carefully.
- 2. Physically confirm the location of all assets.
- 3. If information is missing or incorrect, update asset description information (make, model, serial number, etc.) on the confirmation report, preferably using a red pen or font. Changes to description, make, model and serial number are made by Financial Reporting.
- 4. If Location is missing or incorrect, update it through Fixed Asset Workflow (indicate WF on confirmation). If Location is "Off Campus", be sure to submit the Off-Campus Use/Return of University Equipment form to Financial Reporting.
- 5. If asset has been transferred to another Organization, update it through Fixed Asset Workflow (indicate WF on confirmation).
- 6. If needed, zero value assets through Fixed Asset Workflow (indicate WF on confirmation).
- 7. To add capital assets. complete the Items in Department Not on Inventory form and send with completed inventory confirmation.
- 8. Ensure you have an <u>Off-Campus Use/Return of University Equipment</u> completed for all Off-Campus items (112688 and 112687).
- 9. You must complete a <u>Report of Lost or Stolen Property Form</u> and file it with Police Services for all missing/lost/stolen items. Also, send a copy of the form to Financial Reporting.
- 10. Upon completion of confirmation of all assets on the report, forward a copy of the signed confirmation report to Financial Reporting by the designated date.

FFIMAST – Asset Status

To determine System Status Side of the asset, use the Banner INB FFIMAST page. Enter Decal # (Asset Tag), click on Go.

• Active Status – System Status Code "J" or "I"

X @ ellucian	Fixed Asset Master Query FFIMAST 9.3.16 (PROD)		
Asset Tag: 014153000	14 h		
MASTER INFORMATION	len		
Origination Tag	T00148377	Permanent Tag Date	12/14/2020
Permanent Tag	014153000	LastAdjustment	
		Date	
Primary Tag		Origination Tag	
		Cancel Date	
Subordinate Type		System Status Code	J Source Journal Voucher
Origination Tag Date	12/14/2020	/	
Asset Description	Worstation Standard	Asset Type	FR Furniture

• Inactive Status – Assets that were previously zero-valued, cannibalized, or disposed are indicated by "D" or "C"

X @ ellucian	Fixed Asset Master Query FFIMAST 9.3.16 (PROD)		
Asset Tag: 012531100			
* MASTER INFORMATION			
Origination Tag	700117652	Permanent Tag Date	02/27/2012
Permanent Tag	0/253/100	LastAdjustment Date	01/27/2021
Primary Tag	-	Origination Tag Cancel Date	
Subordinate Type		System Status Code	D
Origination Tag Date	01/04/2012	/	
Asset Description	Apple Mac Pro, Two 6-Core Intel Xeon	Asset Type	CP Computer and Peripheral Equipment

FFIMAST – Organization

• To determine which org the asset belongs, use the Banner INB FFIMAST page. Enter Decal # (Asset Tag), click on Go, and then, click on the down arrow in the bottom left of the screen 2 times.

×	@ ellucian	Fixed Asset Master Query FFIMAST 9 3 15 (PROD)		ADD -		- 🖧	RELATED	🔅 TOOL
Asset	Tag: 014108400				_		Star	t Over
PRO	CUREMENT INFORM	IATION			🛱 Insert 🛛	Dericte	Pin Copy:	P. Filter
	Origination Tag	700147302	Permanent Tag 014108400	3D pr.	inter - Form 34	Complete	Package	
	Vendor Code	U00560005 Formlabs	Submission Numbe	r (2			
	Purchase Order	P0279077	Invoice Iten	n å	2			
	Purchase Item	2	Cancel Dat	é				
	Receiver		Credit Mem	u No				
	Receiver Date		Installment	5				
	Invoice	78230984	Recurrin	a				
	Invoice Date	09/25/2020						
Other	Source Data							
	Document		Document Tag Date					
	Туре		Source Submission					
	Sequence							
Irans	sfer Data							
-	Date		Grant					
	COA	U University of Memphis	Custodian ID					
	Organization	251000 Art	Equipment Manager					
-	Location	115820 Arts & Communication Bldg 20A						

FFIPROC – Fixed Asset Procurement Query

• Additional information may be found using the Banner INB FFIPROC page by purchase order #, serial #, description or other.

X @ ellucian Fixed Ass	et Procurement Query FFIPRO	IC 9.0 (PROD)					🖁 (do) 📓 serverie 🔮	-
FIXED ASSET PROCUREMENT QUERY	1						D hee	rt 🔄 🗖 Gokto
Basic Filter Advanced Filter								
Origination Tag	Permanent Tag	O Di	escription	Origination Tay Cancel D	ate O Purchase Order	Add Another	Field	
Origination Tag Permanent Tag	Description	Cost	Origination Tag Cancel Date	Purchase Order Invoi	e Receiver Vendor	Other Sources Type	Submission Num Serial Number/VIN	As
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Equipment Representatives Listing

The list of current equipment representatives can be viewed at <u>https://umwa.memphis.edu/programguides/</u>.

Make sure that each Organization has assigned equipment representative

	S.			Finance Program Guide
FOAPALS search by index	Equipment Re	eps List by Or	ganization	Print Version
search by fund	Expand All	Collapse All	Export to Excel	
search by organization search by program	+ 10000			
search by activity	+ 20000			
search by multiple fields search by orgn title	+ 30000			
search by index title	+ 40000			
SIGNATURES	+ 60000			
signatures by org	+ 70000			
signatures by name approval queues by org	+ 80000			
approval queues by name	Narrow recults d	icolayod by ante	ring any part of the	e organization code number, title, or
SOMPMENT REPS	equipment rep n		any part of the	e organization code number, title, or
assign equipment reps				
view equipment reps			Search	

Location Code Search

The list of locations codes can be viewed at https://umwa.memphis.edu/programguides/.

	HIS	Finance Program Guide
FDAPALS search by index search by roganization search by organization search by program search by routivity search by multiple fields search by orgn title search by index title SIGNATURES signatures by org signatures by org signatures by org signatures by name approval queues by name EPAF approval queues by name	Location Code Search Enter all or part of the building name Code matches. Search Location: Search	and click Search to generate a list of corresponding Location
EQUIPMENT REPS assign equipment reps view equipment reps fixed asset workflow heip		
CODES account code list role code list location code search program-code list data standards manual	-	

Additional Resources

- Questions/Issues
 - o wf-fixedasset-admins@memphis.edu
- Financial Reporting Website Fixed Assets
 - o https://www.memphis.edu/accounting/fixedassets.php
- ePrint Report FYFR001 (Fixed Asset Inventory Listing)

Banner ePrint
 Banner Development Repository
 Banner Foundation Repository
 Banner Finance Repository
 Banner Student Repository
 Banner Financial Aid Repository
 Banner HR Repository

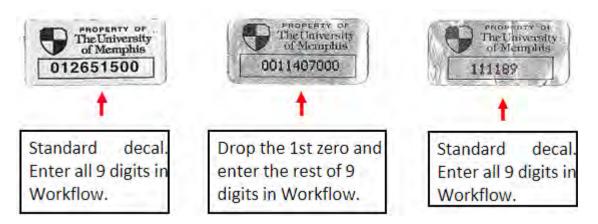
College of Arts & Sciences

- The Equipment Transfer Workflow is an online process to Zero Value eligible equipment.
- Only Equipment Representatives (ER) can *initiate* a workflow.
- ERs are assigned by the Financial Manager (FM) of the organization via the Finance Program Guide.
 - Only one equipment representative can be assigned to an organization.
- Approvals from both the Financial Manager of the org and the Accounting Office are required to the complete workflow.
- The list of current equipment representatives can be viewed in the Finance Program Guide.

	HIS	Finance Program Guide
FOAPALS search by index search by organization search by organization search by program search by activity search by orgn title search by index title SIGNATURES signatures by org signatures by org signatures by org signatures by name approval queues by name EPAF approval queues by name	Equipment Reps List by Expand All Collapse + 10000 + 20000 + 30000 + 30000 + 40000 + 50000 + 60000 + 70000 + 8000 + 80000 + 80000 + 8000 + 80000 + 80000 + 80000 +	
EQUIPMENT REPS assign equipment reps view equipment reps fixed asset workflow help CODES account code list rule code list location code search program code list data standards manual	+ 90000 Narrow results displayed by equipment rep name below.	organization code number, title, or

Important Notes before Starting the Workflow

- PTAG_Code is a U of M Asset tag (also refers to a Permanent TAG, P-tag, Decal). This is a silver tag with U of M logo.
- A valid 9-digit PTAG Code (decal #) number is needed. Three different kinds of decals have been used.



Use Banner INB screen FFIMAST to check asset status

• Assets that were previously zero-valued, cannibalized, surplused, or disposed of otherwise will have a "D" or "C" status and cannot be processed in Workflow.

X () ellucian	Fixed Asset Master Query FFIMAST 9.3.6 (PROD)			🖹 ADD 📓 RETRIEVE: 🍶 RELATED 🔅 TOO
Asset Tag: 011327300	1			Start Over
MASTER INFORMATIO	N			Dittaert Didele Copy 9, Fit
Origination Tag	011327300	Permanent Tag Date	09/30/2003	
Permanent Tag	011327300	Last Adjustment Date		
Primary Tag	-	Origination Tag Cancel Date		
Subordinate Type		System Status Code	D	
Origination Tag Date	09/50/2003			
Asset Description	Apple Computer Emec	Asset Type	NC Sensitive flems Not Capitalized	
Commodity		User Status Code		
Unit of Measure				
Insurance Value		Replacement Value		
Market Value		Book Value	1,274.00	
	Capitalization Indicator		Tag in Use	
	Asset Text Exists		Gft Indicator	
Cost	1,274.00	Net Book Value	0.00	
	1,274.00	Total Net Book Value	0.00	

Use Banner INB screen FFIMAST to check organization

• Be sure that you are ER for the Organization listed.

X @elucian	Fixed Acasel Master Query FFIMAST \$3.16 (PROD)				b	AGO 👔 RETREVE	A RELATED	♦ 10015
AssetTag: 01434410	1						(Surt Over
·PROCUREMENT INFO	RMATICH					0	tref Diete	4099 R
Orgination Tog	700152061	Permanent Tag	(1434(10)	Der OptPer 5098 3FF				
Verdor Code	LOUD(34) Del Harvary LP	Submission Number	Ø.					
Purchain Order	P0110047	inter line	1					
Puchase literr	1.1	Cancel Date						
Receiver		Ded West	No					
Receiver Date		intalnets						
inno	78266193	Examp						
invoice Date	10/14/2022							
Other Source Data								
Cocument		Document Top Date						
Type		Source Submission						
Sequence								
Enersider Data								
Dela		Cret						
COA	U University of Merriphie	Custodan D						
C paraton Locaton		Esichen Matage						

To initiate the workflow, the **Equipment Representative**:

- Log into the My Memphis Portal at http://my.memphis.edu
- Select the "Workflow" tab
- Scroll down to "My Processes"
- Select Workflow type "UOM Equipment Transfer"

	🖓 Refresh 🖉 Open Workflo
ОМ	
UOM Equipment Location Change	
UOM Equipment Transfer	

- Enter decal number in "PTAG_CODE" field then click on "Start Workflow"
 - Note1: Workflow Specifics Name and Note are not required
 - Note2: PTAG_CODE is 9 digit UOM decal number

Ξ	@ ellucian.	A	ter
ଜ	Start Workflow		
g	Start Workflow		
0	Organization: UOM Workflow Name: UOM_FN_EQUIP_TFANSFER 4 Workflow Specifics Name: Priority: Normal Workflow Note: Required Parameters PTAG_CODE *:	ی Start Workflow الله Attach File الله Reset الله Car	cel

• Click "OK" to view your Worklist OR click on the link in the email that will be sent to you

Equipment Transfer -012485400 - Enter Transfer Details	G	Ð, v
tecarter@memphis.edu To: Tiffany E Carter (tecarter)	© 📑 ← ≪ → Tue 1/17/2023 10:20	
Please login to <u>Banner Workflow</u> to access this worklist item and enter the transfer details for the following equipment: Decal #: 012485400 Description: Dell OptiPlex 790;OptiPlex 790 Minitower for S Make: Dell Model: OptiPlex 790		
Serial Number: D4FP6V1 Amount: \$980.84 Original Organization: 201000 - College of Arts and Sciences Original Location: 101802 - Ellington Hall 103		

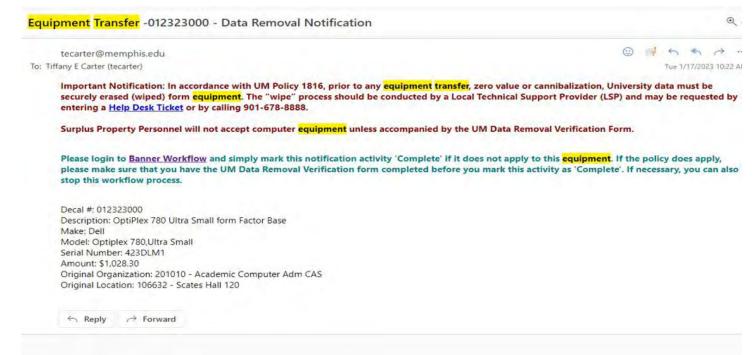
• Click the job on the Workflow Worklist to continue

=	@ ellucia	an.							A tecarte
ដ	Worklist							_	
	Worklist						Advanced Search	Workflow Specifics Name	Q
8									
	Status	Organization	Workflow	Activity	Priority	Created		View Details	
		UOM	Equipment Transfer -013399700 Performing	Enter_Transaction_Type	Normal	07-Feb-202	13 10:33:14 AM	٩	
	Show Reser	rved Items	4	- 1 of 1 First & Previous Next & Last. Go To Page				Records Per Pa	ige: so v
	-			© 1999-2021 Ellucian Company L.P. and its affiliates.					

- Verify the asset information, select the "Zero Value" transaction type, enter current Org. Code in "New Org. Code" field and enter transfer reason.
- Click on "Complete" to finish the workflow.

ellucian		
anau: Ener Equipment Transition Type		
ter Equipment Transfer Transaction Type		
ter Equipment fransies fransaction type		
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Vode		
Opt Fiel 7453 AIG		
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Serial Number:		
1120-01		
Current Organization		
201000 - College of Arts and Sciences		
urrent Lituationi 105256 - Dunn Hall 127		
rensection Type *-		
Zerd Velle	~	
Vanjter Reacion 1		
Ecoloment a not functioning		
New Organization Code ** 201000		
Page ancer 860000 for Surplus. Dick have to search for a welld organization bode.		
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of the and treat a time tampaits it also are terms and proofs of the light paralates on terms the artist	and the second has been account to account to account and the second s	Surplus to pay up the example suppress demostrical gaugithrough the second area the equipment within longer by surged. You are example areas a c

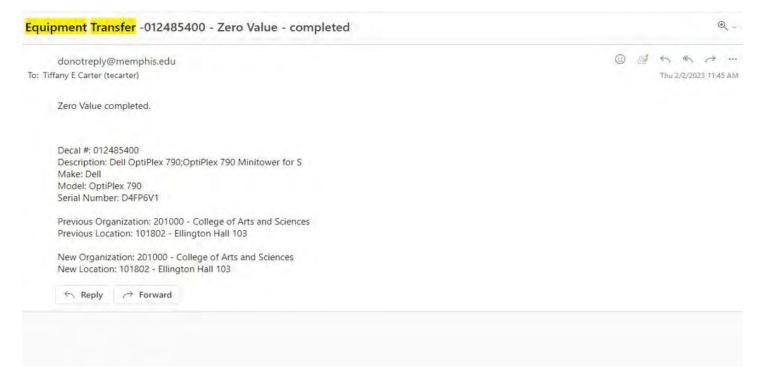
- The **Equipment Representative** will receive an email with instructions to login to workflow and complete "Data Removal Notification" process.
 - If you already received Notification from LSP or do not need one just click on "Complete" to finish the workflow.
 - If you do not have it contact LSP to obtain one.



• The **Financial Manager** will receive an email with instructions to login to workflow to approve or decline the transaction.

	From: dparks@memphis.edu [mailto:dparks@memphis.edu]	
	Sent: Friday, July 13, 2012 1:17 PM	
	To: Libby Shelton (ewsheltn)	
	Subject: Equipment Transfer -011936600 - Approve Transfer	
	Elizabeth Shelton,	
	Please log into Banner Workflow to access this workflow worklist item and approve/decline the	
	following equipment transfer:	
	Transfer Type: Zero Value	
	Decal #: 011936600	
	Description: Dell Optiplex GX620	
	Make: Dell	
	Model: GX620	
	Serial Number: FZH1091	
	Current Organization: 511030 - Grants and Contracts Accounting	
	Current Location: 100252 - Administration 275	
	Transfer Reason: old	
	New Organization: 511030 - Grants and Contracts Accounting	
	Equipment Rep: David Parks	
NAME THAT IS A DWARDOW TO	8. Tanhili	

• If approved, the workflow will be sent to Accounting Office for final approval and update. The following notification email will be sent to the equipment rep.



• Upon approval by the Accounting Department, the Banner Fixed Asset System will be updated. You can use Banner INB screen FFIMAST to view whether the "Disposal Method" is updated to "Zero Value".

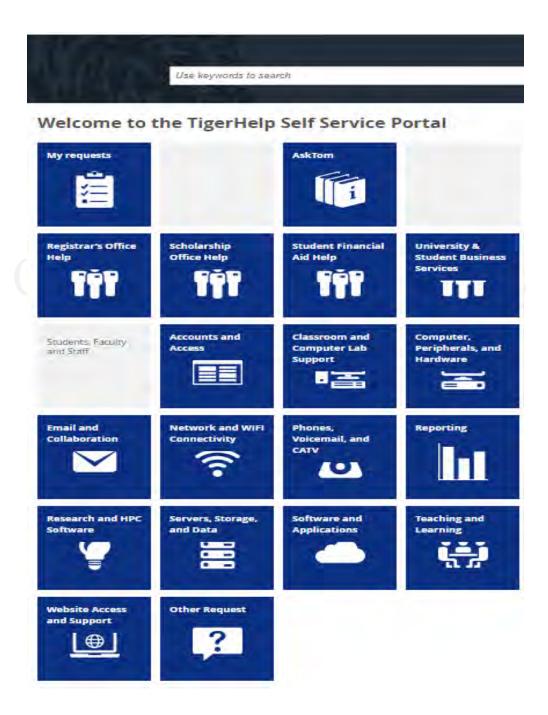
Asset Tag: 012485400				
ACQUISITION INFORM	ATION			
Origination Tag	700119592	Permanent Tag	0124854	00 Dell OptiPlex 790;OptiPlex 790 Minitower for S
Acquisition Method	PO Purchase Order or Invoice	Acquisition Date	07/26/20	12
Make	Dell	Serial Number or VIN	D4FP6V1	0
Model	OptiPlex 790	Part Number or		
		Vehicle Tag		
Manufacturer				
User Reference		Percentage Used		
Number				
Barcode Number		Work In Progress		
In Service Date	07/26/2012	Condition	GD	Good
Last Inventory Date		Title To	UM	University of Memphis
Disposal Method	ZV Zero Value	Disposal Date	02/02/203	23

Surplus

- For active inventory items (system status code I, N, J, G) the department should complete Zero Value process via the Fixed Asset Workflow system (except vehicles).
- Only Inactive items (system status code D or C) should be surplused.
- Use Banner INB screen FFIMAST to view whether the "System Status Code" is "D" or "C"; if yes, print the screenshot.
- University-owned computers and portable devices or media must have all confidential and official University data erased from the computer or portable device or media prior to its transfer out of University control, and/or destroyed, using current best practices.
- Obtain "Data Removal Notification" from your LSP.
- Attach screenshots of FFIMAST with "System Status Code" "D" or "C" along with "Data Removal Notification" to the asset.
- Go to Physical Plant's website and complete the work order.
- <u>A work order</u> should be completed for all equipment to be picked up by Physical Plant.
- Decals are to remain on the equipment.

The TigerHelp Self-Service Portal or Helpdesk is a reporting system that allows issues to be routed to the appropriate department ranging from technology to financial aid, as seen below. This portal can be access in myMemphis, under the *Home* tab. It is labeled as the <u>UMTech Service Desk</u>.

Requests are made by navigating through the provided modules and submitting information based on your needs. Each module has subunits which allow you to send your issues to where it needs to go. Each ticket is different and requires different information. If you do not see your specific issue, select *Other Request*. You can also check your submitted requested in the *My request* module.



Office Keys

In most cases, you will have to maintain the office keys. This will include:

- assigning keys,
- collecting keys,
- repairing locks,
- and reporting lost or stolen keys.

Assigning Keys

To assign keys:

- Log into the <u>Access Control System (the University-wide key inventory system that keeps track of keys,</u> and where you will report lost or stolen keys) found on the Physical Plant's webpage
- Select Your Inventory
- Check the list for the key(s) you are looking to assign (there should be either a combination of numbers and letters or numbers on the key, which is known as the key code)
- Select **Reassign** under the *Action* column.
- A *Reassign Key* window should pop up. Enter the Key Code, the Access information (door or cabinet number) and the new holder's UUID.

Collecting Keys

If keys are being returned, have them log into the Access Control System account and reassign the key to you, following the same steps used to assign keys.

Ordering Replacement Keys/ Repairing Locks

To order new keys or request lock repair:

- Log into the <u>Access Control System</u> (the University-wide key inventory system that keeps track of keys, and where you will report lost or stolen keys)
- On the homepage, scroll to the bottom, select your role, and then select Go.
- On the request page, select **Begin a New Access Request**
- Fill out the form and submit.
- Note: You will need to provide an Index number, so be sure to know which account the funds will come from.

Campus event spaces are booked through the <u>Virtual EMS</u> system. After logging in with your UofM credentials, complete the following steps:

- Select CREATE A RESERVATION.
- On the *My Reservation Templates* page, select **Book Now.**
- Enter the event information on the New Booking page, then select Next Step.
- If the room you have selected requires additional services, you will be prompted to adjust your selection. If not, select **Next Step.**
- Fill out the *Reservation Details*, select **Create Reservation.**

EMS will email you a confirmation once your booking is confirmed. If you do not receive a confirmation, Conference & Event Services office are reviewing the booking. You should receive an email confirmation directly from their office once it has been approved. This process generally takes between 2-3 days. If not, email them at <u>conferences@memphis.edu</u>.

College of Arts & Sciences

HOW TO SCHEDULE AN EVENT USING THE VIRTUAL EMS WEB TOOL

Virtual EMS (vEMS) is used to request event space at the University of Memphis by internal clients. It is accessible to all Faculty, Staff, and student members of designated Registered Student Organizations (RSOs). For more information, please contact scheduling@memphis.edu or call the Scheduling Office at (901) 678-2042.
1. Using your Browser, go to http://vems.memphis.edu. *Please note vEMS is not compatible with Mozilla/Firefox.* Under the My Home tab, sign in using your University User ID and password.

2. Click Book Now next to the role for which you are

SITE HOME MY HOME		Sign In	
My Reservation Templates		Sign in	
Faculty Staff Selections	book now about		
RSO Selections	book now about		
scheduling the event.	Ex: RSO Selections		

Password *

.....

- 3. Start with the "Date & Time" section:
 - a. Under "Date," click the calendar to select a single date for your event.
 - Next, enter the event start and end time. It is important that the <u>actual</u> start and end time is entered. EMS will automatically include at least one hour for setup and teardown.
 - c. Next to "Locations," click Add/Remove and select the building(s) or location(s) you wish to search. You may select multiple buildings/locations. Your selections will be shown

				Locations	
Date	_			BUILDINGS VIEWS	
Sat 03/04/2017	雦	Recurre	ence		
Start Time	Fo	d Time		Find locations	Q
		5:00 PM	٢	Select All Buildings	
4:00 PM (2) Create booking in the			U U	 Elma Neal Roane Fieldhouse John Willard Brister Hall 	ĺ
Central Time			Ŧ	Lambuth - Hyde Hall Lambuth - Oxley Field	
				Lambuth - Recreation Center	- 8
Locations		Add/	Remove	Lambuth - Varnell-Jones Hall	
(all)				Lambuth - Wilder Student Union	
			Search	Selected Locations	
				O University Center O Michael D. Rose Theatre O Elma Neal Roane Fieldhouse	

under "Selected Locations." To remove a particular building/location, click the negative symbol next to that building/location. Click Update Locations.

- d. In the event you want to book an event for the same time on a number of different days, you may go to the "Recurrence" button and select the date pattern you want the event to meet. When you use recurrence, you may limit the number of spaces available to you, because a location may be available on one date and not another.
 - i. Ex: You may want to schedule a meeting every Wednesday for several weeks starting August 30.

	f. Ifa	ck Apply Recurrence a Location has not been ded, do so and click "Se		Recurrence		→			-0	0 ×
				Repeats	We	ekly	Re	move Recurrence		
				Every	Ĩ	week(s)				
Date & Tin	ne			On	Sun	Mon Tue	Wed	Thu Fri	Sat	
Date				Start Date	Wed	9 08/30/2017	#			
Wed 03/15/2	2017	Recurrenc	e	End Date	Wed	10/25/2017	*	(9 occurrences)		
				End after	1	occurrence(5)			
Start Time		End Time								
12:30 PM	0	2:00 PM	0	Start Time		End Time				
				12:30 PM	0	2:00 PM	0			
				Create booking in th	nis time zo	one				
				Central Time						
								Apply Recurren	nce	Close

- 4. To narrow down your search, you can find a room by entering your preferred setup type and number of people expected/anticipated to attend the event. It is not necessary to select a Floor, Room Type, or Features – those selections can be left at "all/none." Click "Search."
- 5. For a single event date, you'll see a **schedule** of available (and unavailable) rooms you can request. The event start and end time will be between two red lines. To get more information about a particular room, click on the room name in **blue lettering**. Select the room(s) that meets your setup/attendance requirements by clicking the blue plus (+) sign. Your choice(s) will move to the Selected Rooms portion toward the top of the page.

Date & Time				Selected Rooms 🖋	Attend	ance 8	Setup	Туре							
Date				O UC Memphis Room	(340)	O UC	River Ro	om (300)	O UC	Shelby Ro	oom (342)				
Tue 05/09/2017			Room Search Results												
start Time		nd Time		LIST SCHEDULE											
12:30 PM O 2:00 PM O		E Favorite Ro								Find A	Room		Search		
Create booking in this time zone				7 AM	8	9	10	11	12 PM	1	2	3	4		
Central Time			۲	Rooms You Can Requ	uest										
Locations University Center		Add/R	lemove	University Center (CT)	Cap	7 AM	8	9	10	11	12 PM	1	2	3	4
		-	UC Ballroom A (32	105											
	_	_	Search	UC Ballroom AB (3	. 200										
 Let Me Search 	For A Ro			O UC Ballroom ABC (. 500										
Floors (all)		Add/R	temove	UC Ballroom B (32	. 105										
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Room Types		Add/R	temove	UC Beale Room (36.	54								_		
(all)				UC Bluff Room (304) 105						_	-		-	-
Features (none)		Add/R	lemove	UC Fountain View	. 48				-	-	-	-0			
Number of People				OC Memphis A (34	. 45										
30				OUC Memphis B (34.	. 45										
			Search	UC Memphis Room	105										
S I Know What R	oom I W	ant		UC River Room (30.	105										
				UC Shelby Room (3.	45										

- a. Notice the blue minus (-) sign next to your selected room(s). If you change your mind and wish to remove a room, click the negative sign.
- b. The thin blue lines are the setup and teardown times for an event.
- c. You may change any data in your request and search for available space(s) in other buildings on different dates and/or times.
- 6. For multiple event dates, instead of a schedule, you'll see a list of available rooms you can request. Under the 'Available' column, there are two numbers. The second number is the amount of dates you are requesting space for, while the first number is the amount of days that are available for that particular space. If you select a room that is not available for all of the dates you are requesting, the system will automatically update with available rooms for the remaining dates of your request.

	Room	Available	Location	Floor	TZ	Cap	Price	Match ~
Room	ns You Can Request							
0	UC River Room (300)	6/9	University Center	3rd Floor	ст	216		
0	UC Bluff Room (304)	6/9	University Center	3rd Floor	ст	216		1
0	UC Memphis Room (340)	7/9	University Center	3rd Floor	ст	216		
0	UC Fountain View Round (350)	7/9	University Center	3rd Floor	сŢ	100		
0	UC Poplar Room (308)	6/9	University Center	3rd Floor	ст	60		
0	UC Ballroom A (320A)	1/9	University Center	3rd Floor	ст	250		

- 7. Once you have your selected room(s), click "Next Step" toward the top of the page to continue.
- 8. The second step in reserving a room is adding services to your request. Here, you can add a desktop/laptop computer, projector, and any visual aids, if needed. If there is a resource that you would like to request that you do not see as an option in this step, please list it in the Setup Notes box before continuing to the next step. Once all needed resources are selected, click "Next Step."
 - a. Note: Audio Visual RTH are compatible resources for the Rose Theatre, while Audio Visual UC are compatible resources for the University Center.
- 9. The third and final step in the reservation process is the Reservation Details.
 - a. Event Details: Enter a name for your event and select an Event Type from the drop down menu. Please be advised that if you choose "Meeting-Private," your event will not show on the Master Calendar (this might not always be advisable).
 - b. Client Details: If this is your first time scheduling an event, you will need to add your organization as a client. Click the magnifying glass next to the Client

	1 Rooms	2 Services
Services For Your Reservation		
Audio Visual-RTH		
Laptops/Desktop PC		~
Projectors		^
Audio Visual-UC		
Laptops/Desktop PC		~
Projectors		^
Visual Aids		~
Set Up Notes		
		in.

dropdown. All University of Memphis departments/student organizations will begin with "UofM." In the search box, type "UofM" and at least the first part of your department/organization name. The system will begin to auto-filter results as you type.

 Note to Student Organizations: Your client name will read similar to what is listed in Tiger Zone. For example, if your organization name is 'The University of Memphis Coloring Book Club', your client name would read "UofM Coloring Book Club."

	Clie	nts you can book for			20
Client Details	Cli	ent name starts with	Q		
Client *		Client		Client Type	City
		UofM Conference and Event Services		U of M	Memphis
1st Contact					
(temporary contact)	*				Close
Ist Contact Name *					
(temporary contact)					

- ii. Once the client name has been selected, it will add it as a client you can book for. Close the pop-up window and select the client name from the dropdown.
- Whomever is making the reservation should be selected as the First Contact from the dropdown. The Second Contact is optional for University departments, but the Faculty/Staff advisor must be listed as the Second Contact for all Registered Student Organizations.
 - 1. If you do not see your name listed from the contact dropdown, please contact the Scheduling Office.
- c. Additional Information: Fill in information as it may apply.
 - i. If your VIP isn't listed from the dropdown or you have more than one VIP attending, select "Other/Multiple" and list them in your event description.
 - ii. Your event description should be such and should not be the same as your event name.
 - iii. Posting your event to the Master Calendar will be included on the University's calendar on the main website.
 - There are multiple catering options to choose from for your event. If you are unfamiliar with what these options mean, please review the FAQs from our website at

http://www.memphis.edu/conferences/internal_scheduling/index.php

- v. If you are scheduling an event **outdoors** and would like to amplify sound, please select one of the available options for outdoor amplification. Permission to have sound outdoors will be approved/denied before your reservation is confirmed. Permission is not required from 12:30-1:30pm on Fridays.
- vi. **For University departments only**: Please enter an appropriate Index Code before submitting your reservation request. Any charges incurred will be included in your reservation confirmation.
- vii. Check that you read and agree to the terms and conditions, then click "Create Reservation" to submit your request.

PLEASE NOTE: After submitting your request, you will automatically receive an email notification of your reservation request summary. This email does not serve as reservation confirmation. If a confirmation is required, a reservation confirmation email will come from the approver of the particular building/area you have requested space.

- 10. You may view your upcoming, past, and cancelled reservations by clicking on the 'My Events' tab on the left side of the page. To review the reservation details for a particular event, click on the reservation event name. From this page, the following can be done:
 - a. Cancel Reservation under Reservation Tasks near the top, right side of the page.
 - b. Cancel Booking listed above the single or series of dates requested for particular reservation.
 - c. Add Booking to Current Reservation click 'New Booking' (across from Cancel Bookings, mid-page, right side).
- 11. From the left side of the page, you can also browse Events, Locations, and People/Groups. Filters are available to narrow down your search.

The University of Memphis' official food vendor is <u>Chartwells</u>. Ordering food from outside restaurants or vendors is strongly discouraged. Chartwells does not have single-user authentication; therefore, you will need to register.

Registering

- Select a Location
- Select Account (SIGN IN / REGISTER)
- Fill in your information

Creating an Order

- Sign into the Chartwells website
- Select your Location
- Select Account
- Select **Create a New Order** (*Note: once you've made some orders, you'll be able to manage and repeat orders.*)
- Browse the different menus/items; find the items that you like, add them to your cart. There are curated box lunches, specialized menus and individual items that can be added to your order.
- Add your order information as directed, review your cart and order.

Note: you will be charged for table linens, so deselect this if you do not want this charge. Also, make sure that you specify that you want plasticware.

Paying Chartwells

Chartwells will invoice you for payment. Fill out a Foundation Expenditure Request form to process.

Chartwells contact information:

901-678-2046 901-678-2325

How to Order Online Video: Tutorial Video

Business cards and other campus affiliated items such as letterheads and envelopes are ordered through <u>Tiger</u> <u>Copy & Graphics</u>. When ordering, you will need to download and fill out the <u>Tiger Copy & Graphics Order</u> <u>Form</u>. Once the form is completed, email it to <u>tigercopygraphics@memphis.edu</u>. Once your items are ready, you will receive an email to pick up your order at the Tiger Copy & Graphics office, which is located above Starbucks in the Tiger Bookstore. The invoice will be sent directly to the Accounting office.

Note: For business cards, be sure to check Proof Needed to receive a prototype of the card before printing.

Highlighted below is the information needed for your order to be processed based on horizontal cards.

Tiger Copy & Graphi	cs Order Form
Faculty/Staff Business Cards Faculty/Staff Business Cards Image: Cord product of the state of the sta	Check if you wish to be contacted with a quote. Proof Needed Proof Waived: X year mate at the Name: Title: Name: Title: Department: Address Line 1: Address Line 2: Office or Cell#: Fax/Cell#: Email:
Envelopes Please Pick Size & Quantity: #9 Envelope 500 Count #10 Envelope 1000 Count #10 Envelope 1000 Count Window Other: Letterhead	Website: Please pick one of the following logos for Horizontal Layout Website: MEMPHIS MEMPHIS
MEMPHIS. Memory and a stationery must be printed on university approved watermarked paper** Contact Information	Please pick one of the following logos for Vertical Layout
Name: Fax:	Faculty
Email:	Athletic THE UNIVERSITY OF MEMPHIS.
Index #: Order Date: Due Date:	

Physical Plant handles the operation and maintenance of the physical facilities, as well as the landscape of the University. All changes to University landscape or physical facilities is coordinated through the Physical Plant Department.

Physical Plant request are made using the WORQ orders form. The form is straightforward. Fill in the information as best as you can. The following shows the different request you can send via the WORQ orders form.

General Maintenance

General Maintenance Check/Repair Lock **PPE Supplies** Lighting/Electrical Alarms and Audio/Video Landscape **Recycling Services Confidential Shred Bin** Heating/AC Custodial Signage Plumbing Pest Control Carpentry Campus Planning/Design Surplus Equipment Central Receiving Painting Renovation Interior Design

Interior Design

System Furniture General Purpose Classroom Furniture Boiler Shop File Cabinet/Desk Keys

NOTE: Be sure to write down the provided reference numbers once the request has been submitted. This will allow you to check the status later. For copy machine repairs, you will contact the distributor. The number can be found on the machine.

Office Hours: Monday thru Friday, 8 a.m. to 4:30 p.m.

Phone: 901.678.2699 | Fax: 901.678.4888 | E-mail: <u>pp@memphis.edu</u> Physical Plant: <u>https://www.memphis.edu/pp/</u> WORQ Request Form: <u>WORQ Request form</u>

The University of Memphis is phasing out the TigerLine phone service and will be switching to

<u>RingCentral in 2024.</u> For more information on RingCentral visit, the <u>RingCentral webpage</u>. Here are some helpful tips.

All phone service matters are handles through UMTech Service Desk or Helpdesk. Sign-in to myMemphis and go to the *Home* tab. In the right columns, you will see a "*Welcome!*" here you can access UMTech Service Desk. You should now be in the *TigerHelp Self Service Portal*. Select *Phones, Voicemail, and CATV*; from here select *Phone*. In this portal you will be able complete the following:

• Install a new phone

Welcome!

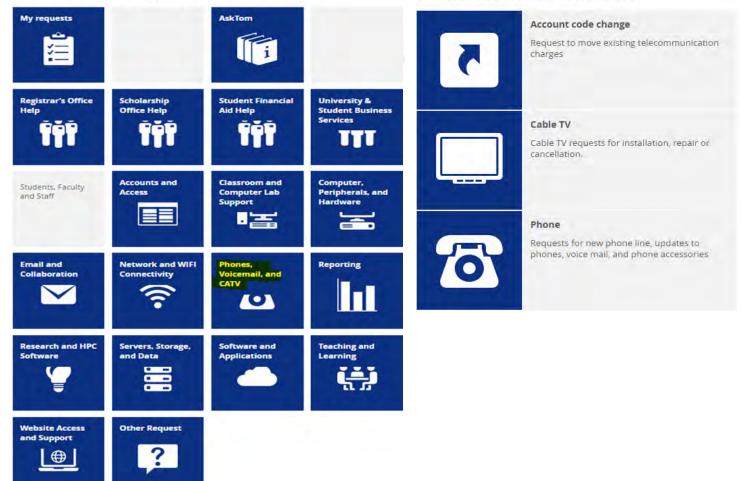
- Change display
- Delete/ Move existing extension
- Phone Accessories
- Phone Trouble
- Voicemail Add/Change/Remove
- Request a TigerLine Code (long distance)

Welcome to the myMemphis portal!

If you're experiencing issues, please contact the Help Desk UMTech Service Desk 901-678-8888

Welcome to the TigerHelp Self Service Portal

Phones, Voicemail, and CATV



Thank you for your contributions to the College of Arts & Sciences! We hope that this information support you in completing your role within the University. If you have any questions, please contact the Dean's Office at 678-5454.

College of Arts & Sciences

This handbook was curated by Iesha Williams in the CAS Dean's Office.