Account Managers Group

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Welcome

Marilyn Fowlé
Account Managers Group

New Purchasing Procedures

Steve Shelley
PAPERLESS REQUISITIONS

Banner Requisition & Document Management System and The Approval Module

– Mandatory Training
  • For Requisitions
  • For approval of Requisitions

– Sign up by calling Steve Shelley or Lori Case

– Training Manual can be found on the Purchasing website.
PURCHASING

• FUTURE WEB PAGES
  – Preferred Vendors
  • Hotels
  • MRO
  • Toner & Ink cartridges
  • Office Supplies
  • Furniture
  • Plus more
DPV PAYMENT VOUCHERS

• In the future, DPV’s cannot be used for the following:
  – Fees for Guest Lecturers, Performers, Entertainers
  – Bus Charters
  – Printed Publications

• A Purchase Requisition will need to be completed

• This will help ensure that Contracts are completed for these types of purchases

• Purchase Requisitions allow for better tracking through Banner
SHRED DAY

• Scheduled Dates:
  - July 14, 2015
  - October 13, 2015

• Documents must be sent to central warehouse prior to these dates

• No Cost To Your Department
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On-Line Budget Transfers

Valarie Maxwell and
Debbie Vaughn
On-line Budget Transfers

– Transfers are done in Self Service Banner.

– Allows you to make transfers between certain budget pools without the need to contact the Business or Budget Offices.

• 6200 – Graduate Assistants
• 6300 – Student Assistants
• 6400 – Non-student Part Time Wages and Allowances
• 7000 – Travel
• 7200 – Maintenance & Operations (M&O)

– Your will only have access to the Funds and Orgs within your areas.

– You will not be able to make transfers between different funds.
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Web Time Entry Update

Kathy Rice
Web-Time Entry Update

• Go-Live Dates:
  – May
    • Administrative Assistants
    • Secretaries
    • Information Technology
    • Clark Student Center
    • Housing
    • Wellness Center
  – June
    • Facilities Services
    • Police Department
Web-Time Entry Update

• Those who will be training in May will be entering their April hours into production during their training.

• Those who have training in June will be entering their May hours into production.

• Bring to training:
  – M#  
  – PIN #
  – Timesheet information (list of days taken for vacation, sick, etc)

• If someone doesn’t know their M# or PIN, we can help them during the training session.
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Software Tip of the Month
Terry Ortiz

**Word --- Calculator Function**
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Next meetings:

✓ June 25, 2015 – Dillard 189
✓ September 24, 2015
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Open For Questions and Answers
Thank you!

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