BUY.IU and Chrome River
Training Updates

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Supplier Resources

The For Suppliers section of Purchasing’s website has been updated!

• Separate walkthroughs for international and domestic individuals.
  • Screen shots of entire process; invite to approval.

• Additional documentation:
  • Locating purchase orders.
  • How to submit an invoice via the supplier portal.
  • How to track status of payment.
  • And more!
ACH Lookup Report

- Departments are not able to view supplier payment details on the supplier record.
  - View access is the same as edit access.

- Instead, use the ACH Lookup report in IUIE.
  - Search for a supplier using their supplier number (starts with “p”).
  - Lookup returns what type of payment method the supplier has established.
<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Diversity Classifications</th>
<th>Date Registered</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith and Logsdon Inc</td>
<td></td>
<td>SBE</td>
<td>7/22/2019 3:32 PM</td>
<td>1/18/2020 8:49 AM</td>
</tr>
<tr>
<td>Smith Supply Inc</td>
<td></td>
<td>None</td>
<td>7/20/2019 4:39 PM</td>
<td>9/22/2019 4:25 PM</td>
</tr>
<tr>
<td>Smith Walbridge Band Products, LLC</td>
<td></td>
<td>Does Not Qualify</td>
<td>9/13/2019 1:54 PM</td>
<td>9/16/2019 8:01 PM</td>
</tr>
</tbody>
</table>
ACH Lookup

Instructions

Run | Save Settings

Specify Parameter Values to Restrict Output

BuyU Vendor ID (p123456789) | p4856711
KFS Vendor ID (12345-0) |
Payee or Employee ID |

(P123456789) or (12345-0) or (0001234567)

Select the Output Format

☑ MS Excel 2007 (XLSX)
☐ Plain text (TXT)

Scheduled Job Details: Not Scheduled

To schedule this report object, first save it to your personal catalog by clicking "Save Settings".

Select the Output Destination*

☐ Wait
☐ Send to Completed Reports
☐ Push to |
(comma separated usernames)

* Security Note: Downloaded institutional data should be saved to a properly administered/secured server. Personal workstations may not be maintained frequently enough to be secure and therefore we strongly recommend not storing this data on your personal computer hard drive. If you have questions about whether or not your departmental server is a viable alternative for storing your institutional data, and for instructions on how to connect to that server in order to access and work with your data, please contact your local computer support provider (LCP).

Run | Save Settings
<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>p4658711</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Name</td>
<td>Smith Walbridge Band Products, LLC</td>
</tr>
<tr>
<td>Active ACH Ind.</td>
<td>Y</td>
</tr>
<tr>
<td>ACH Acct Type</td>
<td>Checking</td>
</tr>
<tr>
<td>Current Status</td>
<td>Active</td>
</tr>
<tr>
<td>PayType</td>
<td>DirectDeposit</td>
</tr>
<tr>
<td>AP Wire Transfer</td>
<td>N</td>
</tr>
<tr>
<td>AP Foreign Draft</td>
<td>N</td>
</tr>
</tbody>
</table>
Contract Request Form Change

• Moving forward, supplier-provided contracts do not require a contract request form.
  • Standard Operating Procedure (SOP) updates in progress.
• Instead:
  • Attach the supplier contract to the requisition.
  • Leave a comment for purchasing staff.
  • Mark the order as restricted.
Check Request Changes

• On Tuesday, February 25, several new check request forms go live:

<table>
<thead>
<tr>
<th>Check Request</th>
<th>Use Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletic Settlements and Referees Only</td>
<td>Athletic settlement payments, referees.</td>
</tr>
<tr>
<td>Emergency Repairs</td>
<td>Emergency maintenance.</td>
</tr>
<tr>
<td>Insurance/Medical (Health)</td>
<td>Medical benefit payments for overseas studies, etc., INLOCC payments.</td>
</tr>
<tr>
<td>Notary and Visa Payments</td>
<td>Payments for notary and bonds.</td>
</tr>
<tr>
<td>Rentals – Room, Equipment (No Contract)</td>
<td>IU Real Estate rentals, movie and equipment rentals, IUF room rental.</td>
</tr>
<tr>
<td>Sponsorships – External and Event Tables</td>
<td>External sponsorships or tables at an event, activity, or organization.</td>
</tr>
</tbody>
</table>
Check Request Changes

• Also on the 25th, the Payment for Services Rendered check request form will be retired.
  • Pending requisitions containing the Payment for Services Rendered check request forms will be invalidated.

• Purchasing is prioritizing the approval of these forms prior to its retirement.

• Search for your pending check request forms and request action via the comments.
Training Recordings

• As previously announced, recordings of all BUY.IU classes are now available online.
  • Getting Started in BUY.IU.
  • Catalog Orders.
  • Check Requests.
  • Non-Catalog Orders.
  • Receiving and Accounts Payable.

• Use the **BUY.IU test environment** to follow along and get hands-on practice!

• Access all training recordings via our [channel in Kaltura].
Future Training Plans

• Reworked classes:
  • Non-Catalog Orders.
    • New class will include one-time, recurring, and deposit order examples.
  • Receiving and Accounts Payable.
    • Split into two classes: Introduction to Invoices and All About Receipts.

• New classes:
  • Requisition Approval.
  • PO Management.
  • Invoice Approval.
VPCFO Training and Communication
Who are we?

• Our official name: VPCFO Employee Services, Training, and Communication (but you can call us ESTC 😊).
  • Established in September 2019.

• This group consists of:
  • Steve Miller
  • Sarah Chavez
  • Juliet Roberts
  • Holly Hooper
  • Elliot Jordan - Formerly Procurement Services

Formerly Financial Management Services
What are we responsible for?

• Supporting the training and communication efforts of all VPCFO division units.
• Helping VPCFO units communicate with departments via mass messaging.
• Our immediate focus:
  • Continued BUY.IU, KFS and Payroll support.
  • Beginning Chrome River support.
Speaking of Chrome River...

• Travel in Chrome River is our first order of business.
• Our team is in the initial stages of developing a training and documentation plan to support travel processes.
• What does that mean?
  • Reorganizing the Travel website.
  • New written documentation.
  • New video tutorials.
  • New training offerings — for travel arrangers and approvers.
• There is a ton to do, but we’re very excited to jump in!
Proposed Training Offerings

• Introduction to Travel.
  • What am I allowed to do and where do I do it?

• Non-Employee Travel.
  • How do I book travel on behalf of guests of IU?

• International Travel.
  • How do I book multi-destination trips?

• Travel Approvers.
  • How do I approve documents and review transaction history?
Thank you!