



# PROCUREMENT SERVICES

Newsletter

March, 2019

## William & Mary Supplier Diversity Fair

**When:** Thursday, April 11, 2019 from 1:00—3:00 p.m.

**Where:** W&M Campus Center's Trinkle Hall

The 6th annual William & Mary Supplier Diversity Fair event is a great opportunity for our local and diverse businesses to meet face to face with various representatives from across campuses and gain insight on those departments' goods and services needs. We are looking forward to a fun and rewarding event for our suppliers and campus community. Exhibitors can register now on [our website](#). For questions, email [procure@wm.edu](mailto:procure@wm.edu).



## TSRC Open House

**When:** Tuesday, March 26, 2019 from 10:00 a.m.—noon

**Where:** Procurement Services (conference room)

**RSVP:** [https://wmsas.qualtrics.com/jfe/form/SV\\_7R1DWqAmKNFAUNT](https://wmsas.qualtrics.com/jfe/form/SV_7R1DWqAmKNFAUNT)

Join us any time between 10am and noon at Procurement Services to meet with your procurement sourcing team, TSRC representatives, and product companies including Quartet, Post-It, and Fellows. Please complete the RSVP to attend. Snacks provided.

## New Forms Page

The Finance Forms & Instructions page is now live! This page is intended to be a "one stop shop" for all Finance related forms aggregated on one page. Users can access this page by clicking on the Forms link on the Procurement Services website or by entering in the URL: <https://finopsforms.wm.edu/>. Clean-up of the older form page is still underway.

# WILLIAM & MARY

## Finance Forms & Instructions

All Forms

Budget

Financial Operations

Procurement

Tax Compliance

Form Name

Department

Type

Purpose / Description

Instructions

Contact

Phone

Acknowledgment of Financial Responsibility Form

Financial Operations

Reimbursable & Collections

Acknowledgment of Financial Responsibility

Required of all online MBA, MSBA, and Graduate Education students upon enrollment in their program, and by employees when requesting a Travel Advance through Chronicle River.

Terry Jarrell

757-221-1227

Bank of America SPCC Application

Procurement

SPCC

Required to request a Small Purchase Charge Card (SPCC)

Guide to Complete SPCC Application Using Smartbox

Lekia Martin

757-221-2513

Warner Cash Form VIMS

Financial Operations

Data Control

VIMS Cash Receipts and Disbursements Form

N/A

Sherry Berry Joyner

757-221-2835

## Student Summer Storage Contracts Awarded

Contracts for Student Summer Storage have been awarded to Smartbox and Dorm Room Movers. These firms will offer full service moving, storage & shipping services for students during summer and winter recess, as well as students studying abroad. We would like to thank the RFP Evaluation Committee: Chris Durden, William Horacio & Eva Wong for their diligence and hard work.

## Procurement Award

On March 14, Dave Zoll and John Dixon presented the Procurement Award to Megan Sanbury, Assistant Director of Academic Services at the Mason School of Business, for her contribution to the successful implementation of America To Go. We would like to thank Megan for her positive attitude and support through this institutional change. Her willingness to help make ATG a success has been greatly appreciated!



## Need Help?

Set up time with Procurement Services! We are always happy to set up a meeting to discuss any questions or concerns. Email [procure@wm.edu](mailto:procure@wm.edu) to request a meeting time.



Visit us at [www.wm.edu/offices/procurement](http://www.wm.edu/offices/procurement)  
Questions or Comments? Call 757-221-3952 or email [procure@wm.edu](mailto:procure@wm.edu)



## New Short Story Dispenser

On March 1, Swem Library unveiled a new addition: a short story dispenser that prints flash fiction on demand. Congratulations to W&M Libraries on this exciting project!

## Recent Contract Activity

For current solicitations in eVA, [click here](#).

### In Progress

- Music 2020 Tour (w/ W&M students)
- Integrated Pest Management
- Museum Conservation & Display Services
- IEC HVAC Equipment
- Consulting Services
- Pouring Rights
- Piano Loan Program
- Cashiering System

### Recently Awarded

- Powerwashing
- student summer storage

### Coming Soon

- Photographers, Writers, Videographers
- Hotel Open Enrollment
- Motor/Mechanical Repair

## eVA Reminder

eVA users, please ensure you are coding sole source requisitions with the PO Category of S01. Also attach your approved sole source justification form to the entire requisition section on the Summary tab made not visible to the supplier, and the sole source contract number is entered on each line in the contract number field.



## Forum Resources

The Feb. 26 Procure-to-Pay Forum is now available to view as a [video on our website](#), and the slide deck is available in [Cornerstone](#). Find event photos, including the ATG Supplier Tasting Event, on our [website gallery](#). Thank you to everyone who participated in this event!

## America To Go Point of Contact Change

As of March 1, 2019, Jessica Walton will be the new point of contact for the America To Go program. Please contact Jessica at [jwalton@wm.edu](mailto:jwalton@wm.edu) for ordering assistance.

To date, [America To Go](#) orders exceed \$900,000, with over 2,200 transactions that did not require SPCC reconciliation, Vendor Payment Request paperwork or reimbursement of personal funds. There are currently 59 active menus in the portal.



## SPCC Question of the Month

**Question:** A transaction was Flagged in Works requesting the business purpose. Can you explain what that means?

**Answer:** The specific business purpose must be included on ALL transactions processed on the SPCC. It is the responsibility of all cardholders to certify that all purchases have a valid business purpose and that goods and services are being purchased to support operations or further the mission of the University. If the business purpose is not evident from the documentation uploaded, the cardholder should leave a Comment on the transaction prior to sign off.

**Kudos** to SPCC cardholders from the January cycle. At the time of the monthly sign-off report, there were no delinquent transactions at the cardholder level. Keep up the great timely sign off work!

## Consulting RFP

The open enrollment period for several categories of consulting services will close on 3/29/19. If your department has frequent needs for consultants, we encourage you to have them submit a proposal for consideration. The solicitation for this process is [posted in eVA](#). Questions may be directed to [Sherrene Moore](#).



## Welcome, Emma!

We would like to welcome our newest student department assistant, Emma Perdue, to the Procurement Services office. We look forward to working with you, Emma!

**Upcoming Training Sessions**  
Please log into [Cornerstone](#) to register.

April 4, 9:00 - 11:00 a.m. - Fundamentals of Procurement  
April 9, 9:00 - 11:00 a.m. - SPCC  
April 18, 9:00 - 11:00 a.m. - eVA

**How do I make a purchase...? Check the P2P Matrix as your first stop: <https://procuretopay.wm.edu/>**