



## Banner tip of the Day...

When entering requisitions, do you ever get stuck with error messages...especially when you get to the FOAPAL area? Here is a "TIP" that is sure to help..

If you have tried, more than twice, to complete a Requisition but keep getting that annoying red (!), this tip will almost always get you through.

Clear out the entire FOAPAL area...**YES**...the H, the Index and anything else that is still showing up in that area, whether you know it is correct or not. Start over with just the H and the Index number in those two areas **ONLY** before you click **Validate**. Your Fund and Program will populate for you and the Index jumps to the Organization area. This is all **good** to see and all that is left to enter is your Account Code and your Accounting Amount then click **Validate** again, one last time. You will, at last, get the green check mark with no errors and be able to click **Complete** for your Requisition number.

## Happy Holidays, Tis the Season!!!

Welcome to FY2014/2015! With this new Fiscal Year, may we suggest that you take some time to review and see what you can learn about the Procurement process and how it relates to you and your department? We hope that you will find valuable and timely information in this newsletter that will assist you in understanding the business processes that support the UAHuntsville community..

*How about that Website??? You might be surprised to find out what's available to you on the Business Services Website! Be sure to check it out...(click here)*

The Business Services Website has a wealth of information that you may not even know is available to you. Take a look at just a small sampling of the things you can find on the Business Services Website:

- Business Services Manual (click on a page number in the Table of Contents and it takes you right to that page!)
- Instructions on how to complete a Contract for Professional Services
- Open Bid information
- Listing of commonly used Banner Account Codes
- UAHuntsville Taxpayer Identification Number (W-9) Form
- UAHuntsville State Tax Exempt Form
- Request for Vendor to complete a Taxpayer Identification Number (W-9) Form
- Procurement Officers listed by commodity
- Procurement Card Information
- Central Receiving and Mail Services Information
- Copy Center and Telecommunications information
- ...and much, much more!

So, bookmark this website and visit often. You'll be surprised how helpful it could be!  
<http://www.uah.edu/business-services>

## Spotlight on Asset Management...

*Welcome to Asset Management. This department is located in the Central Receiving Building serves the needs of departments and The University in tracking and maintaining records of their inventory.*

The primary responsibility of Asset Management is to maintain accurate records and control of UAH's Government-owned equipment. Asset Management will furnish each

It works...but if all else fails do not hesitate to contact Judy Curtis, at 256-824-2552 for help with any Banner Requisition entry problems or for Banner Training Classes.

## Contacts and Links

(click below to access)

Business Services Staff  
Contact Information

Procurement Officer Contact  
by Commodity

Procurement Card Program  
Find out more about the UAH  
Procurement Card Program and  
how it can help you and your  
department. (*more*)

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Budget Unit Head a complete history of all capital equipment purchased or acquired for his or her department. The accuracy of these records depends on the cooperation of the departments to inform Asset Management of equipment changes, transfers, and relocations. When creating records of newly acquired equipment, departments will be contacted, usually through email or via phone, to establish the item's custodian, location, and to assign the correct organization code.

“Capital Equipment/Property (Fixed Asset)” is defined as an item of movable, non-expendable, and tangible property. The designations “property,” “equipment,” and “fixed asset” are used interchangeably with “capital equipment.” Capital equipment has a useful life of more than one year and a cost or value of \$5,000 or more. Capital equipment must be tagged with a barcode label. Capital equipment purchases should have one of the following account codes: 8100, 8101, 8103, 8105, 8106, 8107, 8108, 8109, and 8110.

For a list of Account Codes used for Capital Equipment you may use the following link:  
<http://www.uah.edu/business-services/faculty-staff/procurement-services/forms>

Asset Management...

The following forms are available at the following link:  
<http://www.uah.edu/business-services/faculty-staff/asset-management/forms>

The UAH Property Relocation / Transfer Form should be used to inform Asset Management of the following:

To record...

- ...a change of location for a piece of equipment
- ...a change of custodian for a piece of equipment
- ...a transfer of equipment to another department
- ...equipment moves to off-campus locations

The Property Disposition Form should be used:

To report the...

- ...loan of Capital equipment to another university or organization
- ...cannibalization of capital equipment for usable parts
- ...disposal of capital equipment by the user or department

The Temporary On-Loan / Donated Equipment Form should be used:

To report receipt of...

- ...equipment on loan, valued at \$5,000 or above, from an outside organization or corporation
- ...donated equipment, \$5,000 or above, from an outside organization or corporation
- ...equipment acquired without a Purchase Order (to be tagged/tracked after submission of documentation)
- ...equipment acquired as a gift (should be coordinated through the University Development office)

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***Asset Management Reminders: ...***

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### **EQUIPMENT INVENTORY CHANGES**

As of January 5, 2015, Asset Management will no longer tag/inventory state purchased **non-capital equipment** (\$1,000 - \$4,999.99). However, when purchasing these items

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## Banner...Helpful Links

(click below to access)

Requisition Entry  
Workbook

Requisition Approval  
Workbook

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## Other Important Links

(click below to access)

*Copy Center*

*Telecommunications*

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we will still use the appropriate Account Codes. In addition, we will change from completing a campus survey in two years, to completing it annually. All federally purchased/furnished equipment regardless of cost will continue to be tagged/inventoried. Your assistance in completing the yearly surveys will be greatly appreciated.

When an asset has a change in location (including off campus moves), custodian or a transfer to another department please use the following form to report:  
[UAH Property Relocation / Transfer Form](#)

When the following occurs, or is planned to occur, to an asset:

- The loaning of an asset to another University or Organization.
- The cannibalization, of the asset, for usable parts.
- The disposal of an asset by the custodian or department.

Please use the linked form to report: [UAH Property Disposition Form](#)

*Please send completed forms to the Asset Management Office – Central Receiving Bldg. – Room 100. Questions or concerns? Contact Asset Management at 256-824-6315 or [crb@uah.edu](mailto:crb@uah.edu)*

To surplus an asset and request removal please complete a [Surplus Pickup Request Form](#).

*Fax to 256-824-7448, email to [crb@uah.edu](mailto:crb@uah.edu) or via campus mail to the Central Receiving Bldg. - Room 103*

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## ***Holiday Schedule for Central Shipping & Receiving and Mail Services ...***

### **Shipping/Receiving and Mail Services Holiday Schedule:**

During the Christmas Holidays (December 24, 2014 through January 2, 2015) the Central Shipping & Receiving Building (CRB), including Mail Services, will be open for your convenience from 8:00am to 12:00pm on December 29<sup>th</sup> and January 2<sup>nd</sup>. The deadline for Bulk Mailing has past.

Off-campus, incoming mail will be received and processed; however, no packages or mail will be delivered or collected. All University personnel are welcome to come by Central Receiving and pick up packages and mail and leave outgoing mail (which will be taken to the Post Office the next working day). To allow time for mail to be processed, plan to come by after 10:00am on December 29<sup>th</sup> or January 2<sup>nd</sup> to pick up your mail and packages.

In addition, no industrial gases or laboratory alcohol will be delivered during the holidays. Orders for industrial gases or laboratory alcohol received after Close of Business on December 16<sup>th</sup> will not be processed until after the holidays. The surplus property area will be closed.

We will return to normal business operations on Monday, January 5, 2015. If you have any questions, call x6315 for Central Receiving or x6116 for Mail Services.

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## ***Protecting against Fraud...***

Incorporating a few practices into your daily routine can help keep your Procurement

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Cards and account numbers safe. Here are some safety tips that could help.

- Don't give your Procurement Card number to anyone on the phone unless you've made the call to a company you know to be reputable. If you've never done business with them before, do an online search first for reviews or complaints.
- Be alert for phishing, a trick in which spam or pop-ups mimic legitimate banks or businesses to obtain your personal information, which they use to access your accounts.
- Never respond to suspicious emails or click on links inside questionable messages. If an offer sounds too good to be true, it probably is.
- Seek out safety symbols, including the padlock icon in your browser's status bar and "s" after "http" in the URL, or the words "Secure Sockets Layer (SSL)." These are your assurance that only you and the merchant can view your payment data.
- Credit card information should only be provided in a secure environment (online through a secured website, in person, or by telephone).
- Protect any documents that may contain the 16 digit card number, expiration date or the security code from the back of the card. (Ensure that only the last four digits are visible.)
- During a transaction, keep your eye on your card. Make sure you get it back and verify the transaction total before you walk away.
- Never sign a blank receipt. Draw a line through any blank spaces above the total.
- Report any questionable charges.

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## ***Do you know how to order Business Cards, Envelopes, and Letterhead from the UAH Copy Center?***

There are several things to remember when ordering official UAH business cards, envelopes or letterhead. The Copy Center does not provide design services at this time. All file design work will need to be coordinated with the Office of Marketing and Communications (OMC), currently located in Shelbie King Hall. They can be contacted at 256-824-6414. follow:

If you're a new employee who is ordering business cards for the first time, or you are making any changes to an existing business card you will need to contact OMC and have them design your business card. They have a form that you will need to fill out in order to provide your design work. Once you've approved the design work they will send the file to the Copy Center for printing.

The Copy Center has a separate form (work order) that is required for the printing of your job. To expedite receipt of your order please provide the Copy Center with your approved work order at the time you place your design request with OMC.

The Copy Center keeps the business card files that we receive from OMC for printing of future orders. As long as there are no changes to be made to your existing file you may contact the Copy Center directly to place future orders for reprints.

These procedures also apply for envelope and letterhead requests. New requests, or those that require any changes, must initially be sent through OMC, for design creation



## Contact Us

UAHuntsville Business Services

Ph:256-824-6484

bussvcs@uah.edu

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or changes to an existing file. Thereafter, reprint orders may be placed directly with the Copy Center.

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## Information regarding sending On-Site Mail...

### Information from Mail Services

FYI... When mailing Campus Mail please remember to include the Name, Dept. & Bldg. on the address portion. Also on outgoing mail include the Dept. and the Acct# in the upper right hand corner where the postage is positioned. Please keep in mind that there are a lot of Depts. that are relocating to other locations.

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## Telecommunications ...

### Helpful Information...

**Conference Calling:** If you see the letters “Conf” above one of the soft keys on your phone, this means you have conference calling. The most common type of conferencing allows you to have yourself and 5 other callers on the phone with you. The other callers can either be on campus or off campus; you just have to call them. The system limit is six total callers including yourself.

**Autodial:** If you see the letters “AutoDI” above one of the soft keys on your phone, it means you have a key with the auto-dial feature on it. (Autodial keys are beside the keys on the M3903 and M3904 sets). You can program up to sixteen digits into this key. You just have to press the key, enter the digits and press the key again and it’s programmed. Then, to use it, you can either pick up the handset that has a speaker on it to obtain dial tone, and then press your auto-dial key and the number will automatically dial! Don’t forget to put in a “9” if it is a call outside the campus. For example: press the auto-dial key, put in 9-256-533-1990 and press the auto-dial key again and you’re programmed up!

**Call Forward:** If you see the word “Forward” on your phone you have the call forward option. This has several useful functions. First, if you are out of the office, you can forward your phone to someone else to answer it for you. Just press the forward button, input the four digits and forwarded! However, it’s most useful function is when you want to be left alone. If you have voice mail, just press forward, input 2000 and press forward again. Presto! Your calls are then forwarded to voice mail and your phone will NOT ring at the telephone set. Remember to cancel this feature when you want to receive calls again.

Did you know you already have a re-dial key programmed on your phone? That’s right. If you press the little green key on your phone (after you obtain dial tone) it will re-dial the last number you dialed. Try it! It’s fast!