AGENDA

SLU Business Manager Meeting
September 10, 2015
College for Public Health and Social Justice, Rm 1411
9:00a.m.-10:30a.m.

1) Announcements – Janet Strader
   • Sign in Sheets
   • Who’s New?
   • Future Business Manager Meetings
     ➢ Solicit input to enhance/expand meeting topics
     ➢ jstrade1@slu.edu or 7-2891
     ➢ December 10, 2015

2) Capital Campaign Update – Sheila Manion

3) B&F Policy of the Quarter
   • Travel Policy – Sharon Gajewski

4) SSM/SLU Hospital transaction – Gary Whitworth

5) eProcurement – Anne Becker

6) United Way Campaign – Carolee Patek, Rita McMillan
eProcurement Initiative

Business Services
# Challenges and Solutions

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cumbersome and time-consuming shopping/approval experience for end users</td>
<td>• An improved shopping experience for end users</td>
</tr>
<tr>
<td>• Visibility limitations for administration</td>
<td>• Time savings at the department level</td>
</tr>
<tr>
<td>• Access to spend data to allow for fact-based negotiations with suppliers</td>
<td></td>
</tr>
</tbody>
</table>
Challenges and Solutions – Cont’d

<table>
<thead>
<tr>
<th>CHALLENGES</th>
<th>SOLUTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Buyers lacking information to make educated purchasing decisions</td>
<td>• Comparison shopping capabilities</td>
</tr>
<tr>
<td>• Limited purchasing oversight</td>
<td>• Cost savings for departments</td>
</tr>
<tr>
<td></td>
<td>• Management over the products, vendors, and contracts that end users access</td>
</tr>
</tbody>
</table>
## Project Timeline

<table>
<thead>
<tr>
<th>AUGUST</th>
<th>SEPTEMBER-NOVEMBER</th>
<th>DECEMBER-FEBRUARY</th>
<th>MARCH-MAY</th>
<th>JUNE 2016-ON</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kickoff</strong></td>
<td><strong>Integration</strong></td>
<td><strong>Implementation</strong></td>
<td><strong>Go Live</strong></td>
<td><strong>Program Expansion</strong></td>
</tr>
<tr>
<td>COMPLETED</td>
<td>0-90 Days</td>
<td>90-180 Days</td>
<td>180-270 Days</td>
<td>270 Days-On</td>
</tr>
<tr>
<td>• Contract signed&lt;br&gt;• Kickoff meeting&lt;br&gt;• Implementation timeline developed</td>
<td>• Build and test ERP integration&lt;br&gt;• Supplier enablement</td>
<td>• Implementation&lt;br&gt;• Test orders placed</td>
<td>• End User Training&lt;br&gt;• Pilot Program Launch&lt;br&gt;• Rollout product to campus community</td>
<td>• Continued user adoption&lt;br&gt;• Continued user training&lt;br&gt;• Continued supplier enablement</td>
</tr>
</tbody>
</table>
Communication Tools

• Dedicated website
• Business Manager meetings
• Newslink
# Project Team

<table>
<thead>
<tr>
<th>Anne Becker</th>
<th>Terra Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Services</strong></td>
<td><strong>ITS - Division Administration</strong></td>
</tr>
<tr>
<td><strong>Procurement Project Lead</strong></td>
<td><strong>IT Project Lead</strong></td>
</tr>
<tr>
<td>977-1455 <a href="mailto:abecke20@slu.edu">abecke20@slu.edu</a></td>
<td>977-2677 <a href="mailto:thamil11@slu.edu">thamil11@slu.edu</a></td>
</tr>
</tbody>
</table>
Travel Policy

Business Managers’ Meeting
September 10, 2015
1. Travel Authorization
2. Air
3. Hotel
4. Car
5. Meals
6. Other reimbursable expenses
7. Non-reimbursable expenses
8. Responsibilities and Enforcement
Travel Authorization

Approval prior to making arrangements.
Domestic = Fund admin and supervisor or department head
International = Above plus Dean/AVP

Sponsored Program Fund = SponPro checklist completed by approver

Note: Online booking routes for approval.
Air

**Book online** (fee is $7)
access thru MySLU tools;
Concur and Cliqbook icon

**Call an agent** at TravelPlex (fee is $22)
Joan Tarrant at 314-569-1900 or email
Joan@travelplex.com

Lowest available airfare in Economy class
Book several weeks in advance
Hotel

Book online or with TravelPlex agent.
Book directly with Conference hotels

Single room
SLU per diem is U.S. government rate + 20%
Itemized hotel receipt
Cancel with a TravelPlex agent or the conference hotel
Car

Rent a car when less expensive than air or personal mileage. Transportation calculator.

Rent at destination when less expensive than taxis or shuttles.

Preferred: Enterprise, National and Alamo
Intermediate size
Standard size if 4 or more travel together
Decline insurance in U.S. No reimbursement for insurance or GPS.
Book online or with TravelPlex agent
Car (continued)

Evidence of Insurance – complete MVLRC and get insurance card from Risk Mgmt.

Departments pay first $1,000 of damage.

Personal car mileage – IRS rate
Not within campus; tickets; tow; repair; deductible.

Rental cars should not be used outside U.S. and Canada. To obtain an exception to the rule, please contact Risk Management.

Prohibited - Vans with wheelbase over 138 inches
Meals

Travel meals – up to: daily per diem or 60%
Home city – at airport only

Meals with other SLU travelers – pay for self

Group meals – Coach and team; faculty and students

Business Meals – non-SLU persons
  Name, Co, where, date, amount, purpose
Other Reimbursable Expenses

Professional Conferences/Seminars
Laundry after one week
Tolls and Parking
Phone, fax, etc.
Passport fees, visas, currency conversion fees, and required shots for foreign travel
Tips and incidentals: up to 20% on meals; average of $5/day. Receipt for incidental.
Non-Reimbursable Expenses

Child care
Airline clubs; hotel point programs, etc.
Barber/Hairstylist
Health clubs
Hotel room movies
Kennel fees
Recreation and personal entertainment
Luggage, briefcases
Personal: tobacco, toiletries, clothing, magazines, etc.
Responsibilities and Enforcement

Reimbursement within guidelines of policy. Divisions can impose greater control. Approvers should inform and review for compliance.


Employees should not pay for other employees while traveling. Submit expenses in 60 days from travel end.
Questions?