Travel Assistants & BOBCATBuyers
Meeting Minutes
May 9, 2012
Reed Parr Room, J.C. Kellam

1. Minutes & Other Business – The meeting began with Jacque Allbright, Purchasing Department, welcoming everyone to the joint meeting of Travel Assistants and BOBCATBuyers.

1. Minutes – Minutes of the April 11 meeting were emailed on April 16, 2012.

2. Agenda Items

1. Travel Assistant Recertification – James Webb, General Accounting
   The Travel Assistant classes began in May 2011. We have done some restructuring of the Travel classes and all are now listed under Training & Development. Since annual training is required to maintain certification, many Travel Assistants need to take the recertification class. We have established an email notification process for Travel Assistants to receive a 60 day and 30 day notice prior to expiration of their certification. Since this has just been established, a grace period has been extended for the May and June Travel Assistants to have 60 days after they receive the email.

   Travel Assistant Recertification Classes – Janet Weitz & Glynda DeLong, Travel Dept.
   1. A new class is being developed for the annual Travel Assistant Recertification. This class will review university travel policies, the travel website, updates in TRAVEL Tracks, shortcuts, tips, common errors and Q&A. The first classes on May 23, June 21 and June 27, will be held in JCK Reed Parr Room to accommodate a large group. Subsequent smaller classes will be scheduled each month.
   2. Enrollment will be through the SAP Portal.
      1. Log onto the SAP portal.
      2. Select Training and Development
      3. Select Organizational Excellence
      4. Select Travel Assistant Certification
      5. Register for one of three classes available at this time: May 23, June 21 or 27.
   3. A recertification class will be scheduled at the Round Rock campus also.

2. P-Card Log Demo (New Changes) – Judi Nicholson, Purchasing
   1. The P-Card Transaction Log has been updated so that you can now save.
   2. The log will now automatically total and recalculate as you add amounts.
   3. On the Verified column for items over $500, indicate that it is verified, add your comments and attach a copy of the documentation to the log.
   4. Let Judi know if you have any problems.
Comments – Joyce Wilkerson, TR
1. You can now add the latest version of Professional Adobe from the TR website.
2. If you are still having a problem, the Electronic PCR software may conflict with Professional Adobe. Call ITAC for assistance.

Q. Will this also conflict with Banner or other University software? A. It should not. Call ITAC if you have issues.
Q. Will the paper form still be acceptable, or must the electronic form be used? A. You can still use the paper form. The electronic form is helpful for those who do many P-Card purchases.

3. Purchasing Training (Requisition to Check) – Velia Espinoza & Shonte Gordon, Purchasing
1. SAP/BOBCATalog classes have been developed for both basic and advanced level. The basic class will be 9:00-12:00 and the advanced class from 2:00-4:30. The first classes will be held on May 22. There is a signup sheet at the back of the room for the May 22nd class. Details are still being worked out to have the class under Professional Development. Invitation emails will be broadcast for subsequent classes scheduled for September 27 and November 1.
2. The Basic class will cover requisitions, purchases over $5,000, modifications, profile set-up and functionalities, and ordering non-catalog items.
3. The advanced classes will cover RFQ creation, maintaining quotes & bids, and Compliance with State, Texas State University and HUB.

Q. Will you consider taping the classes so we can go back or refresher when we have questions? Jacque Allbright will investigate.

Jacque thanked everyone who responded to the survey sent out after the last joint meeting. We really appreciate the suggestions and comments some of you added. It was suggested that purchasing guidelines be distributed at the New Employee Orientation. Professional Development requests that handouts be limited to one page, so the handout contains the key contact people for assistance, and the controlled items outline. Controlled item problems are usually on cameras, TVs and printers.

Edward Suarez, Office of Facilities Planning, Design & Construction, has been testing the Rockford Business Interiors program, and it is now on BOBCATalog for everyone to use. One of the great features is that you can download a quote converted to your order without having to input each item.
1. After all items on the quote are correct as you want your order, contact Holly our sales representative, and request that she put your quote on BOBCATalog.
2. You will be able to retrieve your quote and download the quote into your order form.

Q. Is it possible to test the chairs? A. Holly, our rep, will make arrangements for you to have a visitation with the chairs.
B&H Photo-Video-Pro Audio is our other new store online now. Remember, if you have any suggestions for stores or new store category, please let Purchasing know.

7. **Enterprise Purchase Orders – Jacque Allbright**  
Jacque thanked everyone who worked so hard to resolve all of the old Enterprise purchase orders.

**Enterprise - James Webb**  
Some customer service issues have been reported with the local San Marcos branch: vehicles not ready, vehicles not fueled, and vehicles not cleaned.

1. We met with our Enterprise representatives, Regan Morton and Michael McClure.
2. The San Marcos branch has brought in additional vehicles to lower the occupancy rate and has made improvements in making sure that the vehicles are fueled and clean.
3. The San Marcos branch is developing a “National” style bypass system for us. The pink copy of your order with only your name will be on the wall. Just find your pink copy and take it to the counter. They will have your keys and everything ready.
4. When you need a rental car for personal use, be sure to check the personal use category on Enterprise and National to compare rates.

**Comments - Glynda DeLong.** Fast Park signed up new users at the Vendor Fair. Some people used the 601 University Drive address, but that address is undeliverable. Those cards are in the Travel Office, JCK 564. Thank you to all who attended the Vendor Fair.

8. **Summer Meeting Schedule – Jacque Allbright**  
Because so many people take vacations in the summer months and coverage becomes an issue in many departments, we have cancelled the June and July meetings. Our next meeting will be on August 1st, in the Reed Parr Room of JCK. We will talk about the end of year closeout procedures.

**Comment: Carole Brauer-Dykema, Accounts Payable.** When you create a Purchase Order, if you put notes in the Purchase Order requesting special check arrangements, remember that the check request information does not transmit to Accounts Payable. Have your vendor send an invoice to you and send the invoice to Accounts Payable with approvals and indicate the check arrangements you are requesting.

**Comment: Jacque Allbright.** Q. One of the questions we had on the meeting survey was how to get someone on the list for the meeting. A. If someone in your office needs to come to the meeting, by all means bring them along. You can email or call Purchasing, Travel, or the Accounts Payable office to get added to the group meeting list.

Meeting adjourned, the next meeting is scheduled for Wednesday, August 1, 2012, Reed Parr Room, J.C. Kellam.