Concur Travel & Expense System

The University is in the early implementation stages of Concur, an automated Travel & Expense system, that will streamline and speed travel related processes, including booking trips and expense reporting. A collection of apps will provide an electronic itinerary and updates on mobile devices, allow electronic capture of expenses and receipts, and provide emergency notifications. For more information, click on the following link:

http://www.stonybrook.edu/commcms/projects/project/travel-services

WB Mason

Office Supplies, Paper, Toner and Breakroom Products

Starting July 2017, all your Office Supplies, Paper, Toner and Break Room Supplies needs will be handled by one supplier: W.B. MASON. This contract will reduce total costs; both for the products ordered, as well as in the time spent placing and receiving your orders. We have negotiated the best “Hot List” pricing for the most frequently purchased items as well as deeper discounts on all other items. You will continue to place all your orders via the Wolfmart punch out. By consolidating all your orders with one supplier, you will no longer be browsing multiple websites nor will you have deliveries arriving from multiple suppliers. Not only will you receive the best discounts, but pricing includes next day desktop delivery with no freight charges and no minimum order amounts.

WolfMart Updates

Amazon Business

Attention State Procurement Cardholders: Amazon Business is now on our WolfMart showcase as a punch-out supplier! Our goal is to simplify the purchasing process so you can take advantage of the wide selection and competitive prices of the Amazon marketplace. Click HERE for Amazon Business FAQs, Punch-out Instructions, & Customer Support Contact Information.

VWR Hotlist Items

We are excited to announce that VWR has provided additional discounts to some of our most frequently purchased products in WolfMart. Please click HERE for additional information on the hotlist and other benefits that can be found with your VWR purchase.
**Frequently Asked Questions about the WolfMart System**

**ACCOUNT NUMBERS:** How do I add an account number to the WolfMart system?

In order to have access to an account number in WolfMart you must be in the ERAS system as a WolfMart Requester or Approver. The Account Director or Account Assistant for the account can add you to ERAS by going to the following link [http://www.stonybrook.edu/eras/](http://www.stonybrook.edu/eras/) and then clicking on HELP/FAQS.

**COMMODITY CODES:** How do I find a commodity code?

Please refer to the cheat sheet & video located under the training section on the login page in WolfMart: [https://wolfmart.stonybrook.edu/training](https://wolfmart.stonybrook.edu/training)

**ERAS:** How do I add a WolfMart Requester/Approver in WolfMart?

Please go to the following link [http://www.stonybrook.edu/eras/](http://www.stonybrook.edu/eras/) and click on HELP/FAQS.

**FORMS:** How do I add additional lines to a form?

Once you have completed the form go to the top (available actions) then go to the drop down, and choose add to cart and return. Make this selection for each additional line. Once you have added all the lines then click add to cart and GO.

**FORMS:** How do I know which form to use in WolfMart?

The “Showcase Form Cheat Sheet” [https://wolfmart.stonybrook.edu/training](https://wolfmart.stonybrook.edu/training) and “Purchasing with Forms” [https://wolfmart.stonybrook.edu/kb-articles/purchasing-forms](https://wolfmart.stonybrook.edu/kb-articles/purchasing-forms) has information on choosing which form to use.

**PROFILE:** How do I update my office telephone number in my profile?

Please go to SOLAR and update your information. The information should synch over to WolfMart in approximately 24-48 hrs.

**REQUISITIONS:** Why was my requisition returned to me?

Please scroll to the bottom of the email you received advising you the requisition was returned. There will be an explanation at the bottom of the email which will say validation failed (no funds) or some other reason explaining why the requisition was returned.

**SPLITS:** Can I split research and state accounts on the same requisition in WolfMart?

No, you can only split state with state funds and research with research funds.

**SPLITS:** How do I process a split funded order?

Once you process through checkout and add the first account number, scroll to the far right side and click add split. A new funding line will appear for the second account number. If needed, once you add the second account number, you can add split for the third account number and so forth. Make sure you go to the drop down and choose % of price for State funds. Research funds may choose from the drop down. Keep in mind the total must be 100%. If you do not have access to one of the account numbers please input your account number and assign to the person in the department that has access to add their account number. Make sure you fill out the percentage of the split in each line to total 100%. Once everyone has added their account number the person to add the last split will submit the requisition. Once the requisition has been submitted all approvers will approver their part of the split.

*** Please refer to the Split Funds Video located under the training section on the login page in WolfMart for additional information: [https://wolfmart.stonybrook.edu/training](https://wolfmart.stonybrook.edu/training)

**VENDORS:** How do I update or add a new vendor in WolfMart?

Please email [procurement_vendorfile@stonybrook.edu](mailto:procurement_vendorfile@stonybrook.edu) with the following information: Please contact the vendor and verify the vendor accepts Purchase Orders. If the vendor accepts Purchase Orders please request a W9 form, and email the W9 along with the Phone#, Fax#, Email address and contact name to the vendor file. Also specify if you are using state or research funds. Keep in mind State funds take 3-5 business days to be added to the system. Research funds can be added the same day if we have all the information including the W9 form. [https://wolfmart.stonybrook.edu/kb-articles/adding-vendorsupplier-wolfmart#](https://wolfmart.stonybrook.edu/kb-articles/adding-vendorsupplier-wolfmart#)
WolfMart Training

Please check out our Online Training with step by step instructions located on the log in page under the Training Tab.  [https://wolfmart.stonybrook.edu/training](https://wolfmart.stonybrook.edu/training)

**New, in Person Training Classes** for beginners and advanced users are planned for this **Summer 2017**. Training will take place at the Procurement Office which is located at Research & Development Park, RSS Building Room 107. You can register online at [www.stonybrook.edu/wolfmart](http://www.stonybrook.edu/wolfmart) by clicking on the Training Tab. Any questions, please feel free to contact Margaret Uyeno or Fran Gandia at 2-4573 or email us at [Wolfmart_Help@stonybrook.edu](mailto:Wolfmart_Help@stonybrook.edu)

Property Control

Per Albany’s guidelines Property Control is currently conducting the verification of fixed assets worth $5000 or more. This is an ongoing process where the assets needs to have the location, manufacturer, model, serial number, and decal number information verified. If any equipment has been moved to a new location please have a [Report for Surplus and/or Transfer of Personal Property Form](mailto:Report for Surplus and/or Transfer of Personal Property Form) completed with changes and forwarded to PC so that Real Asset Management (RAM) system can be updated. This is necessary to maintain compliance per Albany and Federal guidelines.

Property Control is also in the process of sending out the Department Annual Inventories. “Campus departments are responsible to review/update all inventory listings on an annual basis” per [Equipment Inventory Control policy P602](mailto:Equipment Inventory Control policy P602). The annual inventory is important to update information on file along with informing Albany of any changes for accurate reporting.

If there are any questions or you need to submit a form please contact [Property_Control@stonybrook.edu](mailto:Property_Control@stonybrook.edu) or call 631-632-6306.

Travel Reminders

**Rental Vehicle vs Personal Vehicle, Which is More Cost Effective?**

When traveling on behalf of Stony Brook University, travel should be by the most efficient and cost-effective method of transportation available in the best interest of the State.

The Office of General Services (OGS) has Rental Vehicle agreements with both Enterprise and Hertz. To assist travelers in determining the most cost effective method of transportation, “Trip Calculators” can be located at: [http://www.ogs.ny.gov/bu/ss/trav/calculators.asp](http://www.ogs.ny.gov/bu/ss/trav/calculators.asp)

Supervisors should review travelers’ itineraries in advance to ensure that the most economical method of travel is used.

When supported by proper justification, personal vehicles may be used when common carrier or rental vehicle transportation is not available or cost effective. The justification, submitted with supervisor approval, must clearly state why the use of the personal vehicle was the most cost effective option. Mileage will be reimbursed in accordance with the current standard IRS mileage rate.
**Travel Ban to North Carolina and Mississippi**

Please note that the NYS Governor’s ban on Travel to **North Carolina** and **Mississippi** is still in effect. This directly affects **all** travel using State and IDC funds. It also affects certain State Funded sponsored accounts.

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**Lapsing Funds Calendar**

The complete 16/17 lapsing funds calendar is posted at:

http://www.stonybrook.edu/budgetoffice/managing/lapsingfunds.php

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**New York State Citibank Procurement Card**

**Important Reminders:**

- Catering orders are not allowable P-Card expenses. Please visit the [Procurement](http://www.stonybrook.edu/procurement) website for the [Food Policy](http://www.stonybrook.edu/brand/food-policy).
- **DO NOT** share your Procurement Card, account number, and/or passwords with anyone.
- Travel, lodging, and entertainment expenses for yourself, faculty/staff members, guest speakers, consultants, and/or **students** are prohibited. Please contact the Travel Office for assistance.
- Amazon Prime and Amazon Fresh Memberships are not allowable P-Card expenses. If you have been charged for a membership, please request a cancellation and refund.
- P-Card payments for advertising (including all social media campaigns) must have prior approval from the Office of Communications. Please use the following link and be sure to submit your written approval with your receipt(s) when the charge(s) appear on your statement:
  
  http://www.stonybrook.edu/brand/request-assistance/
- Promotional items may be ordered without prior approval; however, you must use a licensed vendor and follow Stony Brook University's licensing policy:
  
  stonybrook.edu/brand/design-visual-identity/merchandising-licensing/
- Cardholders who have joined the program after February 7, 2016 will use the last 4 digits of their SUNY ID (found in “**Your Settings**” on the Cardholder Statement page of the certification system) for verification when calling Citibank. All other Cardholders will continue to use the last 4 digits of their SSN as verification.
- When placing an order with your P-Card:
  
  1. Use preferred sources when possible. Make sure you are getting contract prices if applicable, and/or substantiate price reasonableness.
  2. Identify yourself as a New York State Employee and notify the vendor that the purchase is tax exempt.
  3. Provide the vendor with the following information:
     - Cardholder name, as it appears on the card
     - The card number and expiration date
     - Cardholder address, as it appears on the Citibank Visa cardholder statement
     - The NYS Tax Exempt ID No.
• The ship to address. If the item is being delivered through Central Receiving, please request that the package includes the following information:
  1. Recipient name/Procurement Card
  2. Recipient department
  3. Cardholder phone number

Please make sure that your credit card number is not referenced on the package.

• Please be advised that if, after 3 occurrences, the following requirements are not met by the assigned monthly deadlines your Procurement Card will be suspended:
  o Certification of your monthly P-card statement on-line. For your convenience the certification system can now be accessed remotely.
  o Submission of your Citibank Cardholder Statement signed by your supervisor with all attached supporting documentation including justifications, to the Procurement office.

• Report lost or stolen cards to Citibank and your Procurement Card Administrator immediately.

• Notify your Procurement Card Administrator if:
  o Your supervisor changes
  o If you will be going on extended leave/vacation
  o Accounts need to be added/removed from your profile
  o You change departments
  o You terminate employment
  o You no longer need the card

Please visit the Procurement website for complete guidelines. Should you have any questions please feel free to contact Gerardina Paduano, Procurement Card Administrator at 2-6017.

Contact Information:
Procurement Office: 631-632-6010
http://www.stonybrook.edu/procurement

Stony Brook University FAR BEYOND