TRAINING QUESTIONS

1. **Description of BMP roles can be found in the BMP FAQ's on our website:** https://www.usf.edu/business-finance/purchasing/staff-procedures/purchasing/usf-bull-marketplace/faq.aspx

2. **What is a Punch Out?** Basically, it is a way that our eProcurement system BMP directly integrates and takes you to a web ordering system hosted by a vendor. You "Punch Out" of our system, into their hosted system. Shop and fill a cart as you normally would on the same interface you are used to. Then you "Punch-Back-In" to BMP to input your chartfield and shipping information and create a Purchase Order that is sent to the supplier to fulfill. This way we can keep a record of all the orders, and automatically reconcile your purchases to your chartfield.

3. **Are we supposed to be able to see Amazon Business in our punch out supplier showcase?** You won't be able to see it until it goes live November 20.

4. **What other options do I have for training ?** We are offering 4 training sessions this week open to all employees, we will also have a recorded session on our website. Additional trainings with Amazon are being scheduled for after thanksgiving. In addition, I'll be contacting each of the budget directors for major USF units and offering consultation and large group training for their unit members.

5. **I'm still hesitant, I don't want to use BMP**. That is of course your choice, but as we add to our marketplace suppliers, we will be reducing PCard ordering to other existing BMP suppliers and new BMP suppliers, so we hope we can work with you to get what you need to make you comfortable with the system so you can continue to make use of our preferred suppliers, including Amazon.

ROLES & WORKFLOW

6. **How do you become an approver?** Information on roles and role requests can be found BMP FAQ . Approvers are given their roles through a FAST Purchasing Workflow Requests and are typically an accountable officer for a chartfield or a budget officer for a department area. This form can be found here: https://www.usf.edu/business-finance/controller/about/ucoforms.aspx. Our recommendation - due to the number of orders that may be processed – is to have someone familiar with BMP such as an existing approver associated with chartfields in your areas to keep orders moving. Also try to have 1-2 backup approvers for each chartfield. If you are from a small area you may want to work with someone

in a central business office for your area. We can also consult with you to help determine who should have what role based on your business process.

7. **How do you determine if you are a requestor? Is that somewhere on your BMP profile?** In our BMP FAQ there is information on a FAST query which will show you what roles you have. You can also see your role in your profile in BMP under "Users Roles and Access → Assigned Roles." If you were just assigned a role today, it may not update in BMP until the following business day.

8. **How do you request your role to be changed in Bull Marketplace?** Information on the different roles and how to request them can be found here: https://www.usf.edu/business-finance/purchasing/staff-procedures/purchasing/usf-bull-marketplace/faq.aspx Please note a Requestor role requires you to complete Procurement 101, we can consult with your department to see what roles are most appropriate for your needs.

9. **Can OPS staff be shoppers?** Yes, all individuals with an employee ID and active employment have shopper roles by default. As you will see, a shopper can fill out a cart only - so they can't actually complete any purchases. We recommend this role for student workers, faculty and the majority of employees who do not have budget authority or purchasing tasks as a part of their regular job roles.

10. **Can a Shopper and a Requestor be the same person?** They are separate roles, so the user would only show up as a Requestor. But a Requestor can still do everything a Shopper can; you can think of a Requestor as a Shopper with some additional access to features. If you are a Requestor however, you cannot be an Approver. This would be a conflict of roles.

11. **How does an Approver know there is something to review/approve?** The system will send email notifications, or we recommend if you are an approver, you spend 5 minutes a few times a day logging into BMP and checking your action items (little flag at the top right of the screen) similar to how you would check your email. It only takes a few minutes to check over a requisition and decide if you need more information or if you want to approve the purchase.

12. **When a cart is submitted, is it to a specific person or can it be to a group of people? i.e., multiple requestors/approvers seeing 1 cart?** It must be to a specific person. We understand that many areas have shared email boxes or groups of approvers right now, so this will be an adjustment. It will require a bit of communication as to who you should assign your cart to and what to do if that person is out of the office.

13. **Can we add a supervisor's approval in the process before the cart goes to the actual approver?** Our system currently isn't configured for ad hoc approvals so the best way to accomplish this is through cart assignments.

14. **What if I don't know my Approver's vacation plans – I need to buy something and they are out!** We agree this can be a tricky thing to navigate. This is also why we recommend that each chartfield has a primary and 1-2 backup Approvers so that when someone is on holiday, your orders are not held up. When it comes to assigning carts (remember this is prior to submitting to workflow) you have the option to pull your cart back from someone you assigned it to and re-assign it to someone else). If your area plans on using cart assignments from a Shopper to a Requestor, it's also important that your area communicates who your primary Requestor is and who their backup is when they are out.

15. **As a Shopper, how do I let a Requestor know I need to use a specific Chartfield or Shipping Address for my order?** The main method of communication is the requisition "Comments" page if the user would like to communicate using the system. You can also put in a note when assigning your cart to the Requestor; this will become a Comment on the requisition itself.

16. **What if there is only one approver for all the chartfields typically used. That approver is out of the office, can you assign request to that approvers supervisor even though they typically do not approve day-today purchases for your area?** We strongly recommend that each chartfield have at least 1-2 backup approvers. If you are in a small department we can consult with you to figure out what roles are appropriate and how to share workload.

17. **If you are a "Shopper" are you able to enter in the chartfield info?** Shoppers can fill in the chartfield information, however we don't often see that shoppers want to take the time, or have access to the information necessary to provide the full chartfield. They can indicate the chartfield to be used - maybe by a project or fund "nickname" to the requestor who can enter the full information.

18. **Who enters the chartfield strings? A Shopper, Approver or a Finance Employee?** The Requestor is typically the person who can enter the chartfield information. This is usually someone with a purchasing role for the department. The Shopper can let the Requestor know what chartfield to use if they know it or they can fill it in before assigning their cart. An Approver would also be able to return a requisition to a Requestor to adjust a chartfield if necessary - lots of opportunity for correction if needed. An example - Faculty member is a Shopper and when they assign a cart to their Requestor (central business office) they put in the comments they want to use Grant ABC for the purchase, the Requestor can hopefully lookup the grant and enter the chartfield information. The Approver (determined by workflow) would perhaps be a central budget director, URA or the PI would then be able to review and approve before the purchase is made.

19. **Just to make sure I'm clear, as a Shopper, one of the key distinctions is that while Amazon allowed us to easily buy equipment without approval, the Bull Marketplace route requires approval before equipment procurement?** Sort of... You still needed to have review and approval through both your P-card reconciler and your Supervisor on your P-card statement for each purchase. Moving to BMP has just shifted the approval to before the purchase rather than after. It should result in saved headache of trying to justify an order after the fact when you submit your PCard receipt and will give better oversight on purchases. Ultimately, due to the reduction in receipt handling, we anticipate an overall time savings for administrative work in your department.

SHIPPING & RETURNS

20. **Amazon is known for their next day deliveries or "prime" timelines, so with this Punch out should we expect items to take a bit longer?** Maybe… it will depend on how well your department adopts and pays attention to the workflow and approvals. We see many purchases being placed and approved the same day, so in that case you shouldn't experience any delays. We can consult with your areas to help with making sure the right people have the right role to make sure you keep things moving. We are also looking into an App which would allow "on the go" approvals

21. **Is there a minimum or maximum total cart value required for Amazon Punch Out? Or can the total cart value be any monetary amount?** It can be any amount, but we suggest, to the extent it's possible or feasible to consolidate your orders so you need to take less action overall in the system.

22. **If I place an order over $10,000 on Amazon, will it end up being a P PO instead of a C?** That is a Connection (Computer Store) requirement, not an Amazon requirement. A Procurement Agent will be added to the requisition workflow if your total is over $10,000, but the resulting PO will still be a "C" PO if the requisition is approved.

23. **What if we want a receipt?** You would be able to access your order history through the punch out, but once the order is placed BMP will talk to FAST to automatically encumber the funds from the chartfield you provided. Once the item ships the charge will automatically reconcile and the encumbrance will be reduced, and you will see the expense on your chartfield report. This reduces the need for receipt processing with PCard. If your area has specific reporting and tracking needs, we can work with you to get the data you need.

24. **Question about cancelations, replacements and returns: Are they going to be done via Purchasing or directly via Amazon?** Good questions. Amazon returns will be handled as they are now - you can login to the punch out and look at your order history to request a return.   Since we are processing a PO to place the initial order, we don't allow cancellations or substitutions once the PO is sent. This is to ensure that the automatic reconciliation to your chartfield will work as expected. However, since we suggest you focus on the purchase of Prime items anyway, -- returns are free and processed quickly, so you can reorder the correct items quickly if you ordered something by mistake.

25. **How long does it take before we see a refund?** That's a good question, we get a bank file loaded into FAST 5 days a week, so provided the credit is issued and contains the information needed, you should see the credit the day after the return is processed. Amazon typically processes the return within a few days of receiving the order. This is a great question to bring up in Amazon Specific Training later this month

26. **Will we be notified when the return has been completed?** We are trying as much as possible to keep the notifications you are used to seeing the same including notifications for shipments and returns.

27. **Will the Account Rep(s) be listed in BMP**? Our rep really handles the back end of the Amazon contract with us, not the day to day purchasing. Amazon customer service is probably the fastest route to resolution if you have a question about an order.

28. **Am I able to ship to a non-USF mailing address?** Yes, we allow the use of the One Time Address to input shipping address for orders to locations not at USF - similar to how P-card is used to order from Amazon today.

29. **How about if you have to split your orders to different shipping address same Chatfield?** Unfortunately you would need different PO's for each different shipping address - I think this is how you need to do it now with Amazon

30. **Where can I find more information on adding an address or using a One Time address?** We have a job aid on adding a frequently used address. "One Time Address" is one of the Ship To addresses you can select on the requisition page. https://www.usf.edu/business-finance/purchasing/documents/pur-manual-shipto-faq-2022-07.pdf

31. **I saw that you were able to add an address when selecting a pre-populated address before moving to BMP. I think it was under TPA Central Receiving in the Amazon business account. I am assuming that we cannot send items to locations like home addresses since the order will be moved to punch-out and a USF location will have to be added:** Ooo trick question --there are 2 places for an address. In the Amazon Punch Out we have 5 hard coded addresses that are used for estimation of shipping costs - the Tampa, St. Pete, Sarasota Manatee, Downtown health building and Keys Marine Lab.   When you bring the cart back to BMP, for most of our Punch Out suppliers you would need to select one of our 100 or so hard coded addresses but Amazon is special! Amazon allows you to select a One Time Address option in BMP to put in a home or other address. We wanted to keep your order experience with Pcard as similar as

possible. Information on One Time Address - https://www.usf.edu/business-finance/purchasing/documents/pur-manual-shipto-faq-2022-07.pdf

PURCHASE SPECIFIC QUESTIONS

32. **What about gift card purchases?** You will still be required to have a Request for Gift Card Purchase Form on file and members of our PCard team will be integrated into the approval workflow to check these purchases before they are made.

    There will be consequences for gift card purchases not covered by an approved form or for research participants. Likely involving retraining (at minimum).

33. **Are we able to purchase music/songs through Amazon digital?** Unfortunately, digital content such as Amazon music, video, and other modules such as Amazon pantry are disabled. If this changes or some sort of exceptions allowed in the future, Procurement Services will most likely announce it in our monthly newsletter and our website.

34. **Will we have the option to change the account code if 53000 supplies is not correct? Grants sometimes need to go to 53500 or something else.** Likely - a lot of our account codes have several commodity codes mapped to them. Procurement maintains the mapping, so if you encounter an issue matching an account code to a frequently purchased item let us know and we can support you.

35. **Can we purchase organization restricted items if they are categorized as organization restricted?** Category warnings and blocks have been put on Amazon and will remain in place in the Punch Out - since Amazon is such a wide distributor, we put these in place to help you make responsible buying decisions. "Restricted" warnings do not prevent you from purchasing the item. They are intended to make you pause and consider what you are buying. Some items in "restricted categories" could include office suppliers, IT peripherals, books, etc. which could need other approvals, or we have a preferred supplier for, "Blocks" do not allow you to select the item or add it to a cart. We have tried to be selective with these categories - focusing on alcohol, tobacco, adult items, and weapons. USF only controls the restrictions and blocks based on broad item categories which we do not control. Individual sellers on Amazon set the commodity category. So, it is possible that an item that should be blocked will be available, and an item that should be available will be blocked. Ultimately it is your responsibility to ensure only items that are allowable under the expenditure guide, USF procurement policies and which have a valid business purpose are purchased.

36. **Are computer items UTSB pre-approved? Will non-approved computer items be blocked?** IT is joining the workflow for certain commodity codes which are of concern. They will act as educators and UTSB Approvers to support items across all Punch Outs which are not the USF Computer Store. Their focus is primarily hardware such as laptops, computers, tablets, networking equipment and mobile phones -- not monitors, cords etc.

    Generally speaking, technology that will require IT set-up or servicing (especially computers) should be purchased through the Computer Store, and IT will refuse to service items purchased elsewhere. Their role in the Punch Out workflow approval will be to emphatically impress this upon users.