

Business Administrator's Forum



WAKE FOREST
UNIVERSITY

How to Plan an Event or Conference - The Resources Available

*Presenters: Matt Pack, Director of Conference Services & Graylyn Sales
Account Manager*

Jessica Wallace, Food Service and Catering Director

Procurement Fiscal Year-End Deadlines

Presenter: Michael Logan, Manager, Strategic Sourcing

Internal Service Providers - Deacon Depot

*Presenters: Nathan Anderson, Director, Financial Systems & Analysis
Michael Logan, Manager, Strategic Sourcing*



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U N I V E R S I T Y

All in One: Hospitality and Conference Services

Presented by Jessica Wallace and Matt Pack

Conference Services

Your One Stop Shop!

Camps, conferences, retreats and
receptions on campus in the
community and at Graylyn
International Conference Center



Part of the Hospitality and Auxiliary Services Division

- Locating and Reserving Meeting Space
- Providing Logistical Assistance
- Parking and Transportation
- Overnight Accommodations
- Place Your Event Planner in Contact with Aramark Dining Services





THE POSH PLATE

Our Passion Is Unmatched.

What Makes a Great Event?

The Entire Experience!

Ask Yourself:

Who

What

When

Where

Why



Choosing the Perfect Meal for Your Guests

When we ask you who what where when and why, we aren't being nosy, we are just trying to be better informed to assist you.



Who Will Be Attending Your Event?

Faculty and Staff

Trustees

Students

Parents

Professional Group



What Type of Event is This?

Breakfast, Lunch or Dinner
Reception
Retirement Event
Buffet
Working Lunch
Cocktail Hour



Where?

Many locations on campus
but it must fit your need.



When?

Time of day can dictate the type of foods needed and the budget needed to entertain them.



Lastly.....
Why?

Information Session
Fundraiser
Thank you event



Choosing the Menu

www.wfu.catertrax.com

336-758-5610



Allergies and Dietary Needs

Be aware of allergies and dietary restrictions of your guests



A Picture is Worth a 1000 Words



Suggestions to Elevate to a 5 Star Event





THE POSH PLATE

Our Passion Is Unmatched.

Let us make your event look and feel like
a million bucks!



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Thank You!

Procurement Fiscal Year-End Deadlines

Presenter: Michael Logan, Manager, Strategic Sourcing

FY4 Procurement Deadlines

- **May 9th** **Deadline to submit request for RFP's**
 - **May 23rd** **Deadline to submit request for vehicles**
 - **June 6th** **Deadline for requests to set up new suppliers through Procurement**
 - **June 23rd** **Deadline to submit approved Deacon Depot purchase requisitions**
 - **June 30th** **Final day for receipt of goods for fiscal 2013**
 - **July 1st** **P-card statement closing date. Transactions must be posted by this date.**
 - **July 7th** **All P-card transactions must be updated in Works and statements with appropriate documentation received in A\P**
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Internal Service Providers – Deacon Depot

*Presenters: Nathan Anderson, Director, Financial Systems & Analysis
Michael Logan, Manager, Strategic Sourcing*



DEACON **DEPOT**

Internal Service Providers (ISP)



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What is an Internal Service Provider (ISP)?

- Internal department that provides goods or services to other departments
- Examples at other universities include:
 - Athletic tickets and box rentals
 - Conference center reservations
 - Mail services
 - Software licenses
 - Transportation services

What does an ISP have to do with Deacon Depot?

- ISP's can be set up in Deacon Depot with catalogs of services and products, or forms
 - ISP's will expand the breadth of content within Deacon Depot to help make it your one place for shopping
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Shop Via Catalogs or Forms

- Use the 'Shop at the Top' bar
- Utilize a form to submit requests

Update Cart and Place Order

- Update your shopping cart as usual

Electronic Requisition Approvals

PO Sent Electronically to ISP

ISP Fulfills Order

- ISP provides services or goods
 - ISP creates journal entry to charge requesting department and close PO
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- Increased visibility of products and services available to the entire campus
 - Electronic approval process prior to the request reaching the service provider
 - Electronic repository of all orders within Deacon Depot
 - ISP's will have an automated JE process via WIN instead of manual journal entries
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Internal Service Providers: Process Deacon Depot Orders

Select the appropriate filters below (the internal service provider filter is required) from the list below and press 'submit' in order to view all open orders:

ISP:

PO #:

PO Dates from to

These orders can be totally or partially fulfilled. For applicable line items, enter the quantity fulfilled. If the total open quantity exceeds the quantity that will be fulfilled and the line should be closed to further updates, click the 'Close Line Item' checkbox.

If a particular line item is closed, no further updates may be made to it unless a change order is submitted by the requestor through Deacon Depot on a Change Order Request Form.

Enter the transaction date: Please note that the transaction date must be in an open period as well as the same fiscal year that the purchase order is in.

PO #	Line #	Line Description	FY	Open		Unit Price	Extended Amount	Quantity Filled	Close Line Item?	Use Tax Applicable?
				Open?	Quantity					
P0001567	1	External hard drive	14	Y	1	50.00	50.00	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
P0001567	2	Lenovo ThinkPad	14	N	2	375.00	750.00	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
P0001567	3	Loaner laptop	14	Y	4	50.00	200.00	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
P0001798	1	Desktop computer	14	Y	1	450.00	450.00	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
P0001809	1	Docking station	14	Y	1	95.00	95.00	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once the 'Submit' button is pressed:

- A journal entry will be processed in Banner to record the revenue and expense.
- The encumbrance will be partially or fully liquidated and closed, if applicable.
- It may take up to two hours for the transaction to be reflected in Cognos financial reports.

By pressing the 'Submit' button, you certify that the order was appropriately fulfilled and authorize Financial & Accounting Services to create a journal entry reflecting this transaction.

- Campus departments scheduled to be part of the pilot
 - Graylyn
 - Parking and Transportation
 - Are there others willing to volunteer to be part of a campus pilot?
 - Questions?
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