BBE North (Kaufert Lab) Purchasing Processes
(Effective August 2, 2016)

**Purchase Orders** – Use the new form attached. Instructions are at the top of the form. *Note: there is no need to submit packing slip.* Notify LaDonna Olson that you have received the item or convey any discrepancies.

**U Market Orders** - Submit your cart to LaDonna Olson - *olson*. There is no need to submit packing slip.

**Internal Orders**

**Employee Expense Reimbursement:** Email to Madeline (Maddie) Oskey – *oskey010@umn.edu*.

A digital signature is acceptable. Or you can continue to put this paperwork in the accounting mailbox. It will be picked up twice a week.

**Pcard Transactions** - Use *My Wallet*.

**User Instructions**

Even if you’ve already taken the training, I suggest a refresher. It only takes a few minutes. Access ULearn at: [http://humanresources.umn.edu/working-u/ulearn#anchor-access](http://humanresources.umn.edu/working-u/ulearn#anchor-access) and click Sign in to ULearn. Under Browse for Training click on Financial Management. On the left side under Subject choose Travel and Expenses. Choose the online class *My Wallet for Cardholders*. Then launch the course.

*Please note:*

- The field where the justification and chartfield string need to go is **not** the "Description" field that you see on the small pop-up screen while you are attaching your receipt. This field is basically useless and should be ignored. Instead, for each transaction, click on the word "pcard" under the "Expense Type" column to access that transaction's "My Wallet Detail" screen. On this screen, there is another "Description" field (in the middle near the bottom), and this is the field that should be used.

- After you finish entering your info on the above-mentioned detail screen, click the "Return to My Wallet" link. It seems that the system may not save the info that you entered unless/until you click this link.

A digital signature is acceptable

If you have questions about using *My Wallet*, please contact Madeline Oskey at *oskey010@umn.edu*
Additional P card resources:

- My Wallet Attachment and Comments Job Aid
- Justification Standards Job Aid
- Chart of Accounts Manual
- P card Policy

University Financial Helpline 612-624-1617

Requests for New Pcards

Contact Department Card Administrator (DCA) Julie Borris: jborris@umn.edu