



# UPPWords

News from University Procurement Professionals

December 2013  
Volume 4, Issue 1

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## The Phoenix Interface

by Linda Van De Rostyne, USD

We have associated the term “Phoenix” as a bird rising from the ashes, being reborn. Maybe that’s the perfect symbol for what SciQuest is calling The Phoenix Interface available in SDezBuy. SciQuest, our software provider, has improved the look and feel of the application to make interacting with the application easier for the user to learn and use.

Within the next several months, campus purchasing officials will be providing training on the Phoenix interface. We have until March 28, 2014 to get our training completed and our users transitioned to the new interface. After that the old “Classic” interface is going away.

Key features of the Phoenix interface are:

- Side menu navigation
- Breadcrumb trail
- Menu Search
- Bookmarks
- Action Items
- Notifications by email and within SDezBuy
- Cart Preview
- Quick Search
- Ability to set your homepage
- New Profile/User Management Interface
- Express Checkout
- Quick Keys

Come to one of several training opportunities on your campus to learn more.

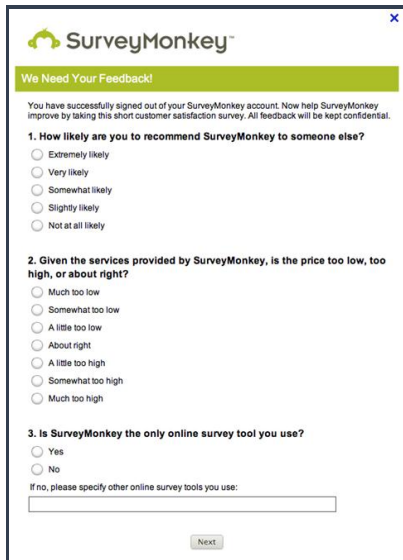
The screenshot displays the SDezBuy Phoenix interface. On the left is a blue sidebar menu with icons for home, shopping, dashboard, and orders. The main content area is titled 'Orders & Documents' and includes a 'Document Search' section with options to search documents, view saved searches, and download export files. Below this is contact information for SDSU and USD, followed by 'Training Information' for the new Phoenix interface, listing dates and locations for classroom training. A 'My Cart' popup window is overlaid on the bottom right, showing two items: a HERO3+ Black Edition Camera for 302.40 USD and a Rechargeable Battery for 12.94 USD, with a total of 315.34 USD. The cart also shows the user's name (Jean Barkley), action items, notifications, and a checkout button.

## University Procurement Professionals (UPP) Webinar

by Earl Weisenburger

It is understood that life in general is going way too fast especially with all the changes in technology, new releases to software systems, purchasing procedures, policy changes, state statute changes and the list could go on. The ever growing demand of everyday life is a challenge for all of us on a daily basis. To try to better serve you, our customers, and understand what it is you need, the SDBOR UPP Group is working on a webinar for all SDezBuy users for the upcoming spring semester. To make it as beneficial, educational and useful for everyone, we will be asking for your input for topics, questions, policies, and/or concerns. In the very near future you will be receiving a survey with a list of potential topics or suggestions. We really need your input on topics you would like covered in the Webinar.

Please take a few minutes to respond to the survey with your topics and questions. It is the mission and goal of the SDBOR UPP Group to serve all of you to the best of our abilities.



The image shows a screenshot of a SurveyMonkey survey window. The title bar says "SurveyMonkey". The main heading is "We Need Your Feedback!". Below this, there is a message: "You have successfully signed out of your SurveyMonkey account. Now help SurveyMonkey improve by taking this short customer satisfaction survey. All feedback will be kept confidential." The survey consists of three questions:

1. How likely are you to recommend SurveyMonkey to someone else?
  - Extremely likely
  - Very likely
  - Somewhat likely
  - Slightly likely
  - Not at all likely
2. Given the services provided by SurveyMonkey, is the price too low, too high, or about right?
  - Much too low
  - Somewhat too low
  - A little too low
  - About right
  - A little too high
  - Somewhat too high
  - Much too high
3. Is SurveyMonkey the only online survey tool you use?
  - Yes
  - No

If no, please specify other online survey tools you use: [text input field]

Next



## UPP Member Spotlight



Karen Alfson, Purchasing  
Dakota State University

Karen Alfson has lived in Madison her entire life. She has been married to her husband Rick, a retired postal worker, for 40 years. They have one daughter and two amazing grandchildren, ages 11 and 6, who also live in Madison.

Karen started her career as a claims clerk at DSU in 1989. She handles the purchasing and travel at DSU and is the shared buyer for maintenance, repair and operating equipment for SDBOR.

You may see Karen walking anywhere in town as taking long walks is one of her favorite activities. She also enjoys golfing and tries to take a trip south every winter to get in a few rounds of golf in the off season.

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### What's Coming in SDezBuy

by Linda Van De Rostyne

B&H Photo Video Punchout Catalog – based on our E&I contract should be ready to roll-out to campuses in the next several weeks. Use the B&H punchout to procure your Audio Visual and Photography equipment and supplies.



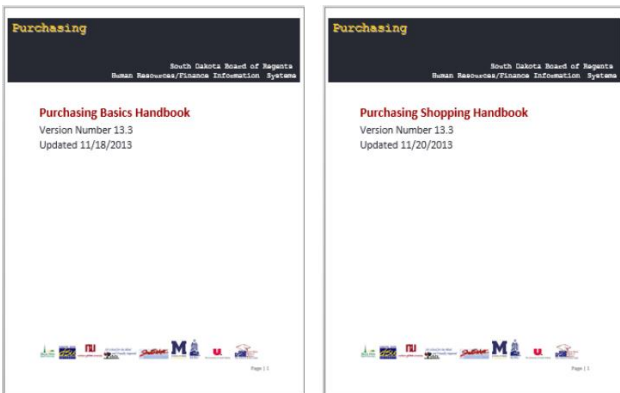
The Cole Papers punchout will include items and pricing based on our State Contract and additional items at a negotiated 15% discount. The punchout should be available in early 2014 and will replace the existing hosted catalog currently in SDezBuy. Cole Papers punchout catalog will include paper and custodial products.

## Training Materials Updated

by Linda Van De Rostyne

The Requestor Handbook has been replaced by two handbooks: the Purchasing Basics Handbook and the Purchasing Shopping Handbook. Both have been updated with the Phoenix Interface process and screenshots to assist users with the transition to the new interface. The Purchasing Basics Handbook includes navigation techniques, document search and Banner processes such as receiving, open encumbrances and document history. The Purchasing Shopping Handbook includes shopping techniques for the hosted and punchout catalogs, understanding search results, non-catalog item entry, favorites and the checkout process.

Those with the Requestor, Assigner and Assignee role in SDezBuy might find the Getting Started Guide a good summary of some of the processes found in the larger handbooks. It has also been updated with the Phoenix steps and screens.



The Approver handbook has been updated to include steps and screens using the Phoenix Interface. Approvers are able to use email or mobile devices to approve requisitions in the new interface.

These and more purchasing training materials can be found on the Purchasing Training Resources website which is accessible from SNAP, SDezBuy or by accessing this link: <http://mytraining.sdbor.edu/resources/banner/purchasing.html>

## Importance of Receipting Purchase Orders

by Darby Ganschow

The final step in the procurement process is to pay the supplier for the items purchased. The supplier invoice is routed to SDSU Accounts Payable (APSS) for entry in Banner and for the check to be issued. Before the check is issued, a matching process must take place to ensure what was ordered matches what is being invoiced and what was received. This is called a three-way match process and payment cannot be made until the invoice, purchase order and receiving all match.

The Purchasing and Accounts Payable offices receive calls and emails frequently from suppliers asking about the status of their payment. In most cases, we have thirty days after the item(s) is physically received to make payment to the vendor. Payments beyond thirty days can result in late fees.

Payments should not be delayed if the equipment has been received. Arrangements can be made with the accounting and purchasing offices to partially prepay an invoice in the event that equipment must be set up and tested. Manufacturer's warranty will cover defects with the equipment in the event it does not function properly. Banner screen FPARCVD is used to receipt in orders.

A Receipt Required Reminder is emailed twice per week on Mondays and Thursdays at 10:00am. Please keep in mind that if you are receiving a reminder, it is because there is an invoice present in Banner and the items pertaining to that invoice have not been receipted in or it may also be due to an error in the receipt that you have entered. If you receive the email, please take it upon yourself to investigate why you have received it. By providing these reminders twice per week, we hope to help APSS process payments in a timely and efficient manner.

# UPP Members

<p><b>Black Hills State University</b>  <b>Lorraine Talks*</b>          (605) 642-6285  <a href="mailto:Lorraine.Talks@bhsu.edu">Lorraine.Talks@bhsu.edu</a></p> <p><b>Anne Langdell</b>          (605) 642-6938  <a href="mailto:Anne.Langdell@bhsu.edu">Anne.Langdell@bhsu.edu</a></p> <hr/> <p><b>Dakota State University</b>  <b>Karen Alfson*</b>          (605) 256-5131  <a href="mailto:Karen.Alfson@dsu.edu">Karen.Alfson@dsu.edu</a></p> <hr/> <p><b>South Dakota Board of Regents</b>  <b>Ellen Walker</b>          (605) 773-3455  <a href="mailto:Ellen.Walker@sdbor.edu">Ellen.Walker@sdbor.edu</a></p>	<p><b>Northern State University</b>  <b>Earl Weisenburger*</b>          (605) 626-2529  <a href="mailto:Weisenbe@northern.edu">Weisenbe@northern.edu</a></p> <p>Crystal Sturdevant          (605) 626-2533  <a href="mailto:Crystal.Sturdevant@northern.edu">Crystal.Sturdevant@northern.edu</a></p> <hr/> <p><b>South Dakota School of Mines and Technology</b>  <b>Barbara Mustard*</b>          (605) 394-2228  <a href="mailto:Barbara.Mustard@sdsmt.edu">Barbara.Mustard@sdsmt.edu</a></p> <p><b>Brenda DenOtter*</b>          (605) 394-2512  <a href="mailto:Brenda.DenOtter@sdsmt.edu">Brenda.DenOtter@sdsmt.edu</a></p>	<p><b>South Dakota School for the Deaf</b>  <b>Nancy McKenzie</b>          (605) 367-5200  <a href="mailto:Nancy.Mckenzie@sdsd.sdbor.edu">Nancy.Mckenzie@sdsd.sdbor.edu</a></p> <hr/> <p><b>South Dakota State University</b>  <b>Vicki Soren*</b>          (605) 688-4989  <a href="mailto:Vicki.Soren@sdstate.edu">Vicki.Soren@sdstate.edu</a></p> <p><b>Karen Bravek</b>          (605) 688-4451  <a href="mailto:Karen.Bravek@sdstate.edu">Karen.Bravek@sdstate.edu</a></p>	<p><b>The University of South Dakota</b>  <b>Darby Ganschow</b>          (605) 677-6623  <a href="mailto:Darby.Ganschow@usd.edu">Darby.Ganschow@usd.edu</a></p> <p><b>Linda Van De Rostyne*</b>          (605) 677-5503  <a href="mailto:Linda.Vanderostyne@usd.edu">Linda.Vanderostyne@usd.edu</a></p> <p><b>Kyra Blatchford*</b>          (605) 677-5667  <a href="mailto:Kyra.Blatchford@usd.edu">Kyra.Blatchford@usd.edu</a>          *denotes shared service buyer</p>
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## UPP Members at Purchasing Workshop in August (Hosted by SDSU)



**Back Row:** Kyra Blatchford (USD), Rob Houdek (BHSU), Nancy McKenzie (SDSD)

**Front Row:** Monica Fier (SDSU), Ellen Walker (SDBOR), Vicki Soren (SDSU), Earl Weisenburger (NSU), Linda Van De Rostyne (USD), Barbara Mustard (SDSM&T), Brenda DenOtter (SDSM&T), Anne Langdell (BHSU), Lorraine Talks (BHSU), Karen Alfson (DSU), Darby Ganschow (USD), Karen Bravek (SDSU)