



UPP Words

News from University Procurement Professionals

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PURCHASING SURVEY RESULTS

In November the purchasing office asked that current users of SDezBuy and Banner purchasing processes respond to several survey questions. 30% of SDezBuy Requestors responded to the survey. Following are some of the highlights.

- The majority of the respondents sounded confident with SDezBuy, as 80% said they could easily find suppliers, products and services they needed.
- 59% have used the new features from the 11.1 and 11.2 releases indicating that they like and will use the improvements that have been implemented.
- 90% of the respondents felt that creating requisitions in SDezBuy is either very easy or easy. 86% found the ability to track the progress of their orders either very easy or easy and 83% responded that performing the receiving process in Banner was either very easy or easy.
- 27% of respondents were able to check correctly all 3 of the codes where a purchasing assessment would apply. Slightly more, 37% were able to check correctly both of the codes where capital asset applies. This would tend to indicate that more training is needed in this area.
- 36% of respondents felt that they needed more training on “determining if competitive quotes should be solicited”. While 35% felt that they needed more training on the topic of “non-contracted non-exempt items over \$4,000”. 25% responded that they needed training for the requirement for a quote, for orders over \$1,000. Since respondents were anonymous, please contact your local purchasing office if you need more training in any area.
- Some respondents stated that it was not easy to find training material. Please review, “Locating Purchasing Training Materials” on page 4 of this newsletter.
- It should be noted that the frequency of using the Banner screens to review your open encumbrances is an individual’s choice, but UPP would like to see users review this report at least monthly until year-end approaches, then more frequently.
- More than 60% agreed that competitive quotes realized savings when solicited by purchasing.
- There were numerous comments on future purchasing process improvements that UPP welcomed and will take into consideration.

Thank you to all those of you who responded to the survey!!

Purchasing Forms & Related Links

by Earl Weisenburger and Kyra Blatchford

The University Procurement Professionals (UPP) group continues to work on improving the end users experience in SDezBuy. With the additions of more hosted and punch-out catalogs for easier access we have recently added forms and related links to SDezBuy. “Purchasing Forms & Related Links” can be located directly under the hosted catalogs and above the punch-out catalogs.



The Related Links are to the Office of Procurement Management’s website so that it is easily accessible to get to all State Contracts that are not hosted or a punch-out catalog in SDezBuy. Other links are to the Purchasing Training Materials, National IPA Contract, WSCA/NASPO Contract Agreements and the Purchasing Commodity Code to Account Code Crosswalk.

The Forms that are listed for use are intended to stay in the format that they have been created in. Complete the forms online then save them to your computer desktop or a file folder. Never print the form and scan it. Once the form has been scanned it is a sealed document which eliminates the use of cutting, pasting and adding to the document by the Buyers or Office of Procurement Management.

The steps listed below are a quick reference guide on how to use the forms and attach them to a requisition:

1. Locate and select the form or link from the SDezBuy Purchasing Forms & Related Links section.
2. Click on form or link to open it, read the instructions for the use of the form or link.
3. Complete the form with **detailed information**.
4. If the form requires “**electronic signature**” please do so. If you are not able to do an electronic signature you should contact your campus IT department for assistance on setting up an electronic signature or you may leave it blank and make note in the Internal Notes of the requisition that you are not able to sign it electronically.
5. Save and Name the form to your computer hard drive file folder or desk top to be retrieved later.
6. Attach the saved form to the Internal Notes & Attachments area of the requisition.

We hope this addition in SDezBuy streamlines the process for the end users by getting more of the daily forms and links in one location rather than the need to bounce back and forth from SNAP to SDezBuy. The “Available Actions” drop down menu on the links or forms cannot be used to start a cart or save the form, you must follow the directions listed in the pop-up. It is unfortunate that we are not able to remove the “Available Actions” menu or change them per SciQuest, our software provider. If for any reason you need assistance with using any forms or links contact your local purchasing office, the shared buyer for the particular commodity or the Requestor Handbook located on the Purchasing Training Resources link.



Coming Soon!

New Punchout Catalog with Fastenal

UPP Member Spotlight!



Kyra Blatchford, Purchasing Specialist
University of South Dakota

Kyra Blatchford is a native of Iowa, but moved to a small town in northeast Nebraska after college where her husband grew up. She is a 2006 graduate of Midland Lutheran College in Fremont, NE with her BSBA and is currently working on obtaining her MBA.

Kyra began working at the University of South Dakota in 2007, where she started out in the receiving department driving the forklift and delivering packages throughout the campus. Just a short three months of working at USD in receiving, she came to work for the purchasing department and enjoys the opportunities to communicate with the departments even more. She is the shared buyer for Lab, Scientific and Medical Equipment and supplies for the SDBOR; and works with Planning and Construction when it comes to USD construction/service contracts.

Kyra and her husband Josh of 5 years have one daughter, Haylee who is a very busy and independent two year old. They live in Newcastle, NE with their two dogs, Copenhagen (chocolate lab) and Cletus (red bone coon hound) that Josh both named. Josh's family lives in the same town and their four nephews and five nieces keep them busy with school activities to attend.

In her spare time Kyra enjoys spending time with family, reading books she enjoys, visiting with friends and enjoying the great outdoors.

The W9 Process and Why It's Important

by Karen Bravek, SDSU

The process of sending completed W-9's to the Accounts Payable Shared Service Office is different on every campus but the REASON for the W-9 process is the same for all.

The Accounts Payable Shared Service Office must have a W-9 form on file for all vendors and individuals paid through the Accounts Payable/Banner System. The W-9 form supplies the Taxpayer Identification Number (TIN) for the vendor/individual. In addition to the TIN is the vendor/individual's contact information.

If a voucher is being prepared or a purchase order needs to be done to purchase goods or services from a vendor or individual that has not been paid before, a W-9 will need to be requested from that vendor/individual. The person who requests the W-9 may be different from one campus to another but the information needed is the same. It is very important that the vendor/individual supply the following information listed below on the W-9 form to make sure that the vendor file is complete.

- Vendor Name
- DBA (Doing Business As) Name, if applicable
- Taxpayer Identification Number (TIN)
- Vendor Address (Order From & Remit To Address, if different)
- Telephone Number
- Fax Number
- Email Address

When processing purchase orders, the fax number is extremely important because the majority of the time purchase orders are distributed via the fax number listed on the W-9. If there isn't a fax number listed on the W-9 then the purchase order will distribute to a monitored fax number within the SD Board of Regents System, which then extends the time it takes for your order to be placed.

Before forwarding the W-9's to the Accounts Payable Shared Service Office, it is important that the W-9 is legible. If you can't read it then neither will the Accounts Payable Shared Service staff!!

Please direct questions regarding the W-9 process, or to get a copy of the W-9 form, to your local Purchasing Staff.

Happy New Year 2012

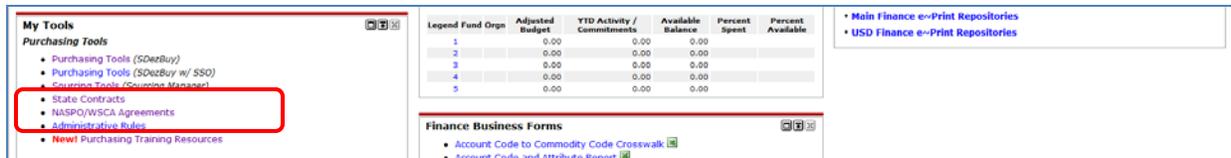
Locating Purchasing Training Materials & Quick Reference Guide

by Linda Van De Rostyne, USD

All written training materials are stored within the Training Website which and can be accessed through several links on the SNAP portal and within the SDezBuy application for easy retrieval by all SDezBuy users.

The first way you can locate the training materials is by logging on to the **SNAP** portal. Then click on the **Resources** tab. Click on **Training Website** in the System Resources section. Next, click on the **Training Resources** link. Then click on the **Banner** link. Next, click on the **Purchasing** link under Banner Resources. This will bring you to the **Purchasing Training Resources** screen where you can click on the handbook or manual most appropriate for your needs or role. UPP Newsletters and links to CBT's (Computer Based Training) are also posted on this site.

The second way you can locate the training materials is by logging on to the **SNAP** portal and selecting the **Finance** tab. Then click on the **New! Purchasing Training Resources** link in the My Tools Purchasing Tools section. This link takes you directly to the **Purchasing Training Resources** screen where you can select the material most appropriate to your needs.



The newest way that you can locate the training materials is by logging onto **SDezBuy**. The link to **Purchasing Training Resources** is found on the Home/shop screen in the new **Purchasing Forms & Related Links** section. Please see screenshot on page 2 of this newsletter for specific location.

The **Requestor Handbook** is updated to include the most recent changes which occurred in SDezBuy through release 12.3. The handbook is in a searchable PDF format and provides step-by-step instructions with the appropriate screen shots which most users find helpful. **The Quick Reference Guide** which begins on page 217 provides just the step-by-step without screen shots. Once a particular lesson is learned, the Quick Reference Guide may be all you'll need.

Each campus Purchasing Office provides user training for their campus users. They also provide the updates and announcements throughout the year. If you have any questions or need assistance to get you through a process, please contact a member of your campus purchasing office listed below. Thank you.

UPP Members			
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