



# UPPWords

News from University Procurement Professionals

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## Purchasing Policies

By Darby Ganschow

Following, you will find information regarding the established policies for purchasing equipment, supplies and services. The policies are established by the Bureau of Administration and the South Dakota Board of Regents. Questions regarding these policies should be directed to your campus Purchasing Office.

It is recommended that a requisition be submitted through SDezBuy for all equipment and supplies.

### On Campus Services

Some campuses operate on-campus services such as printing centers and office supply stores. Departments located on these campuses are required to utilize these services as a first source.

### State Contract Items

Equipment and supplies available from State contracts including WSCA contracts must be purchased from these contracts and there is no limit to the amount that can be purchased. If the items requested are not available through established contracts, the following guidelines shall apply.

### Equipment/Supplies \$0 - \$1,000

Equipment and supplies with a cost of \$1,000 or less may be purchased from a source offering the best value. Sound business practices should be followed to ensure the best value is being obtained.

### Equipment/Supplies \$1,001 - \$10,000

Equipment and supplies with a cost of \$1,001 - \$10,000 require competitive quotes. The Purchasing Office shall have the sole authority to solicit these quotes. Approval from the Office of Procurement Management is also required and will be coordinated by the Purchasing Office. Departments may request a quote from a single vendor to establish an estimated cost.

### Equipment/Supplies \$10,001 & above

Orders totaling \$10,001 and above require bidding by the Office of Procurement Management. Complete specifications must be provided with the requisition in SDezBuy.



Darby Ganschow, Director of Auxiliary Services, USD

The bidding process takes a minimum of two weeks and usually three to four weeks, so please plan accordingly.

### Exempt Items

South Dakota codified law 5:23-21 exempts certain items from the state bidding process. Items included in this exemption include laboratory apparatus and appliances, chemical and biological products, library books, computer hardware and software as well as other items. South Dakota Board of Regents policy 5:4 governs the purchasing process for these items. Competitive quotes are required for orders totaling more than \$5,000. Approval from the Bureau of Information & Telecommunications is also required for all non-standard computers and technology orders exceeding \$10,000.

### Non-Professional Services

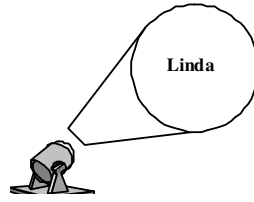
Non-professional services require competitive bids when the estimated cost of these services exceeds \$10,000. The Purchasing Office is responsible for soliciting these bids and is required to do so according to state law. Anyone requiring additional information regarding non-professional services should contact their campus Purchasing Office.

### Professional Services

Professional Services exceeding \$50,000 require competitive proposals. State law provides the process to be used and the criteria for which the proposals must be evaluated. Please contact your campus Purchasing Office for additional information.

## UPP Member Spotlight!

**Linda Van De Rostyne is a Purchasing Specialist**  
at the University of South Dakota  
Official title: Purchasing/Property Management Officer



Linda Van De Rostyne has been a member of the purchasing module group since March of 2006. Linda assisted with the implementation of the HR/FIS project and with the implementation of Order Manager which allows PO's to be completed in SDezBuy.

Linda has been working in the purchasing profession for about 14 years. As Purchasing Specialist at USD, her role includes being a shared buyer for SDBOR, system administrator for SDezBuy, writing and presenting the training to various end-users and helping with the catalog management in SDezBuy. Linda has recently become newsletter editor for UPP.

In her spare time Linda enjoys spending time with her husband and two boys fishing and gardening. She volunteers her photography talents for friends and family weddings, reunions and senior photos and enjoys sewing when time permits. Linda also volunteers for Boy Scout Troop 133 and is an avid supporter of several charitable organizations such as Habitat for Humanity and has worked on a Habitat home.

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### My Banner

By Vicki Soren, SDSU

#### DID YOU KNOW???

**You can save your "favorite Banner screens" by using MY BANNER!!**

Trying to remember a Banner screen name can be difficult at times! So, use the MY BANNER feature!

Steps:

1) Sign in to Banner and double click on the words MY BANNER. It will expand and screen GUAPMNU will appear underneath it. It will also have the words "Empty, Select to Build". Note: Once you have put one screen into your "My Banner", next time it will show up as "Organize My Banner".

2) Double click on the words GUAPMNU

3) There are several ways to set up your favorite screens, but this is an easy way: click on the right side of this screen under Object. Type in the letters of one of your Favorite Screens and tab. It will populate the name of the screen. IF you want to personalize the name, go ahead and type over the name. For example: I use FOIDOCH a lot so I type in FOIDOCH under Object – tab and it populates with Document History as the screen name. Since that doesn't mean much to me, I typed over the screen name with "My Favorite Screen". You can also pull over your favorite screens from the left side by finding the particular screen, double clicking on the name and using the Insert icon (in the middle of the screen).

PLEASE NOTE: if you don't have rights to view a screen, you will get an error message at the bottom of your screen (or it could lock you up).

4) Don't forget to click on the SAVE icon to save your work!

Next time you sign in to Banner, your favorite screens will be listed under My Banner!

If you have any questions on this feature contact your purchasing office on your campus.

## UPP Members

**Black Hills State University**  
**Jerry Swarts**  
(605) 642.6565  
[jerryswarts@bhsu.edu](mailto:jerryswarts@bhsu.edu)

**Lorraine Talks**  
(605) 642-6285  
[Lorraine.Talks@bhsu.edu](mailto:Lorraine.Talks@bhsu.edu)

**Dakota State University**  
**Karen Alfson**  
(605) 256-5131  
[karen.alfson@dsu.edu](mailto:karen.alfson@dsu.edu)

**Northern State University**  
**Earl Weisenburger**  
(605) 626-2529  
[weisenbe@northern.edu](mailto:weisenbe@northern.edu)

**South Dakota School of Mines and Technology**  
**Sandy Fischer**  
(605) 394-2228  
[Sandra.Fischer@sdsmt.edu](mailto:Sandra.Fischer@sdsmt.edu)

**Jan Hargens**  
(605) 394-2512  
[Jan.Hargens@sdsmt.edu](mailto:Jan.Hargens@sdsmt.edu)

**South Dakota State University**  
**Vicki Soren**  
(605) 688-4989  
[Vicki.Soren@SDSTATE.EDU](mailto:Vicki.Soren@SDSTATE.EDU)

**Karen Bravek**  
(605) 688-4451  
[Karen.Bravek@SDSTATE.EDU](mailto:Karen.Bravek@SDSTATE.EDU)

**The University of South Dakota**  
**Darby Ganschow**  
(605) 677-6623  
[Darby.Ganschow@usd.edu](mailto:Darby.Ganschow@usd.edu)

**Linda Van De Rostyne**  
(605) 677-5503  
[Linda.Vanderostyne@usd.edu](mailto:Linda.Vanderostyne@usd.edu)

**Kyra Blatchford**  
(605) 677-5667  
[Kyra.Blatchford@usd.edu](mailto:Kyra.Blatchford@usd.edu)

## UPP Members

### South Dakota Board of Regents

Ellen Walker

(605) 773-3455

[Ellen.Walker@sdbor.edu](mailto:Ellen.Walker@sdbor.edu)

### South Dakota School for the Deaf

Nancy McKenzie

(605) 367-5200

[nancy.mckenzie@sdsd.sdbor.edu](mailto:nancy.mckenzie@sdsd.sdbor.edu)



## Locating Training Materials

By Linda Van De Rostyne, USD

All written training materials are stored on the SNAP portal for easy retrieval by Requestors, Approvers and Purchasing Office staff.

You can locate the training materials by logging on to the **SNAP** portal. Then click on the **Resources Tab**. Scroll down, if needed, until you can view the Banner Procedures section of the screen. Click on **Finance Procedures**. Next, click on **Purchasing**. This will bring you to the screen where you can click on the handbook or manual most appropriate for your needs or role.

The **Requestor Handbook** has just been updated to include the most recent changes which occurred in SDezBuy through release 9.3. If you click on the link for Requestor Handbook, it opens the document and then you can save it to a more convenient location on your desktop or drive. Your campus Purchasing Office will let you know the next time that this document has been updated so that you can always have the most recent version at your fingertips. 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 146 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. 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 your campus Purchasing Office. Thank you.

## Proper Use of Forms used in the Purchasing Process

by: Earl Weisenburger, NSU

[Specification Document](#) // [Printing Specification Template](#) // [Sole Source Request](#) // [Emergency Purchase Request](#)

All forms are intended to stay in the format that they have been created in. Complete the forms on-line, 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 forms on the SNAP Portal, Finance Tab, and Finance Business Forms section.
2. Double Click on the form to open it.
3. Complete the form with **detailed information**. [NOTE: the specification form should not be used if you are able to enter the complete specifications details in the 250 characters provided on the line description of the requisition.]
4. If the form requires "electronic signature" please do so. If you are not able to do 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 electronic sign it.
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 attachments on the Header level of the requisition in the Internal Notes area.

Just a note of interest, the **Emergency Form** requires 3 written quotes to accompany it to the Office of Procurement Management. It is better to use the Sole Source Form and state that the purchase is in the "best interest" of the state and explain why.

(Example: HVAC unit in Gerber Bldg is not functioning at all. It is in the best interest of the state to get it operational ASAP so that classrooms can continue to be utilized for classes and that staff / faculty offices have heating & cooling capabilities so they can continue to stay in their office to perform their duties. The loss of the HVAC would cause loss of revenue and productivity.)

If you need assistance with using any form do not hesitate to contact your campus purchasing office or the shared buyer for the particular commodity.