

The **REQUISITIONER**

N E W S L E T T E R

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Materials Management Issues of Interest to GSU Faculty & Staff

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The mission of the Georgia Southern University Department of Materials Management is to provide University departments with customer oriented procurement and logistics services necessary for their effective and efficient support of the University's mission.

COMMENTS BY GEORGE

Personnel changes lead off this issue of the Requisitioner. Ms. Susan Clarke retired at the end of the year. Susan was an outstanding buyer, team leader and innovator within the department. While we will miss her tremendously, she is most deserving of her retirement and we wish her well. In the wake of losing Susan, we were pleased that Ms. Sheryl Lewis was promoted into Susan's position. Sheryl has been preparing herself for this role and now has a chance to provide some new leadership. Ms. Chandra Cheatham was recently promoted to the Buyer II position within the department. A short while back Chandra and Sheryl "switched" teams to allow Sheryl to work with Susan and an opportunity for Chandra to work with IT commodities. This move has paid tremendous dividends as each has excelled in their new area. Ms. Lynn Fail has moved over to Sheryl's team giving her exposure to new commodities. Mr. Chris Wright, our new Procurement Assistant has been taking over more of the responsibility for the Procurement Card program. Once the conversion to Works is complete, we anticipate he will be the primary administrator for the P-card program. A replacement for Keith Bedgood, a Receiving Clerk, still has not been identified. A number of folks have reported seeing Keith around campus in his Fedex uniform and he appears to enjoy his new job. We also say goodbye to Allison Powell, our student worker here in Purchasing. Allison graduates in May. She has been with us since August 2004 and has been responsible for many clerical associated duties here. She will be missed and we wish her all the success in the future.

Plans are underway to vacate the old Central Stores warehouse across from the Continuing Ed building. The surplus showroom will move to the ETS warehouse down the road. The operation at the ETS warehouse will consist primarily of surplus property and disposal operations. We will continue to showcase some surplus items albeit at a much reduced level.

We are also in the initial stages of reviewing our annual contracts database. In the past we have retained control of many contracts under the \$3,000 departmental purchasing threshold. Recommendations have been made to move many of these small dollar contracts back to the departments especially if we provide no added value to retaining them. This should allow departments to renew their contracts in a timelier manner.

As we approach both Spring break and summer, the number of campus moves tends to increase. This year appears to be no different. With the space available for surplus storage and processing being limited, we ask each department anticipating moving to identify surplus items early on and notify Property Control as soon as possible. It is far easier to transfer surplus from its original location rather than move it twice.

Streamlined procedures allowing departments to order software directly without the need to submit requests to Materials Management via Information Technology Services are in the planning stages and hope to be released soon.

The new requisition form should be "rolled out" by the time this issue is released. We regret the delay. Every attempt has been made to anticipate problems and questions with this form but we do ask your patience and, if you have any questions, contact us immediately. We most strongly encourage reading the instructions accompanying the form prior to completing it. The new form, once released, is the only version that can be accepted. This new form was required to ensure that all pertinent information was included prior to being receiving in our office.

There seems to be some concern on the part of some departments concerning the new “Works” procurement card management program. My suggestion is to attend the training to discover its capabilities and, yes, limitations. Then, if you still have a concern, address your issues to us. This tool provides department heads with information and management tools previously unavailable. So far the comments and feedback have been extremely positive.

One final note.....departments have asked in the past why we will not “recommend” a particular vendor or make/model of equipment. I do not encourage my staff to make recommendations of one vendor or equipment over another. Rather I ask that they provide you with information, both positive and negative, that we have received regarding the company and/or their products. I can not recommend a Canon copier when I use a Konica and have no first hand knowledge of the Canon. We encourage departments to communicate with other departments and sales personnel from multiple companies in making “experience” based equipment purchase decisions. There are many good vendors (and perhaps many not so good!) out there deserving of consideration. I would hope that Georgia Southern University provides maximum exposure and opportunity for vendors to do business with us.

In closing, we hope you find the information in this newsletter informative and encourage your feedback and recommendations.



George Horn
Director

SOLE SOURCE PURCHASES OVER \$5000

The procedure for establishing a Sole Source Justification changed effective July 1, 2004. Prior to this most recent change, the Purchasing Office was authorized to approve these requests in-house, thereby exempting these purchases from normal bidding requirements. This is no longer the case. The new procedure now requires that a “notice of intent to purchase” be posted to the State Procurement Registry for a period of 3 days prior to placing an order. Therefore it is imperative that for ALL such purchases expected to exceed \$5000 in a fiscal year, a Purchase Requisition with a Sole Source/Sole Brand Justification form attached be submitted to our office PRIOR to taking any action with a vendor.

If you have a purchase that was exempt in the past, this exemption may no longer be in effect.

Some examples of these purchases are Magazine/Newspaper/Radio/TV ads, magazine/newspaper subscriptions, SAT scoring reports, mandated training programs, etc. There are practically no exceptions to this requirement. A detailed explanation of Sole Source/Sole Brand Justifications can be found in the Policy and Procedures section of our website.

ADOBE ACROBAT PROFESSIONAL 7.0 SOFTWARE

Several months ago, IT Services purchased a bulk license of Adobe Acrobat Professional 7.0 for staff and faculty users. When you order a computer, Adobe Acrobat Reader is imaged on your hard drive as part of the standard software load. Many forms, currently used on campus, require Adobe Acrobat Reader 7.0. With Adobe Acrobat Professional 7.0, one can save copies of the completed forms in an electronic format as opposed to hard copies stored in filing cabinets. If you feel you need this software program to save forms, please call IT Services Help Desk at extension 5429 or email a request to helpdesk@georgiasouthern.edu.



TIMELINESS OF PURCHASE AND LEAD TIMES

The Purchasing section is committed to completing departmental purchases in a timely manner. Many factors determine the time to complete a purchase including, but not limited to, state procurement regulations, buyer workload, commodity purchased, availability of funds, vendors, time of year and other contract considerations. The following lead times (from receipt of requisition to issuance of purchase order) are considered to be necessary to ensure that procurement can be completed correctly and within established regulations:

- | | |
|--|-----------------|
| a. Bids greater than \$5,000 and not otherwise exempted | 30 working days |
| b. Sole Source/Sole Brand | 10 working days |
| c. Open Market purchases (less than \$5,000) | 7 working days |
| d. Contract Releases (purchased against state or agency contracts) | 10 working days |

These timeframes are in “addition to” the lead time the vendor requires to furnish and ship the materials ordered. We ask that you keep these timeframes into consideration when annotating your required delivery date on the requisition.

PURCHASING DEFINITIONS

Mandatory: required by order stipulated, i.e. specification, specific description, that may not be waived.

Lowest Responsible Bidder: the bidder, with the lowest price, whose past performance, reputation and financial capability is deemed acceptable.

Emergency Purchase: a purchase made in an exigency, often made under special procedures, designed to meet the urgency.

Appropriation: sum of money from public funds, set aside for a specific purpose

Purchase Order: a purchaser’s written document to a supplier formally stating all terms and conditions of a proposed transaction.

Excess Property: property on hand which exceeds the needed amount, but may be needed by other eligible users.



NEW PURCHASE REQUISITION FORM

The Purchasing Department is pleased to release a new version of our Purchase Requisition form. The new form looks very similar to the old form. But, we have added several required fields that should help expedite the purchase of orders and deliveries. You can find the form on Materials Management webpage: <http://services.georgiasouthern.edu/purchasing/webpg3.htm>. In addition, you will find an instruction page attached for your use in completing the form. You can complete the form in Adobe Acrobat Reader and print. You will need to use Adobe Acrobat Professional 7.0 for Windows to access the form and to save documents to your hard drive. IT Services has the latest version of this software and at your request will come and install the program on your computer. Go to the IT Services webpage: <http://services.georgiasouthern.edu/its/help.php>, click HelpDesk@georgiasouthern.edu and submit your request. If you are a Mac user, you will need Adobe Acrobat Professional 7.0 for Mac. The software can be ordered thru the “MSD” webpage: <http://www.msd.uga.edu/catalog/products.php?by=mfr&id=1075> and charge to your department P-Card.

Please discontinue using any old forms. The use of the old form may cause delays in processing your request.

WHAT IS A SPECIFICATION??

Purchasing always asks departments for specifications.....but what are they really asking for? A good specification should:

- identify the minimum requirements of the customer department. Too low or too high requirements waste dollars.
- allow more than one bidder to supply the good or service. Lock out specs are illegal and often cost the department additional dollars.
- be kept simple but concise/exact.
- be capable of being checked/verified upon receipt. A specification that you can not check is of little value.
- be reasonable in tolerances. Unnecessary precision costs money. Is there really a difference between a 20” and a 21” tire?
- be flexible. Inflexible specifications defeat progress. Vendors can suggest new products, innovations and/or substitutes that may meet your need.
- describe a requirement in relation to a function, task, or desired accomplishment without indicating a physical detail or design (i.e. a performance specification).
- describe a requirement in relation to a specific set of conditions, physical means, dimensions or details to perform a desired result (i.e. design specifications).
- incorporate a combination of design and performance specifications.

Only the department really knows what they need. Conveying that need to Purchasing can often be difficult and/or frustrating. Please understand that a good set of specifications is the only way we are able to fulfill your needs.

WHO’S AUTHORIZED TO DRIVE?

The question often arises as to who is authorized to drive University vehicles – staff, casual labor, students? A forthcoming University policy on vehicles states that “University employees (including faculty, staff and student employees) who hold a valid state drivers license and who maintain a good driving record are authorized to operate University vehicles on University business. Volunteers, including students who participate in a structured volunteer program which is organized, controlled and directed by the University and who hold a valid state drivers license and have a good driving record may drive University vehicles while in the performance of their University related functions.” This new policy will also address issue related to acquisition and disposition of vehicles and insurance.

WRIGHT EXPRESS FUEL CARD PROGRAM

The University has been using the Wright Express fuel cards for two years. The Wright Express cards are unique to a particular University vehicle and NOT an individual. The cards may be used at participating stations to purchase fuel, automotive supplies and minor maintenance while traveling. The cards are not to be used in the local area (Statesboro) for fuel purchases unless a problem with the Gasboy system has been identified and the campus has been notified via Email. When utilizing the Wright Express card, it automatically deducts taxes for which the University is exempt. In order to use the Wright Express card, the individual operator must have a Personal Identification Number (PIN) number assigned. The Fuel Authorization Form on our web page is to be used to request a PIN. Persons or departments desiring additional information on the Wright Express card or the Gasboy System may contact Joya Sabb at ext. 5226 for details.



FUEL AUTHORIZATION FORM USAGE

The Fuel Authorization form is utilized to update department employee and vehicle listings. Departments should use this form when employee(s), vehicle(s), or departments need to be added or deleted to the Gasboy and Wright Express system. It is also used to obtain gas keys or gas cards and/or replacements.

In order to make this form binding, the signature of the department head is required. The signature authorizes all additions and deletions to/from the departmental listing. Originals are to be sent to Materials Management and keep a copy for your records.

The Fuel Authorization Form is located on the Materials Management web page under purchasing forms:<http://services.georgiasouthern.edu/purchasing/purchase/download.htm>

If you have questions or comments, please contact Joya Sabb at 681-5226.

ANNUAL ASSET INVENTORY RESULTS

Property Control, like departments through-out campus, has experienced personnel turn over and hiring irregularities that have likely affected the annual campus wide inventory. Normally, inventory findings and results have been processed and in your hands much sooner, but with on going training, moves, and personnel shortages we were unable to provide timely results.

With that stated, we are working diligently to have the inventories results to you no later than mid month April. Upon receipt of this new inventory, departments should spot check their inventory to ensure that the necessary corrections were made. Discrepancies should be immediately reported to Property Control. Departments are urged to maintain their inventory records on an ongoing basis. Property Control will update records as proper documentation is received and acknowledgements of action taken returned to departments.

Note: Items identified as missing (MISS or STOLEN2006) on this year's inventory will remain in a missing or stolen status for at least two consecutive inventories before they can be removed. Department Heads are required to submit a report explaining the situation of items found missing in the "2006" inventory count to the Materials Operation Manager within "10 days" of receipt of the report.

RECYCLING TONER CARTRIDGES

The toner cartridge that we all use in our printers is recyclable and has a return value. The universities have an existing contract and are retuning used cartridges in numbers.

Property Control is the action office to contact for pick up. What we ask is that you please retain the package and its contents to recycle used cartridges. This is the only way they can be shipped and accepted by the contractor. There is no limit required for pick-up. Just call Property Control at 681-5544, 5226, 5381 or 871-1560 and someone will stop by promptly.



WORKS/PROCUREMENT (P-CARD) UPDATE

WORKS, an on-line, web based program for the P-Card program is being implemented on campus. Some of you have been contacted and have attended training. The remainder will be receiving notification very soon for training. Each cardholder will need to attend training with this program so the purchases can be signed off for payment and funds restored for your future use. The Student Affairs Division, University Advancement, and the Business and Finance Divisions have been trained. The Provost's Division is well under way and is approximately 50% complete. As with all new programs, there is a learning curve, however, we feel it is small. Materials Management is working with the Financial Accounting Department to make the transition of payments into Peoplesoft. Once the campus is trained and the final testing of Financial Accounting is complete, the cardholders will be on a live system. The cardholders will continue to submit an activity log, statement and receipts each month, but not required to submit a requisition for payment. We will notify you when this change takes effect. All payments will be made thru WORKS.



Reminders for WORKS Users only:

Change the account code from 714900 to the appropriate code for item/service purchased.

Also, cardholders need to add comments when signing off on transactions. This will come in very useful in the future and when managers/accountants are processing.

ELECTRICAL AND DATA INSTALLATION PROJECTS

Purchasing has been working with Physical Plant and Telecommunications to review all purchases of equipment installations that require electrical power and/or data line drops. Prior to any projects being installed in any building, you need to contact the Planning, Design, and Construction Section of Physical Plant for power requirements and Telecommunications for any data line drops. The Electrical Engineer will review your request and discuss all plans for upgrades and new installations. All projects, regardless of dollar amount, requiring high or low voltage must have the approval of the Electrical Engineer prior to any upgrades/changes. Some examples of this type of project: burglar & fire alarms systems, projectors, projector screens, copiers, etc. To discuss future electrical projects, please contact Planning, Design and Construction at extension 5781 and for data lines, contact Telecommunications call extension 5000.

PROPERTY CONTROL REMINDER

Every spring one or two departments relocate their offices. Surprisingly this year we have quadrupled last year's moves. As a reminder, when the dust settles and everything is in its proper place, don't forget to submit your inventory location changes to Property Control. If you have any questions as to the procedures, please don't hesitate to call us at 871-1560 or 681-5381.

KUDOS

My how time flies! I can't believe five years has come so quickly. It seems like yesterday Materials Management offered me an opportunity to excel. Since then, this job has been one BIG challenge, but your support and genuine efforts to account, track, safeguard, and inventory your department's assigned resources has made my job painless... at times. I can say without any reservation, campus wide, that the way we manage our resources has improved. My success and achievements were made possible by your support. I couldn't accomplish what I have without U! Many thanks, from Property Control.

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The Fuel Authorization form is utilized to update department employee and vehicle listings. Departments should use this form when employee(s), vehicle(s), or departments need to be added or deleted to the Gasboy and Wright Express system. It is also used to obtain gas keys or gas cards and/or replacements.

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If you have questions or comments, please contact Joya Sabb at 681-5226.

OFFICE DEPOT/VIP

It's getting close to year end again and many of you will want to order office supplies. If anyone needs any help, please feel free to contact Lynn Fail at lfail@georgiasouthern.edu or ext. 5538. Lynn is the new contact in Purchasing for the Office Depot/VIP statewide contracts. Recently there were catalog swaps held for both Office Depot and VIP. If you were not able to attend and still need a catalog from either supplier, please let Lynn know and she will be glad to get one to you. With Office Depot, you can have a catalog included in your next order by entering sku# 903984. It will be shipped free of charge with your other supplies.



YEAR END DEADLINES

As of press time the University had not yet approved the proposed year end deadlines for purchases, travel and so forth. The following dates are recommendations only:

- a. Purchases between \$5,000 and \$100,000 requiring bids
(i.e. non-statewide contract) 5/1/06
- b. Purchase <\$5,000 or on statewide contracts 5/26/06

No date has yet been set for cutoff of departmental purchases using the Procurement Card.. Departments should remember that purchases not posted to their VISA card by 6/15/06 will be charged to FY07.

MAINTENANCE/LEASE CONTRACT RENEWAL TIME

Once again it is the time of year that you will be receiving Emails regarding the maintenance/service/lease contracts renewal process. This year a minor change is taking place, in that, Materials Management will be referring some of the small dollar (<\$3,000 – departmental purchasing authority) contracts which may be renewed via departmental P-cards back to the departments. You may remember that last year a slight change was made with you receiving two contract listings. One list detailed contracts up for renewal only and the other list shows contracts that require re-bidding in order for the service to continue. The contracts that require re-bidding is a lengthy process which can take up to 30 days or more and which will require updated specifications in addition to a requisition authorizing funds. Please keep this in mind when submitting paperwork.



SPOTLIGHT ON VENDORS

This section will highlight new vendors and vendors who have communicated their interest in doing business with the University. Departments are encouraged to contact these vendors if you have a need for their good or service. Listing vendors does not constitute an endorsement or other recommendation by Materials Management.



Wiggins Office Equipment – Statesboro, GA
912-764-9067
Authorized Reseller and Warranty Service Center for Gateway Computers
Jimmy Wiggins, Owner
Jeff Page, Partner



Gateway Computers – North Sioux City, SD
Georgia Higher Education Account Executive
800-211-4952 ext 25255
Email: Stacey.Ratkiewicz@Gateway.com
For Personal Purchases



National Office Systems
Heather Novak-Interior Designer/Rep
125 MLK Blvd
Savannah, GA 31401
912-238-0539
Statewide Furniture Contract dealer



Mason, Inc
Shanna Kicklighter-Interior Designer/Rep
300 W. Broughton Street
Savannah, GA 31401
1-800-383-6537
Statewide Furniture Contract dealer



Tap Office Furniture Co.
Tim Parker
P.O. Box 395
140 Willingham Drive
Bolingbroke, GA 31004-0395
866-992-9856
Statewide Furniture Contract dealer



GEORGIA SOUTHERN MATERIALS MANAGEMENT
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Thank you for taking the time to read this newsletter. We look forward to meeting your needs and helping you accomplish your mission. We encourage you to stop by and visit us or, better yet, allow us to visit your departmental areas and meet with you.