



Purchasing \$ense

A Quarterly Publication from the OU Purchasing Department

www.ou.edu/purchasing/home/index.htm

Did you know?

OU is home to one of the two largest natural history museums in the world associated with a university. The Sam Noble Oklahoma Museum of Natural History has more than 7 million artifacts and contains 195,000 square feet on 40 acres of land. The museum exhibits include the largest *Apatosaurus* on display in the world and the oldest work of art ever found in North America – a lightning bolt painted on an extinct bison skull.

-Source, OU Public Affairs

Inside this issue:

Norman Year End Dates	2
HSC/Tulsa Year End Dates	3
Norman Property Control	3
Purchasing Roadshows	3
PeopleSoft Tips	4
Congratulations	4
FY 09 and FY 10	4
Meet Kenny Moore	5
Contact Us	5

The Purchasing Department Hits The Road!

The Purchasing department has developed a “Road show” project that has been underway for a few months. Many of you already contact Purchasing for assistance in a variety of areas – an entry problem you are experiencing in PeopleSoft, clarification on University policies or procedures, assistance with purchases requiring Regents approval, allowable purchases on the University Pcard, etc. The Road show project is a continuing effort to offer customer service and address **your** specific needs and questions. The goal is to tailor a presentation based on questions or issues that are unique to your department or experience level. After a discussion on the topics you would like addressed, the Purchasing Road show will travel to your department in response to your plea for help or invite you to the Purchasing conference room where parking is right next to the building! We can offer a wide variety of topic sessions for your entire staff or group, or can be as simple as one-on-one training or assistance for individuals. Please direct your questions or requests for a Road show to Jan Duke, Assistant Director, at 325-1321 or email jan-duke@ouhsc.edu. A Road show will be coordinated with you, and presented by select purchasing staff that will offer a program customized for you or your group, at your convenience and choice of location. Give us a call!

Sales Tax Permit Number

Recently, the university was given an updated sales tax permit number instead of a sales tax exemption letter from the Oklahoma Tax Commission. The permit still allows for OU to be exempt when purchasing from a merchant located in Oklahoma but is now listed as a form instead of a letter. The new permit can be found on the Purchasing website at http://www.ou.edu/purchasing/home/forms/tax_exemption_letter.PDF

Please use this updated form and permit number when requesting sales tax exemptions from Oklahoma vendors.

Norman Campus Project Year End Dates—Fiscal Year 2010

Although there is the need to establish due dates to guarantee processing of FY 2009 funded purchases, we recognize that emergencies and unplanned requirements will occur. In addition, we must also provide responsive support for summer research programs. We will make every effort to handle all emergencies, unplanned requirements, and special research projects during this year-end period. Please do not hesitate to contact Jean Wilson if something of this nature occurs during this period. Our goal is to process all FY 2009 purchases by the end of the fiscal year. We guarantee this goal if your requisitions are in our office by the dates indicated.

- ◆ Requisitions (marked FY09) for purchases in excess of \$250,000 that are to be charged against FY 2009 budgets, and which must be approved by the Board of Regents, must be received in the Purchasing Office by February 27, 2009.
- ◆ Requisitions (marked FY09) for purchases in excess of \$50,000 to be charged to FY 2009 budgets, other than those requiring Regents approval as noted above, must be received in the Purchasing Office by May 1, 2009.
- ◆ Requisitions (marked FY10) for annual leases, contracts, or purchase order agreements for the period beginning July 1, 2009 (to be charged against FY 2010 budgets) and that require competitive bidding, must be received in the Purchasing Office by May 1, 2009, and must clearly indicate that this will be a charge to FY2010 budget. Note: For more information and detailed instructions for correct entry of Peoplesoft requisitions, please reference the Purchasing website.
- ◆ Requisitions (marked FY09) for purchases of \$50,000 or less to be charged to FY 2009 budgets must be received in the Purchasing Office by May 26, 2009.
- ◆ Requisitions (marked FY10) for annual leases, contracts, or purchase order agreements for the period beginning July 1, 2009 (to be charged against FY2010 budgets) that are renewals (not requiring competitive bidding), must be entered by the department as PeopleSoft requisitions when directed.

February 27, 2009	Requisitions (marked FY09) for purchases in excess of \$250,000 to be charged against FY 2009 budgets and must be approved by the Board of Regents
May 1, 2009	Requisitions (marked FY09) for purchases in excess of \$50,000 to be charged against FY 2009 budgets
May 1, 2009	Annual leases, contracts, or purchase order agreements for the period beginning July 1, 2009 (to be charged against FY 2010 budgets)
May 26, 2009	Requisitions (marked FY09) for purchases of \$50,000 or less to be charged against FY 2009 budgets

The correct fiscal year should be clearly indicated in the justification comments of the requisition.

HSC and Tulsa Campus Projected Year End Dates—Fiscal Year 2010

The following dates apply to all orders from **FY10** funds that require **processing** prior to **July 2009**.

- ◆ Approved Requisitions to Purchase over \$250,000 requiring **June Regents'** approval and requiring formal competitive pricing should be submitted to Purchasing by 5:00 P.M. **Tuesday, March 31, 2009**.
- ◆ Approved Requisitions to Purchase less than \$250,000 requiring formal competitive pricing but not Regents approval, should be submitted to Purchasing by 5:00 P.M. **Friday, May 1, 2009**.
- ◆ Approved Requisitions to Purchase over \$5,000 requiring informal competitive pricing should be submitted to Purchasing by 5:00 P.M. **Tuesday, May 26, 2009**.
- ◆ Requisitions for construction and requests for proposals require an additional three weeks prior to the above dates.
- ◆ Requisitions received after these dates will be processed as time allows.

Additional instructions for Peoplesoft requisition entry can be referenced on the Purchasing website. (<http://www.ou.edu/purchasing/home/>). Contact the Purchasing department at 325-2811 for additional assistance or questions.

In this age, which believes that there is a short cut to everything, the greatest lesson to be learned is that the most difficult way is, in the long run, the easiest. ~Henry Miller, *The Books in My Life*

Norman Campus Property Control Equipment Inventory and Reutilization Services

Property Control is located at 2101 W. Tecumseh Road, Suite B in Norman. We offer a huge selection of office furniture such as desks, filing cabinets, chairs, bookcases and tables to the departments of the university. We also have various lab and medical equipment, power supplies and smaller office supplies like hanging files, paper trays, staplers and desk accessories. Visit our website at: http://www.ou.edu/property_control/reutilization/propcon_reutilization.htm.

The Property Control Store is open to the Public on Wednesday's only from 8:30am-2:00pm. The University faculty and staff are also welcome during store hours to purchase items for personal use. Items sold during store hours have to be removed from the store by 3:00pm the following day. Property Control has a web site showing some of the items offered to the public http://www.ou.edu/property_control/index.htm.

Property Control is also responsible at the end of each fiscal year for reporting to the state of Oklahoma all items purchased for \$5,000 and over by the University. Therefore it is vital that each fiscal year we complete all department validations as early as possible. Validation forms were sent to departments in August 2008. If your department has not returned this form to Property Control please email Patty.L.Bowman-1@ou.edu the Property Control Manager or Stephenk@ou.edu the Property Control Assistant Manager.

PeopleSoft Tips

Norman Campus

When choosing a vendor in PeopleSoft for your requisition, do not choose a vendor whose address is "FSS – PAYMENTNET". If you cannot find the correct address or the vendor is not in the system please use Best Source vendor number 0000019344. You can then enter the vendor name, address, and FEI number, if known, in the Comments section of your requisition.

HSC Campus

The e-mailed recycle message generated from PeopleSoft for recycled requisitions has changed. Before the recent upgrade the e-mail was from PeopleSoft. The e-mail message now is received from: FS900@ouhsc.edu [mailto:FS900@ouhsc.edu]. When you receive an e-mail from this address please open to find instructions on what revisions are required on the requisition.

Congratulations

The Purchasing department is proud to recognize some of our employees who have recently received promotions due to their hard work and dedication. Craig Sisco was promoted to Manager of the Facilities/Technology/Furniture team in January. Tami Tatum was raised from the title of Buyer to Senior Buyer in December. Teresa Bernhardt who had been the Purchasing Receptionist was elevated to an Administrative Assistant and Charity Johnson who had been a Pcard Assistant was promoted to Purchasing Assistant. Congratulations to you all!

End of Current FY09 and Start of FY 10 is Fast Approaching!

If your department is considering a purchase of equipment or service that will require Board of Regents approval (over \$250,000), and you hope to purchase with current fiscal year funds or anticipate a new FY10 purchase to be placed on or after July 1, please pay close attention to the dates below to assist you in your procurement planning.

Only two dates remain for the Board of Regents to meet before the current fiscal year ends June 30. Your last opportunity to submit an agenda item requesting the Board's approval of your anticipated purchase will be the scheduled meeting dates in May and June:

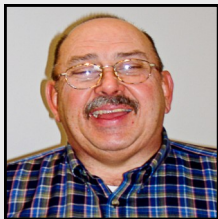
Regents' Meeting Dates - 2009	Due to Purchasing	Due to Admin Affairs
MAY 14-15	March 30	APRIL 6 –HSC/Tulsa April 8 - Norman
JUNE 22-24	MAY 12	MAY 19

Your agenda item will be one of many written for HSC, Norman and Tulsa campuses so the "**Due to Purchasing Date**" is very important. Please contact Purchasing with questions regarding additional time necessary for a competitive solicitation, evaluation and approval process. Purchasing main phone number: 325-2811.

**Serving the Norman,
Oklahoma City and Tulsa Campuses**

University of Oklahoma Purchasing Department
2750 Venture Drive
Norman, Oklahoma 73069
Phone: (405) 325-2811

**Meet
Kenny Moore**



Kenny Moore has been with OU since 1972 and works in Shipping and Receiving area of the Purchasing department for the Norman campus. Along with Gary Roberts, he handles all the shipments that come through the receiving department. He takes pride in making sure the items that come in are what the department ordered. Kenny was born in Norman. In his spare time he enjoys fishing, hunting and watching OU football. When asked how he would describe himself, Kenny stated "I am a very easy going person, sometimes, more or less." If you have any issues regarding shipping or receiving, give Kenny a call at 325-1052.

Welcome to these new employees!

- ◆ Mike Bowser, Buyer
- ◆ Kent Depe, Buyer
- ◆ Heather Sprunger, Pcard Team

Purcha\$ing \$en\$e is a quarterly publication of the
University of Oklahoma Purchasing Department.
Jean Wilson, Associate Director of Purchasing

Have a Pcard question?

Suzanne Carter—Pcard Team Manager
(405) 325-5092
Proadmin@ouhsc.edu

Norman Campus

OU Property Control Surplus Store
Now open for general public sales each
Wednesday, 8:30 AM—2:00 PM

Need to surplus unused items?

Patty Bowman—Property Control Manager
(405) 325-2641
Stephen Kraus—Property Control Assistant Manager
(405) 325-2782

Give our buying staff a call!



Nathan Baird, 325-5083
Mike Bowser, 325-3308
Pam Cantrell, 325-9606
Kent Depe, 325-2818
Linda Johnson, 325-2229
Mark Keesee, 325-8519
Brad Larson, 325-8965
Susan Mecham, 325-3091
Lisa Merrell, 325-4893
Ron Nealis, 918/660-3079
Randy Payton, 918/660-3082
Kira Reyes, 918/660-3091
Linda Royal, 325-7079
Craig Sisco, 325-5261
Tami Tatum, 325-5097
Sandy Totten, 325-5090