

March 2010



The University of Oklahoma

Purchasing \$en\$

A Quarterly Publication from the OU Purchasing Department

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

Did you know?

OU ranks first in the Big 12 and at the top in the nation in international exchange agreements with universities around the world. The University has 174 student exchange agreements with universities in 66 countries and plans to increase the number of students studying abroad by more than 50 percent over the next four years.

-Source,
OU Public Affairs

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Important Dates to Remember for Year End



Memos were distributed to all three campuses during the month of February to provide information regarding deadline dates for purchases by end of fiscal year 2010, and purchases or contracts anticipated for new fiscal year 2011. All are reprinted in this newsletter for your convenience, listed by campus. All memorandums are also posted on the Purchasing website.

HSC AND TULSA CAMPUSES New Fiscal Year Purchases

The following dates apply to all orders from FY11 funds that require processing prior to July 2010.

- ◆ 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. **Monday, March 15, 2010.**
- ◆ 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, April 30, 2010.**
- ◆ Approved Requisitions to Purchase over \$5,000 requiring informal competitive pricing should be submitted to Purchasing by 5:00 P.M. **Monday, May 24, 2010.**
- ◆ 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 (405) 325-2811 for additional assistance or questions.

Norman Property Control

Everyone is feeling the budget cuts across campus, come check out Surplus at 2101 W. Tecumseh Road. Surplus has all types of office furniture, office supplies and most anything you need for your department. If you want an item we don't have, the friendly staff will be more than happy to put you on our waiting list and notify you when the item comes in.

Surplus is open to the public on Wednesdays from 8:30 AM – 2:00 PM and has a huge variety of items that can be purchased for your personal needs. Check out our Bargain Corner as well for items offered at unbelievable low prices.

http://www.ou.edu/property_control/index.htm

NORMAN CAMPUS Fiscal Year End Submission Dates

Although there is the need to establish due dates to guarantee processing of FY 2010 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 2010 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 FY10) for purchases in excess of \$250,000 that are to be charged against FY 2010 budgets, and which must be approved by the Board of Regents, must be received in the Purchasing Office by February 26, 2010.
- ◆ Requisitions (marked FY10) for purchases in excess of \$50,000 to be charged to FY 2010 budgets, other than those requiring Regents approval as noted above, must be received in the Purchasing Office by May 3, 2010.
- ◆ Requisitions (marked FY11) for annual leases, contracts, or purchase order agreements for the period beginning July 1, 2010 (to be charged against FY 2011 budgets) and that require competitive bidding, must be received in the Purchasing Office by May 13, 2010, and must clearly indicate that this will be a charge to FY2011 budget. **Note: For more information and detailed instructions for correct entry of Peoplesoft requisitions, please reference the Purchasing website.**
- ◆ Requisitions (marked FY10) for purchases of \$50,000 or less to be charged to FY 2010 budgets must be received in the Purchasing Office by May 24, 2010.
- ◆ Requisitions (marked FY11) for annual leases, contracts, or purchase order agreements for the period beginning July 1, 2010 (to be charged against FY2011 budgets) that are renewals (not requiring competitive bidding), **must be entered by the department as PeopleSoft requisitions when directed.**

HSC PeopleSoft Standing Orders for Budget Year 2011

Instructions to enter FY11 requisitions in PeopleSoft have been posted on the Purchasing website for your convenience. The instructions are also printed below for your convenience. If you have questions or require additional help, contact any buyer or call the Purchasing main telephone number at (405) 325-2811.

Standing Orders for Budget Year 2011

1. Copy the current year's requisition only if you audit from the current purchase order.
2. Or, you may create a new requisition by entering the information from the current purchase order.
3. Enter the type of standing order in the comments field (property or equipment lease, maintenance, etc). Enter beginning and ending dates in the comment field (ex. July 1, 2010 – June 30, 2011), and enter the previous year purchase order number if applicable.
4. Create each line and enter the amount.

NOTE: DO NOT edit and budget check.

5. Put it in Waiting Bid status.
6. Save your requisition.
7. Purchasing will issue any necessary price comparison documents and notify the department of any necessary changes.
8. When 2011 budget becomes available, you must go back into your requisition, **change the requisition date** (ex July 1) confirm vendor # is valid, dollar amounts are correct, and change **Origin field** from WB back to **ONL**.
 - ◆Go to **Requisition Defaults**, and confirm **Distribute by = Amount**.
 - ◆Go to **Schedule Distribution** and confirm **Distribute by = Amount**.
 - ◆**Budget check, click the green approve checkmark** for pending approval and **save**. Your requisition will now go to workflow and your next line approver.

If you have any questions contact any of the Buyers in Purchasing for assistance.

BEWARE Toner Companies

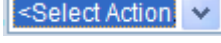


Please be aware of questionable sales tactics that are used from time to time, usually by companies selling toner cartridges for copiers. The main message is that you don't have to do business with these people, and you really shouldn't. They viciously overprice their product, and they use deceptive and very questionable sales pitches. It is our understanding that one of these companies has recently "struck," and so this message is timely and appropriate. Through our cost-per-copy contracts with BMI and Standley Systems, toner cartridges are already provided as part of the lease payments, so you don't need to (and shouldn't) buy toner cartridges from anyone else. If you have any questions, please call Purchasing at (405) 325-2811.

Norman Campus PeopleSoft Requisition Entry for FY11

Entering Budget Year 2011 Standing Orders/Requisitions

1. Create a new requisition by entering your information in **eProcurement**. If you have saved you annual orders under your template or favorites from previous years then select one or the other for a new requisition.
2. **Vital information** Enter **FY11** on **first line** also (**Please include purchase order number if requisition is replacing previous order**) in Justifications Comments. Also enter the type of standing order in this field (Property or Equipment lease, Maintenance, etc). Enter beginning and ending dates as well (ex. July 1, 2010- June 30, 2011).
3. Click **Save & Preview Approvals** once your requisition is complete. This will be your **“only”** save to notify Purchasing that a FY11 requisition is waiting for review. Requisition status will show **OPEN** under requisition status field. Purchasing will run on a daily basis a report for all open requisitions.

NOTE: Do Not Click Submit or Budget Check Button on the Confirmation Page.

4. When **2011** budget becomes available, Purchasing will notify requester after **July 1st** of any necessary changes.
5. Once notified by Purchasing please **Edit** or **Submit** and **Budget Check** your requisition. Your requisition will now go through workflow for your next line approver.
6. Click on eProcurement → Manage Requisitions →  click drop down select **Edit Requisition** and click  Update any Changes – Amount, Quantity, etc.
 - ◆ Update Vendor information if required
 - ◆ Save & Submit
 - ◆ Budget Check  on confirmation page

If you have any questions contact any Buyer in Purchasing for assistance.

2010 Regent's Meeting Dates

The following Board of Regents meeting dates are provided to assist you in your planning for any purchase over \$250,000. Purchase orders over this amount cannot be issued until approved by the Board of Regents of the University of Oklahoma. Please contact Purchasing as soon as possible for assistance to plan and allow adequate time to purchase goods or services requiring Regents approval. You will need to allow sufficient time for the bid process - in most cases this is a minimum of three weeks **prior** to the 'Due to Purchasing' date. For construction projects, a minimum of 6-8 weeks is required prior to the "Due to Purchasing" date. Please note the following columns. The first is the posted Regents meeting date. The second is the deadline to submit your **required information** to Purchasing for an agenda item. Your agenda item will be one of many written for HSC, Norman and Tulsa campuses so the lead time is very important. Required information to Purchasing includes bid results with completed matrix or approved sole source justifications, source of funding, etc. The third is the deadline for Purchasing to submit the completed agenda item to Administration and Finance.

Regent's Meeting Dates—2010	Due to Purchasing	Due to Administration and Finance
March 24-25	February 5	February 15
May 13-14	March 23	April 5 HSC/Tulsa, April 7 Norman
June 21-23	April 26	May 10
September 13-14	July 26	August 2
October 27-28	September 2	September 13
November 30— December 1	October 8	October 18

The dates for submission to Purchasing and Administration and Finance are estimates and subject to change. Please contact Purchasing to confirm correct deadlines to ensure an adequate timeframe for your entire solicitation, evaluation and approval process. Purchasing's main phone number is (405) 325-2811.



Green Tip

Who didn't hear it from their dad — TURN OFF THE LIGHTS WHEN YOU LEAVE THE ROOM!! Well, Dad may have been dead wrong about everything else (or so we'd like to think), but he was right about lights. By now you've probably heard that lighting is responsible for about 11 percent of a home's energy bills. And you've probably heard that a compact fluorescent light bulb (CFL) uses about 75 percent less electricity than an incandescent. No bulb saves energy like one that's turned **off**, however. So flip the switch. You don't have to tell Dad he was right! Source: The Daily Green

Sole Source Procurements Procedures

Sole Source Procurement Defined. A sole source procurement is any acquisition which, by the specifications, restricts the contract to one vendor or to one brand or is restricted by the designated funds for payment.

Sole Source Procurement Discussed. Examples of sole source procurements are:

1. Equipment for which there is no comparable competitive product.
2. Public utility services from natural or regulated monopolies.
3. A component or replacement part for which there is no commercially available substitute.
4. A component or replacement for which can and be obtained from the manufacturer.
5. An item where compatibility is the overriding consideration, such as computer operating software enhancements for an existing system.
6. A supply, equipment, part, service or supplier that, due to technically constraining factors associated with scientific research, are needed to ensure the fairness and validity of the underlying research.
7. A supply, equipment, part, service or supplier that is specifically and clearly required by a grantor, contractor, donor, or other provider of funds where the usage of those funds is specifically, explicitly, and clearly restricted by the funds provider.

There are two types of sole source assertions.

1. Supplier – One and only one supplier is capable of delivering the good or service needed, and that the supplier is peculiarly qualified in the entire market to do so.
2. Brand name – One and only one brand of good or service is capable of addressing the need, and that the brand is peculiarly capable in the entire market to do so.

When determining that a procurement is sole source, you should provide justification. You should not base it on personal or professional preference, but rather provide objective evidence. Because competition is not involved, you must demonstrate that the price is fair and reasonable. If your sole source procurement falls into the dollar value that must be approved by or reported to the Board of Regents, you may be called upon to defend the action before the Board. You may also be required to justify your sole source procurement in cases of audit, protest, public inquiry, litigation, or similar circumstance.

New Competitively Awarded E&I Contracts Announced

Through our participation in the Educational & Institutional Cooperative (E&I), we are pleased to announce new contracts with Grainger and Barnes & Noble available to OU departments. Effective February 1, 2010, a new five-year, competitively awarded contract went into effect with Grainger for MRO equipment, services and supplies. The new contract features enhanced discounts, additional incentives and even more savings opportunities than in the past. All Grainger accounts associated with all three campuses of the University have been tied into the new contract pricing. Effective October 1, 2009, E&I have competitively awarded a contract with Barnes & Noble.com. E&I's agreement with Barnes and Noble.com features an exclusive member discount structure and online savings opportunities through www.bn.com/eandi on books and other merchandise offered in the E&I online bookstore. Free standard domestic shipping is included. If you would like more information on these and any other contract opportunities with E&I, contact Craig Sisco, Manager-Acquisitions at 325-5261 or craig-sisco@ouhsc.edu.

Pcard Tips

January 2010 - How you file your documentation is an important factor in both the reconciliation and review processes. Every department files differently, but those who choose to file by merchant need to take extra care when getting their paperwork in order. Since merchant names often appear differently in SAM than they do on the actual invoice, it is always a good idea to make a note on the invoice and/or in SAM if the merchant name differs. This will make finding the invoice easier should you need to go back to it for any reason, and will help speed things along and avoid confusion when your yearly review comes around!

February 2010 - Fraudulent charges, double-billing, billing an incorrect amount- these are all valid reasons to dispute a charge in SAM. However, it is a good idea to contact the vendor first to see if the issue can be resolved since the dispute process often takes longer than it would for the vendor to just issue a refund. If you are unable to contact or resolve the issue with the vendor directly you can issue a dispute in SAM by clicking on the transaction from the Transaction Summary screen and select the Dispute option from the Summary Actions drop down list. SAM will then present a pop up screen where it will ask you to validate your email information and select a reason for the dispute. Once you have entered in the correct information and selected a dispute reason, explain in the Comments field what if any information you have about the charge. An example of this would include any contact with the merchant about the charge. Once this is complete, click Next at the bottom of the screen and then Submit. Remember to print the page so that you have the dispute reference number. In most cases the bank will credit the amount of the transaction you are disputing within a few weeks and contact the vendor directly to collect on the charge. If you haven't seen a credit appear or had any contact from the bank after two weeks of submitting your dispute, please contact proadmin@ouhsc.edu so that we can research the status of the dispute for you. Please note that situations like being charged state sales tax or accidental personal charges made on your University Pcard are not good reasons to dispute a charge. The dispute function is intended for use when the vendor has made an error, and it is the responsibility of the cardholder to ensure that they are not being charged sales tax or making inappropriate charges on their cards.

March 2010 - If you are coming across error messages in SAM and you are not sure why, make sure to check the web browser you are using. SAM only functions in Internet Explorer or Safari. All other browsers (like Mozilla Firefox) will cause error messages to appear.



Pcard Training Dates

HSC

April 7th, 1:30 – 3:00, SCB 111

May 5th, 8:30 – 10:30, SCB 111

Norman

April 7th, 8:30 – 10:30, OMU Sooner Room

May 5th, 1:30 – 3:00, OMU Sooner Room

Tulsa

No events are currently scheduled.

Please email proadmin@ouhsc.edu to setup a training session.

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

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

**Norman Campus
OU Property Control Surplus Store**
Now open for general public sales each Wednesday
from 8:30 AM—2:00 PM
2101 West Tecumseh Road, Norman
Call (405) 325-2782 or visit
http://www.ou.edu/property_control/index.htm
for more information.

Meet Lisa Merrell



Lisa's career with OU began in 2007 as a buyer, and was promoted in June 2009 to Acquisitions Manager for the Medical/Research team. Lisa enjoys interacting with and assisting the many departments her team serves. Lisa is not a native Oklahoman, but grew up in Chattanooga, TN and is a graduate of the University of Tennessee. She met her husband while working in Washington, DC, and since has lived in Lawton, OK, Chattanooga, TN, and Anderson, SC. She and her husband, along with their three children finally settled in Norman five years ago and are enjoying life as a Sooner.

Welcome back to Tami Tatum and congratulations to Michael Parrish on his promotion to Senior Buyer.

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

Give Us A Call!



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Lisa Merrell 325-4893
Ron Nealis (918) 660-3079
Michael Parrish 325-9846
Randy Payton (918) 660-3082
Kira Reyes (918) 660-3091
Linda Royal 325-7079
Sean Simpson 325-3308
Craig Sisco 325-5261
Tami Tatum 325-5097
Sandy Totten 325-5090

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Suzanne Carter 325-5092
Emily Pierce 325-9485
Rebecca Selby 325-5081

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David Seymour 325-2782
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