



# Purcha\$ing \$en\$e

A Quarterly Publication from the OU Purchasing Department

[www.ou.edu/purchasing/home/index.htm](http://www.ou.edu/purchasing/home/index.htm)

### Did you know?

The University of Oklahoma has established a comprehensive diabetes center with operations on the OU campuses in Oklahoma City and Tulsa to provide statewide leadership in diabetes treatment, research, prevention, information, education and awareness. The Harold Hamm Oklahoma Diabetes Center provides access to the latest developments in diabetes care and management through the clinical trials hosted by the center.

-Source,  
OU Public Affairs

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## Be a Post-Consumer Consumer

By thinking a little about the products you choose, you can promote recycling and make a big difference for the environment.



In order to support recycling efforts, look for products made from high percentages of post-consumer waste, which is the waste produced by the end consumer of a material stream. Post-consumer waste is the garbage that individuals routinely discard, either in a waste receptacle or a dump, or by littering, incinerating, pouring down the drain or washing into the gutter.

Post-consumer waste is distinguished from pre-consumer waste, which is the reintroduction of manufacturing scrap (such as trimmings from paper production, defective aluminum cans, etc.) back into the manufacturing process. Pre-consumer waste has been commonly used by industries for many years, and is often not considered recycling in the traditional sense.

Therefore, buying products with post-consumer content is an easy way to keep landfills lean. It avoids using virgin resources like forests and strengthens the market for recycled materials. We can separate all the metal, paper and plastic we want, but if no business remakes the scrap into something new, the cycle is broken. Many bottles, cans, bags, boxes and packaging materials are made with recycled content these days. So check labels. Choose a product that has a high percentage of post-consumer waste over one that does not.

Source: The Daily Green

## What Is Your EQ (Ethics Quotient)

Practicing good ethics is about making choices that may not always feel good or seem like they benefit you but are the "right" choices to make. Vendors often offer University employees gifts, prizes and incentives that may seem harmless enough, but you should take the time to educate yourself on the State Ethics Rules and how they apply to you. No gift from a vendor is acceptable if the intent is to influence the recipient, regardless of the value of the gift or number of recipients.

State officers and employees who are not elected officials may receive only \$100 per year in gifts or things of value in the aggregate in any calendar year.

Under the Rules, a "thing of value" is anything pecuniary, or a tangible good, a rebate or discount (not ordinarily available to a member of the public), transportation, lodging or entertainment. Things of value do not include (in part):

- ◆ any books, written materials, audio tapes, videotapes, or other informational promotional material related to the performance of a state officer's or state employee's official duties;
- ◆ a gift that is (1) not used, and (2) no later than thirty (30) days after receipt, is returned to the donor or delivered to a charitable organization and is not claimed as a charitable contribution [by the donor] for federal income tax purposes
- ◆ a plaque or trophy with a value that does not exceed two hundred dollars (\$200);
- ◆ modest items of food and refreshments, such as soft drinks, coffee, and donuts, offered other than as part of a meal;
- ◆ food and beverage consumed on the occasion when participating in a charitable, civic, or community event, or at any event to which all members of the Legislature are invited, which bears a relationship to the state officer's or state employee's office and the officer or employee is attending in an official capacity;
- ◆ greeting cards and items with little intrinsic value, such as certificates, which are intended solely for presentation;
- ◆ rewards and prizes given to competitors in contests or events, including random drawings, which are open to the public; rewards and prizes from contests or events which are not open to the public are also excepted if the state officer's or state employee's entry into the contests is required as part of his official duties;
- ◆ any gift accepted on behalf of the state of Oklahoma or a governmental entity by the Governor under Section 381 et seq. of Title 60 of the Oklahoma Statutes. In order to be deemed accepted, the Governor must be notified in writing of any gift received by a governmental entity, or person on behalf of a governmental entity, within ten (10) days of receipt of the gift. Notice of acceptance must be received from the Governor within the next thirty (30) days. Upon lack of a response from the Governor with the thirty (30) days of receipt of the notice, the gift is deemed rejected and must be returned to the donor;
- ◆ a meal or other food served at a meeting at which the state officer or state employee is an invited guest; and
- ◆ any gratuity provided at a meeting, conference, or seminar by sponsors, exhibitors, etc., the cost of which is not borne by a registrant to such meeting, conference, or seminar, and which is available to all registrants; and

## What Is Your EQ (Ethics Quotient) Continued

- ◆ any single item with a fair market value not exceeding Ten Dollars (\$10.00) provided to a state officer or state employee during a calendar year; provided, if a donor provides more than one such item to a state officer or state employee during a calendar year, any such additional items shall not be subject to this exception.

The obligations under these Ethics Rules apply to both the recipient of the gift and the donor. The Ethics Commission may investigate and impose civil penalties [against the individuals involved], require the return of the gift, or issue a public reprimand. Additionally, private individuals may institute a civil action in state district court regarding the Ethics Violations, and the attorney general or district attorneys may prosecute any crimes associated with the Ethics Violations.

Additional information may be found on the State of Oklahoma Ethics Commission website.

[http://www.ok.gov/oec/Ethics\\_Laws/State/index.html](http://www.ok.gov/oec/Ethics_Laws/State/index.html)

## Take Advantage Of New Learning Opportunities In PeopleSoft!

Purchasing is pleased to partner with the Accounts Payable Department to present PeopleSoft refresher courses to the HSC and Tulsa campuses. Classes are being offered in Choosing the Correct GL Code and PO Activity and Invoice.

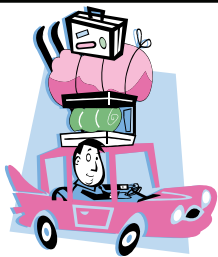
**HSC** staff can visit the HR Training Enrollment website located [http://hr.ou.edu/training\\_dev/catalog/](http://hr.ou.edu/training_dev/catalog/).

**Tulsa campus** should email [Kevyn-Bagby-Grayson@ouhsc.edu](mailto:Kevyn-Bagby-Grayson@ouhsc.edu) to enroll.

**Norman Campus** users interested in refresher training or new user requisition entry or approval training may enroll online through the Purchasing website located at [https://webapps.ou.edu/Purchasing/peoplesoft/forms/peoplesoft\\_form.cfm](https://webapps.ou.edu/Purchasing/peoplesoft/forms/peoplesoft_form.cfm).

Questions about any Purchasing PeopleSoft class or request for individual training may be directed to the Purchasing main number at 405-325-2811.

## The Purchasing Department Hits The Road!



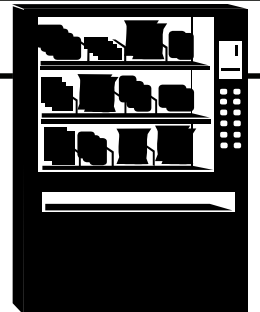
The Purchasing department has developed a Road show. Many of you have already contacted Purchasing for assistance in a variety of areas – a PeopleSoft entry problem, clarification on University purchasing policies or procedures, assistance with purchases requiring Regents approval, allowable purchases 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, a selected purchasing staff will offer a program customized for you or your group, at your convenience, and your choice of location at your department or at 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 it 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 405-325-1321 or email [jan-duke@ouhsc.edu](mailto:jan-duke@ouhsc.edu). Give us a call!

**Important Reminder!****OfficeMax®**

Please remember your online OfficeMax purchases for office supplies should be placed through the designated University OfficeMax website ([www.officemaxsolutions.com](http://www.officemaxsolutions.com)). This website will ensure University orders are not charged tax and that you are quoted University E&I contract pricing. Please be sure you are prompted for a login and password when you access the OfficeMax website. If not, you did not select the correct link or website.

**Vending/Beverages—Norman Campus Only**

The University through a competitive bid process awarded a contract to Great Plains Coca-Cola Company. All questions regarding the purchase of these types of products should be referred to Real Estate Operations on the Norman campus, at 405-325-6041. The list of available products can be found at <http://www.ou.edu/contracts/#VENDING>.

**2010 Regents Meeting Dates**

The following Board of Regents meeting dates is provided to assist you in your planning for any purchase over \$250,000. Purchase orders over this amount cannot be issued until first 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 three dates below. The first is the posted Regents meeting date. The second date is the deadline to submit your **required information** to Purchasing so an agenda item can be written. 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 date is the deadline Purchasing will submit the completed agenda item to Administration and Finance.

**Regent's Meeting Dates 2010****Due to Purchasing****Due to Administration and Finance**

September 13-14

July 26

August 2

October 27-28

September 2

September 13

November 30- December 1

October 8

October 18

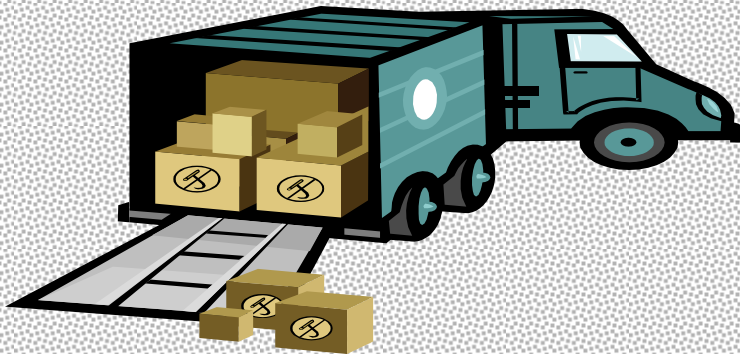
The dates for submission to Purchasing and Administration and Finance are estimates and subject to change. Please contact Purchasing to confirm correct deadlines to ensure an adequate timeframe for your entire solicitation, evaluation and approval process. Purchasing main phone number: 405-325-2811.

## Hauling and Change of Status Form—Norman

Property Control is coming to the end of Inventory Validation for FY10. Management would like to remind departments that if you and Property Control Staff were unable to locate items valued greater than \$5,000 on your account for three or more years, you may complete a Change of Status Report. This report can be found on the Property Control website [http://www.ou.edu/property\\_control/](http://www.ou.edu/property_control/) under Change of Status. Once completed it may be faxed or mailed to Property Control for removal of the missing item on your account.

This report also needs to be completed for items being transferred from one department to another, as well as an item stolen from your department (police report also has to be attached). Filling out this report correctly and having items removed from your account will help your department as well as Property Control with the status of your inventory for future FY inventory validations.

If you have any questions involving an item missing on your account please contact Property Control Manager Patty Bowman at 405-325-2641.



## Moving/Relocation Contracts

Newly hired staff and faculty moving to the Norman, Oklahoma City or Tulsa campuses are encouraged to use one of the OU contracted moving and relocation vendors that have been established through competitive solicitation. In most cases, the contracted moving vendor can arrange for relocation services anywhere in the United States and around the world. Most of the established contract vendors have local offices to better assist you. Moving estimates can be obtained from as many of the contracted vendors as desired, at the employee's discretion. Using one of the contracted vendors provides ease of payment, quicker response from the vendor about delivery, and local processing of damage claims. There are also two moving/relocation contracts that have been established by the Educational and Institutional Cooperative Purchasing (E&I) through a competitive process that are available to the University. A list of contracted vendors on the OU Moving/Relocation Contract are available on the Purchasing website located at [www.ou.edu/purchasing/home](http://www.ou.edu/purchasing/home), or access the E&I contracts at their website located at [www.eandi.org](http://www.eandi.org). Questions or assistance in using these contracts can be directed to Mark Keesee, Senior Buyer at (405) 325-8519 or by e-mail at [mark-keesee@ouhsc.edu](mailto:mark-keesee@ouhsc.edu).



## Property Clearance Checklists

Health Sciences Center and Tulsa Campus departments require terminating employees to return all university property in their possession before their last day on campus. The Property Clearance Checklists are designed to facilitate this process. Please ensure that these forms are submitted to the Purchasing department for Pcard Administration to verify terminating employees do not have access to a Pcard or Pcard information. Your cooperation in this process is appreciated.



## American Express Named as One of the “World’s Most Ethical Companies”

American Express has been recognized by the Ethisphere Institute as one of the World's Most Ethical Companies for 2010. Out of a record number of nominations for the award, American Express secured a hard-earned spot on the list by implementing business practices and initiatives that raise the bar for ethical standards within the industry.

"American Express is pleased to be recognized on the 2010 World's Most Ethical Companies list for the fourth consecutive year," said Leonard Shen, Chief Ethics & Compliance Officer. "The strength of a company starts with a deep commitment to ethics from the top, and is sustained with an unwavering dedication to these same high standards from employees at every level around the globe."

This is the fourth year Ethisphere, a think-tank dedicated to the creation, advancement and sharing of best practices in business ethics, corporate social responsibility, anti-corruption and sustainability, has published the WME rankings, which appear in Ethisphere Magazine's Q1 issue.

The methodology for the WME ranking includes reviewing codes of ethics, litigation and regulatory infraction histories; evaluating the investment in innovation and sustainable business practices; looking at activities designed to improve corporate citizenship; and studying nominations from senior executives, industry peers, suppliers and customers. Through in-depth research and a multi-step analysis, Ethisphere reviewed thousands of nominations from companies in over 100 countries and 36 industries in order to determine the winners.

"American Express' promotion of a sound ethical environment shines within its industry and shows a clear understanding that operating under the highest standards for business behavior goes beyond goodwill and "lip-service" and is intimately linked to performance and profitability," said Alex Brigham, Executive Director of the Ethisphere Institute. "This year's World's Most Ethical Companies award was more competitive than ever, because companies realize that making ethics a priority is critical amidst a tough economic environment." View the complete list at <http://ethisphere.com/wme-2010>.

## Pcard Tips

April - On occasion your approver might approve a transaction before you get a chance to change the accounting information or view it in SAM. Unfortunately, once a transaction is approved, it disappears from your Transaction Summary. However, as long as the cycle has not ended, you can still view and change the accounting information on these by searching for them specifically. To do this, select Transaction Review from the Transaction Administration drop-down. Once there, click on the Summary Actions drop-down list and select Search and you will be taken to the Query page for transactions. There will be three search criteria already filled in; delete the first two (Field: Approved Flag, Operation: Equal To, Criteria: No and Field: Final Mapped Flag, Operation: Equal To, Criteria: No) and then click Run at the bottom of the page. This will pull up any transactions you have for the current cycle.



May - As a cardholder it is your responsibility to ensure that your card information remains secure. If you have a document that has your credit card number listed on it you will need to white it out, as having exposed credit card information is considered an infraction.

## Conference Registrations vs. Employee Training

Several cardholders have recently questioned the difference between conference registrations and employee training. In general conferences are events that you attend, usually out of town, that cover a wide range of common topics. Employee training is something that you attend to gain specific knowledge. Examples of key words that are for training instead of a conference would be tuition, course, class, etc. As cardholders already know, conference registrations are allowable on the Pcard if they meet the following criteria:

1. If paying for the registration at the time of the event or after the event has occurred, then only a receipt or invoice is required. Pre-Paid Conference registrations are allowable Pcard expenses with the following in writing from the Conference Host.

i. Conference Host will not, as a standard practice of business, accept a Purchase Order.

\*Purchase Order meaning payment after the event has occurred.

OR, all of the following three criteria must be in place:

i. Conference host will apply a discount for early registration to the conference.

ii. Conference host will allow for substitution of participants.

iii. Conference host will refund 100% of the registration cost if the conference is cancelled.

\*Personal charges such as CME credits, additional meals, banquets, golf tournaments, etc. must be paid for separately and not on the Pcard.

Employee training expenditures regardless of the payment options should be reviewed by FSS/AP prior to payment and therefore is not an allowable expense on the Pcard. If you question whether or not you're dealing with a conference or employee training, please feel free to forward that information over to the Pcard Team for review at [proadmin@ouhsc.edu](mailto:proadmin@ouhsc.edu).

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

University of Oklahoma Purchasing Department  
2750 Venture Drive  
Norman, Oklahoma 73069

**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](http://www.ou.edu/property_control/index.htm)  
for more information.

**Meet Kira Reyes**



Kira has worked in Purchasing on the OU-Tulsa campus since March 2008. She grew up in the small town of Watonga, OK and moved to Sapulpa 7 years ago, loves living in the big city and doesn't think she could go back to the small town life. Kira is the single parent of 3 beautiful children Isabel-10 Edgar-6 Marcus-4. She spends most of her free time going to her kid's extracurricular activities and if she has time aside from that she enjoys running, swimming and reading. Fluent in Spanish, Kira says "Me encanta comida Mexicana". (I love Mexican food).



Congratulations to Nathan Baird and Kira Reyes who were both recently promoted to Senior Buyers. Also, please welcome our newest buyer, Heather Martin.

*Purchasing Sen\$e* is a quarterly publication of the University of Oklahoma Purchasing Department.

Jean Wilson, Associate Director of Purchasing

**Give Us A Call!**



***Acquisitions***

Nathan Baird 325-5083  
Pam Cantrell 325-9606  
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  
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

***Pcard***

Suzanne Carter 325-5092  
Emily Pierce 325-9485  
Brittani Schwartz 325-4637  
Rebecca Selby 325-5081

***Property Control***

Patty Bowman 325-2641  
Eric Harmon 325-1680  
Stephen Kraus 325-2782  
Jeremy Paden 325-2701  
David Seymour 325-2782  
Dennis Winfrey 325-1680