



Purchasing \$\$\$

January 2011

Did you know?

OU ranks number one in the nation among all public universities in the number of National Merit Scholars enrolled with a record 225 National Merit Scholars in this year's freshman class - 29 more than the previous OU record.

Source,
OU Public Affairs

HSC and Tulsa Campus Projected Year-End Dates

The following dates apply to all orders from **FY12** funds that require processing prior to **July 2011**.

- ◆ 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 14, 2011.**
- ◆ 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 29, 2011.**
- ◆ Approved Requisitions to Purchase over \$5,000 requiring informal competitive pricing should be submitted to Purchasing by 5:00 P.M. **Monday, May 23, 2011.**
- ◆ 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 but longer processing times should be anticipated when submitted after the recommended dates.
- ◆ 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.

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Norman Campus
Fiscal 2011 year-end deadlines and due dates

Although there is the need to establish due dates to guarantee processing of FY 2011 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 2011 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 FY11) for purchases in excess of \$250,000 that are to be charged against FY 2011 budgets, and which must be approved by the Board of Regents, must be received in the Purchasing Office by February 25, 2011.

Requisitions (marked FY11) for purchases in excess of \$50,000 to be charged to FY 2011 budgets, other than those requiring Regents approval as noted above, must be received in the Purchasing Office by May 2, 2011.

Requisitions (marked FY12) for annual leases, contracts, or purchase order agreements for the period beginning July 1, 2011 (to be charged against FY 2012 budgets) and that require competitive bidding, must be received in the Purchasing Office by May 2, 2011, and must clearly indicate that this will be a charge to FY2012 budget. **Note: For more information and detailed instructions for correct entry of PeopleSoft requisitions, please reference the Purchasing website.**

Requisitions (marked FY11) for purchases of \$50,000 or less to be charged to FY 2011 budgets must be received in the Purchasing Office by May 23, 2011.

Requisitions (marked FY12) for annual leases, contracts, or purchase order agreements for the period beginning July 1, 2011 (to be charged against FY2012 budgets) that are renewals (not requiring competitive bidding), **must be entered by the department as PeopleSoft requisitions when directed.**

OU INSTITUTIONAL FURNITURE CONTRACT



The OU Institutional Furniture Contract was established to simplify and improve the process for purchasing furniture at all University campuses and locations. The Purchasing Department solicited and awarded contracts to 37 vendors who represent 200+ brands of furniture. The new contract began July 1, 2010 with the option to renew for four additional one-year periods. For more information regarding the

OU Institutional Furniture contract, which includes a list of the contract vendors and furniture brands, you can visit the Contracts page on the Purchasing website located at www.ou.edu/purchasing. If you have any questions or need additional information regarding this contract, please contact Craig Sisco, Manager, (405) 325-5261 or craig-sisco@ouhsc.edu.

Please also contact Craig if you are interested in reviewing the specifications before the next furniture bid is issued or being part of the next furniture bid evaluation team.

OfficeMax update:

Russell Moseley is no longer the University's contact for office supplies from OfficeMax. All correspondences should be sent to Jeff House jeff-house@officemax.com with a copy to Sandy Totten in Purchasing.

OU TRANSCRIPTION SERVICES CONTRACT

Only vendors listed on the Purchasing website under the heading "Transcription Services" should be used. The University of Oklahoma currently has 25 fully executed contracts with vendors for transcription services, which can be found at <http://www.ou.edu/purchasing/contracts/services.html#transcription>. The listed vendors were awarded a contract after responding to RFP-10125-10, and comply with all university requirements and state law, as well as HIPAA. To use any of the listed vendors for medical transcription services, departments may contact the vendor directly. For transcription services other than medical, vendors designated as providing General Transcription Services may be used. The contract administrator is the buyer listed, and pricing and other contract specifics, as well as answers to questions can be obtained by contacting the buyer



Question: When should I enter a requisition?**Answer: As early as possible!**

A requisition is a request for the acquisition of goods and/or services and should be entered when a need is first identified. For all purchases in excess of \$5,000.00 a requisition must be entered and approved before a purchase order can be issued. The purchase order is issued by Purchasing and authorizes the actual purchase of goods and/or services. The requisition should be the first step in the acquisition process to allow purchasing sufficient time for processing in a timely manner. This is especially important when contracts or agreements of any kind are involved as the implementation process may take considerable time to resolve legal issues. We understand that there are occasionally unforeseen circumstances that might necessitate a rush purchase and we try to do everything possible to manage those situations.

In the event the vendor is unknown:

For Norman campus: A requisition should be entered with "Best Source" as the vendor and submitted for approval.

For HSC campus a requisition should be entered with "Best Source" as the vendor and should be left in WB (Waiting for Bid) status. Once a vendor is determined the vendor name should be entered, WB should be changed back to ONL and the requisition should be submitted for approval.

Please remember that once a requisition is entered it must still go through an approval process. It is the department's responsibility to track their requisitions through the approval process. If you need assistance in learning this process please contact Purchasing at 325-2811.

Pcard Tips

Post Dates vs. Transaction Dates

Billing cycles are based off of post dates not transaction dates. The transaction date is the date that your credit card is charged. The post date is the date that the transaction posts in SAM. Since SAM has a forty-eight hour delay, a transaction that has a post date of January 17th will not show up in SAM until January 19th. It is important to remember if you have a transaction near the end of the cycle that you go in before the cutoff date to reconcile that charge.

Ordering Over the Phone

Placing orders over the phone can be a time-saving way to do business, but it's also imperative to make sure your card information remains secure. To avoid compromising your Pcard security always be aware of your surroundings. Don't state your full credit card information in front of an audience. You should never repeat your name, card number and security code over the phone when co-workers, students, guests or other visitors are within hearing distance.

HSC – New User Training – SCB 111 – 2/10/11 – 1:30 – 3:00pm

Norman – New User Training – OMU Sooner Room – 02/10/11 – 8:30 – 10:00am

New Cutoff Dates

The cutoff dates for 2011 have been posted. Since no reminders to reconcile are sent out, it is a good idea to create a reminder for yourself each month in order to avoid missing cutoff dates. We suggest creating a calendar event in Outlook, printing out the cutoff dates and posting them at your desk or writing the cutoff dates in your calendar. The 2011 cutoff dates are linked below so you can start creating your reminders now!

HSC

http://www.ou.edu/purchasing/pcard/cutoff/hsc_cutoff2011.html

Norman

http://www.ou.edu/purchasing/pcard/cutoff/norman_cutoff2011.html

Pcard Compliance is Required

All Pcard holders are required to attend training in order to learn what the Pcard should and should not be used for.

While everyone does their best to comply, occasionally mistakes are made. Please be aware that while cardholders should not be afraid to use their cards, repeated and/or serious infractions of the Pcard policies and/or guidelines could result in your card privileges being suspended or revoked. For those departments that have repeated errors the Pcard Team will take steps to retrain the department cardholders and approvers, and/or conduct additional reviews to assist the department in becoming compliant.



Signing for Deliveries

The final step in the acquisitions/purchasing process is acceptance of goods and/or services. When signing for the delivery of goods or completion of services please be aware of what you are actually signing for. You should refuse to sign for any item that is delivered by mistake to the wrong department, delivered to an incorrect address, or when the services have not been completed.

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 Rebecca Selby



Rebecca was born in Enterprise, AL and moved around a lot with her military family until her dad retired in Midwest City, OK. She attended the University of Oklahoma and earned dual degrees in German and European Studies. She has been a member of the Pcard Administration Team since August 2009 and her favorite part of her job is traveling to the different campuses and seeing what new projects departments are working on. Rebecca recently got married and she and her husband, Jarrod, live in Norman with their dog, Millie, and evil cat, Pearl. Her hobbies include traveling, reading, cooking and obsessing over OU football.

Purcha\$ing \$en\$e is a quarterly publication of the University of Oklahoma Purchasing Department.

Jean Wilson, Associate Director of Purchasing

Acquisitions

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Dennis Winfrey 325-1680
Eric Harmon 325-1680



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