



# Purcha\$ing \$en\$e

April 2011

## Did you know?

OU is a leader among all American universities in the international exchange and study abroad programs. This past year study abroad by OU students increased by 20 percent. OU currently offers programs in over 50 countries and 100 cities in six continents. Students from more than 100 countries are enrolled at OU.

Source  
OU Public Affairs

## Sure You Can Buy a Printer with Your Pcard, But Should You?

### Hint: The answer is No

There is another article in this newsletter that talks about “undisciplined spend,” the problems that go with it, and what Purchasing is doing to help bring OU’s spend under better management. This article is closely related.

The University’s Managed Program for Copier and Print Equipment and Services went into effect October 1 of this year. One of the key tasks that the suppliers (BMI, Standley, Sooner) who operate that program for us must do is study. Study your department’s current set-up, practices, and needs with the intent of eliminating convenience desktop printers where they are clearly not needed. Desktop printing is the most expensive form of printing, the costs of the equipment and toner being the big offenders.

Over the past seven years, many departments have achieved tremendous success by eliminating entirely these desktop printers, directing the work instead to a centrally located multifunctional copier or multifunctional printer. This then allows for two-sided printing (which cuts paper costs in half) and – better – the complete electronic handling of documents (which cuts paper costs to zero). The significant additional benefit of this “directed printing” is that it keeps countless toner cartridges out of the waste and recycle streams. Under the Managed Program, toner is included in the lease cost of the device.

Purchasing doesn’t have the ability to restrict Pcard activity so that convenience printers can’t be bought. Even if it could, Purchasing doesn’t like having to be the “heavy hand.” Instead, the better effort is to appeal to your excellent sense of good stewardship. Please don’t use your Pcard to purchase printers, faxes, and scanners. Use your department’s multifunctional device and:

- Experience the most it has to offer,
- Save precious dollars in these tough economic times, and
- Keep stuff out of the waste / recycle streams

We’ll keep reminding you about this, but for now, Thank You for doing the right thing!

Burr Millsap  
Associate Vice President, Administration & Finance

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## While You Were Sleeping

OK. Never mind. Who has time to sleep? Let's start again...

While you've been working away, consultants have been busy, taking close looks at higher ed institutions across the country to find ways to save costs and streamline operations. One consulting firm in particular, Bain & Company (Bain), has studied UNC Chapel Hill, Cornell, UC Berkeley and others. Chief among Bain's findings is that schools allow too much "undisciplined spend." The result is pricing that is all over the place, hoards of suppliers that needlessly clog up the institution's database, and a hodge-podge of transactions that bog down acquisition and payment processes.

To address these weaknesses, Bain recommends directing spend to a limited number of suppliers and taking advantage of contracts developed through cooperative purchasing.

Your Purchasing Department is busy addressing these very conditions. For one thing, Associate VP, Burr Millsap, serves voluntarily as president of the board of directors of Educational & Institutional Cooperative Services, Inc. (E&I). E&I offers over 100 competitively awarded contracts that address 80% or more of a typical institution's O&M spend (O&M = Operations and Maintenance, or basically most spend that isn't payroll). E&I is higher ed's non-profit purchasing cooperative, owned by the schools it serves. See more at [www.eandi.org](http://www.eandi.org).

For another thing, Purchasing has firmed up plans to offer a "directed" market place that will provide you an on-line "Amazon.com" type shopping experience as you go about acquiring the products and services your department needs. You will be kept informed of the progress of this effort as it unfolds. Stay tuned!

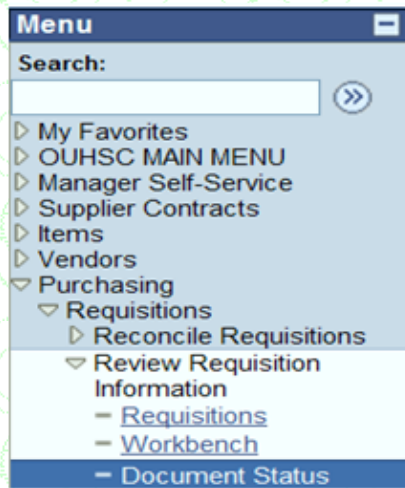
## Pcard Guide Update

The Pcard Guide has recently been updated and can be found on the Purchasing website at [http://www.ou.edu/purchasing/pcard/pcard/pcard\\_guide.html](http://www.ou.edu/purchasing/pcard/pcard/pcard_guide.html). While the Guide hasn't drastically changed, there are a few updates that cardholders should take note of. On the Yes list we have added commonly questioned purchases such as appliances, physician searches and webinars. On the No list we have added some new listings such as printers and foreign vendors. We have also added explanations and examples to several of the listings in an attempt to make the guidelines more clear. Please take a moment to review the updated Guide to ensure that all your purchases are in compliance. Any questions about the Guide can be directed to the Pcard Team by emailing [proadmin@ouhsc.edu](mailto:proadmin@ouhsc.edu).

## REMEMBER TO CHECK THE PO STATUS BEFORE PROCESSING INVOICES!

If you have an invoice to be paid against a Purchase Order, always check the status of the PO, to be sure it is in a *Dispatched* status before submitting to Accounts Payable or Financial Services for processing. PO statuses can be checked through Review Requisition Information/Document Status for HSC and Tulsa users, and E-pro/Manage Requisitions for Norman campus users. The menu selection is shown below as well as the panel illustration indicating the PO Status. If the status indicates anything besides *Dispatched*, contact the buyer or Purchasing for assistance before proceeding with the invoice payment process.

### HSC and Tulsa



Continued on page 4

### Document Status

**Business Unit:** OUHSC      **Req ID:** [0000057014](#)      **Status:** Approved  
**Document Date:** 02/22/2011      **Document Type:** Requisition      **Budget Status:** Valid  
**Currency:** USD      **Amount:** 567.300  
**Requester:** McGuckin, Wendy M.

Associated Document Customize | Find | View All | First 1 of 1

Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location
OUHSC	PO	<a href="#">0000053985</a>	Dispatched	02/25/2011	9100000763	ME-MAIN ST



Norman

**Menu**

Search:

- ▷ My Favorites
- ▷ Employee Self-Service
- ▷ Manager Self-Service
- ▷ Supplier Contracts
- ▷ Items
- ▷ Vendors
- ▷ Purchasing
- ▼ eProcurement
  - ▷ Buyer Center
  - ▷ OU Buyer Modification
  - [Create Requisition](#)
  - [Manage Requisitions](#)



<a href="#">3000013778</a>	United Engines CART #39-12	NORMN	03/11/2011	PO(s) Dispatched	Valid	5,690.73USD
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As the end of the current FY11 year approaches, Purchasing will make every effort to process as many orders as possible per previously announced deadlines or cut-off dates for year-end activity. Departments should pay particular attention to requisition entry and approval dates to ensure adequate time to dispatch the purchase order for the timely processing of invoices.

### Pcard Tips & Training Dates

Have you noticed the links at the bottom left of the SAM homepage? By using the links from the SAM homepage, you can easily start a new email message to the Pcard Team at [proadmin@ouhsc.edu](mailto:proadmin@ouhsc.edu), view the Pcard homepage, read the latest Purchasing newsletter or view the Pcard Guide.

Have a Pcard question? Emailing [proadmin@ouhsc.edu](mailto:proadmin@ouhsc.edu) is the quickest way to change passwords, make account changes or ask whether or not something is allowable. This way you will also receive written confirmation for your questions to keep with your records. We also suggest that you ALWAYS email [proadmin@ouhsc.edu](mailto:proadmin@ouhsc.edu) and NOT an individual Pcard Team member since they are often out of the office for reviews and training and it may delay your response.

#### Norman

OMU Sooner Room, April 19<sup>th</sup>, 8:30 - 10:00

OMU Sooner Room, May 4<sup>th</sup>, 8:30 - 10:00

OMU Sooner Room, June 9<sup>th</sup>, 8:30 - 10:00

To Sign Up Visit

[https://webapps.ou.edu/Purchasing/pcard/training/forms/norman/norman\\_form.cfm](https://webapps.ou.edu/Purchasing/pcard/training/forms/norman/norman_form.cfm)

#### HSC

SCB 111, April 19<sup>th</sup>, 1:30 - 3:00

SCB 111, May 3<sup>rd</sup>, 9:00 - 10:30

SCB 111, June 9<sup>th</sup>, 1:30 - 3:00

To Sign Up Visit

[https://webapps.ou.edu/Purchasing/pcard/training/forms/hsc/hsc\\_form.cfm](https://webapps.ou.edu/Purchasing/pcard/training/forms/hsc/hsc_form.cfm)

SAM is organized by cardholder, not accounting information. Departments often allocate charges to different accounts, some of which belong to them and some that belong to others. Because of this the Pcard team does not necessarily know which transactions belong to which departments based on accounting information alone. For review purposes the cardholder who made the purchase should keep their transaction documentation, or at least a copy of it, with the rest of their department's documentation. This applies even if the transaction ultimately belongs to another department.

**SPOTLIGHT  
ON**

### Transcription Services at OUHSC (Oklahoma City and Tulsa Campuses)

A variety of transcription services are used by departments on campus, primarily for clinical and research purposes. OU Purchasing has competitively bid transcription services and currently has contracts with several vendors. It is mandatory that only vendors approved and contracted through Purchasing be used for transcription services for the OUHSC campuses in Oklahoma City and Tulsa. The majority of transcription services provided at the OUSHC are supplied by these approved vendors; however, there are still a significant number of vendors being used that are not part of the approved list. See link below for list of approved vendors:

<http://www.ou.edu/purchasing/contracts/services.html#transcription>

Questions regarding terms of established contracts, how to participate in the review of bid specifications or special requirements for future solicitations, as well as general information regarding transcription services should be directed to OU Purchasing.

**OfficeMax Update**

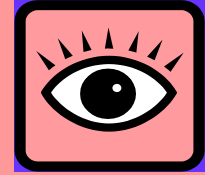
The New Sales Representative for OfficeMax is Paula Watson.  
E-Mail address is [paulawatson@officemax.com](mailto:paulawatson@officemax.com)  
Cell number is (214)592-6950

### UPS Shipping Update

For the past several months, Purchasing has been working with UPS on the recent problems that University departments have had with their UPS accounts. With these recent problems, UPS has assigned Tara Rushing as the new Account Manager and Virgel Smith as the Sales Support Representative to the University. Virgel has been working the past couple of months contacting each department to set up new accounts that will tie into the correct discounting structure. The University's main account (#7AE922) should not be used by departments and a new account will need to be set up specifically for your department. If you or your department is still using the main University account, if you are having any problems with your existing account, problems with CampusShip, or need to set up a new account, please contact Virgel at (405) 409-5660 or [vlsmith@ups.com](mailto:vlsmith@ups.com) and he can assist you. If you have any questions or problems regarding the UPS contract, contact Craig Sisco, Manager at (405) 325-5261.



**LOOK WHAT'S NEW!!**  
**FOR HSC/TULSA ONLY - NEW FEATURE IN PEOPLESFT**  
**REQUISITION ENTRY**



You've probably wished often for a way to attach supporting documentation (in PDF format only) for submission with a requisition you have entered. A new attachment feature allows you to do just that! All you need to do is click on the ATTACH button (shown below) in the Header Comments, browse to locate the document you want to attach and select the documentation to be included. If you want to view the attachment for any reason after you attach it, click the view button as shown below. If you are unable to view your documents, click the CTRL button and click View, and the document will open up in a PDF file. If you need assistance or have any problems, please notify Purchasing 405-325-2811.

**Header Comments**

**Business Unit:** OUHSC      **Requisition Date:** 03/21/2011  
**Requisition ID:** 0000057319      **Status:** Approved

**Retrieve Active Comments Only**      **Retrieve**

**\*Sort Method:** Comment Time Stamp      **\*Sort Sequence:** Ascending      **Sort**

**Comments**      Find | View All      First 1 of 1 Last

[Copy Standard Comments](#)      **Comment Status:** Active      **Inactivate** +

DEPT. CONTACTS: BRYAN BEAVERS,  
LANA HOLLAND, 271-2644  
  
Bid# B-11000-11  
Replaces SKC PO 52000 Due to Remit Address change. 3/2011

**Send to Vendor**     **Shown at Receipt**     **Shown at Voucher**

**Associated Document**

**Attachment**      **Attach**    **View**    **Delete**     **Email**

From -> REQ OUHSC-0000057319

**OK**    **Cancel**    **Refresh**

**Header Comments**

**Business Unit:** OUHSC      **Requisition Date:** 03/22/2011  
**Requisition ID:** 0000057329      **Status:** Approved

**Retrieve Active Comments Only**      **Retrieve**

**\*Sort Method:** Comment Time Stamp      **\*Sort Sequence:** Ascending      **Sort**

**Comments**      Find | View All      First 1 of 1 Last

[Copy Standard Comments](#)      **Comment Status:** Active      **Inactivate** +

SEE ATTACHED QUOTE# QN77952  
SW402286  
SOLE SOURCE  
  
ACTUAL AMOUNT FOR LINE 1 - \$33,950.00. MINUS A DISCOUNT OF \$10,200.00.

**Send to Vendor**     **Shown at Receipt**     **Shown at Voucher**

**Associated Document**

**Attachment** Quote\_for\_Solarwinds\_Req\_57329.pdf      **Attach**    **View**    **Delete**     **Email**

From -> REQ OUHSC-0000057329

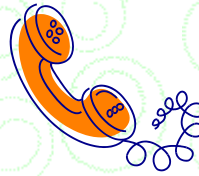
**OK**    **Cancel**    **Refresh**

Serving the Norman,  
 Oklahoma City and Tulsa Campuses  
 University of Oklahoma Purchasing Department  
 2750 Venture Drive  
 Norman, Oklahoma 73069  
 Phone: (405) 325-2811

**Meet Gene Dew**



Gene started with the University in September 1980 in the Institute for Primate Study's department. In March 1982 he transferred to Property Control and in November 1999 he transferred to the Purchasing Department. Gene was an art major in college and enjoys oil and egg tempera painting of People (but not portraits).  
 Congratulations Gene on reaching your 30 year anniversary with the University this year.



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**Acquisitions**

- Nathan Baird 325-5083
- Pam Cantrell 325-9606
- Linda Johnson 325-2229
- Mark Keesee 325-8519
- Brad Larson 325-8965
- Heather Martin 325-2818
- Susan Mecham 325-3091
- 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
- Brittani Schwartz 325-4637
- Rebecca Selby 325-5081

**Property Control—Norman**

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



**Goodbye  
 &  
 Good Luck**

**Lisa Merrell  
 Medical Team Manager**

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

**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.