



Purchasing \$en\$e

June 2011

Serving the Norman, Oklahoma City and Tulsa Campuses

Farewell American Express. Hello Visa!

A new Procurement Card (Pcard) program will be kicking off starting July 1.

Partly in response to the many comments about inadequate supplier acceptance of the American Express Card and partly in response to the Governor's appeal for State agencies to use the State's Pcard program, OU will be migrating to the State of Oklahoma's Visa Pcard with Bank of America. The move will start July 1, 2011.

As with most changes in the workplace, this one will probably be met with mixed reviews, although it is anticipated that the move to a Visa card will be well

received for the most part. We will try to make the migration as smooth and as painless as possible. Some updates (read that: new paper work) may be required for cardholders, reviewers, approvers and reconcilers. If there is anything that can be done to automate this process, it will certainly be pursued and every effort will go toward keeping the "misery needle" at zero.

Training on the new system's reconciliation and reporting tools will be administered timely as the program is rolled out. The migration does not change any of the University's policies and procedures regarding allowable Pcard expenditures. Those remain in effect as they always

have.

Keep yourself continually updated by frequently visiting the Purchasing website at <http://www.ou.edu/purchasing/>. Email updates will also be sent to current Pcard users. If you have any questions at all, please email them to Proadmin@ouhsc.edu



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NEW Pcard Program FAQ's

When will the change go into effect?

Our go-live date with Bank of America is set for July 1, 2011. We will have several Conversion Training sessions scheduled for the last week of June and the first week of July.

Do I have to attend additional training for the Bank of America Visa?

Yes, current cardholders will need to attend a Conversion Training session. New cardholders need to attend New User Training. Please note that current cardholders do not have to reapply to get the Visa. The training dates can be found on the Pcard homepage at <http://www.ou.edu/purchasing/pcard/index.html>.

How do I sign up for Conversion Training?

To sign up for Conversion Training, go to the Pcard homepage (<http://www.ou.edu/purchasing/pcard/index.html>) and select your campus from the Training link on the left side of the page. Select the session you wish to attend and follow the instructions on the page to complete your enrollment. Keep in mind that only current cardholders should attend Conversion Training; new cardholders need to attend a New User Training session.

For more FAQ's regarding the Visa card implementation: <http://www.ou.edu/>



Did you know?

The University of Oklahoma Libraries has added its 5 millionth volume, continuing a commanding lead as the state's largest research library and claiming one of the top two spots in size among Big 12 libraries.

Source
OU Public Affairs

Pcard Tips & Training Dates

Checks and Balances

In order to be in compliance with Pcard guidelines all transactions must be viewed and approved. This process has been set up as a system of checks and balances to ensure that the cardholders and approvers are proactive about monitoring their charges as well as to prevent fraudulent changes and misuse. By viewing and approving a transaction you are not authorizing a charge, but rather acknowledging that you are aware it is there and taking the appropriate measures to resolve it, whether this means changing the accounting information, making supplemental notes or reporting it as misuse or fraud. Please note that even if a transaction is disputed or fraudulent, you still need to view and approve the charge.

Year end Deadlines

HSC

Transactions posted prior to 07-01-11 will be charged to FY 11 budgets. Transactions posted on or after 07-01-11 will be charged to FY 12 budgets. For items ordered prior to 07-01-11 but with transaction dates of 07-01-11 or after, departments have the option of changing the transaction budget period from FY 12 to FY 11 in the SAM system prior to General Accounting downloading the July file for processing.

Norman

Pcard transactions generated from May 17th through June 16th, 2011 will be charged against FY 11 budgets. Any Pcard charges posted after June 16th, 2011 will be charged against FY 12 budgets. If there are any questions, please contact Kennecia Garrison at 325-2553.

Conversion Training and Card Distribution

Conversion training sessions for the new Pcard system will be held the last week of June and the first week of July on all three campuses. Please follow the three links below to sign up for a session on your campus.

HSC link— https://webapps.ou.edu/Purchasing/pcard/training/forms/hsc/conversion/hsc_form.cfm

Norman link— https://webapps.ou.edu/Purchasing/pcard/training/forms/norman/conversion/norman_form.cfm

Tulsa link— https://webapps.ou.edu/Purchasing/pcard/training/forms/tulsa/conversion/tulsa_form.cfm

Cards will be available for distribution beginning July 1st. Please review the calendar linked below for the times and locations when cards will be available for pickup. Please remember that cards will not be distributed to the cardholder or anyone else without the signed Pcard Agreement. You may find this form at <http://www.ou.edu/purchasing/home/pcard/forms/Receipt%20and%20Agreement.pdf>. If someone else is picking up the card for you please make sure that both of you sign the form and have it at the time the card is picked up.

<http://www.ou.edu/purchasing/pcard/index.html>

The University of Oklahoma - Property Control Department

2101 Tecumseh Road Suite B, Norman Oklahoma

Norman Campus Only

Hours of Operation

Property Control has a wide variety of items that are available to University departments including bookcases, chairs, desks, file cabinets, tables, office supplies and many other items. Property Control is open to all Departments on Monday and Tuesday 8 a.m. to 4:30 p.m., Wednesday 2p.m. to 4:30 p.m. and Thursday and Friday 8 a.m. to 4:30 p.m.

A surplus sale is open to the public every Wednesday from 8:30 a.m. to 2:00 p.m. unless otherwise posted on our website. A huge selection of Items are offered for sale with more items added on a regular basis. Check out the Property Control website for updated information, upcoming items for sale and other news at www.ou.edu/property_control.

Guidelines & policies

Property Control tries to satisfy as many needs and requests of University Departments for used items as possible as well as offer excellent customer service. Policies and procedures are set in place by University Administration, state law and other governing agencies. Note: Athletic items cannot be transferred to other departments or state agencies due to NCAA

Validation of Inventory

The end of Validation of Inventory for FY11 is fast approaching. If you have not scheduled an appointment with Property Control to have your items inventoried please contact Property Control Manager, Patty Bowman, or Assistant Manager, Steve Kraus to schedule an appointment as soon as possible. The State requires inventory reporting of all items \$5,000 and greater.



Remaining 2011 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 **pri-**

or 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 2nd 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 3rd date is the deadline Purchasing will submit the completed agenda item to Administration and Finance.

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Regents Meeting Dates 2011	Due To Purchasing	Due to Administration & Finance
June 20-22	May 2	May 13 (Norman), May 16 (HSC & Tulsa)
September 19-20	August 5	August 15
October 26-27	September 9	September 19
November 30-December 1	October 14	October 24

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. The Purchasing main phone number is 325-2811.



SKC Communication Products, LLC

Through a contract established with E&I Cooperative Purchasing, SKC Communication Products, LLC is one of the nation's leading distributors of telecommunications and conferencing solutions. SKC maintains a large in-stock inventory, maintenance and installation services to improve your productivity and operating costs. E&I's competitively awarded agreement with SKC provides members with access to the best possible pricing

and service on an array of products that include: Avaya IP Telephony Solutions and Conferencing Services, Polycom and TANDBERG Video Conferencing, Plantronics Headsets, Codian Video Conferencing, Crestron Control Systems, and Mitsubishi Projectors and Displays. Details about this E&I contract are located at the OU Purchasing website, www.ou.edu/purchasing under the "Contracts" tab or the E&I website located at www.eandi.org. If you have any questions or would like more information

about the E&I contract with SKC Communication Products, LLC, contact Craig Sisco at (405) 325-5261 or craig-sisco@ouhsc.edu.

The new Contract Administrator for the OfficeMax Contract is Senior Buyer, Nathan Baird. If you need assistance accessing OfficeMax online ordering or need to obtain an account number you may contact Nathan @ 405-325-5083 or nathan-baird@ouhsc.edu.

Hello / Goodbye

We would like to welcome these new employees:

Anne Ezzell—Pcard Team

Elizabeth Price—Buyer



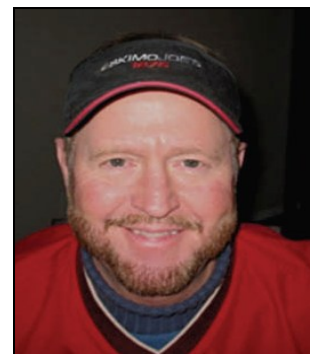
And best wishes to these departing employees:

Tamra Tatum
Sandy Totten
Heather Martin

See ya later, alligator!

Randy Payton, manager for the Tulsa Purchasing office retired in April after over 10 years of service to the University and moves on to a new and exciting phase in his life! Randy was hired as a buyer when the Tulsa Purchasing office was established in 2000 and was a one-man shop for several years before another buyer was eventually added to the staff. Randy was instrumental in training several buyers since and was a true asset to the Purchasing department.

Randy is anxious to explore "this retirement thing" and has many projects he hopes to tackle. It is always difficult to say goodbye so instead we simply say - until we see you next time Mr. Payton and we thank you for your outstanding service and dedication for more than a decade! Most of all, we sincerely thank you for the loyalty and friendship and anxiously await updates on all your adventures! Best wishes and the best of luck to you!



University of Oklahoma Purchasing Department
Serving the Norman, Oklahoma City & Tulsa Campuses

2750 Venture Drive
Norman, Oklahoma 73069
Phone: (405) 325-2811

OU Property Control Surplus Store
Open for general public sales each Wednesday
from 8:30am—2:00pm

2101 West Tecumseh Road, Norman, Oklahoma 73069
Call (405)325-2782 or visit
http://www.ou.edu/property_control/index.htm

MEET TERESA BERNHARDT



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Teresa Bernhardt joined the Purchasing department in 2006 as a receptionist and then promoted to an Administrative Assistant in 2008. In this position she reported directly to Purchasing Administration, assisting with various reports, tracking logs, regents quarterly reporting and was responsible for many administrative duties for the Purchasing Department. Effective June 1st, Teresa was promoted to Buyer and is looking forward to her new role and responsibilities of the position. Teresa's supervisor commented "Teresa is one of those employees that make a supervisor's job extremely easy - she has a wonderful work ethic and such a positive and up-beat attitude and personality. Teresa embraces new challenges and loves opportunities to learn something new!"

Teresa hails from Moore Oklahoma and has two grown sons, ages 23 and 21 and is a very proud Mom! Teresa says she loves to " garden, cook, shop and most of all, spend time with my family!" She commented her life motto is "Be the very best person you can be" and says she is very proud to be an OU employee working in the Purchasing Department!

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

Ron Nealis (918) 660-3079

Michael Parrish 325-9846

Kira Reyes (918) 660-3091

Linda Royal 325-7079

Sean Simpson 325-3308

Craig Sisco 325-5261

Pcard

Suzanne Carter 325-5092

Brittani Schwartz 325-4637

Rebecca Selby 325-5081

Anne Ezzell 325-9485

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

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