# Purcha$ing $en$e

## New "Shopping Carts" for Norman?

A new "shopping" experience is planned for the Norman campus in the near future. Somewhat patterned after Amazon.com, the web based "mart" will allow departments easy access to several available contracts.

Is this something new for higher education? Actually, no. Many institutions across the country have already established this kind of capability (University of Arizona, University of Virginia, Notre Dame, University of Missouri, Kansas University, and many, many others). Through a particular type of software, departments get what they need in a manner that is virtually the same as on-line shopping. The wonderful aspect of this capability is that it interfaces smoothly with the institution's budgeting and accounting systems. The whole "req-to-check" or "procure-to-pay" process is drastically streamlined. Not only do

users benefit, but also Purchasing and Payables departments. Lately, there have been several operational audits conducted of higher education institutions around the country. Noteworthy among them are University of North Carolina, University of California Berkeley, and Cornell. One critical and important finding is that decentralized buying (specifically under "small dollar" policies) results in a proliferation of vendors in the institutions' databases, uncertain terms and conditions that may harm the institution, and disparate pricing. The shopping tool discussed above comprehensively addresses these weaknesses by pointing employees to products and services available through contracts established by an institution's Purchasing department.

At some point, we will be asking for suggestions on what to name

the "mart." Until then, there is much to be done. The software product and company needs to be selected. Negotiations, contract execution, installation, and implementation need to take place. Because the Norman and HSC campuses operate different instances of Oracle/PeopleSoft, the plan is to focus on the Norman campus first.

Stay tuned.

### Inside this issue:

### Did you know?

OU is a leader among all American universities in international exchange and study abroad programs. OU currently offers programs in over 50 countries and 100 cities in six continents, and one in four OU students study abroad. Students from 120 countries are enrolled at OU.

Source
OU Public Affairs

## Property Control, 2101 Tecumseh Rd Suite B

**Hours of Operation**

Property Control has a wide variety of items for departments, such as bookcases, chairs, desk, file cabinets tables, office supplies & many other items. We are open for departments of all campuses, Monday & Tuesday 8am - 4:30pm., Wednesday 2pm - 4:30pm, Thursday & Friday 8am - 4:30pm.

Property Control also holds a sale for the public on most Wednesdays 8:30am-2pm. Check out our website www.ou.edu/property_control .

**Validation of Inventory – NORMAN ONLY**

It's that time of year again when Property Control will begin sending out e-mails addressing validation. Property Control validates items

$5,000 and over that the university has on inventory, and records those that are missing or stolen. We are required by the state to report this information at the end of the validation period, usually by August 15th.

**Watch for the new Property Control website coming soon.**

# Printers and Pcards – Clarifying the Guidance

A previous issue of the Newsletter appeared to communicate a "policy" prohibiting the purchase of printers using the Pcard. It caused a bit of discussion and drew complaints.

The objective of the managed copier and printer program is to nudge us toward working with documents electronically and avoiding printing altogether. The money savings in paper, ink, and toner is a big reason. Perhaps the bigger and better reason is sustainability. To the extent that each of us learn to work without hard copies, we avoid adding to the cause of trees being farmed and paper mills consuming energy, emitting gases, and creating waste. A key move toward this goal has been the elimination of many desktop printers in favor of shared multi-function printers and copiers. Still, there are those situations for which desktops printer are essential. The HSC, Schusterman, and Norman IT departments are working with Printing Services to address those needs. Here is the clarifying information that is posted on Purchasing's website.

The University has a mandatory contract for copiers and printers in support of the University's goals to decrease the consumption of paper and increase the electronic handling and storage of documents. Each supplier under the contract is tasked to help departments identify any truly unnecessary desktop/convenience printers so that they do not have to be replaced when worn out. To the extent it makes sense for the department, minimizing the number of these small printers avoids the cost of acquiring them. It also avoids the cost of replacing the inks/toners, which are exceedingly overpriced.

In the event a department wants a printer not offered under the contract, the University's IT departments, with the assistance of University Printing Services, offer a selection of economical printers that may be leased or purchased through the respective IT stores.

For the OU Norman campus, contact OU IT or University Printing Services.

For the OU Oklahoma City Health Sciences Center, contact OUHSC IT at 405-271-2203 or go to

http://it.ouhsc.edu/services/techsales/

For the OU Tulsa Schusterman Center, contact Tulsa IT at 918-660-3550 or tulsait-helpdesk@ouhsc.edu

> "Oklahoma law does not allow prepayments"

If, after exploring these alternatives the department demonstrates that it needs a printer from a commercial source (e.g., Of-ficeMax, Office Depot, etc.) an exception may be requested to use the department's Pcard. The request should be made via email to: proadmin@ouhsc.edu. The request should document actions taken and the rationale for the exception.

Warranties associated with printer purchases are contracts and likely contain terms and conditions that are not allowed by Oklahoma law. The contracts must be reviewed by Purchasing. Further, Oklahoma law does not allow prepayments; not more than one year-at-a-time of warranty coverage may be purchased.

# Printing Purchase Orders

The Purchasing buyers who provide Peoplesoft Helpdesk assistance answer many of your daily questions and requests for assistance. One of the questions most often asked, is "how do I print a copy of a purchase order"? For your convenience, the link is provided below for instructions to print a purchase order. Click on the training icon and select either HSC or Norman Peoplesoft Training Materials and select the Print PO file.

http://www.ou.edu/purchasing/index.html

# GovConnection

Through a contract established with E&I Co-operative Purchasing, GovConnection is dedicated to fulfilling the unique IT needs of higher education. GovConnection' s extensive experience managing government contracts provides the expertise and knowledge to adequately address the various needs facing higher education procurement. Customer requirements are fulfilled efficiently through a variety of purchasing mechanisms that result in accurate departmental billing and shipment support documentation. E&I's competitively awarded agreement with GovConnection provides members access to over 100,000 peripheral products from hundreds of manufacturers at the best possible pricing and service. Details about this E&I contract are located on 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 GovConnection, contact Craig Sisco at (405) 325-5261 or craig-sisco@ouhsc.edu.

# Records Storage and Destruction

The University has a multiple award contract for Records Storage and Destruction that has been in place for quite some time.  Departments using these services are now required to enter a requisition in Peoplesoft, regardless of the dollar amount so a Purchase Order can be dispatched for payment of monthly invoices.  This will assist Purchasing to track university spend on these contracts, monitor contractual terms, vendor performance etc.

You may view the contracted vendors on the Purchasing website under *Document Storage and Destruction Services:*  http://www.ou.edu/purchasing/contracts/

# Enterprise Rent-A-Car

Through a contract established with E&I Co-operative Purchasing, The University is currently utilizing the new State of Oklahoma and E&I (Educational & Institutional Cooperative) vehicle rental contract with Enterprise Rent-A-Car, now known as Enterprise Holdings, Inc. These contracts have exceptional pricing for the University to rent vehicles for department faculty and staff. Vehicles can be rented anywhere in the country, however reservations need to be made through OUHSC Motor Pool (OKC Campus) or Fleet Services (Norman campus) for you to obtain the low rates.  Details about this E&I contract are located on 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 Enterprise Rent-A-Car, contact Nathan Baird at (405) 325-5083 or nathan-baird@ouhsc.edu.

# 2011 REGENTS MEETING DATES

Board of Regents meeting dates are provided below 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 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.

| Regent's Meeting Dates – 2011 | Due To Purchasing | Due to Administration & Finance |
|---|---|---|
| October 26-27 | September 9 | September 19 |
| November 30 – December 1 | October 14 | October 24 |

The dates for submission to Purchasing and Admin Affairs 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.

# Update Visa Pcard Program

On July 1st the new Pcard program with Bank of America was rolled out and users began switching from American Express Pcards to Visa Pcards. Since that time the vast majority of cardholders have been trained, issued their new cards and have cancelled the old ones. The contract with American Express ended on September 30th and any cards that were not previously cancelled were deactivated that day. If you are one of the few cardholders that have not been trained or have signed up for training, we would recommend that you do so as soon as possible so that you can maintain an active Pcard. We have received many positive comments about the new reconciliation system and the flexibility that the Visa card brings. We truly appreciate everyone's cooperation in making this transition a success. As always if you have any questions or comments about the Pcard program, please email proadmin@ouhsc.edu.

## Pcard Training Dates

HSC - https://webapps.ou.edu/Purchasing/pcard/training/forms/hsc/new_user/hsc_form.cfm

Norman - https://webapps.ou.edu/Purchasing/pcard/training/forms/norman/new_user/norman_form.cfm

Tulsa – No dates currently scheduled

## Pcard Tips

### Changing Cycle Dates

Usually the cycles run from the 17th of one month to the 16th of the next for both banks. However, with American Express, if the last day of the cycle fell on a weekend or holiday, they pushed the end of the cycle back. Bank of America does the opposite when that happens; they end the cycle a day earlier. The dates for both programs can be found on the Pcard website under Cutoff Dates. Keep in mind that while each program has its own cycle dates, the cutoff dates for both programs are the same.

### Works Welcome Email

Once a cardholder, reconciler or approver is loaded into Bank of America's Works reconciliation system, they should receive a Welcome email. The email will come from Works and will have a subject line of "Pcard – Welcome to the Works Application!" There are two links in the email. The first one will take the user to set up their account and should only be used the first time a user logs in. The second link (at the bottom of the email) is the bookmark link that should be used to log in every other time. The email also contains the user's email address and user name, which should be noted as they are needed to set up the account.

If you are a new user or a previous cardholder and have attended New User or Conversion training, you should have received your Welcome email directly following the training session. If you attended training and have not yet received your Welcome email, please email proadmin@ouhsc.edu. If you are an approver and did not attend training, you will need to email proadmin@ouhsc.edu to have one sent to you.

### American Express Cancellation Reminder

Please keep in mind that our contract with American Express ended on September 30, 2011. After this date, all American Express cards will be deactivated. To prepare for this we suggest the following:

1. Attend training if you have not already done so.

2. Discontinue use of the American Express as soon as possible by transferring any reoccurring charges to the new Visa card.

3. Email proadmin@ouhsc.edu to cancel your card. (Note: For security reasons only the cardholder's name is needed, please do not send the full card number).

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 Stephen Kraus

If you have ever visited the Norman Campus Property Control Department or Surplus store, chances are you were greeted by the smiling face of Stephen Kraus. Steve has been with the University since 2006 and assumed the Assistant Manager position three years ago. Steve says his job allows him to meet and get to know many interesting people within the University and the public sector as well. Stephen's supervisor says he is "my right hand person" and says one of his many responsibilities is handling vehicle titles for the University and selling surplus vehicles to ensure top dollar return. Steve's background of twenty four years in the automotive manufacturing business made him a good fit for the task!  Stephen and his wife Sherry of 18 years have two children and two grandchildren. The couple loves to travel to anywhere with a beach and especially love it when Cozumel is their destination!

## G I V E U S A C A L L

### Acquisitions

Nathan Baird 325-5083

Teresa Bernhardt 325-2847

Pam Cantrell 325-9606

Susan Hendon 325-4893

Linda Johnson 325-2229

Mark Keesee 325-8519

Brad Larson 325-8965

Susan Mecham 325-3091

Ron Nealis (918) 660-3079

Elizabeth Price 325-2818

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 Norris 325-5081

### Property Control—Norman

Patty Bowman 325-2641

Stephen Kraus 325-2782

David Seymour 325-2782

Dennis Winfrey 325-1680

Eric Harmon 325-1680