



Purchasing \$\$\$

February 2013

Serving the Norman, Oklahoma City and Tulsa Campuses

CrimsonCorner: Seven Months, Counting, and Going Strong!

Norman Campus

Seven action-packed months have come and gone for all the Norman campus CrimsonCorner users. The switch was flipped July 1, 2012, introducing a significant change for ordering and paying for products and services. The implementation team wishes to thank all of the Norman campus users for their patience, support, cooperation, and collaboration. The effort now groups the University of Oklahoma with other big-hitter schools who have implemented the SciQuest Procure-to-Pay technology. Schools such as Yale, Stanford, UPenn, Virginia, Florida, Colorado, Arizona State, Missouri, and Texas A&M, just to name a very few.

CrimsonCorner puts the Norman campus one giant step closer to carrying out a best-practice in Supply Chain Management: Strategic Sourcing. By making it easy to purchase from selected suppliers who are considered vital to OU's mission, the University's spend can be better focused and monitored. Those suppliers are treated as strategic partners of the University so that the overall relationship brings benefits to both parties. CrimsonCorner also puts the University in the perfect position to know at the most detailed level what it's paying for products and services. Being able to benchmark this data against what other universities across the country are paying gives OU increased power and leverage relative to negotiating price, delivery, availability, and other important terms and conditions. A closely related CrimsonCorner objective is to actually reduce the number of suppliers in the University's database. As of June 30, 2012, there were over 20,000 vendors. That's simply too many.

CrimsonCorner will, in time, greatly speed up the procurement-to-payment process, making it leaner and more accurate. Three initiatives that the CrimsonCorner team immediately started on after the go-live date are (1) Advanced Dynamic Matching, (2) Procurement Card Settlement for Catalog Suppliers, and (3) Integration of Facilities Management's AIM (work order accounting) System. Advanced Dynamic Matching is already complete and has greatly facilitated the invoice matching and payment process. Procurement Card Settlement is currently being prototyped with Staples and will be rolled out to the other CrimsonCorner catalog suppliers soon. The integration of AIM into CrimsonCorner is in its final stages of testing; when up and running, this integration will greatly simplify key accounting processes, making them exceedingly more efficient.

In the future, as new strategically vital suppliers are identified - and vetted through the competitive process - they will be candidates as catalog suppliers in CrimsonCorner. Stay tuned! Change is almost never easy, and the initial change to CrimsonCorner proved no different. But, with seven months now under its belt, CrimsonCorner is settling into a rhythm and getting better every day.



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Did you know?

The University of Oklahoma has recorded an all-time high in both the number and total amount of private gifts received for any six-month period for the first half of Fiscal Year 2013 with almost \$140 million in gifts through Dec. 31.

Source
OU Public Affairs



The UNIVERSITY of OKLAHOMA
 Purchasing Department
 Mission Statement

The mission of the University of Oklahoma Purchasing department is to carry out the dual responsibilities of providing outstanding service and ensuring compliance with governing policies, regulations, and laws. Purchasing seeks the best value for the University through open, inclusive, and fair competition conducted under the highest ethical standards.

Ask Purchasing Email Address
All Campuses

Have a purchasing question or problem and aren't certain who to ask? You can now send them to a general email account which is monitored by Purchasing Administration. They will then direct your question or problem to the appropriate person. Add this link to your Outlook Contact List and you will never again be stuck trying to find the right person to help you with your problem.

Purchasing Management Staff - askpurchasing@ouhsc.edu

The University of Oklahoma Board of Regents
2013 Meeting Dates- All Campuses

The following meeting dates for the University Of Oklahoma Board Of Regents are 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.

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 3-4 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 1st date 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.

<u>Regents' Meeting Dates - 2013</u>	<u>Due to Purchasing</u>	<u>Due to Administration & Finance</u>
January 24-25	December 3	December 11 (Norman) December 12 (HSC/Tulsa)
March 27-28	February 11	February 20
May 9-10	March 25	April 3
June 24-26	May 13	May 22
September 18-29	August 6	August 14
October 23-24	September 9	September 18
December 5-6	October 15	October 24

The dates for submission to Purchasing and Administration & Finance are projections based on currently scheduled Regents' meeting dates 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.

Purchasing at Sam's Club: Norman & OUHSC

University of Oklahoma departments (Norman and Oklahoma City only) who would like to make purchases at Sam's Club may do so by following the policies and procedures that have been established by the Purchasing Department. Note: Tulsa campus departments are not authorized to purchase from Sam's Club. The Sam's Club Purchasing Policies and Procedures specific for each campus are located on the Purchasing website located at www.ou.edu/purchasing, "Policies and Statutes", "Buying Procedures".

Departments MAY NOT open individual Sam's Club accounts. The University Purchasing Department is responsible for authorizing departments to make purchases at Sam's, and is the holder of the Sam's Club accounts for the Norman and Oklahoma City campuses. At this time there are only two Sam's Club locations that are set up with the University accounts; Norman and Midwest City.

Before a purchase can be made at Sam's, a requisition must be entered and a purchase order issued by the Purchasing department. The purchase order must be taken to Sam's at the time a purchase is made. A new purchase order will need to be taken each time a purchase is made at Sam's. No standing or blanket purchase orders will be issued. Sam's will not check out the membership card or charge the University account without an official purchase order.

A copy of the purchase receipt must be forwarded to the Purchasing buyer immediately after the purchase has been made. For the Norman campus, a completed Food and Beverage Form must accompany the receipt and attached to a Change Order Request Form in Crimson Corner. For the Oklahoma City (HSC) campus, the original receipt must be sent to Financial Services to process payment immediately. The purpose of these procedures is to ensure that the Sam's accounts are in good standing and that all purchases have been paid for in a timely manner to eliminate the University accounts being frozen and avoid delays in departments able to purchase from Sam's.

Purchasing Entry or Approval Training: OUHSC PeopleSoft Users Only

Classes are required for PeopleSoft users who will be approving or creating requisitions within purchasing menu. The purpose of this training is to provide the user with detailed review of panels and fields along with helpful training material that can be used as a continuous reference.

Don't wait to the last minute to register new employees for purchasing access. Sign-up today to guarantee a spot for our next available class through HR. <http://hr.ou.edu/classcalendar/introduction.asp>

U-Haul Rental Procedure: All Campuses

Do you need a cargo van or box truck? We can help! University departments have been utilizing this contract for years and you can too. To better serve all three campuses, Purchasing will handle these rentals for you.

For all campuses, a PeopleSoft or Crimson Corner requisition will need to be entered for any services provided by U-Haul. The following information will need to be included on the requisition:

- Name of employee renting the moving vehicle, including contact information for the employee (telephone number, email address, etc.)
- Size of moving vehicle required and what other items that may be needed like a dolly, two wheeler, packing blankets, boxes and tape etc....
- Date and time the moving vehicle will be picked up and when it will be returned
- City where moving vehicle will be picked up
- City where moving vehicle will be returned

Once Purchasing receives the approved PeopleSoft or CrimsonCorner requisition, the buyer assigned will contact the U-Haul Corporate Office and schedule the reservation. The buyer will then give the reservation number and instructions to the employee/department renting the vehicle. The employee/department will then contact U-Haul to confirm all information and finalize the reservation. Once the invoice is received by the buyer from the vendor, it will then be forwarded to the employee/department for payment. The department will need to process this payment in a timely manner to avoid the University as a whole to be put on credit hold. If you have any questions regarding this contract, please contact Mark Keesee at (405) 325- 8519 or mark-keesee@ouhsc.edu.

“Best Value” is always the best way to go. - All Campuses

There are always more things to consider than who has the best price. The Purchasing Department has been using a best value system for a few years and you should too. According to Regents Policy, section 4.11.4, “purchases of \$5,000 or less do not require competition or processing by the Purchasing Department, although competition is recommended.” If at all possible, you should try to obtain multiple quotes for your product. When comparing these quotes, you can consider many factors including delivery capabilities, quality, experience, warranty, service, and price in your evaluation. This can ensure that you are receiving the best value for your department and the University.

What Does Signing Off Mean? - All Campuses

In Pcard training, cardholders and approvers are instructed that they should sign off on all of their transactions. However, some people question why signing off on charges is important. When a transaction is signed off in Works, that is an acknowledgement of reconciliation and serves as proof that the cardholder/approver reviewed the transactions during the billing cycle. It is important for auditing purposes to record that reconciliation was done in a timely manner. Occasionally, when there is a transaction that has an issue such as something that is being disputed or returned, cardholders/approvers are hesitant to sign off on the charge. Please remember that signing off is only an acknowledgement of reconciliation; it is not approval of the transaction. Comments can always be made in Works to document the situation but sign off should still occur to record the act of reconciliation.

Property Control's Hours of Operation - Surplus Store

Did you know that Property Control has a wide variety of items that your department could utilize? We carry bookcases, chairs, desk, file cabinets, tables, and office supplies to name a few. We are open for departments Monday & Tuesday 8:00 AM - 4:30 PM, Wednesday 2:00 PM - 4:30 PM, and Thursday & Friday 8:00 AM - 5:00 PM. Property Control also holds a sale for the Public on most Wednesday's 8:30 AM - 2:00 PM. A huge selection of items no longer needed or wanted by the University is offered for sale. Check out our website, www.ou.edu/property_control, for more information on items that we currently have in stock.

Validation of Inventory - Norman Campus

Have you received your validation of inventory email for FY13? If not, please contact Property Control, so we may schedule a date and time with you. As you may or may not know, Property Control validates items \$5,000.00 and over that the university has on inventory, found, missing, or stolen. We are required by state law to report these items at the end of the validation period which is usually in July. You may contact Property Control at (405) 325-2782.

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.html

Purchasing

Property Control

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