

Research Foundation ORACLE Upgrade and Shut Down

The Research Foundation is in the process of upgrading the current **ORACLE** version 11.03 to the new 11i version. This is necessary since **ORACLE** will no longer support the current version RF uses. The upgrade will enable the Foundation to gain immediate and future business improvements.

The RF ORACLE applications will be shut down, and unavailable for operational processing from the close of business on April 20, 2007 through the close of business April 30, 2007.

The new ORACLE 11i applications will be available for processing on May 1, 2007.

The Procurement Office asks that all departments plan ahead and review their needs for this time period. Research Purchasing requests that all Research purchase requisitions be submitted by close of business Tuesday, April 17, 2007 to ensure that all orders can be placed before shutdown. During the shut down period purchase orders will not be able to be issued, however, we will continue to place emergency orders thru the RF Procurement AMEX card.

In case of an emergency please contact **Mary La Corte**, Manager of Research Purchasing at **2-9849** or **Edith Koelln**, Supervisor of the Research Purchasing Agents at **2-6068**.

Research Accounts Payable/Travel offers the following suggestions to Campus Departments prior to shut down on April 20, 2007:

- Obtain Departmental Purchase orders from the Office of Grants Management to order *emergency* items
- Submit any needed Cash Advance requests for Field Trips or Human Subjects
- Submit all reimbursements requests as soon as possible
- Submit all Stipend Payment Requests
- Submit all Lecturer/Consultant Payment Requests
- Submit any needed Travel Advances
- Submit all Travel Reimbursements

In case of an emergency please contact **Bill LaCascia**, Manager of Research Accounts Payable at **2-6001** or **Rosalie Makarick**, Manager of Research Travel at **2-6022**.

During the shut down period the Procurement Office will work with Campus personnel to provide a plan of action to find solutions to any emergency situations that may arise.

New York State Lobbying Law Requirement

Effective January 1, 2006, The New York State Finance Law was amended to regulate efforts to influence the procurement process. All State facilities must abide by strict procedural requirements relating to the award of any contract/purchase order for goods or services in excess of \$15,000.00.

All "contact" relating to potential awards in excess of \$15,000.00 including telephone, electronic, mail or in-person between vendors or their representatives and the awarding State entity is now regulated. Only designated Agency personnel may have contact with the vendors or their representatives or lobbyist. In the case of Stony Brook University, the only designated contact person/s are Procurement Office Staff. It is strictly prohibited for anyone else to have contact with the vendors during the procurement "restricted period".

The **restricted period** starts when the end-user department submits their State requisition to the Procurement Office and ends when an award (Purchase Order/Contract) is officially forwarded to the vendor. During this restricted period, all inquiries must be referred to the designated Procurement Office contact.

Purchasing Furniture on State Funds

When purchasing furniture please allow five to nine weeks lead time. This includes the required release from Corcraft (NYS Department of Correctional Service). New York State has contracted with approximately 240 furniture manufacturers.

- **James Roshilla** specifically represents Corcraft Preferred Source (516) 852-1992

The following dealers represent many of the manufacturers on State Contract.

- **Kevin Clark** (631) 684-0664
- **Evenson Best** Contact: Suzanne Czak (516) 918-6600
- **Innovative Office Environment Inc.** Contact: Luke Davis (212) 920-3076
- **Work Place Group** Contact: Arthur Desin (631) 273-7500

The following dealers specialize in one particular manufacturer.

- **WB Woods** in Herman Miller Contact: Beth O'Boyle (212) 685-1355
- **Legendary Office Furniture** in Hon Contact: Valerie Barnett (631) 988-9300
- **Hudson Bay Environment** in SteelCase Contact: Judy Bayer (631) 218-2715

It is strongly advised to contact the appropriate Purchasing Agent when placing furniture orders. Staples Business Advantage is the designated University office supply vendor and is not recommended by the Procurement Office as an office furniture supplier as most furniture is available on State contract at a much lower cost. Should you have any questions please contact **Lynn Patterson at 2-4154** for State funded orders or **Cyril Rickson at 2-1416** for Research Foundation funded orders.

Are you experiencing Vendor Problems? We need to know

Any department that is having ongoing unresolved issues with a vendor should be documenting the problems. The documentation should be forwarded to the appropriate buyer with a copy to Joanne Joy, Manager of State Purchasing. Upon review by the Procurement Office, should the vendor's performance rate prove unsatisfactory, that vendor will be deleted from any future bid lists.

Staples 2007 Vendor Fair

Mark your calendar and save the dates - **Staples 2007 Vendor Fair** is scheduled for

Monday, April 16th at the Health Science Center

Tuesday, April 17th at the Student Activity Center

Join us in celebrating the Staples Office Supply Program

Product demonstrations - Free Samples - Door Prizes

Stay tuned for further details

You won't want to miss it!

On Site Enterprise Rent-A-Car Location

Enterprise Rent-A-Car is located on the basement level of the Melville Library, behind the book store. Enterprise offers a wide variety of vehicles, ranging from compact cars to small and large 4x4's, Luxury cars, Minivans and Cargo Vans. State contract prices are given to all Stony Brook employees for both business and personal use. For reservations call the on site location located in the **Melville Library from Monday thru Friday from 8:00am till 5:00pm at 2-1133**. For rentals needs before or after these hours please call the Enterprise location in Centereach at 631-588-0200. When the office in the Library is closed, the phones are forwarded to the Centereach Location.

Revised Research Foundation Forms

Please see the Procurement Office website <http://www.stonybrook.edu/procurement> for the Revised Research Foundation Travel Reimbursement Form, and the Research Foundation Independent Contractor/Lecturer Form.

Please note that the Research Foundation Travel Form is to be used for Travel Reimbursements only by RF Employees, State Employees, and Students.

All other travelers are to use the RF Independent Contractor/Lecturer Form. This includes all Travel Expenses for Independent Contractors, Lecturers, Candidates and Conference Participants which are listed at the top of the form. Please see **note** next to the Resident Alien checkbox, indicating that a copy of the Permanent Resident Card is required. ***Only Non-resident Aliens require a review by Human Resources.***

All payments to US Citizens and Resident Aliens on Sponsored Funds can be submitted directly to the Office of Grants Management. When using IDC funds please submit the forms directly to the Procurement Office.

Reminder for Visa Cardholders!

The Visa Procurement card can only be used for goods and services that are purchased for "Official New York State Business". The Procurement Card can never be used as a department's "slush fund". The card cannot be used for greeting cards, parties, or gifts of any occasion.

Prompt Invoice Payment Authorization

As a reminder, Campus departments are advised to promptly respond (within 5 business days) to written and electronic requests for invoice payment authorizations. As an agency of the State of New York, Stony Brook University is required to adhere to the State's Prompt Payment Legislation. This legislation requires that interest be paid to a vendor whose invoice is not paid within thirty days of having been received in the Procurement Office. If there is a discrepancy with an order received in your department, immediately call the Vendor and the Procurement Office. The Procurement Office must be notified of all discrepancies, this will allow us to stop the clock until the discrepancy is resolved so that interest will not accrue during the resolution period.

Stony Brook Foundation Equipment Purchases

Stony Brook Foundation (SBF) account managers are reminded that the purchase of equipment such as computers and other "high-dollar" equipment valued at \$1,000.00 or more must be initiated by submitting a SBF purchase requisition to the Procurement Office. Employees of Stony Brook University, Stony Brook University Hospital, the Long Island State Veterans Home and any other University affiliated offices or departments are not authorized to purchase "high-dollar" equipment from a vendor without the prior approval of the Procurement Office. Prior approval constitutes the issuance of a formal purchase order by the Procurement Office. If a campus department deems an order to be an emergency they must contact the Procurement Office for written authorization prior to purchasing the goods. The Procurement Office staff is available weekdays from 8:00 AM to 5:00 PM to assist you in placing and expediting your emergency orders. The Procurement Office can be reached at 632-6010.

Also, all goods ordered for Stony Brook University, Stony Brook University Hospital, the Long Island State Veterans Home and any other University affiliated offices or departments funded by the Stony Brook Foundation must be shipped to the respective University receiving address. Under no circumstance are deliveries to be made to an address other than an official, University-related receiving address (i.e. Central Receiving, SBUH Receiving, LISVH Receiving, Brookhaven National Lab, VA Medical Center, Cold Spring Harbor Lab, etc).

Printing Services

Stony Brook Foundation (SBF) account managers are reminded that all requests for printing services (i.e. Fantastic Graphics, FedEx Kinko's or Maryhaven) must be initiated by the submission of a SBF purchase requisition to the Procurement Office for the issuance of a purchase order number. Printing service vendors have been advised not to accept printing orders unless they have a valid SBF purchase order on file.

FY 2006-2007 Lapsing Funds Calendar

FINAL CUTOFF DATES

Please contact Procurement Commodities at 632-6046 and Procurement Services 632-9093 with any questions.

Cutoff Date for FY 2006-2007 Transactions	Day of the Week	Item
23-Feb	Friday	Last day to submit all non-contract (which will require bidding) over \$150K for State Accounts with an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007.
16-Mar	Friday	Last day to submit all contract items regardless of \$ amount with a lead time requirement between 60-90 days and an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007.
23-Mar	Friday	Last day to submit all non-contracts (which will require bidding) items between \$20K and 150K with a lead time requirement between 45 – 60 days and an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007.
13-Apr	Friday	Last day to submit all contract items regardless of \$ amount with a lead time requirement no greater than 60 days and an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007.
27-Apr	Friday	Last day to submit all contract items regardless of \$ amount with a lead time requirement between 30 and 45 days and an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007.
4-May	Friday	Last day to submit all items between \$5k to \$20k with an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007.
25-May	Friday	Last day to submit requisitions to Procurement for all items under \$5K with an expected delivery date no later than July 13, 2007 , all services must be completed by June 30, 2007. No exceptions.
25-May	Friday	Last day for VP rollovers to be identified.
1-Jun	Friday	Letters sent to departments and vendors notifying them of the cutoff dates.
29-Jun	Friday	Last Business day of the fiscal year.
13-Jul	Friday	For State and IFR accounts, last day for receipt of items to be paid against fiscal year 06/07 funds.
20-Jul	Friday	Last day to submit all invoices to Procurement for processing. Cancellation of all non-contract encumbrances.
10-Aug	Friday	Cancellation of contract encumbrances.
17-Aug	Friday	Last day for departments to submit budget transfers. Last day for departments to submit journal transfers. Last day for departments other than Accounting to process journal transfers and budget transfers.