

# Dollars & Sense

Fall 2010 Volume 5, Issue 2

Purchasing Resource Services

## Save Time and Money on Groceries with Peapod

Going offsite to purchase groceries is costly and risky. There is a better alternative for groceries—Peapod, a Northwestern University Preferred Vendor. Whether you are purchasing soft drinks, snacks, deli trays, or paper goods for group meetings and special events, ordering from Peapod should save you time and money. Here's why:

- **Save time and hassles.** You can shop online and have your order delivered at a convenient time.
- **Save money.** There may be a perceived savings with on-site shopping. However, any such savings vanish because of lost productivity as a result of the time it takes to go to the store, shop, bring groceries back to the office, and then potentially have to submit an expense report to request reimbursement.
- **Reduce risk.** When an employee travels to a store during normal work hours, the University is exposed to considerable risk. Ordering from Peapod eliminates that risk.
- **Eliminate sales tax.** Peapod ensures that all NU accounts are tax-exempt. Retail stores often do not honor this tax-exemption.
- **Preserve Northwesterns' tax-exempt status.** There is also risk associated with potential abuse of our tax-exempt status for personal use. If this abuse happens, we risk losing our tax-exempt status. Using Peapod eliminates that risk.
- **It's easy.** The P-Card is the perfect buying tool to use for exactly this kind of non-purchase order procurement.
- **Stick to your list.** A running tab on the Peapod screen helps you stay on budget, buying only what is needed and avoiding spontaneous extras.

Peapod online grocery shopping and delivery is the most efficient and convenient way to buy groceries that are approved, per NU policy, for the office, meetings and events. For more details, visit the [PRS Peapod webpage](#).

**Peapod**<sup>®</sup>



**SPECIAL OFFER FOR FIRST TIME PEAPOD USERS — \$20 OFF YOUR FIRST ORDER!**  
**To set up an account, follow these steps:**

- 1) Go to [www.peapod.com](http://www.peapod.com) and follow the New Customer "Consumer" Registration instructions.
- 2) Use your procurement card (P-Card) for financial information.
- 3) Use your Northwestern work email address as your primary email address.
- 4) Use "NORTHWESTERN" as our exclusive business promotional code for \$20 off your first order in your new NU Account.

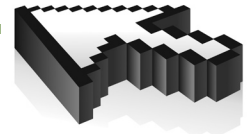
**Special Delivery Fees:** Pricing: \$7.95 "Consumer" delivery fee for orders \$75-\$100 or \$6.95 "Consumer" delivery fee for orders over \$100. Be sure to select the "CONSUMER" option.

When planning for upcoming academic events, keep in mind that Peapod has a wide variety of beverages, snacks, ethnic foods and party trays. Save time and money and order your provisions from Peapod.

## PRS Website Update

Purchasing Resource Services and University Services are working with University Relations on a complete overhaul of the PRS website. Re-launch of the site is scheduled for early 2011. Let us know what you'd like to see on the new site by completing the [PRS Website Survey](#). Please provide as much constructive feedback as possible. We expect our site to be informative, easy to navigate, and user-friendly. Your suggestions are welcome and appreciated.

WWW.



### IN THIS ISSUE:

PROCESS & PROCEDURES: Credit Application, W-9, Tax-Exempt Status, Conflict of Interest	2
UPCOMING EXPOS & INFO SESSIONS	2
PREFERRED VENDOR UPDATES	3
NEW PREFERRED VENDORS: Printers, Copiers, Mobile Communications	4
NEW PREFERRED VENDORS: Audio Conferencing, Vending	5
iBuyNU: Barnes & Noble Bulk Orders, Dell Standard Configurations	5
ANTI-IDLING ORDINANCE FOR VENDOR DELIVERIES	6
PURCHASING TIPS: Terms and Conditions, Vendor Deposits	6
iBuyNU: New Vendors	6

# Process & Procedures

## Credit Application

When a department or school is making a purchase from a vendor or supplier, the vendor may ask NU to complete a Credit or Direct Billing application. Such requests should be e-mailed to Purchasing Resource Services at [purchasing@northwestern.edu](mailto:purchasing@northwestern.edu). Include the following information:

- Attach the application as a Word document or PDF file
- “Company information” section with your department name, address, phone number and contact person
- Vendor Name, e-mail address or fax number
- Name of person who made the request
- Your name and contact information

**IMPORTANT: Do NOT sign the vendor applications** as you may not have signature authority and there may be terms the University does not accept.

PRS will send the Credit Application directly to the vendor at your request. Once the Credit Application has been sent to the vendor, you will receive an e-mail confirmation.

## W-9

When a department or school is selling a good or service to another company, the company may ask for a Northwestern W-9 form and direct billing information. This form is usually required to establish payment procedures. Please forward such requests to Veronica Hudgins at [v-hudgins@northwestern.edu](mailto:v-hudgins@northwestern.edu) or contact Accounting Services at 1-5337. Your request should include:

- Vendor Name, e-mail address or fax number
- Name of Person who made the request
- Your name and contact information

Accounting Services will send the W-9 form directly to the vendor and you will receive an e-mail confirmation once it has been sent.

## Tax-Exempt Status

PRS maintains information related to Northwestern’s tax-exempt status in Illinois as well as several other states. If a department/school needs proof of Northwestern’s tax-exempt status, please adhere to the following:

- An official Purchase Order should be issued to vendors for University purchases. It references the standard NU Purchase Order terms which includes tax-exempt information.
- An Illinois Tax- Exempt One-Time Use Letter is available on the [PRS website](#) for individual purchases that many vendors will accept, which includes appropriate approval information.
- PRS can send the official Illinois Tax-Exempt Certificate (or the official certificate from other states where NU is tax-exempt) directly to vendors that do not accept either of the above. PRS does not provide the official Illinois tax-exempt letter to departments/schools.

## Conflict of Interest Requirement on Vendor Add Portal form

Each year, members of the University community examine their activities for possible conflicts of interest between personal activities and University responsibilities. The most prevalent conflicts of interest relate to relationships and interactions with NU suppliers. In an effort to routinely evaluate these relationships, individuals who select or direct that a vendor be added to NUFinancials will have to complete a Conflict of Interest Certification Statement (COI). The COI form is similar to the annual disclosure form, but it focuses on the individual’s relationship with the proposed vendor.

The COI form must be electronically attached to the Add Vendor Form via the NUPortal. The new requirement will be effective Nov. 1, 2010. Information sessions will be held in October. Please watch for an upcoming announcement from the Controller’s Office.



## New Vendor Mini-Expo

### Evanston Campus

October 12

10:30 am – 1:00 pm

Norris University Center  
2nd Floor, Louis Room  
1999 Campus Drive

### Chicago Campus

October 14

10:30 am – 1:00 pm

Robert H. Lurie Medical  
Research Center Atrium  
303 E. Superior

Meet NU’s new and recently awarded Preferred Vendors and learn about their valuable products and services. We will have 19 vendors on each campus representing **copiers, mobile communications, audio conferencing**, and a new preferred vendor category, **printers** (excluding NU stationery). Visit [www.northwestern.edu/userservices/purchasing/news.html](http://www.northwestern.edu/userservices/purchasing/news.html) for more details.

## INFO SESSIONS

**December:** General Purchasing Info Session

**February:** Legal/Risk Management Info Session

**March:** University Services Vendor Expo

**April:** Sustainability Info Session

# Preferred Vendor Updates

## Apple

Apple Education Licensing Program (AELP) for the Mac Software Collection is now available for Higher Education departmental purchases. Effective immediately, this new purchase option applies to the Mac Software Collection for college departments purchasing a minimum of 500 “Institution” licenses (for department use), or to college departments purchasing a minimum of 500 “student” licenses (for student use). (NOTE: Higher Education departmental purchasing for Pro Apps and IT applications has been available with no minimum purchase requirement since the program launch in September.) For more information, contact our Apple representative, Ty Beckmann at 630-805-0503, tbeckmann@apple.com.

## SHI

SHI Contact Information: PRS has established a process in order to receive improved customer service from SHI:

Northwestern staff should use the team line (888-606-8512) and team e-mail (teamshi@shi.com) for any initial inquiries or requests. Once a team member has been assigned to an issue and responds to the customer, you may communicate directly with that team member. However, if you don't get a response from the team member within 4 hours (and not more than 24 hours), feel free to contact the team e-mail address.

If an issue doesn't seem to be getting handled in an appropriate timeframe or manner, please escalate it by contacting (kevin\_farrell@shi.com) or the team manager, Dominic Certo (dominic\_certo@shi.com).

## Symantec

NU has signed an agreement for Symantec products. Many Symantec items are now available at the NU contracted price through SHI. For items not available in iBuyNU, request quotes from teamshi@shi.com.

## Microsoft

NU has signed a campus agreement with Microsoft, which includes MS Office and upgrades on operating systems. Due to this agreement, all our computer resellers will sell products with the minimum operating system. In addition, purchases of MS Office are available at no cost through SHI.

## VWR

Now, ordering lab coats and having them cleaned is easier than ever! VWR offers Lab coats available for purchase through iBuyNU and lab coat cleaning through the VWR Stockroom on both campuses. For more information, contact your VWR Stockroom representative:

- Chicago Stockroom (Searle/Morton B652): On-Site Coordinator: 312-503-7520
- Evanston Stockroom (Tech Institute KG48): Michael, On-Site Coordinator: 847-491-8620

## Bio-Rad

Everyday savings on everything from Bio-Rad Laboratories Life Science Research Catalog — no hassles, just purchase through iBuyNU! Bio-Rad Laboratories is proud of the research discoveries you make using the trusted Bio-Rad brand products. To make your ordering easy, every item in the Bio-Rad Life Science Research Catalog is discounted through iBuyNU. Here are some of the great savings already loaded on iBuyNU:

- MJ Research Thermal Cyclers – 20% savings
- iQ Real-Time Supermixes and cDNA synthesis kit – 30% savings
- Bio-Rad Real-Time PCR Machines – up to 25% savings
- Packages with Bio-Rad Power Pac & electrophoresis units – 15% savings

Not sure if you have the correct part number? Do you need more information on products? Contact your local Bio-Rad

account manager, Debra Stoiber, [debra\\_stoiber@bio-rad.com](mailto:debra_stoiber@bio-rad.com), 800-876-3425 x8540.

## Office Furniture

Henricksen/Allsteel has a new Evanston Representative. Chris Cole can be reached at [c.cole@henricksen.com](mailto:c.cole@henricksen.com) or 312-860-3397.

## HP Printing

PRS recently discussed HPs out-of-stock printer situation with our rep, and she has reported that there has been tremendous improvement in the situation:

*“HP is pleased to announce a significant recovery of availability on Northwestern’s most popular printer models. Overcoming the worldwide product constraints during the last year has been challenging for the industry and our most important customers like Northwestern University. However, we have increased production of our high-demand products and invested in air freight to recover the backorder. Although there are still some models whose demand is outpacing supply, many of the top selling devices are now in stock. Please visit the HP punch-out site on iBuyNU for the lowest pricing on HP printers and multi-function products. Thank you for your patience and continued support of HP imaging and printing.”*

If you haven't tried ordering a printer through the HP punchout site in iBuyNU recently, we encourage you to do so.

## Millipore

Millipore has recently expanded their catalog in iBuyNU to include a number of additional items. NU now receives a discount on all products purchased through iBuyNU.

# New Preferred Vendors

## Preferred Printing Vendors

PRS recently worked with University Relations to establish a **Pre-Qualified List of Preferred Printing Companies (for items other than NU business cards or stationery)**. A detailed bid process was conducted that included soliciting proposals from 85+ vendors. All vendors were evaluated based on a variety of factors, such as equipment inventory, quality, past performance, minimum order, delivery turnaround, pricing methodology, etc. Site visits were also performed. After an extensive evaluation and negotiation, contracts have been awarded to the following 12 printers:

- ABS Graphics
- Argus Avante Group
- Consolidated Carqueville Printing
- Creative Printing Service Inc.
- Darwill Press
- The Graphic Arts Studio
- K & M Printing
- Lake County Press
- Quantum Color Graphics
- RIPA LLC dba Printing Arts
- UniqueActive
- Vision Integrated Graphics Group

It is our recommendation that when you have a print project (brochure, pamphlet, magazine, flyer, etc.), solicit a quote from at least three of these vendors to ensure that you are receiving the best possible price for the project. For more information about specifying and buying printed materials, visit our Printer Selection web page at: [www.northwestern.edu/userservices/purchasing/vendors/secure/printers-selection.html](http://www.northwestern.edu/userservices/purchasing/vendors/secure/printers-selection.html). You will also have the opportunity to meet the printing vendors at our upcoming New Vendor Mini-Expos on October 12 and 14. Visit [www.northwestern.edu/userservices/purchasing/news.html](http://www.northwestern.edu/userservices/purchasing/news.html) for more details.

If you have any questions, contact Devi Patel in PRS at 1-8122 or [d-patel3@northwestern.edu](mailto:d-patel3@northwestern.edu).

## Copiers

PRS recently worked with the University Services Copier Management Program to solicit proposals for new copier contracts. All vendors were evaluated based on a variety of factors such as quality, past performance, delivery turnaround, pricing, etc. After an extensive evaluation and negotiation, the following three vendors were determined to represent the best value to Northwestern:

- Gordon Flesch Co. offers Canon and Sharp models
- Ricoh Americas Corp. offers Ricoh machines
- Regal Business Machines offers Konica Minolta & Lexmark items



If you have questions, contact Sheila Watkins in PRS at 1-8125 or [s-watkins@northwestern.edu](mailto:s-watkins@northwestern.edu), or Tom Luczkowiak in University Services at 1-8411 or [t-luczkowiak@northwestern.edu](mailto:t-luczkowiak@northwestern.edu).

## Mobile Communications

As previously announced, PRS recently went through a competitive bid process for mobile communications and selected AT&T, T-Mobile, and U.S. Cellular. The contracts have now been signed, and the vendor profiles are listed on the PRS website at [www.northwestern.edu/userservices/purchasing/vendors/secure/cellphones.html](http://www.northwestern.edu/userservices/purchasing/vendors/secure/cellphones.html). Below are details regarding each of the three agreements:

### T-Mobile

T-Mobile offers a 15% discount for Corporate and Personal Cell phone accounts. Deep discounts are also available on select devices and models through T-Mobile. T-Mobile will waive their initial Activation Fee for all new accounts. T-Mobile representatives are Robert Cummings, [Robert.cummings@t-mobile.com](mailto:Robert.cummings@t-mobile.com), 773-444-5641 and Amy O'Malley, [amy.omalley@t-mobile.com](mailto:amy.omalley@t-mobile.com), 847-912-3001. For corporate accounts

of at least six lines of Service, you may enroll in T-Mobile's iBilling and/or iAnalyst online billing services on the T-Mobile iBilling website.

To Order: Call 866-464-8662 and use promo code 14779TMOFAV. The T-Mobile extranet ordering site will be available soon.

### AT&T

AT&T offers a 20% discount for Corporate and Personal Cell phone accounts which can be obtained by signing up with the Premier Employee website. Existing customers should already be receiving the new 20% discount. AT&T will also provide a 20% discount off wireless accessories ordered through Premier Online. AT&T will provide a \$100 Activation Credit for any new Individual account that activates new service on (a) any standard Voice Service Plan with a Monthly Service Charge of \$39.99 or higher; and (b) a Wireless Data Service Plan with a Monthly Service Charge of \$30 or higher. This Activation Credit will be available only through January 31, 2011. Activation must be through Premier Online. The Activation Credit is not available for iPhones. Please contact Purchasing Resource Services for Premier access. Our AT&T Representative is Nadir Khan at 312-953-4803 or [nk6666@att.com](mailto:nk6666@att.com)



### U.S. Cellular

U.S. Cellular offers a 15% discount for individual plans of \$49.99 or higher and family plans of \$69.99 or higher. Deep discounts are offered on devices as well. U.S. Cellular will waive their initial Activation Fee for all new accounts. Northwestern's U.S. Cellular Representative is Martin Heffron at 847-293-0002 or [martin.heffron@uscellular.com](mailto:martin.heffron@uscellular.com).

If you have any questions, contact Betsy Costello in PRS at 7-0590 or [m-costello@northwestern.edu](mailto:m-costello@northwestern.edu).

# New Preferred Vendors

## Audio Conferencing Services

In partnership with Northwestern University Information Technology (NUIT), PRS is pleased to announce the launch of a new, cost-effective agreement with Premier Global Industries (PGI) to facilitate secure and reliable audio conferencing services. Features and benefits of the GlobalMeet® service include:

- No reservations required
- Private phone number for secure conference calls
- Up to 125 participants per call
- Easy to integrate with Adobe Connect Web conferencing
- 24/7 tech online support including tutorial videos and Live Chat
- Aggressive pre-negotiated calling rates starting at 1.7 cents per minute for all departments

Effective October 15, those who are authorized to place telecommunications services requests with CONDUITS will be able to place requests to activate GlobalMeet® conferencing service accounts with PGI via the [online PGI Enrollment Form](#). PGI will issue a GlobalMeet® account number and access code for each individual user, upon authorized request. A list of [CONDUITS work order contacts can be viewed online](#). To activate or deactivate a conferencing account and for ordering and pricing information, visit our [website page dedicated to PGI](#).

PGI Account representative contact information: Ginger Courtney, Account Development Manager, 650-670-6215, [Ginger.Courtney@pgi.com](mailto:Ginger.Courtney@pgi.com) and Mark Sason, Account Development Manager, 415-595-8645, [Mark.Sason@pgi.com](mailto:Mark.Sason@pgi.com). Also, PGI customer care representatives are available 24/7. The Customer Care number is 877-807-0970.

Details on all of the new contracts can be found on the [Preferred Vendors section of the PRS website](#). Thanks to all those individuals from various departments and schools who participated in the evaluation committees for the new contracts.

## Vending

### Coca-Cola

At the end of a 10-year agreement with Pepsi, it was time to put beverage pouring rights out to bid. The NU Beverage Committee—PRS, Athletics, University Services and Student Affairs—collaborated on a thorough bid process which resulted in a new contract with Coca-Cola. You will see Coke signs at athletic events, and Coke will provide vending service and fountain service at dining locations. All of Coke's new vending equipment incorporates the most energy-efficient technology available.



### Canteen

Canteen is NU's new Food Vending Service provider for snacks, coffee and fresh food. Existing vending machines will be replaced with brand new, energy-efficient equipment. All equipment will be fully transitioned by the end of October. *(Please note that the existing machines will become nearly empty prior to the transition.)* Canteen offers a broad range of snack and fresh food choices, including more healthy alternatives. Please use the survey cards found at vending locations to communicate your preferences.



### Vending Machine Payments

For added convenience, most new beverage and food vending machines will accept credit/debit cards in locations where a cellular signal is available. In locations where a cellular signal is not available, vending machines will continue to accept the WildCARD cash stripe. All machines will also accept cash. In the next few weeks, we will be updating our [Vending website](#) to indicate the types of payments accepted at each machine.



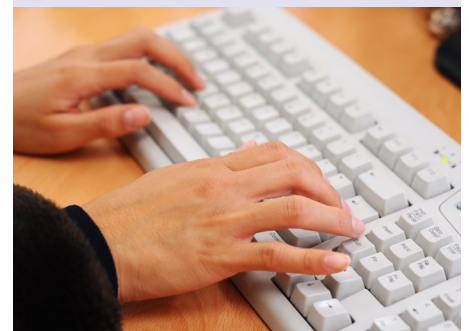
## Barnes & Noble Bulk Orders

To ensure your bulk Barnes & Noble order is shipped in one package instead of fragments, please use the following steps:

1. Login to NU Portal.
2. Go to Staff Tab → Purchasing & Payments
3. Login to iBuyNU
  - a. Shopper: Click on iBuyNU Secure Site Link
  - b. Requesters: Click catalog requisition in NUFinancials Link
4. Go to Barnes & Noble punch out site → Bulk Orders Tab → Request a Quote. *Please note: The minimum requirement for an NU bulk order is 30 copies of a single title.*
5. Complete the Bulk Order Quote form
6. Submit form by clicking on Send Mail
7. B&N will send an email to the Requester with the quotation attached. The email will be sent from [bulkorders@book.com](mailto:bulkorders@book.com)

## Dell Standard Configurations

Northwestern University Information Technology (NUIT) and Purchasing Resource Services have collaborated on the update of the Dell standard configurations for Northwestern University. Dell is offering these updated configurations at a significant discount. To view the standard configurations and discounts, access the Dell punchout site on the iBuyNU portal.



## Anti-Idling Ordinance for Vendor Deliveries

NU has many vendors that make deliveries to both our Evanston and Chicago campuses. We do our best to inform them of various requirements related to making deliveries. The City of Evanston has a formal anti-idling ordinance to which all vendors should adhere. The ordinance prohibits standing or parked vehicles that are over 8,000 lbs. in gross weight from idling their engines for more than five minutes in any 60-minute period. We have communicated this information to many vendors, but also wanted to remind faculty and staff of this ordinance as well. If you see a company making a delivery on campus, please feel free to remind them to turn their engines off when making deliveries because there is an anti-idling ordinance in effect. For more information on the ordinance, visit <http://www.cityofevanston.org/government/city-code/recently-passed-most-requested-ordinances/>. Thank you for your cooperation.



## Purchasing Tips

### Review of Terms and Conditions

The requesting department or school is responsible to have the Office of General Counsel review and approve any legal terms when a vendor provides their own document with legal terms and conditions. We want to avoid terms that may negate the University's standard terms. Prior to submitting a requisition to PRS for approval, all terms should already have the authorized approval from the Office of General Counsel.

### If a vendor needs a deposit:

- When working with a vendor who requires a deposit, the Requisition should include the total amount of the transaction.
- The Requisition should be set up with the deposit as one line item and the estimated balance as a separate line item.
- Once the Requisition is approved, an invoice and receiver can be entered against the first line item and the deposit will be paid.
- After the project is complete, an invoice and receiver can be entered against the second line item in order to pay the remaining balance.
- If the final balance on the vendor invoice differs from the purchase order balance, complete a Change Order Request so that the PO and Invoice totals match and the invoice can be paid.

**iBuyNU**

### New Vendors

New pricing agreements have been negotiated with the following science suppliers, and all of their catalogs are now included in iBuyNU:

- Clonetech
- Rainin
- Santa Cruz

Also, a catalog has now been added for each of the following Preferred Vendors for office furniture:



- Allsteel/Henricksen
- Haworth/Kayhan
- Steelcase/Office Concepts

Please note that the catalogs for the above office furniture vendors reflect a streamlined list of the products and colors to support occasional needs for these items. If you have a significant project that may involve design needs, you should work with the contact person from each of these vendors.

## PRS Directory

**General Purchasing**  
847-491-8120  
[purchasing@northwestern.edu](mailto:purchasing@northwestern.edu)

**Jim Konrad**  
Director of Purchasing  
847-491-8121  
[j-konrad@northwestern.edu](mailto:j-konrad@northwestern.edu)

**Chelsea Wagenblast**  
Program Assistant  
847-467-4572  
[c-wagenblast@northwestern.edu](mailto:c-wagenblast@northwestern.edu)

**Sheila Watkins**  
Procurement Administrator  
847-491-8125  
[s-watkins@northwestern.edu](mailto:s-watkins@northwestern.edu)

**Devi Patel**  
Procurement Administrator  
847-491-8122  
[d-patel3@northwestern.edu](mailto:d-patel3@northwestern.edu)

**Shari Janoff**  
Procurement Administrator  
847-491-5321  
[s-janoff@northwestern.edu](mailto:s-janoff@northwestern.edu)

**Betsy Costello**  
Procurement Administrator  
847-467-0590  
[m-costello@northwestern.edu](mailto:m-costello@northwestern.edu)

**Matt Marzillo**  
Procurement Administrator  
847-467-0837  
[m-marzillo@northwestern.edu](mailto:m-marzillo@northwestern.edu)

**Keith Paddy**  
eProcurement Manager  
847-467-6963  
[k-paddy@northwestern.edu](mailto:k-paddy@northwestern.edu)

**Dave Zohfeld**  
Procurement Analyst  
847-467-0838  
[d-zohfeld@northwestern.edu](mailto:d-zohfeld@northwestern.edu)

**Lori Lehnhardt**  
Procurement Analyst  
847-467-0840  
[l-lehnhardt@northwestern.edu](mailto:l-lehnhardt@northwestern.edu)

**Alicia Schemel**  
Procurement Analyst  
847-467-0839  
[a-schemel@northwestern.edu](mailto:a-schemel@northwestern.edu)

Purchasing Resource Services  
University Services  
Northwestern University  
2020 Ridge Avenue, 2nd Floor  
Evanston, IL 60208-4303  
Phone: 847.491.8120  
Fax: 847.467.5400  
[purchasing@northwestern.edu](mailto:purchasing@northwestern.edu)  
[www.northwestern.edu/userservices/purchasing](http://www.northwestern.edu/userservices/purchasing)