

Dollars & Sense



Winter 2011 Volume 5, Issue 3

Purchasing Resource Services

New SSJ and BD Forms Include COI Statement

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 Northwestern University suppliers.

In addition, individuals who select or direct a vendor to be added to NUFinancials have to complete a Conflict of Interest Certification Statement (COI). This document must be filled out and electronically attached to the portal form sent to Accounting Services. The COI form is similar to the annual disclosure form, but it focuses on the individual's relationship with the proposed vendor.

In an effort to more routinely evaluate vendor relationships, PRS has also developed a new Bid Documentation Form and Sole Source Justification Form that includes a question regarding the relationship between the individual who selected the vendor and the vendor. The new forms are now available on the [PRS web site](#) and the [NU Portal](#). Please begin using these new forms, effective immediately. One of the forms must be attached to all requisitions of \$25,000 or more. Effective March 1, 2011, any older versions of the BD and SSJ Forms received by PRS will not be accepted.

If you have any questions, contact PRS at 1-8120 or purchasing@northwestern.edu.

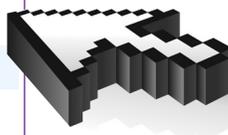
PRS Website Launches in February

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 tentatively scheduled sometime in late February. Thanks to everyone who responded to our PRS Website Survey. Our goals are to make the site more informative, easy to navigate, and user-friendly. Based on your feedback and our research, we have some exciting changes planned for the site, including:

- Preferred Vendor Matrix that can be sorted by commodity/service, company name, ordering method, supplier diversity, and NU contact
- Comprehensive Preferred Vendor Profiles
- Detailed Instructions about Procurement Methods
- Document Library

Product/Service	Company Name	Order Method	Supplier Diversity	NU Contact
Cell Phones	AT&T	Non-Catalog	No	Betsy Costello
Cell Phones	T-Mobile	Non-Catalog	No	Betsy Costello
Cell Phones	U.S. Cellular	Non-Catalog	No	Betsy Costello
Coffee Service	Filterfresh Coffee Service, Inc.	Blanket	No	Betsy Costello
Computer Peripherals	HP Imaging & Printing Group	iBuyNU	No	Devi Patel
Computer Peripherals	Technology Integrated Group (TIG)	iBuyNU	Yes	Devi Patel
Computers	Apple Computer	iBuyNU	No	Devi Patel

As you use the new site, let us know what you think at purchasing@northwestern.edu. Your suggestions are welcome and appreciated.



www.purchasing.northwestern.edu

Annual Vendor Expos

Does your department or school need new furniture? Looking to save some money on coffee service or catering? The University Services Vendor Expos are your annual opportunity to meet NU Preferred Vendors. From furniture to food to software to lab supplies and more, you'll find it at the Expos.

Evanston Expo: March 22, 2011
Norris Louis Room
Lab Vendors: Tech Institute Lobby



Chicago Expo: March 24, 2011
Lurie Center Atrium
Rubloff Building Atrium



See back page for more details.

IN THIS ISSUE:

PROCESS & PROCEDURES: Online Vouchers, Receivers, Change Orders, Open Encumbrance Reports, Closing Requisitions	2
NEW CHICAGO HOTEL RATES	2
TEXT-TO-WIN VENDING PROMOTION	2
PREFERRED VENDOR UPDATES: Barnes & Noble Removed From iBuyNU, Apple, HP, SHI	3-4
PRS INFO SESSIONS & TRAINING	4
NEW PREFERRED VENDORS: Corporate Business Cards, Executive Search Firms	5
BEWARE OF TONER PIRATES	5
ANNUAL VENDOR EXPOS	6
PRS WELCOMES NEW EMPLOYEE	6

Process & Procedures

Online Vouchers are NOT to be used when a Purchase Order should have been issued

The policy for appropriate uses of the Direct Payment Request has not changed. The Online Voucher process is a way to request payment for services when the transaction does not warrant the issuance of an official Purchase Order to a vendor. It is primarily a method to request a check.

The Online Voucher process is NOT to be used as a method to pay invoices for products or services after the fact when a Purchase Order should have been issued and sent to the vendor at the beginning of the transaction.

Accounts Payable will reject Online Vouchers that do not comply with policy. You will then need to contact PRS to discuss alternative payment options.

Receivers

For Purchase Orders that have been rolled per the fiscal year-end process, all receipts must be applied in Add/Update Receipts. Receipts cannot be applied via Manage Requisitions. The navigation to find Add/Update Receipts in NUFinancials is: Purchasing > Receipts > Add/Update Receipts. You can find a tip about this process at: <http://cafe.northwestern.edu/resources/tips.html#pos>

Change Orders – Supplier Updates

You may receive notice from a supplier that an item(s) is no longer available and will not ship. Once you receive notice, remember to submit a change order request to have the item(s) removed from the purchase order. This will result in the purchase order being closed once all other items have been invoiced. You can find the job aid for how to submit a Change Order Request on the Project Café web site:

<http://cafe.northwestern.edu/training/materials.html>

On that page, go to: Purchasing > FMS815 – Requester Advanced Topics > 7. Submit Change Order Request for Non-Catalog PO (pdf).

Open Encumbrance Report

The Cognos SC016–Open Encumbrance report is a great tool to assist in reconciling your department’s budget. The report highlights all open purchase orders within your department and is based on each purchase order line activity. If a PO appears on this report, action is needed. It could be that a receipt needs to be applied to the PO or to a line on the PO; there may be a match exception on the PO or a line on the PO; or the purchase order may need to be invoiced.

Also, if a supplier contacts you stating an item will not ship and a change order to remove this item from the PO has not been submitted, this item will remain on the report and the PO will remain open until this action is requested. It is recommended that you run the SC016–Open Encumbrance report monthly. Find the SC016 in Cognos > Project Café Reports > School > Supply Chain.

Closing Requisitions

To help keep our NUFinancials records up-to-date, all requisitions with a status of Open or Pending Approval that haven’t been sourced into a purchase order within 30 days after the creation date will be closed. If you ever have an active requisition that is near 30 days old that hasn’t been fully approved and you wish to keep it open, submit a request to PRS at purchasing@northwestern.edu.

NEW CHICAGO HOTEL RATES

Northwestern University’s Preferred Chicago Hotels have announced their revised rates for 2011. In addition, there have been changes made regarding the account representatives and amenities offered for several of the hotels. These updated rates and revisions can be accessed on the [University Services Travel Website](#). To obtain these rates, request the Northwestern University rate when making reservations.

Hotel Discounts for Personal Use

Remember that you can also use the NU rates for personal use. Enjoy a night on the town right here in Chicago!

“TEXT TO WIN” VENDING PROMOTION

From February to June, Coca-Cola is conducting a “Text to Win” Promotion at NU and 17 other top colleges.

EVERY cap code wins! All you have to do is text in your Coke 20 oz. “cap code” to a specific short code (“41461”), and you will automatically receive, via text message, either an instant win prize code valued at \$10-\$100 from one of the following prize partners: Napster, Target, Amazon, Visa, Netflix or an instant digital offer from [snapfish.com](#). (One prize per cap code.) In addition to receiving either a prize code or digital offer, every cap code will be automatically entered into the Grand Prize Sweepstakes which is a Trip for two to South Padre Island “Home of Coca-Cola Beach”. There will be four trips awarded during this promotion.

For more information, visit the [University Services Vending Website](#).

Problems with a broken vending machine or inventory supply?

Call the phone number on the vending machine and provide the machine number:

Canteen (snacks): 800-676-6652
Coca-Cola: 800-647-2653



Preferred Vendor Updates

Barnes & Noble Removed from iBuyNU

Due to unforeseen circumstances, Barnes & Noble decided to terminate all business-to-business contracts with organizations such as NU and no longer supports eProcurement platforms such as iBuyNU. The cancellation was effective November 30, 2010, and Barnes & Noble is no longer available in iBuyNU.

For any questions or concerns about orders placed before November 30, contact Barnes & Noble's general customer service by calling 1-800-THE BOOK (843-2665) from 7:00 am - 6:30 pm CST Monday through Friday.

Purchasing Resource Services remains dedicated to providing valuable contracts to help departments and schools make informed purchasing decisions and save time and money. Unfortunately, there are some factors that are simply beyond our control. We are actively looking for other alternatives for your book, CD, and DVD purchases. In the meantime, consider contacting the Barnes & Noble bookstore at Norris University Center for book, CD and DVD needs. We appreciate your patience and understanding in this matter.

If you have any questions, or would like any additional information, feel free to contact PRS at 1-8120 or purchasing@northwestern.edu.

Apple

New Pricing

Purchasing Resource Services, with the help of several other departments and schools at Northwestern, has recently renegotiated our contract with Apple. We will no longer receive a flat discount off the educational pricing. Instead, we will receive a defined dollar amount discount on all hardware products. Below are other changes to the contract:

- The discount off educational pricing applies to all hardware products, with the exception of the MacBook and MacBook Air.
- Apple Care must be purchased in order to qualify for the discount.

The Apple site in iBuyNU has been updated to reflect this change. [Click here to link to the Apple profile page](#) for more detail regarding the revised Apple discount structure.

iPad Discount

Individual purchases of iPads are not discounted. However, Apple does offer a discount on iPads for orders of 10 or more. Quantities less than 10 are purchased at the single unit price. The discount on 10 iPad orders varies from 2.8% - 11% depending on the model you select.

New NU Team at Apple

Customer Service/Inside Sales Representative:

Jessica Morris
800-800-2775 ext. 42873
Fax 866-219-9213
morris@apple.com

NU Account Representative:
Jack McLaughlin
630-325-9998
jackm@apple.com

HP

As of January 1, 2011, Northwestern University has a direct relationship with HP. Our contract with HP consists of printers and printer related components only and we now deal directly with HP for service. The updated HP team is as follows:

Mary D. Feldman
Account Manager
847-951-0626
mary.feldman@hp.com

Jen Smerud
Inside sales /Customer service
800-277-8988 ext. 7723146
jsmerud@hp.com

SHI

There is a new SKU for Parallels from SHI: PDFM6XLM-ALP-EN. Northwestern University's price is \$36.16 with one year of maintenance. Orders can be placed through SHI under NU's commonly purchased products on the SHI catalog in iBuyNU.

As of November 1, Nathan Cantwell was hired as an Account Executive based in Chicago to service Northwestern locally. He has several years of experience working with higher education and is committed to instilling confidence within the University that SHI as a company is able to meet their needs quickly and accurately. He has made himself available to meet to discuss any issues or concerns.

Nathan Cantwell
Mobile: 312-731-3894
nathan_cantwell@SHI.com

Please direct all customer service/order-related inquiries to the Inside Team at:

Email: teamshi@shi.com
888-606-8512
Fax: 800-711-2616

continued on page 4



Apple offers discounts on iPads for orders of 10 or more

Preferred Vendor Updates

SHI *continued*

Improvement in Ordering Software

Do you order software for multiple departments? Do you need to deliver your software license key to your IT Department or to a professor?

You can now do this by inserting variable email information in the "ATTENTION" field of your requisition. Variable email is an email address of a person who should receive the software key for installation, renewal notices (other than the person who is placing the order).

To include someone other than the buyer:

- The information should be entered in the ATTENTION Field when creating a requisition. The "@northwestern.edu" should be dropped from the email address. For example, if the email address is j-smith@northwestern.edu, j-smith is the variable email information that should be entered in the ATTENTION Field.
- By entering variable email information in the attention field, SHI will be able to deliver license key, renewal information, etc. to the buyer as well as any person whose information is entered in the ATTENTION Field of the requisition.

Improvements in iBuyNU

SHI has made numerous improvements to their catalog in iBuyNU. They received a lot of feedback and implemented these requests to simplify the user experience. SHI's website reflects the following changes:

- In the center of the page, there is a list of commonly purchased products and software bundles.
- To the left is the entire catalog.
- To the right are NU's most popular products.



PRS Info Sessions & Training



Upcoming PRS Info Sessions

FEBRUARY 10: CHICAGO CAMPUS

10:30 am–12:00 noon, Lurie Center: Searle Seminar Room, Chicago

FEBRUARY 15: EVANSTON CAMPUS

1:30–3:00 pm, Transportation Building: Chambers Hall, Evanston

Topics covered will include:

- General Purchasing (processes and procedures)
- Legal (Signature Authority)
- Risk Management (insurance)

APRIL *dates TBD*

Topics covered will include:

- Sustainability – Learn more about the environmental qualities of many of our Preferred Vendors

Watch for a listserv e-mail to staff from PRS with more details and registration information.

Acquiring Goods and Services (Purchasing to Payment)

Learning & Organization Development recently revamped the *Acquiring Goods and Services* workshop to reflect substantial changes in our procurement environment and systems. This interactive workshop explores purchasing processes in depth, and helps participants make best value purchases when dealing with a variety of suppliers.

This is a great overview for new as well as existing staff. You'll learn the processes for making internal and external (both catalog and non-catalog) purchases; how and when to use the Procurement Card and On-Line Voucher: Direct Payment Request (DPR); which payment processes and forms (Contracted Services, Additional Pay, Special Pay) to use when engaging the services of individuals; how to reimburse individuals for purchases and expenses; and how to obtain advances for travel and non-travel expenses.

There are also some excellent tools (including Process Maps and a Quick Reference Guide) available at any time as references for all these procurement processes at www.northwestern.edu/hr/training/business.html#ags. The process maps replicate how the major procurement processes are performed on the job and link you to the relevant policies, forms, and additional training that correlate to each step in the process. The next available workshop is scheduled for Monday, January 31, 2011. Visit www.northwestern.edu/hr/training for all other upcoming availability.

Advanced iBuyNU Workshop

PRS and Project Café will be facilitating a workshop to demonstrate advanced functions in iBuyNU. Learn how to track purchase orders and invoices in iBuyNU, print purchase orders and invoices from iBuyNU as well as learn about the substitute requester functionality. Workshops will be hands-on. Note: You must complete *FMS801: Shopping in iBuyNU* before attending the workshop. The workshop is scheduled for Friday, February 4, 2011 in Evanston. Register in eDev for *FMS855: Advanced iBuyNU Workshop*. It is also listed under Purchasing on Café's Training page: <http://cafe.northwestern.edu/training/matrix.html>.



Beware of Toner Pirates

Several departments have recently been contacted by “toner pirates”. Toner pirates are companies that will call departments and give the impression that they represent the company from which you leased or purchased your printer or copier. Sometimes they will be promoting a special deal on toner. Another tactic is to appear as if they are confirming an order that has already been placed. If you order or confirm an order from them, you will receive the toner, but you will also get a bill that is highly inflated.

Some things to remember about toner purchases at Northwestern:

If you have a copier from one of our contracted vendors in the Copier Management Program (Ricoh, Regal Business Machines, Gordon Flesch, and Impact Networking), your toner is included in your agreement. You should never receive a call from these companies or from the manufacturers they represent (Ricoh, Konica, Canon, and Kyocera) asking if you need toner. You should never pay for toner for your copier from these vendors. Normal delivery is included. Your only charge would be shipping charges for next-day delivery.

Toner for desktop printers should be ordered from Cardinal which is on iBuyNU. You will need to pay for this toner, but you initiate the order. Cardinal will never contact you.

So, if you receive a call from a person that would like to ship you toner, just say no – more than likely, it’s a scam. For questions, contact Tom Luczkowiak at t-luczkowiak@northwestern.edu or 1-8411.

New Preferred Vendors

Corporate Business Cards

Purchasing Resource Services and University Services are pleased to announce a new contract and vendor for business cards, letterhead, envelopes, and other printed stationery items. After a thorough and competitive bid process, Corporate Business Cards (CBC) was awarded the contract which began on November 1st.

CBC has an online ordering system that allows you to enter your information, see a proof, and order using a chart string in a few easy steps. The interface for the CBC system is the same as the interface for the system with our former vendor, Triangle Printers. Anyone who was registered to use the system with Triangle Printers will be able to log into this system using the same log-in name and password. Existing users may access the site from the [Printing Products and Services web page](#).

If you were not a user on the old system, you can register by sending an email request to support@corpbuscards.com.

If you are interested in printing items other than NU stationery, consult the list of [Preferred Printers \(excluding NU stationery\) web page](#).

We are confident that you will enjoy the easy transition and lower prices over our previous contract. We are also working on adding CBC to iBuyNU, which will make the ordering process even easier. If you have any questions regarding the new vendor or contract, please contact Tom Luczkowiak, Senior Manager, University Services at 1-8411 or t-luczkowiak@northwestern.edu or Shelia Watkins, Procurement Administrator, at 1-8125 or s-watkins@northwestern.edu.

Executive Search Firms

PRS recently participated in a joint Invitation to Bid process with the other 11 schools that make up the CICPC (Committee on Institutional Cooperation, Purchasing Consortium, which consists of the Big Ten schools and University of Chicago), to establish contracts for Executive Search services. After a thorough evaluation, a best-value decision was made to award contracts to the following 11 vendors:

Academic Search, Inc.

Rosa Morris, 202-263-7479
rosa.morris@academic-search.com

Allen Austin Global Executive Search

Jackie Gorman-Johnson, 210-648-2743
jgorman@allenaustinsearch.com

Auerback Associates

Judith Auerback, President
617-451-0095
Judith@auerback-assc.com

Greenwood/Asher & Associates, Inc.

Jan Greenwood, 850-650-2277
jangreenwood@greenwoodsearch.com

Hodge Partners LLC

Betty Hasler, 415-445-9154
bhasler@hodgepartners.com

Hollins Group Inc.

Lawrence Hollins, 312-606-8000
lhollins@thehollinsgroup.com

Isaacson Miller, Inc.

John Fahy, 617-262-6500
jfahy@IMsearch.com

Korn/Ferry International

Kenneth Kring, 215-496-6666
Ken.kring@kornferry.com

R.H. Perry & Associates

Robert H. Perry, 202-965-6464
rh@rhperry.com

Witt/Kieffer

Dennis Barden, 603-575-6167
dennisb@wittkieffer.com

Storbeck/Pimentel & Associates, LLC

Charles Bunting, 807-985-4987
C.Bunting@storbeckpimentel.com

These 11 vendors are now considered Preferred Vendors at Northwestern. Detailed information regarding each contract will be included on the PRS website soon. If you have any questions, contact Betsy Costello at 7-0590 or m-costello@northwestern.edu.

Vendor Expo

Meet NU's Preferred Vendors at the Annual Vendor Expos

This is your annual opportunity to meet with most of NU's Preferred Vendors on the same day and learn about their valuable products and services.

In response to your feedback from last year's expos, we are expanding the space for the events to better accommodate all of our vendors and attendees. In Evanston, all of the Lab Vendors will be at the Tech Lobby while all other Vendors will exhibit at the Norris Louis Room. In Chicago, the Expo will be held simultaneously in the Lurie Atrium and Rubloff Atrium.

Visit www.northwestern.edu/userservices/purchasing/news.html for details or contact Jessica Jacobs at 7-2491.



Evanston Campus

Tuesday, March 22
11:00 am – 2:00 pm

On the Evanston Campus, our lab vendors will have their own designated area in the Tech Lobby.

Lab Vendors:
Tech Institute – Lobby
2145 Sheridan Road

All Other Vendors:
Norris Center – Louis Room
1999 Campus Drive



Chicago Campus

Thursday, March 24
11:00 am – 2:00 pm

On the Chicago Campus, the Vendor Expo will be held simultaneously in two locations.

Lurie Center – Atrium
303 E. Superior

Rubloff Building – Atrium
420 E. Superior

PRS Directory

General Purchasing
847-491-8120
purchasing@northwestern.edu

Jim Konrad
Director of Purchasing
847-491-8121
j-konrad@northwestern.edu

Samantha Kustra
Program Assistant
847-467-4572
s-kustra@northwestern.edu

Sheila Watkins
Procurement Administrator
847-491-8125
s-watkins@northwestern.edu

Devi Patel
Procurement Administrator
847-491-8122
d-patel3@northwestern.edu

Shari Janoff
Procurement Administrator
847-491-5321
s-janoff@northwestern.edu

Betsy Costello
Procurement Administrator
847-467-0590
m-costello@northwestern.edu

Matt Marzillo
Procurement Administrator
847-467-0837
m-marzillo@northwestern.edu

Keith Paddy
eProcurement Manager
847-467-6963
k-paddy@northwestern.edu

Dave Zohfeld
Procurement Analyst
847-467-0838
d-zohfeld@northwestern.edu

Lori Lehnhardt
Procurement Analyst
847-467-0840
l-lehnhardt@northwestern.edu

Alicia Schemel
Procurement Analyst
847-467-0839
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
www.purchasing.northwestern.edu

PRS Welcomes New Employee

Samantha Kustra, PRS Department Assistant:



Purchasing Resource Services is pleased to welcome Samantha Kustra as Department Assistant. Samantha comes to Northwestern with a financial background in the insurance industry and recently earned her MBA in Marketing from Dominican University.



NORTHWESTERN
UNIVERSITY