

Dollars & Sense



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Purchasing Resource Services

Valuable Feedback Provided in PRS Survey

Purchasing Resources Services recently conducted a thorough campus-wide survey that focused on PRS services, Preferred Vendors, iBuyNU, and more. We received a very high response rate and excellent feedback. Overall, users are very satisfied with PRS services and contracts. Respondents let us know what vendors are doing a good job and who needs improvement. In addition, we realized there are several areas in which we could better communicate services and policies. Key takeaways include:

- We are continually working to improve the usability and functionality of iBuyNU. In addition, we look to add new catalogs whenever possible.
- Contracts are awarded based on best value decisions. In any given catalog, you will find the best price on the vast majority of the items, with the remaining items being very competitive in price. However, if you see pricing in iBuyNU that is simply not in line with pricing from similar vendors, please let us know.
- We are working on adding more job aids to our website and making all procurement-to-payment procedures more streamlined and easy to understand.
- Many of the things that you might buy from non-iBuyNU vendors are available in iBuyNU. It's helpful to think about the product that you need rather than a specific vendor. For example, a few people asked that we set up a Preferred Vendor relationship with Amazon.com. As a company that sells from many third-party providers, Amazon would not work in iBuyNU. In addition, Amazon will not establish a single agreement with a university that covers all departments and schools. For books, we encourage all staff to take a look at [Complete Book & Media Supply](#), our current Preferred Vendor in iBuyNU. For other things you might order from Amazon, take a look at many of the other catalogs in iBuyNU.

We will continue to highlight more survey results in upcoming issues of *First Choice* and *Dollars & Sense*. Thank you for your feedback.

Orbitz For Business Rollout in October 2013

After an extensive competitive bid process, University Services and Purchasing Resource Services, with the help of a formal evaluation committee consisting of representatives from several departments and schools, selected Orbitz For Business to replace Tower Travel as NU's primary Preferred Vendor for Travel Services. To learn more about why the Travel Services Bid Committee selected Orbitz for Business, visit the [PRS News web page](#).



We are currently working with Orbitz for Business on the implementation. As we get closer to the planned launch date of October 21, we will provide information about training sessions and profile customization. Travel 100 Group and Intra World Travel will continue to be included in the travel program as agent-assist only options. Until the transition to Orbitz For Business occurs, you can continue to use Compass online reservations and Tower Travel as you normally would.

For questions about the bid process, contact [Betsy Costello](#), Procurement Administrator, at 7-0590. For questions about Travel Services, contact [Jeff Levin](#), Travel Program Manager, at 1-5993.

Fiscal Year End Key Dates

August 30, 2013 is the last day for FY13 Requisitions to be approved and sourced into PO's. Any Requisitions that have not been approved and sourced by 6:00 pm will be cancelled and closed.

All iBuyNU orders that were created in FY12 and rolled to FY13 last year, and are not completed will be closed. All other iBuyNU PO's will be rolled to FY14.

September 1, 2013 FY14 opens at 7:00 AM for the creation of Requisitions for goods and services to be received in the new fiscal year. Any Requisition created on or after this date will default to FY14. This is the first day to submit new blanket Requisitions.

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What Are the Core Responsibilities of PRS?

We would like to take this opportunity to remind departments and schools about the following core responsibilities of Purchasing Resource Services, followed by an NU staff testimonial at the end of each section. Our goal is to help you save time and money as well as make informed decisions.

PRS establishes Preferred Vendor contracts

- Based on the results of a formal competitive bid process managed by PRS
 - Establish contracts AS A UNIVERSITY, instead of every department/school selecting a vendor on their own
 - Strategic sourcing – leverages the University’s considerable volume (more spend with fewer vendors)
- Evaluation/advisory committees consist of department/school representatives
- Awards are made based on best value

“PRS has done all the hard work of finding good vendors with great prices. When I joined The Graduate School, we found that we were significantly overpaying for our copiers, were locked into a bad three-year agreement with a non-preferred vendor, and were receiving very poor service. As soon as this contract was up, we immediately took advantage of the Preferred Vendor program. We had three excellent vendors from which to choose, and now enjoy excellent services at greatly reduced overall cost to the office.”

– Michael Satut, Director of Information Technology, The Graduate School

PRS helps departments/schools go through a formal process to select a vendor for specific products and services

- PRS knows the purchasing process, key vendors in various industries, other customers, what consortium deals we have access to, methods for benchmarking prices, how to negotiate, etc.
- Organized, formal process that generates competition (which provides incentive to vendors to submit their most aggressive pricing) and allows for a more informed decision to be made

“Recently, we completed a significant furniture contract that allows us to purchase high quality student room and lounge furniture. The process and negotiations were managed by PRS with our input when necessary. As a result, we now have favorable pricing and an excellent contract for future furniture purchases. In addition, the PRS team negotiated the pricing so that other departments at the university can also take advantage of the new furniture contract for lounge furniture.”

– Paul Riel, Executive Director, Residential Services

PRS manages iBuyNU

- Integrated part of NUFinancials
- Includes many of Northwestern’s Preferred Vendors
- Provides end users with a web-based ordering experience
- Allows Northwestern to implement streamlined, electronic processing of purchases and payments including workflow/approvals, dispatch of purchase orders, receipt of invoices and payments to vendors
- Improved and consistent pricing

“Ordering through iBuyNu is very efficient because I can select the item and create the requisition and don’t have to enter all the item details. This really saves time and is error-proof. I also get purchase requests where shoppers will get higher prices off the vendor’s website, and when I go into iBuyNU to place the order, I can get them a lower price for the same item.”

– Majida Puthawala, Financial Assistant, Chemistry of Life Processes Institute



STAFFING CHANGES IN PURCHASING RESOURCE SERVICES

Devi Patel

Procurement Administrator

PRS regretfully announces the departure of Devi Patel, Procurement Administrator. Devi is leaving to pursue a tremendous opportunity for her entire family. She was with the University for 18 years and has been a valued part of our team for the past eight years. Many people in PRS and at the University have enjoyed working with her, and we wish her success in her new endeavors.

David Zohfeld

Procurement Administrator

After a thorough recruitment process, David Zohfeld has been selected to fill the open PRS Procurement Administrator position. David was previously a PRS Procurement Analyst and is excited to apply his skills and knowledge to his new position. He will be handling the Invitation to Bid processes and contract administration primarily for IT-related products and services. Please join us in welcoming David to this new challenge and congratulate him on his promotion.

BUY & SELL ON THE SURPLUS PROPERTY EXCHANGE

The Surplus Property Exchange is an online bulletin board where Northwestern University departments can list surplus University property. At any given time there are a variety of NU-owned items for sale and for free. Visit the [Surplus Property webpage](#) and you can also sign up for the listserv and receive emails when items are posted to the site.



A selection of Dell computers that are currently for sale on the Surplus Property Exchange.

New Preferred Vendors

All Preferred Vendor contracts are awarded after a thorough, competitive bid process that includes committees with representatives from several departments and schools.

Sodexo – Chicago Campus

PRS recently awarded a new and improved five year contract to Sodexo for Chicago Food Service. The evaluation committee consisted of representatives from Kellogg, the Law School, Feinberg, and University Services. The new contract includes the implementation of a new ZeBi (Zest Bistro) concept in Lurie, which provides exciting, healthy food options at Feinberg (replacing the current White Coat Café). ZeBi will offer a rotating menu comprised of hot, made-to-order sandwiches, soups, pastries, coffee and espresso, salads and various hot entrees. The popular build-your-own salad bar will remain a part of the operation. ZeBi is scheduled to open in early September.

Harry's Café in Rubloff will also receive a makeover, and the food prep kitchen in Abbott will be improved to provide quality food service for meetings and events on the Chicago Campus. Staff should expect to receive increased customer service, additional side options for boxed lunches and more menu variety.

For questions or comments regarding the new contract, contact [Alexis Karas](#), Procurement Administrator at 1-5321. Contact [Liz Gavigan](#), Sodexo General Manager, for customer feedback, questions and concerns.



MRO Vendors

PRS is pleased to announce the awarding of new Preferred Vendor contracts for Maintenance, Repair and Operations (MRO) supplies as follows:

- Steiner Electric: Electrical Supplies, Philips Lamps, Belts
- Johnson Pipe & Supply: Plumbing
- Grainger: Tools, Hardware, Fasteners, Filters, Safety, Primary HVAC, GE Lamps, Landscaping and Other Miscellaneous MRO supplies (i.e. adhesives, lubricants)
- Neuco: Secondary HVAC

Factors considered in awarding the contracts were breadth of product, pricing and cost savings, delivery capabilities (same day, next day, and emergency), free shipping, and no minimum order. It is expected that the new vendor catalogs will be available in iBuyNU by September 1. Catalogs with the previous MRO preferred vendors (MSC, Graybar, Columbia Pipe, and Kimball Midwest) will be removed at the same time. These new contracts should be a substantial improvement.

If you have any questions regarding these new vendors or contracts, contact [Alexis Karas](#), Procurement Administrator at 1-5321.

Document Imaging Services

PRS has awarded two Preferred Vendor contracts for Document Imaging Services for use by departments and schools. This service will allow you to take file cabinets full of paper and convert them to digital records with a secure vendor at a very competitive price. Below is contact info for both companies:

Datamation Imaging Services
[Jim Collins](#), 630-321-0601

Databank IMX
[Bob Sobolewski](#), 847-323-8614

If you have any questions regarding the document imaging service contract, contact [Dave Zohfeld](#), Procurement Administrator, at 7-0838.

Residence Hall Furniture

Working with Residential Services, PRS recently awarded two Preferred Vendor contracts for residence hall furniture. Foliot Furniture and RT London provide both sleeping room and public area furniture. They were selected as providing the best overall value to the University in terms of breadth of product, quality, timeliness, and pricing. Below is contact info for both companies:

RT London	Foliot
Steve Eldersveld	Eric Proulx
616-551-4617	614-441-6448

If you have any questions regarding the residence hall furniture contracts, contact [Laura Norton](#), Procurement Administrator, at 7-3345.



Lab Furnishings

The University has selected Lab Builders Incorporated (LBI) as the Preferred Vendor for direct lab furnishings and other related materials. LBI's entire catalog will be available at regular lead times at an extended discount. In addition, the contract will include a selection of approximately 25 popular items that are available with reduced lead times. Below is the contact info:

Laboratory Builders, Inc.
[Greg Ginger](#), 630-235-5292

If you have any questions regarding the lab furnishings contract, contact [Matt Marzillo](#), Procurement Administrator, at 7-0837.

Preferred Vendor Updates

U.S. Cellular

U.S. Cellular recently sold its Chicago market to subsidiaries of Sprint Nextel Corporation. We encourage NU customers to move their service to one of the other two Preferred Vendors, AT&T or T-Mobile. For more information on these vendors visit the [AT&T Vendor Profile](#) or [T-Mobile Vendor Profile](#).

BD Biosciences

All BD cell analysis items should be purchased via the BD Biosciences iBuyNU catalog. If you have any question regarding these products, contact Thomas Lendrihas, Ph.D. All BD Falcon items are available via the VWR catalog. VWR's contact is [Amy Van Arsdale](#).



Peapod

Northwestern accounts with Peapod should automatically be tax-exempt. However, some accounts have been missed in establishing the NU tax-exempt status. When setting up a new Peapod account or issuing an order on your existing account, please make sure that you are not charged tax. If your order has a charge for tax, contact Peapod's Customer Service at service@peapod.com and ask them to adjust your account accordingly.

Visit the [Peapod Vendor Profile](#) for details about opening an account, and receive \$20 off your first order. Use of an official Northwestern Procurement Card is the preferred method of payment at this time. (Please note: Peapod should only be used when there is a legitimate, approved need for their products.)

Embassy Canteen

As previously announced, our coffee service provider (Embassy Canteen Refreshment Services) has been acquired by parent company Compass Group, USA. Blanket PO's for FY2014 are to be issued with the new vendor name: "CANTEEN REFRESHMENT SERVICES". Users can now set up an account and issue orders directly via their website. To set up online ordering, contact [Starr Ostrander](#) and request the link with instructions to set up your departmental account. Please note that our contract pricing and service requirements have not been affected.

For more information, visit the [PRS Canteen Refreshment Services Vendor Profile](#). For questions or concerns regarding Canteen Refreshment Services, contact NU's representatives: [Shahn Moten](#) at 847-946-6127 and [Jack Mufley](#) at 847-291-0470, or PRS Procurement Administrator [Laura Norton](#) at 7-3345.

The approved methods of payment for coffee service are Blanket, Online Voucher, and Procurement Card.

Complete Book and Media Supply

Complete Book & Media Supply is Northwestern University's Preferred Vendor for books, DVDs and CD's. Over 3 million books, 500,000 e-books, subscriptions and media titles can be purchased through iBuyNU. Their comprehensive selection includes both books and subscriptions in all fields, available in electronic or print format. Complete Book is also a certified HUB/Small/Minority-Owned Business. Northwestern's contract with Complete Book features benefits such as discounted pricing that is very competitive with Amazon, along with additional discounts on bulk orders.

Complete Book has free standard



ground shipping on total orders of \$15 or more, and they also offer personal purchase discounts!

For additional details, visit the PRS [Complete Book PRS Vendor Profile](#). For information on bulk discounts or hard to find titles, contact the NU Complete Book representative [Cameron Bird](#).

Sigma-Aldrich

Sigma Aldrich, one of NU's Preferred Vendors for laboratory supplies, has a new NU Representative. [Heidi Schindler](#) can be reached at 847-366-0813.

EMD Millipore

EMD Millipore, one of NU's Preferred Vendors for laboratory supplies, has a new representative. [Mark Ferguson](#) can be reached at 847-867-6391.

SHI

SHI, NU's Preferred Vendor for software, has a new representative. [Casey Dellsperger](#) can be reached at 847-802-2428.

Ice Mountain

Ice Mountain, NU's Preferred Vendor for water (bottled & filtration units), has a new representative. [Raven McNeal](#) can be reached at 630-546-6167.

Transgroup Worldwide Logistics

Transgroup Worldwide Logistics, NU's Preferred Vendor for customs clearance and freight, has a new representative. [Keith Tokarz](#) can be reached at 630-521-9801.

IDT

IDT, one of NU's Preferred Vendors for laboratory supplies, has a new representative. [Branimir Bugarija](#) can be reached at 773-766-6856.

Process & Procedures

OPEN ENCUMBRANCE AND MATCH EXCEPTION REPORTS HIGHLIGHT FISCAL YEAR END CLEANUP NEEDS

It's time to prepare for Fiscal Year-End. Departments and schools should run their Open Encumbrance Report and Match Exception Report to confirm whether there are any active orders. These reports should be run regularly throughout the year to help manage orders submitted through NUFinancials.

Open Encumbrance Report: This report, entitled SC016–Open Encumbrance Report in Cognos, lists all active Purchase Orders or all active lines from a PO and provides the details of each order. Following are a some reasons why a Purchase Order or line(s) from a PO will appear on your Open Encumbrance Report:

No Invoice: If a PO has been issued and you have received the product or service but have yet to be invoiced by the vendor, reach out to the supplier to request the invoice and forward it to Accounts Payable once it is received. If you have any questions about open PO's for iBuyNU Suppliers, contact Keith Paddy at 7-6963.

Items Unavailable: If you received notice from a supplier that an item on a particular order (either iBuyNU or non-catalog) is unavailable and will not ship and it is still showing on your Open Encumbrance Report, you must submit a Change Order Request to have the PO canceled or the appropriate line(s) on the PO canceled.

Match Exception Report: This report is titled SC027–Match Exception Report by Department in Cognos. Following are a couple of reasons why a Purchase Order or line(s) from a PO will appear on your Match Exception Report:

Invoice Not Within Tolerances: If an invoice has been entered that does not fall within tolerance, a payment will not be processed. Tolerance issues can be caused when the price listed on the invoice is 25% or more than the price listed on the Purchase Order. Discrepancies in quantity and unit of measure can also cause orders to appear on your Match Exception Report.

- If the price listed on the invoice is incorrect, contact the vendor to request a corrected invoice.
- If the invoice price is correct but does not match the price on the PO, submit a change order request to PRS to have the price adjusted.

Open Receipts for non-catalog orders only): It is important that you enter receipts once your order has been received. If you have any open Purchase Orders on your Match Exception Report, confirm whether a receipt needs to be entered. If so, enter the receipt, and if there are no other issues with the PO, it will automatically be removed from your Open Encumbrance Report within 15 days.

For more information on match exceptions, review the [Project Café Match Exception Report Explanation](#). For assistance locating or running the Open Encumbrance Report or Match Exception Report, contact the NUIT Support Center by dialing 847-491-HELP (4357), option 2, or access a [Project Café Reporting training guide](#). If you have questions regarding the necessary steps to remove a PO on your department's Open Encumbrance Report or Match Exception Report, contact PRS at 1-8120 or purchasing@northwestern.edu.

ESTABLISH BLANKET PURCHASE ORDERS FOR NEW FISCAL YEAR

With the new fiscal year beginning on September 1, 2013, remember to set up new Blanket Purchase Orders for services your department regularly uses such as Ice Mountain for water services, Canteen Refreshment Services for coffee service, Cintas Document Management for shredding services, and other similar services.



PRS BIDS AND CONTRACTS IN THE WORKS

Purchasing Resource Services is always working to establish Preferred Vendor contracts that best serve the needs of NU departments and schools. These are a combination of new contracts and timely rebids of current contracts. Some of these are very close to being completed. PRS is currently working on the following:

- Temporary Staffing
- Overhead Door Repair
- Carpet & Flooring
- Paint & Paint Supplies
- Evanston Hotels
- Chicago Hotels
- Computer Hardware
- Promotional Items
- A/V Products
- A/V Integration
- ORS Certification
- Faculty & Staff Assistance Program
- Internal Moves
- Relocation Moves
- Pharmaceuticals
- Hazardous Material Shipping Services
- FM Pre-qualification of Contractors and Consultants
- R&D Systems–Lab Supplies
- Lab Animals, Feed & Bedding
- CMS for NUIT
- Lab Capital Equipment/ Service Master Agreements
- Appliances & Electronics
- Digital marketing strategy for Kellogg
- VOIP phone system replacement for NUIT
- Medical Supplies

For questions about these or other bids or vendors, contact PRS at 1-8120 or purchasing@northwestern.edu.

Find More Purchasing and Payments Aids Online

Purchasing and Payment Methods Quick Reference Guide

For a purchasing and payment methods quick reference guide to help explain which purchases are processed by a department, which are processed through NUFinancials and paid through Accounts Payable and which are processed through Payroll, [download the reference guide](#) from the Financial Operations website.

To learn more about the different processes, consider signing up for HR training course *HRD715-Purchasing and Payments*. [Visit the HR website](#) to view more information on this free workshop that will soon be accessible to take online.

Who handles what in the procurement-to-payment process?

On the [PRS website](#), we have posted a chart summarizing the functions of key departments in the procurement-to-payment process from a transactional perspective.

Processing Invoices For Non-Catalog Orders & Online Vouchers

Non-catalog Requisitions

The purchase of goods (not through iBuyNU) or services that can be planned for should always start with the initiation of a non-catalog requisition in NUFinancials so an official Purchase Order can be issued and sent to the vendor.

A Bid Documentation Form or Sole Source Justification Form needs to be attached to the requisition for purchases of \$25,000 or more. The vendor's quote should also be attached. (An invoice should not be attached since there should not be an invoice at this point—nothing has been delivered and no service has been provided).

Once the product has been delivered or service has been provided, the invoice needs to be forwarded to Accounts Payable (with the PO number identified on the invoice) to initiate payment against the Purchase Order in NUFinancials.

Online Vouchers

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 way to request a check (i.e. registration fees, subscriptions, membership dues, unplanned and emergency repairs, research subject fees, hotel charges when hosting a conference or academic function, payments to NU affiliated organizations, etc.).

For online vouchers of \$25,000 or more, a Bid Documentation Form or Sole Source Justification Form should be attached, and the invoice should also be attached as well. The invoice does not need to be sent to Accounts Payable because the subtotal of an online voucher with the invoice attached is to initiate payment to the vendor.

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


To summarize, invoices **should not** be attached to requisitions. Invoices **should** be attached to online vouchers.

iBuyNU Purchase Orders

The invoicing and payment of orders placed through iBuyNU is automated.

Custom Engrave Your Apple Products in iBuyNU

There is a new enhancement on the Apple iBuyNU Punchout. You can now personalize iPad and iPod products with engraving in the online store! You can select the engraving options before or after you add the item to your cart.

Item Picture	Part Number	Description	Quantity	Unit Price
	MDS10LL/A	iPad with Retina display Wi-Fi 16GB - Black [Engrave] Estimated Shipping: 3 - 5 business days	<input type="text" value="1"/>	499.00 USD

PRS Directory

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

Jim Konrad
Director of Purchasing
1-8121, j-konrad@northwestern.edu

Holly Golcher
Department Assistant
7-4572, holly.golcher@northwestern.edu

Sheila Watkins
Procurement Administrator
1-8125, s-watkins@northwestern.edu

Betsy Costello
Procurement Administrator
7-0590, m-costello@northwestern.edu

Matt Marzillo
Procurement Administrator
7-0837, m-marzillo@northwestern.edu

Laura Norton
Procurement Administrator
7-3345, laura.norton@northwestern.edu

Alexis Karas
Procurement Administrator
1-5321, alexis.karas@northwestern.edu

Dave Zohfeld
Procurement Administrator
7-0838, d-zohfeld@northwestern.edu

Keith Paddy
eProcurement Manager
7-6963, k-paddy@northwestern.edu

Lori Lehnhardt
Procurement Analyst
7-0840, l-lehnhardt@northwestern.edu

Samantha Kustra
Procurement Analyst
7-0239, s-kustra@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