

Dollars & Sense

Fall 2015

Northwestern | FINANCIAL OPERATIONS
Procurement and Payment Services

iBuyNU Access Available for All Employees

Procurement and Payment Services has partnered with NUIT's Finance, Facilities, and Research Administration systems team (FFRA) to automatically grant employees access to iBuyNU, Northwestern's online marketplace of Preferred Vendors. No action is required on your part.

Advantages:

- Shoppers will be able to more efficiently send purchase information to the person in their department who places orders on their behalf (known as a 'Requester').
- Allowing employees to shop in iBuyNU will save departments and schools time and money.
- Employees will see contract pricing from Northwestern's Preferred Vendors in iBuyNU.
- Automatic Shopper access will save departments time in getting new staff up and running with iBuyNU.
- Creating a cart does not lead to a purchase until the cart is processed by a Requester. Since purchases cannot be completed without approval, there is minimal risk.

Who is eligible?

- Shopper role access was granted to employees who did not already have either the Shopper or Requester role in the system.
- New NUFinancials users will automatically receive the Shopper role. Departments still have the option to fill out security paperwork to provide new employees with the Requester role instead.
- The Shopper role is not automatically given to temporary/work study employees or affiliates who do not have Financials access. You may request either Shopper or Requester access using the [FFRA Systems Express Security Form](#).

Shoppers access iBuyNU through the NUPortal using their netID and password. To learn more about how to use iBuyNU, visit the following link:

[iBuyNU Shopper Training](#) (online and classroom sessions available)

If you have any questions, contact Keith Paddy, eProcurement Manager, at 847-467-6963 or k-paddy@northwestern.edu.



UPCOMING CHANGES FOR THE PROCUREMENT CARD

We are excited to announce several changes are coming in early 2016 for Procard users. The Procurement Card office is currently working with FFRA and Accounting Services, developing a new reconciliation process called My Wallet in NUFinancials for Procard transactions. The new process will eliminate the need to update transactions in PaymentNet. The initial response from people who have seen a demonstration of the new process has been very positive. Informational meetings and training sessions will be scheduled as we get closer to roll out of the new process.

Also, we will be switching to Procards utilizing chip and pin technology. New cards will be issued but card numbers are expected to stay the same. Watch for more information on these upcoming changes.

If you have any questions, call Mary Hallissey at 847-491-5340.

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Northwestern | PROCUREMENT & PAYMENT SERVICES

Vendor File Management • Purchasing • eProcurement • Accounts Payable • Procurement Card • e-Payment

PPS News & Updates

2015 Vendor Expo Review

Thank you to everyone who attended the Vendor Expo August 20, 2015 at the Norris Center on the Evanston Campus. Procurement and Payments Services was excited to host its first event as a new organization, which proved to be a success with over 400 attendees and 51 featured vendors. Amongst the participating vendors included our new Preferred Vendors B&H Photo and Abt.

The expo provided the opportunity for the Northwestern community to meet face to face with NU's preferred vendor representatives, as well as learn about the products and services offered with cost-effective solutions.

If you have any questions regarding NU's Preferred Vendors, please contact Procurement and Payment Services at procurement@northwestern.edu or reference the [PPS website](#).



New Stockroom Ordering Process

The Fisher and Sigma stockrooms opened on October 1 on both campuses, and the chemical bunker in Evanston recently opened on November 1. The new and improved stockrooms now leverage iBuyNU to streamline the ordering and payment process. With this new process shoppers can now view available stockroom items in iBuyNU and place orders online. The invoice process is no longer manual and overall there is a higher level of transparency with stockroom purchasing data. For detailed instructions on the new stockroom shopping processes please visit the [Lab Supply Stockroom Website](#).

Tips and Updates:

- We recommend that new shoppers take shopper training to familiarize themselves with iBuyNU. The live in person training course for iBuyNU is FMS801 Shopping iBuyNU. There is also a list of tutorials, demonstrations, reference documents and training guides that can be reviewed to learn more about the iBuyNU by accessing [this link](#).
- Stockroom Order Confirmation emails will now only be sent when requested.
- Shoppers who walk in should assign carts to their requesters in iBuyNU at the kiosk in the stockrooms. For requesters, if you begin the checkout process you will need to complete the requisitioning process or else you will lose the cart.
- Remember to set up the shared cart functionality to facilitate the process of sharing carts for immediate pickup.
- Also, labs must remember to turn carts into requisitions immediately after picking up items in order to make sure Fisher is paid for the purchases.
- Bio-Rad and NEB are in process of being added to the stockrooms and will have freezer programs on-site.

If you have any questions regarding the new stockroom ordering process, please contact Kimberly Li, Procurement Administrator, at 847-467-0837 or Kimberly.li@northwestern.edu.

VENDOR FILE MANAGEMENT, EPAYMENT, AND THE PROCUREMENT CARD PROGRAM HAVE MOVED

As previously announced, Purchasing, Vendor File Management, Accounts Payable, the P-card program and e-Payment were recently combined into Procurement and Payment Services, reporting to Financial Operations. ePayment, the Procurement Card Program, and Vendor File Management are now also located at 2020 Ridge, Room 111, Garden Level and are open for business.

Thank you for your patience while we moved. Telephone numbers and contact information will remain the same.



Preferred Vendor Updates

Preferred Vendors Selected for Promotional Products

PPS recently issued an Invitation to Bid (ITB) for Promotional Products and received bids from over 30 individual suppliers. Ultimately the Evaluation Committee (comprised of 13 individuals from various departments and schools) found the following 4 suppliers represented the best value to Northwestern – Overture, Club Colors, Corporate Imaging Concepts, and 4imprint. These suppliers not only have a wide range of products, sourced manufacturers, and industry relationships, but also exhibited highly structured technology, detailed product quality assurance, environmental awareness, creative designs and ideas, competitive pricing and showed an ability and enthusiasm to integrate into iBuyNU (coming soon!). Dedicated sales representatives have been assigned to NU for each supplier. Please see their contact information below.

Club Colors

Jason Heiss
800.249.2582 x 388
jheiss@clubcolors.com

Overture

Bobby Hazan
847.573.6086
BobbyH@overturepromo.com

4imprint

Karla Kohlmann
800.760.4137
kkohlmann@4imprint.com

Corporate Imaging Concepts

Mike Goldman
847.412.6626
mikeg@corp-imaging.com

If you have questions, please contact Julie Maul, Procurement Administrator at 847-491-5321 or at julie.maul@northwestern.edu.

Henry Schein iBuyNU Catalog Now Live

As previously announced, Henry Schein Medical has been selected as the University's preferred provider of medical/surgical products and solutions as the result of a competitive ITB process. This contract provides access to a complete portfolio of medical/surgical supplies and equipment. A dedicated representative from Henry Schein will be working with you to ensure the highest level of service and support.

The catalog is now live in iBuyNU. Please visit the Henry Schein's punchout catalog to see the vendor's complete portfolio of medical/surgical supplies and equipment. By leveraging the University's overall purchasing power through our specific manufacturer contracts and additional saving opportunities, you should see an immediate impact on your spend. Please note pharmaceutical items are not part of this contract and will not be included in the catalog. For questions about this award, or to provide feedback, contact Kimberly Li, Procurement Administrator, at 847-467-0837 or Kimberly.li@northwestern.edu.



CURRENCY CONVERSION TOOL

Looking for a tool to convert foreign currency to USD? Oanda offers a useful Currency Converter, which can be located at <http://www.oanda.com/currency/converter/>.

When submitting an international Expense Report, converting foreign currency to U.S. dollars is required. Be sure to use the rates from the date of transaction, and not the rates in effect at the time of creating the Expense Report.

PPS BIDS AND CONTRACTS IN THE WORKS

Purchasing is always working to establish Preferred Vendor contracts that best serve the needs of Northwestern departments and schools. These are a combination of new contracts and timely rebids of current contracts. PRS is currently working on the following:

- Office Furniture
- Event Rentals (tents, chairs, tables, etc.)
- Carpet and Flooring
- Window Treatments and Blinds
- Pre-Qualified Vendors for Facilities Management Services
- Commencement (regalia and diplomas)
- Outside Catering Services
- Hotels
- NUIT Next Generation Voice Solution
- Shuttle Services
- Window Washing
- After Hours call center for Health Services

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

ICE MOUNTAIN REBRANDS AS READYREFRESH

In August of 2015, Ice Mountain re-branded its delivery service to "ReadyRefresh" and continues to be owned by Nestle Waters North America, Inc. The change is primarily in the corporate name and will not affect the water service contracted by Northwestern University. Services may still be paid by P-Card, Blanket Order, or by an on-line voucher. The existing Ice Mountain vendor code, 0000028181, has been updated to reflect the new name. Going forward, NU will pay all Ice Mountain invoices using the ReadyRefresh name. When creating Online Vouchers to pay Ice Mountain invoices, or when creating your FY 2016 blankets, please use vendor code 0000028181.

Preferred Vendor Updates

Apple

Apple has recently added iPad Pro products to their catalog in iBuyNU. Also, MacBook Air products will now reflect an additional promotional discount if bundled with the AppleCare Protection Plan.

Please remember that Apple does not allow returns except in situations of Apple shipping errors (wrong item, incorrect configuration, etc.). Product defects and problems are still covered by Apple's standard warranty, however.

If you have any questions regarding the contract, please contact Dave Zohfeld, Procurement Administrator at 847-491-8122 or d-zohfeld@northwestern.edu.

CDW-G

As a reminder, preferred pricing for most Microsoft Surface products is currently available through the CDWG iBuyNU catalog for computer peripherals and supplies. Please do not buy Surface products directly through Microsoft's website, as the pricing in iBuyNU is lower and includes all the usual benefits of iBuyNU (easy ordering and payment, tax free purchasing, quick shipping, etc.).

If there is a surface product that you cannot find in iBuyNU, please email angieandbrian@cdwg.com to see if they are able to add the item to their catalog.

OfficeMax

As many people know, OfficeMax and Office Depot recently merged. Northwestern's agreement is with OfficeMax, which was awarded before the merger based on the results of a formal, competitive bid. We have made the decision to transition to the Office Depot web based catalog platform. Same great contract pricing, but a more user friendly web catalog in iBuyNU. Our plan is for the changeover to occur in February or March of 2016. Stay tuned for more information.

Life Technologies

The acquisition of Life Technologies by Thermo Fisher Scientific is now complete. As part of the merged company, the Life Technologies catalog in iBuyNU will now display a Thermo Fisher Scientific logo. The Life Technologies punchout landing page will also reference Thermo Fisher. Life Technologies will continue to be the vendor name on all orders and invoices.



Temp Staffing

Lab Support, an affiliate of Apex Systems, Inc., has been added to NU's Preferred Vendor staffing agency program. Lab Support provides supplemental staffing services and/or permanent recruiting services for Research Science, Engineering and Lab Techs.

For questions about this program, contact Betsy Costello, Procurement Administrator at 847-467-0590 or m-costello@northwestern.edu.

LabView

Procurement and Payment Services has recently helped facilitate the purchase of a campus-wide site license for LabVIEW, which is a National Instruments system-design platform and development environment for the "G" programming language. Faculty, staff, graduate students, post-docs, and undergraduate students can all benefit. The Office for Research, Weinberg College of Arts and Sciences, Feinberg School of Medicine, and McCormick School of Engineering and Applied Science have all partnered to make this product available. Please see the [NUIIT LabVIEW page](#) for instructions on how to order LabVIEW at an extremely discounted rate.

For questions about this award, or to provide feedback, contact Kimberly Li, Procurement Administrator at 847-467-0837 or kimberly.li@northwestern.edu.

Grainger

Purchasing and Facilities Management are excited to announce Grainger has updated their Employee Discount Program to the Northwestern Community – faculty, staff, and students. Grainger will extend Northwestern contracted pricing as well as free shipping to the Northwestern Community. To register for the program, please visit the [Vendor Matrix](#), click on the Grainger link, and review the documents for the Personal Purchase Discounts.

For questions about this award, contact Julie Maul, Procurement Administrator at 847-491-5321 or julie.maul@northwestern.edu.

B & H Photo

B&H Photo-Video was added to iBuyNU in 2014, and they continue to be the Preferred Vendor for photography equipment and supplies. B&H also offers over 90,000 audio-visual (AV) products across approximately 200 manufacturers. This includes scanners, projectors, displays, presenters, and other AV products.



In researching other AV contract opportunities, Purchasing has determined that the B&H iBuyNU catalog (in combination with the CDWG iBuyNU catalog) already offers extremely competitive pricing, a wide variety of items, and free shipping on most products. When purchasing AV equipment and supplies, please make sure to check the B&H iBuyNU catalog.

To learn more about our Preferred Vendors, and to find the Procurement Administrator who handles each Preferred Vendor contract, please visit our [Preferred Vendor Matrix](#).

Preferred Vendor Updates

Temp Staffing Preferred Vendor Program

Using Preferred Vendor agencies allows you to request and hire temporary and direct hire staff from a broad pool of experienced workers who have been pre-screened to meet the particular needs of your school or department. Specialty job categories include but are not limited to:

Administrative and Clerical, Financial and Accounting, IT and Technical, Marketing and Graphic Design, Research Science, Engineering and Lab Techs

As an added benefit, discounted mark-ups on temp pay rates, percentage fees for temp-to-hire conversions, and direct-hire fees have already been pre-negotiated to ensure University-wide consistency. More information is provided in the [Preferred Vendor Matrix](#). Below is a list:

- Advanced Resources
- Apex Systems Inc.
- City Staffing
- Insight Global
- Lab Support
- LaSalle Network
- Northbridge Staffing Group
- Populus Group
- Swoon Technology Resources

For more information about processing temporary staff hiring requests, please contact Tina Martin, Supervisor - NU Temporary Staffing Center, at 847-467-3271 or tina.martin@northwestern.edu.

DIRECT BILLING THROUGH ORBITZ FOR BUSINESS

Orbitz for Business offers thousands of Orbitz Business Advantage and NU Preferred hotels that accept direct billing to a Northwestern University chart string, making it easy for you to book and pay for hotel bookings. This eliminates the need for personal credit cards and streamlines the direct-bill process, eliminating the need for paper invoices. NU Preferred Hotels are flagged on OFB's site and provide pre-negotiated NU Preferred Discount rates.

As an added benefit, the [Guest Traveler](#) enhancement allows travel arrangers to invite people outside Northwestern to use the NU site on Orbitz for Business to search and book travel and have it billed directly to the University.

For more information, go to the "How to Order" section of the Preferred Hotel vendor matrix page on [Preferred Vendor Matrix](#).

Nikon Instruments Selected for University's LED Microscopy Initiative

Nikon Instruments Inc. has been selected as the Preferred Vendor for its LED Microscopy Initiative. The initiative encourages researchers to replace all mercury and metal halide lamps on microscopes with more eco-friendly LED lamps. The latter have undergone significant increases in brightness over the past few years, and there are significant advantages for replacing the mercury-containing lamps with LED lamps (no mercury, longer operating life, lower energy consumption, less heat and ozone production, more uniform spectral properties, no alignment issues). Disposal of existing mercury lamps will be included as part of the replacement process.

Selection of the Preferred Vendor was the culmination of 9 month process managed by Purchasing in cooperation with the Office for Research. It involved surveying the research community to assess needs, submitting an RFQ to vendors, interviewing vendors, and negotiating price and service. Although Purchasing was able to negotiate a substantial reduction in price for one year (Oct-Oct), researchers will be responsible for the cost of replacements.

Researchers are encouraged to take advantage of the University's negotiated pricing and extended warranties which will be available through Oct 2016. Please see pricing and terms via the [Vendor Matrix](#) online.

The LED Microscopy Initiative is a joint effort of the Office for Research, Purchasing and the Office of Sustainability. The University is committed to reducing its environmental footprint through an emphasis on efficiency and renewable energy through its [SustainNU](#) program as well as by influencing purchasing decisions through its [Commitment to Sustainability](#) program.

For additional information about the initiative, please contact Phil Hockberger (p-hockberger@northwestern.edu), Executive Director of Research Facilities in the Office for Research. For technical information, please contact Chris Mauer (cmauer@nikon.net), Advanced Imaging Specialist at Nikon Instruments.

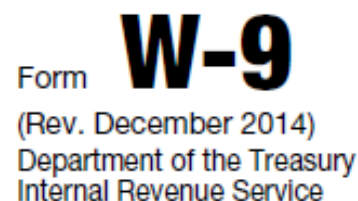
Process & Procedures

Vendor Code Request Tips

There are a couple of things that you can do to speed up processing of your vendor requests. Check that you are using the most recent version of the W-9 form. Look at the top-left corner of the form – it should be dated **December 2014**:

Vendor requests can be sent back to the submitter for a number of reasons: old version of forms used, missing signatures on documents, etc. You will receive an automated email if your vendor request is sent back. The email will indicate the Vendor Request Number and the reason for the return. Click the link in the email to be directed back to your original vendor request. Delete the attachment with the error and attach the corrected document. Click Save and Submit. No need to process a new vendor request!

Questions should be directed to the VFM (Vendor File Management) helpline at 847-491-4707.



Electronic Approvals on Paperless Expense Reports

Electronic approvals (instead of wet signatures) for employees and supervisors, along with the ability to scan in and submit documentation online and workflow tracking (shown below), will bring us another step closer to paperless reimbursements.

- Printed and signed paper expense reports are being phased out of the employee reimbursement process in NUFinancials.
- New certification/approval step in NUFinancials acts as the electronic signature.
- Traveler's Expense Report Supervisor (or backup) will also approve the expense report in NUFinancials.
- Individual schools and units may continue to follow internal processes.
- HR Temporary/Part-Time employees may file electronically but the report will NOT go into electronic workflow. Instead, they will need to print-sign-scan-attach-resubmit.

Accounts Payable Email Inboxes

Send invoices only to: invoices@northwestern.edu

- This mailbox should only be used to attach invoices that are ready to be paid. All invoices should contain valid Northwestern PO numbers. If the PO number is not noted on the invoice when it is received from the vendor, it should be clearly written on the invoice before submitting for payment. This mailbox should NOT be used to submit questions or to request any special service, as it is only a collection point for invoices, and content is not reviewed for questions or requests. Invoices are printed and batched for processing at least twice daily.

Send Accounts Payable questions or requests for special handling to: a-payable@northwestern.edu

- This mailbox is constantly monitored by our Accounts Payable Customer Service group, and should be used to submit AP questions or requests for special handling on invoices, vouchers or checks.

Questions and special requests may also be directed to the Accounts Payable Customer Service team at 847-491-7339, between 8:00 am – 5:00 pm.

REGULAR VOUCHER IMAGES AVAILABLE

We are pleased to announce that users can view invoices once again from the Regular Voucher and the Voucher Document Status pages in NUFinancials. Images for Expenses and Online Vouchers remain available in their respective pages.

The navigation to view invoices in NUFinancials is below:

- Accounts Payable > Vouchers > Add/Update > Regular Entry > Related Documents tab
- Accounts Payable > Review Accounts Payable Info > Vouchers > Document Status

Should you have any questions or concerns contact Guy Wilson at 847-491-4445 or gwilson@northwestern.edu.

Using Your Procurement Card on Amazon.com

Earlier this year Amazon began charging sales tax on transactions in Illinois. We have set up a Northwestern University Amazon Business Account. Remember, you should always use Preferred Vendors and iBuyNU whenever possible before deciding to use Amazon. However, if you need to use your Procard to make tax exempt purchases for NU you must be registered under our Business account. If you haven't already joined please send an email to procard@northwestern.edu and an invitation will be sent to you. Once you accept the invitation you must follow the steps outlined on our webpage in order to correctly set up your account as tax exempt. Please contact Patricia Fulton (p-fulton@northwestern.edu or 7-3624) if you need assistance.

After setting up your account as tax exempt you may still see tax charged on a purchase. This happens when you are purchasing from a third party selling through Amazon rather than directly from Amazon. If you see tax being charged you can go back to see if the same item is sold by Amazon directly or by a different vendor that isn't required to charge Illinois sales tax.

If you must purchase from a vendor that is charging sales tax you need to contact the vendor and provide them with a copy of our [Illinois Tax Exempt One-Time Use letter](#). If you are unable to find contact information for the vendor online you may contact Amazon Customer Service at 1-866-486-2360. Their hours are Monday through Friday 7:00 am to 9:00 pm and weekends 7:00 am to 4:00 pm central time.

[Click here](#) for additional information about ordering from Amazon. Questions should be directed to Mary Hallissey in the Procurement Card Office at 847-491-5340 or m-hallissey@northwestern.edu.



CHARTERED TRANSPORTATION SERVICE

University departments, schools, and student groups requiring special transportation for business or school-related trips may charter transportation through University Services. Charter services are provided by our pre-screened transportation vendors, who offer competitive pricing and outstanding customer service. To make a reservation, call us at 312-503-4147 or fill out the Vehicle Reservation Form. More information is available at www.northwestern.edu/userservices/transportation/busservice/index.html.

Bid Assistance from Purchasing & Strategic Sourcing

Departments/schools can request that Purchasing and Strategic Sourcing perform a competitive bid or negotiate on their behalf. In addition to simply providing advice to Purchasing can provide different levels of more formal support.

To request assistance from Purchasing and Strategic Sourcing, please email procurement@northwestern.edu.

Procurement and Payment Services Directory

Procurement and Payment Services

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847-491-4445
gwilson@northwestern.edu

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847-467-0930
w-kailer@northwestern.edu

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847-491-2791
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Please visit the [Procurement and Payment Services Directory](#) for a full list of contact information.