

Dollars & Sense



Fall 2016

Northwestern | FINANCIAL OPERATIONS
Procurement and Payment Services

Campus Agreement for OnBase

OnBase is a document management system with workflow capabilities. It allows users to take paper out of the file cabinet and store it as images on servers where the content can be securely accessed regardless of the user's location.

OnBase offers a wide range of features that can facilitate creation of workflow to eliminate and standardize manual processes. With the ability to create online forms and options to integrate with other enterprise systems, OnBase can facilitate increased productivity and efficiency.

Many units on campus are already using OnBase, some of them for more than 10 years. With a strong established base of OnBase administrators representing Alumni, Finance, Facilities, Office of Research, Library, NIT, TGS, and Kellogg, new units looking at OnBase have an abundance of support in getting projects up and running. Northwestern recently obtained a campus license agreement that greatly reduces the cost and complexity for new units to start using the system.

If you would like more information about OnBase or how your unit might leverage it, please contact Christopher Fowler from Northwestern IT at 847.467.5305 or christopher.fowler@northwestern.edu.

2016 Preferred Vendor Expo Review

A big thank you to all who visited the the 2016 Preferred Vendor Expo! The expo was held August 24th in Evanston and August 26 in Chicago. The Evanston show took place at the Norris Center, as well as a show specific to lab and science vendors in Pancoe. The Chicago show was hosted at the Lurie Atrium.

The expo was a huge success, with more than 1,000 attendees between both campuses and more than 60 featured vendors on each campus. Among the participating vendors were Amazing Edibles, Jewell Events Catering, Limelight Catering, Catered

by Design, 4imprint Inc., Club Colors LLC, Corporate Imaging Concepts LLC, Overture Promotions, and Mark Vend.

The Preferred Vendor Expo provides an opportunity for the Northwestern community to meet our vendor representatives face-to-face, make connections, sample products, and gain information for future ordering. If you have any questions regarding the Preferred Vendor Expo, contact Procurement at 847.491.8120 or procurement@northwestern.edu.



IN THIS ISSUE

| | |
|-------------------------------------|---|
| IBUYNU UPDATE | 2 |
| NEW PREFERRED VENDOR CONTRACTS | 3 |
| SOCIAL MEDIA CONTRACT AWARDED | 3 |
| COFFEE, STATIONERY IBUYNU ADDITIONS | 4 |
| UPDATES ON EXISTING CONTRACTS | 5 |
| BIDS + CONTRACTS IN THE WORKS | 5 |
| CATERING CONTRACTS | 6 |
| NUFINANCIALS REMINDERS | 7 |
| NEW WILDCARD ADVANTAGE DISCOUNTS | 8 |
| PROCUREMENT DIRECTORY | 9 |

Procurement News & Updates

iBuyNU Update

Reminder: Everyone can access iBuyNU as either a Requester through NUFInancials or directly as a Shopper, using your Net ID and password. To enter iBuyNU, visit the Portal > Financial > Purchasing tab.

When searching for a product to purchase, please remember to look at the Preferred Vendor catalogs in iBuyNU as your first choice over Amazon.com, Google, or other online retailers whenever possible. Benefits of using Preferred Vendors – which were all selected based on a competitive bid/negotiation – include savings due to consolidated purchasing power and leveraged volume, reduced risk due to improved contract administration, and streamlined ordering and payment processes. For a full list of the benefits of using Preferred Vendors please visit the [Procurement website](#). Also, remember Northwestern has contract pricing with Preferred Vendors, therefore it is always best to look in the iBuyNU catalog instead of going to the contractor's public website.

Implementation of iBuyNU has been a tremendous success at Northwestern:

- In FY2009, there were 16 catalogs in iBuyNU. 35,054 orders for \$12,230,614 were issued. This represented less than 40% of the total purchase orders issued.
- In FY2016, there were 45 catalogs in iBuyNU. 89,349 orders for \$35,036,386 were issued. This represented 61% of the total purchase orders issued.

For assistance using iBuyNU, contact the Help Desk at 847.491.4357 or consultant@northwestern.edu. If you have questions, you may also contact Keith Paddy, e-Procurement Manager at 847.467.6963 or k-paddy@northwestern.edu.

Contract Management Module Implementation

The pilot for a new Supplier Contract Management module in NUFInancials is currently underway. This module improves service and reduces risk by creating a consistent and efficient process to review and sign contracts. Additionally, the system provides a single, central repository for all supplier contracts.

A full roll-out to departments and schools is expected in early 2017, based on unit readiness. Further information will be forthcoming on how your unit can take advantage of this improved process to manage the contract review and signature process, as well as utilize pre-approved contract templates.

If you have any questions, please contact Jim Konrad at 847.491.8121 or j-konrad@northwestern.edu.

Effective Business Operations

The Effective Business Operations module 2 eLearning program has been updated. This module is a helpful tool that speaks to Procurement and Payment processes at Northwestern. To view this module, visit the Office of Human Resources [Workplace Learning website](#). If you have any questions, feel free to reach out to Procurement at 847.491.8120, or procurement@northwestern.edu.

Illinois Tax Exempt One-Time Use Letter

A Tax Exempt One-Time Use Letter has been added for use by Northwestern Student Groups. Use of this letter requires approval from the University. This letter is in addition to the already existing One-Time Use Letter for use by faculty and staff. Please visit the [Procurement Tax-Exempt Status webpage](#) for all information regarding Northwestern tax exemption.

If you have any questions regarding tax exemption, call Procurement at 847.491.8120 or email procurement@northwestern.edu.

New Contracts

Sprinklr Social Media Software

After a competitive bid process that included representatives from Global Marketing and numerous departments and schools across Northwestern, **Sprinklr** has been chosen as the new enterprise-wide social media platform. The platform should become available to all Northwestern marketing professionals later this year. Further details will be forthcoming from Global Marketing in the coming months.

If you have any questions, please contact Dave Zohfeld, Procurement Administrator, at 847.491.8122 or d-zohfeld@northwestern.edu.



New Preferred Vendor for Window Washing – Corporate Cleaning Services, Inc.



After a competitive bid process, **Corporate Cleaning Services, Inc.** has been awarded a Preferred Vendor Contract for Window Washing services on both campuses. As the largest window washing company in Chicago, Corporate Cleaning is experienced with managing large multi-site facilities and with approximately 100 window washers, and are able to respond to any emergency requirements.

All buildings on campus will be cleaned on a schedule determined by Facilities Management. For ad hoc cleanings please contact Facilities Management to schedule with Corporate Cleaning. For further questions about this contract, please contact Kimberly Li at 847.467.0837 or kimberly.li@northwestern.edu.

New Preferred Vendor for Customs Brokerage Services – DB Schenker

Northwestern lead an RFP initiative for the Big Ten Academic Alliance for Customs Brokerage Services. **DB Schenker** was awarded the Consortium Contract as a result of this RFP. The contract process is still ongoing. In the meantime, please contact Procurement and Payment Services at procurement@northwestern.edu for the interim customs broker's information.

As a reminder, when ordering items from overseas that require customs brokerage services, please set up a separate purchase order for the customs brokerage. As the customs fees are unknown ahead of time, it is recommended that departments set up a non-catalog requisition for the estimated amount in order to have a PO number to provide to the customs broker. After the invoice is received, the PO amount can be adjusted accordingly through a PO Change Request. Alternatively, customs brokerage services can be charged to P-Card.

For questions about this contract or service please contact Kimberly Li at 847.467.0837 or kimberly.li@northwestern.edu.

PROCUREMENT DIVERSITY FAQs NOW AVAILABLE

A new section has been added to the Procurement Diversity webpage! Check out our listed [Frequently Asked Questions](#), to learn more about the Procurement Diversity Program at Northwestern.

For questions about Procurement Diversity, contact Gwen Turner at 847.467.6333 or gwendolyn.turner@northwestern.edu.

DELL PERSONAL PURCHASE WEBSITE AVAILABLE

Dell has recently updated the webpage that is dedicated to Northwestern for personal purchases. This site can be accessed by all Northwestern faculty, staff, and students, and a personal credit card is required for all purchases.

For more details, please visit dell.com/northwestern.

Updates on Existing Contracts

New Branded Stationery Items in iBuyNU

Northwestern recently awarded a Preferred Vendor contract to **Active Graphics, Inc.** for branded stationery items. Their catalog in iBuyNU now features new stationery items reflecting Northwestern's brand standards, thanks to the collaborative efforts of Procurement and Payment Services and Global Marketing. Key benefits of the new catalog include:

- An easier-to-use, streamlined user interface
- High-quality products at competitive prices
- Free shipping (most orders will be received within 5 business days after receipt of order)

This catalog offers frequently ordered items, such as business cards, envelopes, and letterhead (both electronic and paper). Notepads and mailing labels will be added at a later date. If you have any questions about the new Active Graphics contract, please contact Shelia Watkins at s-watkins@northwestern.edu or 847.491.8125.

Corporate Imaging Concepts Added to iBuyNU for Branded Promotional Items

Procurement recently awarded four Preferred Vendor contracts for promotional items based on the results of a formal competitive bid. Procurement is excited to announce **Corporate Imaging Concepts** (CIC) is the first of the four to be added to iBuyNU!

All Northwestern logos and logo placement on the iBuyNU site have been pre-approved by the Northwestern Trademark Licensing Office. This online shopping experience allows Northwestern users to view popular promotional products (such as drinkware, apparel, bags, etc.) and place orders with the approved Northwestern Trademark logos and logo placement. This process will streamline not only the ordering and delivery of product, but Northwestern's internal approval process as well.



If users have any questions or complex orders, it is highly recommended to contact our dedicated CIC sales representatives: Mike Goldman & Stevani Jacob at 847.412.6626; 847.504.1242 or northwestern@corp-imaging.com.

Coffee Services & Pantry/Beverage Supplies Added to iBuyNU

Procurement is excited to announce **Mark Vend** has been added to the iBuyNU Marketplace. As part of the Preferred Vendor contract with Mark Vend, Northwestern receives competitive pricing on not only coffee services, but also pantry items such as chips, sodas, juices, flavored water, and sweets. Coffee machines are provided free of charge when placing coffee or tea orders with Mark Vend.

A dedicated representative is assigned to Northwestern for any specialized needs or order assistance. Please contact Nicki Schuh at 847-291-9216 or orders@markvend.com. If you have questions, please contact Julie Maul, Procurement Administrator at 847.491.5321 or julie.maul@northwestern.edu.

Roche Biochemicals Available through Sigma



As of July 2015, **Roche** has signed a global distribution agreement with Sigma-Aldrich, for their Biochemical products. These items are now available exclusively through Sigma-Aldrich. As a result of this transition, the University will be removing the Roche Diagnostics catalog in iBuyNU effective November 30, 2016, as the Sigma-Aldrich iBuyNU catalog can be utilized.

For any questions regarding this change, contact Kimberly Li at 847.467.0837 or kimberly.li@northwestern.edu.

Updates on Existing Contracts

MileNorth Now Cambria Chicago Magnificent Mile

CAMBRIA As of November 1, Northwestern Preferred Vendor MileNorth is now the **Cambria Chicago Magnificent Mile**. Although the hotel name has changed, their dedicated representatives and reservation process remain the same. Please visit the [Cambria Chicago Magnificent Mile](#) vendor matrix page for further hotel information, or contact Betsy Costello at 847.467.0590 or m-costello@northwestern.edu.

Adobe Creative Cloud Extension

 **Adobe** Thanks to financial contributions made by department and schools across Northwestern, **Adobe's** University-wide agreement (covering all faculty and staff) has been extended for an additional three years. Please see the [Northwestern IT Adobe software page](#) for additional information.

If you have any questions, please contact Dave Zohfeld, Procurement Administrator, at 847.491.8122 or d-zohfeld@northwestern.edu.

LabVIEW Software Extension

 **LabVIEW** Thanks to contributions from the Office for Research, Weinberg College of Arts and Sciences, McCormick School of Engineering, and Feinberg School of Medicine, the University-wide software license for LabVIEW has been extended for another year. With this agreement, faculty, staff, graduate students, and post-docs in all Northwestern schools, centers, and departments can purchase access to LabVIEW for research purposes at an extremely discounted rate. Please see the [Northwestern IT LabVIEW software page](#) for additional information.

If you have any questions, please contact Dave Zohfeld, Procurement Administrator, at 847.491.8122 or d-zohfeld@northwestern.edu.

B&H Photo-Video Representative Change

 Mark Rocklin is the new contract representative for **B&H Photo-Video**. He can be reached at mrock@bhphoto.com.

Code42 Representative Change

 **CODE42** Erik Lee is the new contract representative for **Code42**. He can be reached at erik.lee@code42.com.

Shred-it Representative Change

 **Shred-it** Abigail Barreto is the new contract representative for **Shred-it**. She can be reached at abigail.barreto@stericycle.com.

BIDS AND CONTRACTS IN THE WORKS

Procurement and Payment Services is always working to establish Preferred Vendor contracts that best serve the needs of all Northwestern departments and schools.

These are a combination of new contracts and timely rebids of current contracts. Procurement is currently working on the following:

- Address Validation Software
- Background check/I9/e-verify system
- Campus wide food service
- Carpet and Flooring
- Computer recycling
- Door Locks for Housing Facilities
- Employee Engagement Survey
- Event Rentals (tents, chairs, tables, etc.)
- Fire Suppression Systems maintenance
- Fuel Oil
- Hard Drive Data Recovery Services
- Hotels
- Preferred Software Reseller
- Printer repair
- Printing
- Regalia (caps, gowns, diplomas)
- Student Storage and Supplies
- Test Automation Software
- Timekeeping system
- Uniform services
- Waste Management
- Wearable Body Cameras
- Window Treatments and Blinds

For questions about these or other bids, please contact Procurement at 847.491.8120 or procurement@northwestern.edu.

Updates on Existing Contracts

Catering Contracts

Procurement and Payment Services encourages Northwestern departments and schools to use Northwestern Catering, the official campus caterer, whenever possible. Information is available at northwestern.sodexomyway.com/catering. As a complement to Northwestern Catering, Procurement recently established Preferred Vendor contracts with six external caterers.

Below is contact information:

Northwestern Catering

Stephanie Klafert
847.467.6114
stephanie.klafert@sodexo.com

Catering by Michaels

Emily Proia
847.213.5031
eproia@cateringbymichaels.com

Jewell Events Catering

Katherine Piotrowski
312.374.8205
kpiotrowski@georgejewell.com

Amazing Edibles

Diana Streit
312.563.1600
diana@amazingediblescatering.com

Food for Thought

Jenna Byrne
Delivered Team Manager
847.745.5145
jbyrne@fftchicago.com

Limelight Catering

Nicole Orlando
773.883.3080
norlando@limelightcatering.com

Catered by Design

Tami Henry
847.965.4094 ext. 205
tamih@cateredbydesign.com

Brian Kiefer
FFT Senior Sales Consultant
847.745.5134
bkiefer@fftchicago.com

These vendors offer excellent food, competitive pricing, and the commitment to customer service Northwestern requires. An additional benefit of using one of the above caterers is that the Northwestern Event Rider is part of the contract, so a separate Event Rider is no longer needed for each event.

If you have questions, please contact Julie Maul, Procurement Administrator, at 847.491.5321 or julie.maul@northwestern.edu.



Toxic Gases, Select Agents, and Radioactive Materials Ordering

Utilizing the proper category and account code facilitates the required tracking, shipping, and reporting of Toxic Gases, Select Agents, and Radioactive Materials. Please see the [Office of Research Safety's flyer](#) regarding the ordering process of these commodities.

If you have any questions, please contact Procurement at 847.491.8120 or procurement@northwestern.edu or the Office for Research Safety at 847.491.5581 or researchsafety@northwestern.edu.

Review Vendors Panel in NUFinancials – Additional Helpful Information

Did you know you can check the status of a vendor in NUFinancials?

The **Review Vendors** panel contains information showing the effective status (Active or Inactive) of a vendor code.

To access the information go to the Review Vendors tab located under Main Menu > Vendors > Vendor Information > Add/Update > Review Vendors.

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Review Vendors

Review Vendors

Search Criteria

*SetID:

Name:

Withholding Name:

Vendor Status:

Address:

Customer Number:

ID Type:

VAT Registration ID:

Withholding Tax ID:

Search Results

Main Information | Additional Vendor Info | Audit Information

| SetID | Vendor ID | Name 1▲ | ShortName | Address | City | State | Country | Effective Status |
|-------|------------|---|----------------|------------------------------|------------|-------|---------|------------------|
| SHARE | 0000036034 | OMNI G.R.O.U.P - QATAR | OMNI G.R.O-001 | M. HALLAB | DOHA | | QAT | Active |
| SHARE | 0000036038 | OMNIX QATAR CO. | OMNIX QATA-001 | KAMAL AHMED, SALES EXECUTIVE | DOHA | | QAT | Active |
| SHARE | 0000040556 | QATAR MICE DEVELOPEMENT INSTITUTE | QATAR MICE-001 | PC5 OFFICES EDUCATION CITY | DOHA | | QAT | Active |
| SHARE | 0000115296 | QATAR NATIONAL RESEARCH FUND | QATAR NATH-001 | P O BOX 5825 | DOHA | | QAT | Active |
| SHARE | 0000036138 | QATAR SIGNALS & SYSTEMS W L L SUBSIDIAR | QATAR SIGN-001 | AL HILAL/C-RING ROAD | DOHA/QATAR | | ARE | Active |
| SHARE | 0000096332 | QATAR UNIVERSITY | QATAR UNIV-001 | P O BOX 2713 | DOHA | | QAT | Active |

The search results will show all vendors that contain the name or portion of name.

The “Effective Status” column on the far right refers to whether the particular address is active or inactive.

Search Results

Main Information | Additional Vendor Info | Audit Information

| Status | Classification | Persistence | AR Number | Withholding | Withd Name | VAT Vendor | Open For Ordering |
|----------|----------------|-------------|-----------|--------------------------|------------|--------------------------|-------------------------------------|
| Inactive | Supplier | Regular | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Inactive | Supplier | Regular | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Inactive | Supplier | Regular | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Approved | Supplier | Regular | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Inactive | Supplier | Regular | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Inactive | Supplier | Regular | | <input type="checkbox"/> | | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Clicking on the “Additional Vendor Info” tab shows more information.

In this particular instance only the 4th vendor code “Qatar National Research Fund” is active.

Please contact Vendor File Management at 847.491.4707 or vendorprocessing@northwestern.edu for additional assistance.

Documentation for Requisitions

As a reminder to all shoppers and requesters:

- Requisitions of \$25,000 or more require the approval of Procurement.
- The following should be attached to the requisition:
 - A [Bid Documentation Form \(BD-1\)](#) or [Sole Source Justification Form \(SSJ-1\)](#) must be electronically attached
 - The vendor's quote
 - If the vendor's quote references terms and conditions, an email from the vendor agreeing to Northwestern's terms: northwestern.edu/procurement/docs/poterm.pdf
 - If the vendor does not agree to Northwestern's terms, vendor's terms need to be sent to the Office of General Counsel for approval, and the OGC-initialed version of vendor's terms should be attached.
- Requisitions of \$25,000 or more to order products or services from Preferred Vendors that are not in iBuyNU will require Procurement approval; however, it is expected these approvals will occur very quickly since all pricing and terms and conditions have already been established by Procurement, and the BD or SSJ is no longer necessary.

If you have any questions, please contact Procurement at 847.491.8120 or procurement@northwestern.edu.

Wildcard Advantage Spotlight

New Wildcard Advantage businesses for Fall 2016:

| | | | |
|--|----------|--|---|
| 9Round Evanston | Evanston | bit.ly/adv9round | 25% off quarterly membership |
| Alan Karzen Restoration | All | bit.ly/advkarzen | 10% off |
| Behles Family Dental Care | Evanston | bit.ly/advbehles | Free whitening with select services |
| Blaze Pizza | Evanston | bit.ly/advblaze | 10% off (<i>students only</i>) |
| Businessweek Magazine | All | bit.ly/advbizweek | 87% off |
| Citizens One Home Loans - Troy Yarolimek | Evanston | bit.ly/advcitone | \$250 discount on closing costs |
| ComedySportz Chicago | Chicago | bit.ly/advcsz | \$12.50 faculty/staff tickets |
| CrossFit e-town | Evanston | bit.ly/advcrossfitev | 33% off |
| CycleBar Evanston | Evanston | bit.ly/advcyclebar | 33% off |
| Edens - the Original | Chicago | bit.ly/advedens | 10% off |
| EuroFurniture | Chicago | bit.ly/adveurofurniture | 10% off (<i>students only</i>) |
| Farmhouse Restaurant | Evanston | bit.ly/advfarmhouse | 10% off |
| Gyu-Kaku Japanese BBQ Restaurant | Chicago | bit.ly/advgyukaku | 10% off |
| Ironcompany.com | All | bit.ly/advironco | 6% off |
| Lytic Opera of Chicago | Chicago | bit.ly/advlyric | \$20 student tickets (<i>students only</i>) |
| My Private Chef, Inc. | Chicago | bit.ly/advprivchef | 10% off |
| NU Tutors | Evanston | bit.ly/advnututors | 20% off |
| Touch Transform, LLC | Evanston | bit.ly/advtouch | \$10 off |
| TransUnion SmartMove | Chicago | bit.ly/advtusm | 20% off |
| Two Chefs Restaurant & Bar | All | bit.ly/adv2chefs | 15% off |
| Weather Mark Tavern | Chicago | bit.ly/advweathermark | 15% off (<i>students only</i>) |
| Yoga Tree of Evanston | Evanston | bit.ly/advyogatree | 10% off |

Visit our website for the full list of participating businesses: northwestern.edu/wildcard

Follow us on Twitter for the latest updates: [@NU_Wildcard](https://twitter.com/NU_Wildcard)

Check us out on the [NUhelp app](#) or click on "Discounts" on the official [Northwestern Mobile app](#)

Procurement and Payment Services Directory

Procurement and Payment Services

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847.467.0930
w-kailer@northwestern.edu

Gary Ernsteen, Assistant Manager, Transaction Processing Accounts Payable

847.491.2781
g-ernsteen@northwestern.edu

Tom Luczkowiak Shipping/Receiving & Services Manager

847.491.8411
t-luczkowiak@northwestern.edu

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