

Dollars & Sense



Spring 2016

Northwestern | FINANCIAL OPERATIONS
Procurement and Payment Services

Business Diversity Announcement

We are very pleased to announce that Gwendolyn Turner will join Northwestern as Director of Procurement Diversity in Financial Operations Procurement and Payment Services effective April 4, 2016. In this newly created role, Gwen will report directly to Jim Konrad and be dedicated to the development, implementation, and management of a more strategic approach to business diversity at Northwestern, which will lead to improved support for local and diverse vendors. Gwen has a Bachelor of Arts degree in Economics from Southern Illinois University, a background in procurement through her work at Kraft Foods, and considerable experience working in corporate supplier diversity at the Kellogg Company and Pfizer. She most recently had her own consulting firm specializing in consulting and advising large and small businesses in the areas of diversity, corporate social responsibility, and external relations.

We are excited about the strong leadership and creative ideas Gwen will bring to this position, supporting Procurement and Payment Services, as well as Facilities Management initiatives. Please join us in welcoming Gwen to Northwestern. We will provide opportunities to meet her once she is on board. Gwen can be reached at gwendolyn.turner@northwestern.edu.

Office Depot + OfficeMax: Now One Company

OfficeMax's official name is now **Office Depot OfficeMax**, following a recent merger. Our contract will continue to have representatives:

*Primary Representative and
Resource for all your needs:*

Gerilyn Hocking
815-252-7413
gerilyn.hocking@officedepot.com

Secondary Representative:

Customer Service/Customer Support
877-969-6629 or 800-472-6473
northwestern@officemax.com
Provide NU Account Number: 726855

Gerilyn will help you with selecting an item(s), researching an order, assisting with returns, or any issues you may have related to your office supplies, including any questions you may have from your email order confirmation form.

NU TRANSITIONING TO NEW OFFICE DEPOT WEB CATALOG

As indicated above, Office Depot and OfficeMax recently merged. We are in the process of transitioning to the Office Depot web-based catalog platform. Same great contract pricing, but an improved user interface in iBuyNU, improved visibility to the portfolio of sustainable products, and the re-implementation of a more environmentally friendly delivery process. We are on track for the new web catalog to be active in iBuyNU in April. If you have any questions, please contact Keith Paddy at 7-6963 or k-paddy@northwestern.edu.

REORGANIZATION ANNOUNCEMENT

As of January 1, 2016, the following former University Services functions have been reassigned to Procurement and Payment Services (PPS):

- Copier Management Program
- Internal Moving Services
- Laboratory Supplies and Services
- Printing and Duplicating Services
- Shipping and Receiving
- Wildcard Advantage Program

For any questions regarding the departments above, contact PPS at 1-8121 or procurement@northwestern.edu.

Other offices affected include Facilities Management, Safety and Security, and the newly created Auxiliary Support. For more information about where to locate other former University Services departments, please read the full announcement [here](#).

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Northwestern | PROCUREMENT & PAYMENT SERVICES

Vendor File Management • Purchasing • eProcurement • Accounts Payable • Procurement Card • e-Payment • Shipping/Receiving and Services

PPS News & Updates

Helpful Reminders for the Fisher Lab Supply Stockroom

Fisher Lab Stock Room Ordering: You have 2 options in iBuyNU when ordering from the Fisher lab supply stockrooms:

Option 1: Create an iBuyNU cart, assign it to Requester, wait for the requisition to be approved and for the PO to be sent to the stockroom.

- No need to share cart
- Go down to stockroom and pick up order or arrange for delivery
- This is the exact same process as any other iBuyNU order
- Please note that waiting for all approvals can cause a delay in the PO getting to the stockroom

Option 2: Create an iBuyNU cart, share it with Fisher, pick up items right away. Assign cart to Requester after picking up the order.

- Sharing the cart with the Fisher stockroom is what allows you to pick up the order before a PO is issued
- Go down to stockroom and pick up order or arrange for delivery
- It is imperative that after the product is received, the cart must be processed (requisition submitted, approvals applied, PO issued) for billing purposes

Process Carts: Procurement and Payment Services will work directly with Fisher to follow up on carts that remain pending after the shopper has already picked up items from the stockroom.

- Shoppers – Remember to assign your carts to your Requesters after items have been picked up
- Requesters – Remember to process carts (requisition submitted, approvals applied, PO issued) for billing purposes

Continued success of the Pre-PO pick-up program hinges on the integrity of the lab to process and pay for that cart after the fact. Fisher will continue to follow up with end users who have pending carts and ask them to process these transactions. If a lab does not process pending stockroom carts in a timely manner then Fisher will no longer be able to accept shared carts from members of that lab and you will have to wait for a PO to be created before picking up items.

Know Your Requester

Shoppers who are checking out items in the stockroom should know who their requester is before going to pick up the items. Otherwise, this can cause a delay in getting your items checked out and can create confusion in getting your cart processed. Your requester is determined by your business unit and is an internally assigned role. It is not determined by the system, so Purchasing and Fisher cannot look up this information for the shoppers. Additional information on the stockroom process can be found [here](#).

Santa Cruz Biotechnology Removed from iBuyNU

As indicated in the recent notification sent by the Vice President for Research, PPS has removed Santa Cruz from iBuyNU as of March 1, 2016. The University did not receive sufficient information from Santa Cruz to address concerns regarding their USDA animal care compliance, so we will no longer maintain our relationship with them as a Preferred Vendor.

Many of the products offered by Santa Cruz are available from other Preferred Vendors in iBuyNU including eBioscience, Sigma-Aldrich, BD Biosciences, Cell Signaling Technology, R&D Systems (order through Fisher), Life Technologies, EMD Millipore, Clontech, Fisher, and Abcam.

It is not our intent to adversely impact your research. Labs can still purchase from Santa Cruz using a non-catalog requisition. You would need to get a quote from them, initiate a non-catalog requisition, and a PO will be sent to them. We are leaving in place the ability to order from Santa Cruz using non-catalog orders because we understand that maintaining a consistent supply of items may be critical to the current research a lab might be doing. However, there is a desire to move spend away from them over time, as appropriate for the reasons outlined in the message from Jay Walsh.

If you have questions or need help finding acceptable alternatives, contact Kim Li at 7-0837 or kimberly.li@northwestern.edu. Also, please remember that use of custom antibodies in research requires IACUC approval. Before ordering custom antibodies from commercial sources, please contact the IACUC office 3-9339 or acuc@northwestern.edu for guidance.

My Wallet Helpful Hints

The My Wallet reconciliation process for procurement card purchases was successfully implemented on January 28, 2016. Since that time, much has been learned while adjusting to the new process. Here are a few helpful hints we would like to share:

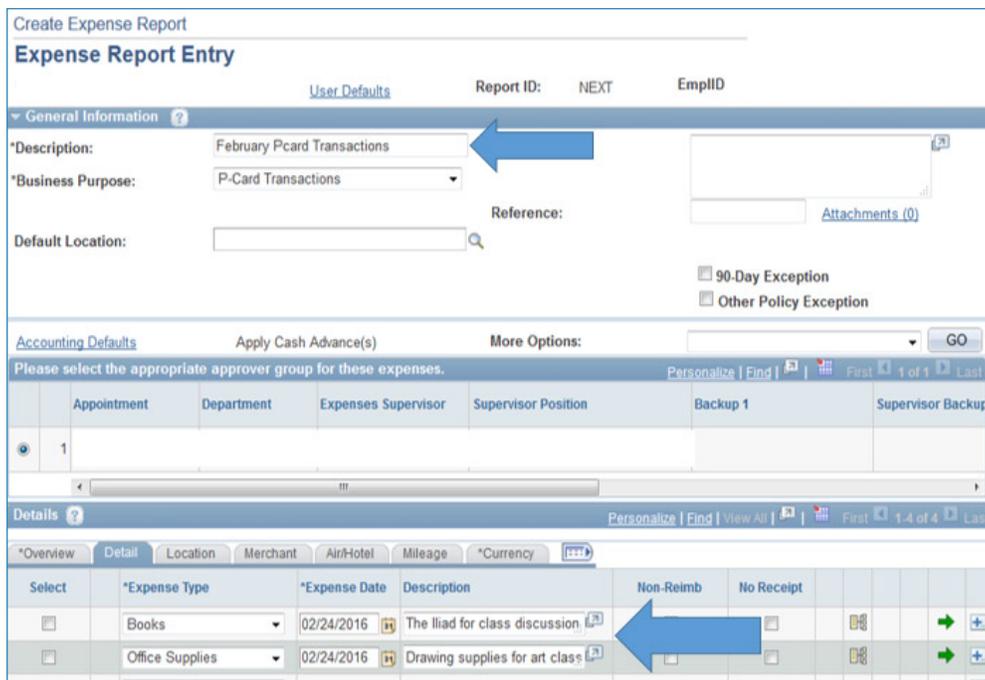
- Pull transactions from My Wallet, do not type transaction information manually into a line on the expense report. Typing procurement card entries directly onto the expense report leaves the merchant blank, which will cause the expense report to be automatically sent back.
- An expense report will also be automatically sent back if a detailed description is not included on each line and if receipts are not attached.
- You do not need to prepare a separate expense report for each individual transaction. Multiple transactions can be grouped together onto one expense report (i.e. weekly for example).
- Transactions accidentally deleted from My Wallet must be restored and processed. To navigate to your deleted items in NUFinancials: Employee Self Service > Travel and Expenses > My Wallet Restore.
- Once a My Wallet transaction is pulled into an expense report the expense type can't be changed. Update the account code on the expense distribution line to make sure the expense is correctly reflected in NUFinancials.
- Expense report approval emails are generated for My Wallet expense reports just like regular expense reports. Please note that the reimbursement amount will reflect \$0 in the email.
- To learn why an expense report was sent back, open the expense report and go to Status > Approval Status > Comments.
- You should no longer update procurement card transactions in PaymentNet. Transactions must be reconciled in My Wallet.
- Turn off the automatic transaction notification email setting in PaymentNet. Log in and go to My Profile, uncheck boxes under Options for Email Notifications and click Save.

More information is available at: [My Wallet in NUFinancials](#). For questions regarding My Wallet or Procurement cards, please contact Mary Hallissey at m-hallissey@northwestern.edu or 847-491-5340. For all other expense-related questions, contact the IT Support Center at 847-491-4357 (1-HELP), or email consultant@northwestern.edu. You can also attend an [FFRA open lab](#).

My Wallet: Required Description Fields

Please remember that, as indicated by the arrows to the right, there are two Description fields that must be completed when processing a My Wallet Expense Report:

1. In the **General Information** section
2. Under the **Detail** tab



Preferred Vendor Updates

Marketing Digital Asset Management Software Contract Awarded to MerlinOne

Procurement and Payment Services, in conjunction with Global Marketing and a committee of representatives from numerous schools & departments from across Northwestern, has awarded a contract to MerlinOne for a marketing digital asset management software solution. The system is scheduled to be launched later this year and will be managed by Global Marketing and Northwestern IT.

This was a great example of a collaborative process to identify an enterprise-wide system that will streamline processes for marketing and communications staff on campus. For questions, contact Dave Zohfeld at d-zohfeld@northwestern.edu or Alice Cameron, Global Marketing, at alice.cameron@northwestern.edu.



Wireless Monitoring Contract Awarded to Mesa Monitoring



Mesa Monitoring was awarded a contract for Wireless Monitoring for labs as the result of an RFP conducted for the Feinberg School of Medicine. Mesa's CheckPoint system is

a wireless temperature monitoring system that can integrate into existing Wi-Fi network infrastructure and remotely monitor refrigerators, freezers and other vital appliances throughout the facility in real-time.

The contract will be available in March/April 2016 and will be accessible to both Chicago and Evanston campuses. Pricing for products and services will be posted in the [Preferred Vendor Matrix](#).

For more information on the Checkpoint system, please see monitoring.mesalabs.com/checkpoint/. For any questions, please contact Kimberly Li at 7-0837 or kimberly.li@northwestern.edu.

Media Planning, SEO Services Contract Awarded to Eduvantis



Procurement and Payment Services recently conducted an RFP for Media Planning and SEO services for the Master of Science in Communication Program and Eduvantis LLC was awarded

the contract. Eduvantis specializes in working with higher education clients to raise brand visibility. For any questions please contact Kimberly Li at 7-0837 or kimberly.li@northwestern.edu.

Hospitality Contract Awarded to American Hotel



Procurement and Payment Services leveraged a competitively-bid contract with American Hotel that was established by E&I, of which Northwestern is a member, and adopted it as a

Preferred Vendor. Departments and schools will receive a discount off the advertised price, plus free shipping is available.

The American Hotel catalog will soon be available in iBuyNU. If you have any questions regarding this contract, please contact Laura Norton at 7-3345 or laura.norton@northwestern.edu.

PROTECT YOURSELF + OTHERS: AVOID THE USE OF LATEX GLOVES

Please avoid latex disposable gloves, as they may cause sensitivity or allergic reactions. Suggested alternatives include Nitrile, PVC, or Neoprene.

Please see [this flyer](#) from the Office for Research Safety for additional information.



SAFELY SHRED UNIVERSITY DOCUMENTS WITH SHRED-IT

Almost every department has information that should be protected, both for privacy purposes as well as University responsibility. Proper disposal of confidential University information is paramount.

Shred-it is our Preferred Vendor, providing tailored document destruction services. Departments can schedule an ongoing regular pick-up service or an individual pickup service for office purges.

Please refer to the Shred-it profile page in the Preferred Vendor Matrix for information on updated pricing, shred bins, and scheduling. Please contact Laura Norton at 7-3345 or laura.norton@northwestern.edu with questions.

Preferred Vendor Updates

Steiner Electric

Purchasing and Facilities Management are excited to announce Steiner Electric has updated their Employee Discount Program to the Northwestern Community – faculty, staff, and students. Steiner Electric will extend Northwestern contracted pricing, including free shipping on most items, to the Northwestern Community.

To take advantage of the program, please visit [Steiner's Preferred Vendor Matrix page](#) and review the documents for the Personal Purchase Discounts.

CDWG

CDWG is now offering personal purchase discounts to all Northwestern faculty, staff, and students. Pricing is at the same levels that the University receives for business purchases, and includes all the same items that are in iBuyNU. This also includes NU contract pricing for Lenovo computers and HP printers. [Click here](#) to access the personal purchase site.

Please note that a personal credit card must be used, and sales tax will be charged for all personal purchases.

PGI

To further improve quality and service, PGI has updated some of the toll-free phone numbers used to access audio conferences from India, Bangalore, and the UK. Northwestern users who have hosted conferences that have included callers from those locations in the past, should have already been emailed the new information directly by PGI. However, if you did not receive the email, or have any questions or concerns, email northwestern@pgi.com.

Also, our new PGI sales representative is Nadeem Parker, who can be reached at 312-794-6704 or nadeem.parker@pgi.com. Our main contact for customer service remains 888-569-3848, or northwestern@pgi.com.

Computer Contract Updates

Tier 1 PC Refresh

Procurement & Payment Services has worked with both Lenovo and Dell, as well as the IT community at Northwestern, to update the Tier 1 units in iBuyNU to reflect updated specs, including the new next-generation Intel Skylake processors. Please see the CDWG and Dell catalogs in iBuyNU to view the updated units.

Dell and Lenovo Shipping Times

When shopping in the Dell or Lenovo (CDWG) catalog for computers in iBuyNU, please note that certain units are available for immediate shipment, while custom tier 1 units may take a bit longer depending on the parts used. All items show an "estimated ship date" which can be seen in the item itself and also the iBuyNU cart (before the requisition is created).

Dell Customer Service Change

Northwestern's Dell customer representative has changed. James Carranco can be reached at 512-513-9196, or james_l_carranco@dell.com. Requests can also be sent to our account's group mailbox: northwesternuniversityteam@dell.com.

Dell iBuyNU Catalog Redesign

Dell has recently launched a catalog redesign for their iBuyNU page. End users will now see Tier 1 units (pre-configured units for which Northwestern receives the largest discount) along the left navigation pane, some of which are available for immediate shipping. The right navigation pane features an easy way to launch custom-build options, along with Dell "Smart Selects," which are pre-configured units that can ship quickly (usually 0-1 day).

Apple Old Orchard Purchases

Effective immediately, Apple will not allow tax-exempt transactions at the Old Orchard store when an end-user from an educational institution is using their personal credit card. Procurement card transactions will still be tax-exempt.

We strongly encourage end users to place Apple orders through iBuyNU, where all orders are tax-exempt and have quick shipping and delivery. If you wish to purchase an item that is not available in iBuyNU, you can contact NU's Apple customer service representative – Jessica Morris, morris@apple.com – who should be able to provide you with a quote for a non-catalog PO in NUFInancials. As an additional alternative, you can also use a chartstring to purchase a select number of Apple items from the Barnes & Noble bookstore at the Norris Center.

If you have any questions about Northwestern's computer contracts, please contact Dave Zohfeld at 1-8122 or d-zohfeld@northwestern.edu.

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

Household Relocation Moving Services Reminder

Household moving season is all most here! (April thru August). When school and department personnel work with new faculty or staff on household moves, we recommend informing them to get their quotes at least 6 to 8 weeks in advance. Please forward our [Best Practices When Moving Household Goods](#) (pdf) to new personnel.

All three Preferred Vendor Household Relocation companies include multiple relocation transportation services (interstate, intrastate, and international). Services also include storage, packing/unpacking services, supplies, equipment and trucks. These vendors offer a discount off the bottom-line transportation costs and guarantee that the final pricing will be based on actual costs and will not exceed the initial estimate. We recommend requesting quotes from these contractors: [Reebie \(Relocation Moves\)](#), [Stevens Worldwide Van Lines](#), and/or [Wheaton Van Lines](#).

For questions, contact Sheila Watkins at 1-8125 or s-watkins@northwestern.edu.

New Eco-Friendly Natural Paper Towel Available

The new janitorial supplies contract with North American started on July 1, 2015. After the award, the evaluation committee members, which included Facilities Management, Athletics, and Residential Services, worked with the Office of Sustainability to discuss how Northwestern could further improve our use of environmentally friendly products and supplies. The decision was made to change from white paper towel to natural paper towel.



There is an environmental benefit in using the new SCA Tork natural paper towel versus the previous white paper towel. The bleaching process that takes place for white towels, is not part of the natural towel manufacture process. The natural towel is made from 100% recycled fiber, and a minimum of 50% Post Consumer versus 20% for the white towel. SCA Tork natural is Ecologo Certified and Seal Certified. The natural towels are also more cost effective.

Promotional Products Contracts Awarded

PPS recently awarded four Preferred Vendor contracts based on the results of a formal competitive bid. The following suppliers were determined to represent 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, and showed an ability and enthusiasm to integrate into iBuyNU (coming soon!). Dedicated sales representatives have been assigned to Northwestern for each supplier and are listed below.

For questions, please contact Julie Maul at 1-5321 or julie.maul@northwestern.edu.

Overture, Bobby Hazan, 847-573-6086, bobbyh@overturepromo.com **Club Colors**, Jason Heiss, 800-249-2582, ext. 388, jheiss@clubcolors.com

CIC, Mike Goldman, 847-412-6626, mikeg@corp-imaging.com **4imprint**, Karla Kohlmann, 800-760-4137, kkohlmann@4imprint.com

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. PPS is currently working on the following:

- Coffee Service and Pantry/ Beverage Supplies
- Printed Stationery Products (business cards, letterhead, etc.)
- Outside Catering Services
- Printing
- Office Furniture (award decision will be announced soon!)
- Event Rentals (tents, chairs, etc.)
- Carpet and Flooring
- Window Treatments and Blinds
- Hotels
- Northwestern IT Next Generation Voice Solution
- Shuttle Services
- Parking Garage Management
- Window Washing
- FAMIS Software Replacement
- Info-ed Software Replacement
- Digital Signage System
- Identity Management and Provisioning
- Timekeeping System
- Background Check/I9/e-Verify System
- Global Marketing Social Media
- Contract Management Solution

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

Wildcard Advantage Spotlight

New Wildcard Advantage merchants for Spring 2016:

800 Degrees Pizza	Evanston	bit.ly/adv800degrees	10% off
Arlen's Chicken	Evanston	bit.ly/advarlens	10% off
Brue Coffee	Evanston	bit.ly/advbrue	15% off
Day Translations, Inc.	All	bit.ly/advtranslations	10% off translation and interpreting services
Epic Burger	Evanston	bit.ly/advpicburger	10% off
exhale Evanston	Evanston	bit.ly/advexhaleev	\$125/month membership + 20% off class packs
FullyScreened	All	bit.ly/advfullyscreened	20% off
Laura M. DeNatale, Ph.D.	Evanston	bit.ly/advdenatale	20% off mental health services
Mayan Moon Healing	Evanston	bit.ly/advmayanmoon	15% off acupuncture treatments
MobilityWorks	All	bit.ly/advmobilityworks	\$10 off any accessible van rental
Proven Data Recovery	All	bit.ly/advprovendata	30% off
Sketchbook Brewing Company	Evanston	bit.ly/advsketchbook	10% off
Snow Dragon Shavery & Yogurt	Evanston	bit.ly/advsnowdragon	Free macaron with any purchase
Studio SLK	Evanston	bit.ly/advstudioslk	10% off (students only)
United Vacations	All	bit.ly/advunitedvacations	\$75-\$500 off vacation packages
The Windsor	Chicago	bit.ly/advwindsor	10% off

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

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](#)



Process & Procedures

Northwestern Transitioning to New Travel Booking Tool

Orbitz for Business is the University-endorsed online booking tool for travel. As a result of the recent merger between Orbitz and Expedia, the Orbitz for Business booking tool will transition to Expedia's business booking tool, Egencia. This move will go into effect in mid-June 2016. We expect most end-users to make the transition very easily. Some of the benefits include access to more hotels that can be charged to a chartstring, the ability to earn hotel loyalty points, and the ability to be billed at checkout instead of when the reservation is made.

You can help prepare for the migration by taking these quick steps now:

- View a 2-minute overview of Egencia in this [short video](#).
- Log on to Orbitz for Business and verify your profile information, especially phone numbers and loyalty program memberships. This information will be transferred automatically to the new system prior to the change.

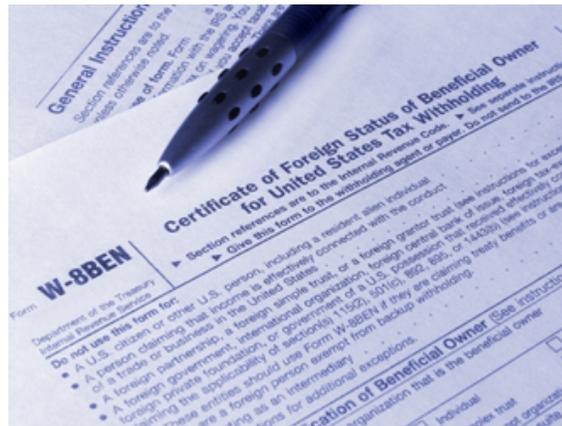
More communication will be sent out, and training opportunities will be available, throughout the transition period. If you have any questions, please contact Travel Services at 1-7569 or travel@northwestern.edu or Jeff Levin at 1-5993 or jhlevin@northwestern.edu.



W-8 Form Helpful Hints

Below are some tips to help with the processing of foreign supplier vendor requests. Any questions should be directed to the Vendor File Management (VFM) helpline at 1-4707.

1. Please direct the foreign supplier to our website for information on the various W-8 forms and links to the forms: northwestern.edu/procurement/purchasing/vendor-file-management/docs/request-tax-form-w-8-guidelines.pdf.
2. Check that you received the most recent version of the W-8 form from the foreign vendor. Look at the top-left corner of the form – it should be dated February 2014.
3. The most common W-8 form we receive from foreign suppliers is the W-8BEN-E, but other W-8 forms may be more appropriate for the organization.
4. All foreign supplier vendor codes have a payment hold placed on them pending a thorough review of the W-8 and each request for payment.



Note Regarding Accounts Payable Methods of Payment

Accounts Payable issues payments through live checks, ACH/direct deposits, and credit cards. Each payment method begins with a different number in NUFinancials and can help you easily identify which was used:

- Payments issued through live checks begin with 5
- Payments issued through ACH/direct deposits begin with 7
- Payments issued through credit cards begin with 8

Procurement and Payment Services Directory

Procurement and Payment Services

Financial Operations
Northwestern University
2020 Ridge Avenue, 2nd Floor
Evanston, IL 60208-4303

847-491-8120
procurement@northwestern.edu
northwestern.edu/procurement

Jim Konrad, Executive Director Procurement and Payment Services

847-491-8121
j-konrad@northwestern.edu

Dessa Buglio, Department Assistant Procurement and Payment Services

847-467-4572
dessa.buglio@northwestern.edu

Keith Paddy eProcurement Manager

847-467-6963
k-paddy@northwestern.edu

Elizabeth Gladic Vendor File Management Supervisor

847-491-5338
e-gladic@northwestern.edu

Mary Hallissey Procurement Card Administrator

847-491-5340
m-hallissey@northwestern.edu

Nicholas Gang Accounting Coordinator E-Payment Solutions

847-491-5340
n-gang@northwestern.edu

Guy Wilson Accounts Payable Manager

847-491-4445
gwilson@northwestern.edu

Wanda Kailer, Assistant Manager, Customer Service

Accounts Payable
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.