

# NU Dollars & Sense

PURCHASING RESOURCE SERVICES (PRS)  
UNIVERSITY SERVICES, NORTHWESTERN UNIVERSITY

## Change is Coming

Northwestern's new financial system will do more than streamline the procurement and payment process; it will change the overall procurement environment as well. What does that mean for you?

Instead of requesting a purchase order, in the new system schools and departments will need to initiate a requisition for purchases. Once the requisition has been approved and budget checked, a purchase order (P.O.) will be issued. The P.O. will be sent to your vendor automatically through PeopleSoft. Once your vendor has received the P.O. they can begin processing your order. Vendors have been informed that products or services provided without an official P.O. may not be paid and have been asked to send invoices directly to Accounts Payable. For non-catalog requisitions, receivers will need to be applied in PeopleSoft. Contact us (PRS) if you need to make any changes to a purchase order or request a new ship to code. New forms for requesting a ship to code will be available on the NU Portal when PeopleSoft goes live.

In accordance with University policy, bids must be solicited for purchases of \$25,000 or more, unless a Preferred Vendor is utilized or the purchase is made through iBuyNU. Purchasing Resource Services (PRS) will now be

responsible for approving requisitions of \$25,000 or more. Requisitions for blanket orders, regardless of dollar value, will also be approved by PRS. Please keep in mind that blanket orders shouldn't be used as an open line of credit or for phone orders without detailed and specific transaction information. Departments/schools are strongly encouraged to involve PRS in the procurement process.

## Procurement Cards

Although most purchases should be handled through a purchase order, there are instances when a P.O. is not practical or necessary. The Procurement Card is another way to make purchases for NU.

Departments and schools can set limits for each P-card—both an amount per transaction limit and a monthly total limit. The Procurement Card can be used for: registration fees, subscriptions, membership dues, emergency products or services, and internet orders.

Departments/schools can also use the Procurement Card for purchases of less than \$500 instead of using a P.O. for items not available on iBuyNU.

Please visit [www.northwestern.edu/accounting-services/menu3.html](http://www.northwestern.edu/accounting-services/menu3.html) for more information about obtaining a Procurement Card.

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# Farewell to CUFS

The last day for CUFS processing is Wednesday, November 26th. The new financial system, including iBuyNU, will go live on Monday, December 8th. Between these two dates, neither system will be available to issue purchase orders or request checks. However, VWR and Corporate Express orders can still be made during the blackout. Please plan ahead and order any supplies you may need ahead of time or obtain a procurement card.

**Beginning December 1st, CUFS numbers will no longer be accepted** for the purchase of products and services. A PeopleSoft chart string must be used instead. Convert CUFS numbers to PeopleSoft chart strings at <http://cafe.northwestern.edu/coa>.

## iBuyNU

Our new online shopping tool, iBuyNU, will go live with the new financial system. iBuyNU will allow you to order from NU Preferred Vendors online. By combining this shopping tool with the new financial system, it will be easier to purchase supplies and goods at the University. Orders can be placed online, and electronic invoices can be automatically sent to Accounts Payable. Only preferred vendors that have a formal contract or agreement with PRS will be considered for inclusion in iBuyNU. iBuyNU will continue to evolve as more contracts and agreements are established.

Below are the initial vendors who will be available in iBuyNU:

Computers: Apple, Dell, Lenovo (through CDW-G)  
Office Supplies: Corporate Express  
Recycled Toner Cartridges: Genesis Technologies  
Printers: Hewlett Packard (HP)  
Software: Software House (SHI)

Books: Barnes & Noble  
Light Bulbs: Bright Electric  
Laboratory Supplies: VWR, Invitrogen, Qiagen, Sigma-Aldrich, Integrated DNA (IDT), New England Bio-labs, Bio-Rad

## Project Café Training

Project Café training is now underway. For more information and to sign up, visit <http://cafe.northwestern.edu/training>.

## Contract Changes and Updates

### PAGERS

USA Mobility, our Preferred Vendor for pagers, has begun work on a project to improve reception in the Pancoe Building.

### FURNITURE

PRS and Risk Management have negotiated an agreement for ergonomic items with Workrite Ergonomics. These items can be ordered through any of our office furniture Preferred Vendors: Office Concepts (Steelcase), Kayhan (Haworth) and Henricksen (Allsteel).

### COFFEE

Due to rising fuel costs, a \$5.00 fee will be added to all Filterfresh orders less than \$75.00. Orders over \$75.00 are shipped for free. This delivery charge is effective immediately. If you have any questions, please contact Devi Patel at (847) 491-8122 or [d-patel3@northwestern.edu](mailto:d-patel3@northwestern.edu).

### COMPUTERS

We are pleased to introduce our new account representatives from Dell, Brett Felten and Michael Ager. Brett is located in the Chicago area and is available to address your departmental and school needs. If you have any questions, please contact Devi Patel at [d-patel3@northwestern.edu](mailto:d-patel3@northwestern.edu) or (847) 491-8122.

Brett Felten  
Dell Account Representative  
773-273-7158  
[Brett\\_Felten@Dell.com](mailto:Brett_Felten@Dell.com)

Michael Ager  
Dell Customer Service Representative  
(800) 981-3355 ext. 7264004  
[Michael\\_Ager@Dell.com](mailto:Michael_Ager@Dell.com)



## Looking for Help?

PRS is here to assist you in managing the competitive bid process. Northwestern requires that a competitive bid is conducted for all purchases of \$25,000 or more, although competitive bidding is recommended for all purchases over \$5,000. We've recently worked with a number of schools and departments to establish contracts to meet their needs, including:

**The Law School – On-site catering services**  
**Facilities Management – Shelving and air-conditioning units**  
**NU Qatar Campus – Relocation services**

We are currently working with the Registrar's Office to establish a contract for graduation supplies and University Housing for dorm room furniture. If your school or department needs purchasing help, please feel free to give us a call!

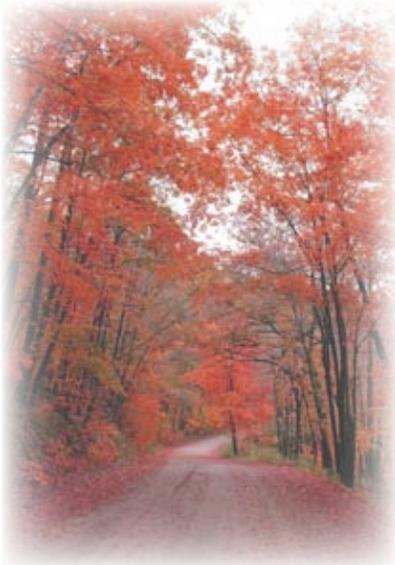
## *FAQ: What is PRS?*

As the point of contact for centralized procurement activities, Purchasing Resource Services (PRS) is here to assist you. Our job is to help your department or school make informed purchasing decisions in accordance with University policy.

We're charged with strategic sourcing for the University. To do this, we first look at the spending and usage patterns of the University and see how we can acquire goods and services in a more efficient and cost-effective manner. Using a competitive bid process, we partner with departments and schools to establish Preferred Vendor contracts and agreements for use by the entire University.

Additionally, we're responsible for maintaining and enforcing the University's purchasing policies. Part of this involves approving purchases through the new PeopleSoft system and dispatching purchase orders. We also support and maintain iBuyNU.

If you have any questions about the changing procurement environment or how we can assist you, we'd be happy to meet with you. To schedule a presentation or meeting, please contact Jim Konrad, Director of Purchasing, at 1-8121 or [j-konrad@northwestern.edu](mailto:j-konrad@northwestern.edu).



## *Electronic Forms*

The Bid Documentation (BD-1) and Sole Source Justification (SSJ-1) forms are going digital. You will no longer have to fill out the BD-1 and SSJ-1 forms and mail them to POPS. With the new PeopleSoft system, you will be able to attach electronic documents to requisitions. The new forms will be available on our website and the NU Portal when the PeopleSoft system goes live on December 8, 2008.

The BD-1 form documents how an award decision was made for purchases of \$25,000 or more. Northwestern requires that a competitive bid is conducted for all purchases of \$25,000 or more. The SSJ-1 form documents sole source purchases of \$25,000 or more. A sole source means that there is only one person or company that can provide the contractual services needed and any attempt to obtain bids would only result in one person or company being available to meet the need. These documents can be created, saved, and electronically attached to requisitions. Signatures are no longer required since they will travel through a defined requisition workflow.

If you are using one of NU's Preferred Vendors there is no need to fill out either form. Preferred Vendors have been awarded a contract or agreement on behalf of the University as the result of a formal process managed by PRS.

## *Save Money at Jewel with NU's Tax Exemption*

If you've had problems in the past with NU's tax exempt status at Jewel, they now have a copy of NU's official Illinois tax exempt certificate on file. There are two ways to make sure you are taking advantage of NU's tax exempt status for purchases:

1. Make purchases using a Northwestern Procurement Card
2. In lieu of a Procurement-Card, present Jewel with the NU Illinois Tax Exempt One Time Use Letter found under "Purchasing Forms" on our web site:

[www.northwestern.edu/userservices/purchasing](http://www.northwestern.edu/userservices/purchasing).



## *We Need Your Input*

PRS is in the process of evaluating printing and mailing service vendors. If your school or department requires printing and mailing services and is interested in participating on the evaluation committee, please contact Devi Patel at (847) 491-8122 or [d-patel3@northwestern.edu](mailto:d-patel3@northwestern.edu).

# New Contracts

We recently awarded several new contracts in a variety of areas: catering, computer peripherals, paint and paint supplies, International freight shipping, and pest control. In addition to these new contracts, negotiated pricing agreements with several lab supply companies were also established.

Use of NU's official on-campus caterer, NU Cuisine / Sodexo is encouraged. Contracts with six off-campus caterers have also been established. The six additional preferred vendors for catering are: All Season's Gourmet (formerly Cater Me Now), Catering by Michaels, Conn's Catering, Food For Thought, Hearty Boys, and MJ Catering. If you use a preferred vendor for your event, a catering agreement approved by General Counsel is not needed and the caterer's insurance documentation is already on file.

Technology Integrated Group (TIG) was awarded a contract for computer peripherals. TIG offers a wide-array of products, fast and free delivery, no minimum order, online ordering and very aggressive pricing.

Wm. Thybony Co. has been awarded a contract for paint and paint supplies. Thybony offers the best available pricing for Benjamin Moore products and high quality Low-Odor/Low-VOC paint.

The Big Ten purchasing consortium has awarded a contract to Scan Global Logistics for customs clearance services, who will also be a Preferred Vendor at NU. Scan Global Logistics



is an International freight forwarder and licensed customs broker with offices located around the world. Contact Sheila Watkins at (847) 491-8125 or s-watkins@northwestern.edu for assistance with any import or export service needs.

A contract for pest control services has been awarded to Smithereen Pest Management Services. Contact Facilities Management or University Housing to place a request for pest control services.

Pricing agreements for laboratory supplies have been established with Invitrogen, Qiagen, Sigma-Aldrich, Integrated DNA (IDT), New England Bio-labs, Bio-Rad and Promega.

## COMPUTER PERIPHERALS

Anna Wells  
TIG Account Representative  
(866) 844-3913 ext. 2033  
anna.wells@tig.com

Laraine Zook  
TIG Customer Service Representative  
(866) 844-3913 ext. 2024  
laraine.zook@tig.com

## PAINT AND PAINT SUPPLIES

Army Allin  
Thybony  
5440 North Clark St.,  
Chicago, IL 60640  
Store Phone: (773) 561-2275  
Cell Phone: (847) 561-3311

## IMPORTS/EXPORTS

Scan Global Logistics  
1254 Mark Street  
Bensenville, IL 60106  
Phone: (630) 616-8800  
Fax: (630) 616-8801

Nicole Roberts,  
Export Account Manager  
niro@scanlogistics.com

Jennifer Hamm,  
Import Account Manager  
jeha@scanlogistics.com

Rasmus Nielsen,  
Branch Manager  
rni@scanlogistics.com

## UNIVERSITY PEST CONTROL SERVICES

Evanston Campus  
Facilities Management Office  
(847) 491-5201

Chicago Campus  
Facilities Management Office  
(312) 503-8000

University Housing  
Main Operation Office  
(847) 491-5101

## Upcoming Contracts and Agreements

PRS is currently working to establish contracts or agreements for the following:



Janitorial Supplies and Disposable Paper  
December 2008

Cell Phones and Service  
January 2009

Maintenance, Repair, and Operation Supplies  
March 2009

# PRS Welcomes Our New Employees

## **Betsy Costello**

### *Procurement Administrator*

Betsy's background includes more than 12 years of business management and purchasing experience, as well as an MBA from Lake Forest Graduate School of Management. Her extensive expertise will be put to use in developing and managing preferred vendor contracts.

## **Keith Paddy**

### *eProcurement Administrator*

Before joining PRS, Keith worked for Topco Associates and Discover Financial Services. Keith's strong background in Project Management and Purchasing will lend itself well to his new role managing the new online shopping tool, iBuyNU.

## **Steve Miner**

### *Procurement Administrator*

Steve recently joined us as a Procurement Administrator. He holds a Bachelor's degree in Business Administration from the University



of Iowa and a Master's Degree from Eastern Illinois University. He most recently worked as a buyer for Carmax. Steve's extensive background in finance and purchasing will be a valuable asset in his new role in developing and maintaining vendor contracts for NU.

## **Shweta Ramesh**

### *Procurement Analyst*

Shweta recently moved to Chicago from the United Arab Emirates where she worked as a travel consultant and trainer with Amadeus, a Global Travel Distribution System. She joins the

PRS team as a Procurement Analyst and will play a crucial supporting role in iBuyNU this fall while pursuing her Masters degree in Organizational Behavior.

## **Melissa Rivas**

### *Procurement Analyst*

Melissa brings over 10 years of both corporate and non-profit retail buying experience to her position with PRS. She most recently worked at the Chicago Field Museum as a retail buyer. Her range of experience will enhance the evolving purchasing environment.

## **Lynn Claus**

### *Procurement Analyst*

Lynn joins us from the University of Wyoming, where she worked for the Athletic Department. She has a Bachelor's degree in Public Relations and Spanish from Western Michigan University. Lynn will play an integral role in implementing and maintaining the new procurement system.

## Contact Us

### **Jim Konrad**

#### *Purchasing Director*

Phone: 1-8121

j-konrad@northwestern.edu

### **Chelsea Wagenblast**

#### *Department Assistant*

Phone: 1-8120

c-wagenblast@northwestern.edu

### **Sheila Watkins**

#### *Procurement Administrator*

Phone: 1-8125

s-watkins@northwestern.edu

### **Devi Patel**

#### *Procurement Administrator*

Phone: 1-8122

d-patel3@northwestern.edu

### **Shari Janoff**

#### *Procurement Administrator*

Phone: 1-5321

s-janoff@northwestern.edu

### **Betsy Costello**

#### *Procurement Administrator*

Phone: 7-0590

m-costello@northwestern.edu

### **Steve Miner**

#### *Procurement Administrator*

Phone: 7-0837

s-miner@northwestern.edu

### **Keith Paddy**

#### *eProcurement Administrator*

Phone: 7-6963

k-paddy@northwestern.edu

### **Lynn Claus**

#### *Procurement Analyst*

Phone: 7-0838

l-claus@northwestern.edu

### **Shweta Ramesh**

#### *Procurement Analyst*

Phone: 7-0840

shweta-ramesh@northwestern.edu

### **Melissa Rivas**

#### *Procurement Analyst*

Phone: 7-0839

m-rivas@northwestern.edu



## NORTHWESTERN UNIVERSITY

### Purchasing Resource Services

University Services,  
Northwestern University  
2020 Ridge Avenue  
2nd Floor

Evanston, IL 60208-4303

Tel: 847 491 8120

Fax: 847 491 3849

E-mail: [purchasing@northwestern.edu](mailto:purchasing@northwestern.edu)

[www.northwestern.edu/userservices/purchasing](http://www.northwestern.edu/userservices/purchasing)