



PURCHASING RESOURCE SERVICES (PRS)  
UNIVERSITY SERVICES, NORTHWESTERN UNIVERSITY

## Use Preferred Vendors

Our primary goal in Purchasing Resource Services is to save departments and schools time and money. We do so by conducting formal processes that result in the establishment of great contracts. We then make it easy to order from many of these vendors by adding their catalogs to the iBuyNU marketplace. This is the most streamlined and cost-effective way for Northwestern staff to order and pay for products.

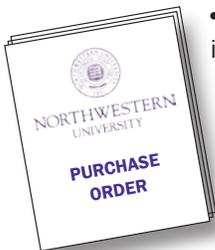
While we understand that many end-users have experience using certain vendors, it is our goal to help you develop the same confidence using the vendors to whom we have awarded contracts. For example:

- If you need to order a book, order it from Barnes and Noble (rather than Amazon)
- If you need to order a flash drive, order it from TIG (rather than CDW-G or Net Egg)
- If you need to buy a power tool, order it from MSC (rather than Grainger or McMaster Carr)
- If you need general lab supplies, buy them from VWR (rather than Fisher)
- If you need copy paper, buy it from Staples/Corporate Express

We are continuously monitoring these contracts to make sure the pricing is aggressive and correct and the service level is high. We also analyze spending to better understand what the University is buying from our preferred vendors. In addition, we have significant leverage to resolve problems when they occur. Your use of these contracts provides us with the negotiating power we need to further improve them, which benefits everyone at Northwestern.

## Changes to Official NU Purchase Order & Terms

Thanks to user suggestions, changes have been made to the official Northwestern Purchase Order that is sent to vendors.



- The Requester's e-mail address has been added in order to facilitate communication between departments/schools and vendors.
- The font size of the words 'Change Order' and 'Cancel Order' has been enlarged.

In addition, the Northwestern standard Purchase Order Terms and Conditions have been revised, effective 5/1/2010.

Updates have been made to Insurance, Discrimination/ Harassment/Sexual Harassment, and Federal Government Provisions; our Tax Exempt ID number has been updated; and paragraphs have been added for ARRA Reporting Requirements and Vendor Responsibilities. To see the full document, go to [www.northwestern.edu/userservices/purchasing/potermms.pdf](http://www.northwestern.edu/userservices/purchasing/potermms.pdf).

### IN THIS ISSUE

USE PREFERRED VENDORS	1
PURCHASE ORDER CHANGES	1
NEW ONLINE VOUCHER	2
CONDUCTING BIDS	2
TRAINING	2
PURCHASING POLICY CHANGES	3
NEW PREFERRED VENDOR	3
VWR SUPPLIES DENATURED ALCOHOL	3
CONTRACT INFORMATION	4-5
HP	
APPLE	
COMPUTER VENDORS	
OFFICE SUPPLIES	
SOFTWARE	
BOOKS	
FILTERFRESH COFFEE	
ICE MOUNTAIN	
PURCHASING TIPS	5
iBuyNU UPGRADES	5
NEW EMPLOYEES	6
CONTACT US	6



### Vendor Expo Feedback

Thank you to everyone who attended our Spring Vendor Expos. We are interested in learning more about your experience at the Expo in an effort to improve the event for next year. Please take a few minutes to provide us with feedback. **Click here to take our brief online survey.**

# NEW Online Voucher



As of Monday, March 8th, the new NUFinancials Online Voucher replaced the paper version of the Direct Payment Request and can be used in conjunction with the paper Contracted Services Form and Visitor's Expense Report. All Requesters were granted access to this new tool upon its launch.

For payments of services such as subscription renewals and membership dues, the Online Voucher is created and the documentation attached. It is submitted through workflow for needed departmental and school approvals. Accounts Payable applies final approval and issues payment.

- Visitors' Expense Reports and Contracted Services Forms must be

signed by the payee and by the approver before they can be submitted as Online Vouchers.

- In the case of Visitors' Expense Reports, the signed and approved form and receipts can be attached to the Online Voucher and submitted for payment.
- For Contracted Services Forms, the signed and approved paper form must be submitted to Accounts Payable once all needed signatures have been applied. Contracted Services Forms cannot be attached to the Online Voucher.
- Accounts Payable only approves Online Vouchers for Contracted Services Forms once the paper forms are received.

Note that the policy for appropriate uses of the Direct Payment Request has not

changed. The Online Voucher process is a way to request payment for services when the transaction does not warrant the issuance of an official Purchase Order to a vendor. It is primarily a method to request a check.

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

Occasionally, if a department or school has an invoice that needs to be paid when no Purchase Order exists, the Online Voucher process should be used. However, please note that this is a violation of policy.

## Conducting Bids

Policy requires that purchases of \$25,000 or more be made based on the results of a competitive bid, unless a Preferred Vendor is used.

Using Preferred Vendors, or conducting bids when the item needed is not available from a Preferred Vendor, is the best way to demonstrate that you are being good stewards of University funds. When multiple bids are received, departments and schools need to use the Bid Documentation Form (BD-1) to summarize their decision, and it needs to be attached to the requisition in NUFinancials.

'Sole source' means that the product or service needed is only available from a single vendor, and should therefore be exempt from the bid process. In this case, the Sole Source Justification Form (SSJ-1) should be used and attached to the requisition in NUFinancials.

Be detailed when completing either form. Both forms are available on the [NU Portal](#) or on the [Purchasing Resources Services](#) web page.

## Training

### General Info Session

In February, PRS had its first General Info Session of the year and the turnout was fantastic. We'd like to thank everyone who attended. Topics included the purchasing environment at NU, purchasing methods, preferred vendors, strategic sourcing, iBuyNU, as well as a few policy highlights. For those that were not able to attend, a copy of the presentation is available on the PRS website at [www.univsvcs.northwestern.edu/Purchasing/pdf/infosession2010.pdf](http://www.univsvcs.northwestern.edu/Purchasing/pdf/infosession2010.pdf).

### Acquiring Goods & Services

Learning & Organization Development recently revamped the Acquiring Goods and Services workshop to reflect substantial changes in our procurement environment and systems. This interactive workshop explores purchasing processes in depth, and helps participants make best value purchases when dealing with a variety of suppliers.

You'll learn the processes for making internal and external (both catalog and non-catalog) purchases; how and when to use the ProCard and On-Line Voucher: Direct Payment Request (DPR); which payment processes and forms (Contracted Services, Additional Pay and Special Pay) to use when engaging the services of individuals; how to reimburse individuals for purchases and expenses; and how to obtain advances for travel and non-travel expenses.

There are also some excellent tools (process maps and a quick reference guide) available at any time as references for all these procurement processes at [www.northwestern.edu/hr/training/business.html#ags](http://www.northwestern.edu/hr/training/business.html#ags). The process maps replicate how the major procurement processes are performed on the job and link you to the relevant policies, forms, and additional training that correlate to each step in the process.

Visit [www.northwestern.edu/hr/training](http://www.northwestern.edu/hr/training) for upcoming dates.

# Revisions to Northwestern Purchasing Policy

We have recently updated the NU Purchasing Policy and Procedures document. This revised policy dated April 1, 2010 supersedes the previous version of policy dated December 1, 2008. The Purchasing Policy Clarification dated January 26, 2009 is also hereby rescinded. A link to the revised policy is below:

[www.northwestern.edu/uservices/purchasing/policy.pdf](http://www.northwestern.edu/uservices/purchasing/policy.pdf)

Please review and familiarize yourself with this revised policy and share with others in your department/school as necessary. Below is a summary of the primary changes:

- The 'Hold From Further Processing' functionality was defined and included in paragraph W - REQUISITIONS. This was not included in the original policy document.
- The 'One Time Service' functionality was defined and included in paragraph K - SPECIAL REQUISITION TYPE.
- The paragraph titled REQUISITIONS was AA under Procedures in the old version. It has been moved to paragraph J under Policy in this version.
- Paragraph K - SPECIAL REQUISITION TYPE was added. In addition to 'One Time Service' being included in this section, we also moved 'Grant Subcontract' and 'Blanket Order' which were previously defined but included in other paragraphs.
- Changes were made to paragraph P - OTHER ACCEPTABLE PROCUREMENT/PAYMENT METHODS:
  - The Procurement Card paragraph was changed slightly to reinforce that it is not to be used for all purchases.
  - The DPR section was changed due to the launching of the Online Voucher.
  - The Blanket Order section was moved to paragraph K - SPECIAL REQUISITION TYPE.
  - The Grant Subcontract section was moved from paragraph M - APPROVALS/WORKFLOW to paragraph K - SPECIAL REQUISITION TYPE.
  - Slight changes were made to paragraph O - INVOICING/PAYMENT under Tolerance due to program changes made by the supply chain team.
  - Slight corrections were made to paragraph AR - DIRECT BILLING, HOUSE ACCOUNTS, CREDIT CARDS.



## New Preferred Vendor



The AFFINIA Hotel Chicago has been added to our Preferred Hotel Program in Chicago. The location, amenities, and pricing make the Affinia a great addition to our Preferred Hotel program for Chicago. The Affinia is located at 166 E. Superior Street. Contact information for the Affinia is: Erin Hubbard, Phone: 312-787-6459, email: ehubbard@affinia.com

Have lunch or dinner at a discount. All Preferred Chicago Hotels offer a discount in their restaurants to any NU guest showing a valid WildCARD. Contact our hotel representatives for assistance and best pricing when planning department meetings and events.

To view all of the 2010 Rates for Northwestern's preferred hotels, visit [www.northwestern.edu/uservices/travel/hotels/index.html](http://www.northwestern.edu/uservices/travel/hotels/index.html).

## VWR to Distribute Denatured Laboratory Alcohol on the Chicago Campus

VWR, Northwestern's preferred vendor for general lab supplies, currently sells denatured alcohol for labs on the Evanston campus. In addition, VWR now sells denatured alcohol on the Chicago campus. University Services transitioned this service to the VWR stockroom, located in the basement of the Searle/Morton building in Room B652.

Lab gases and dry ice are still available through University Services on both campuses.



## Look for these Upcoming Purchasing/Payment-Related Events

### Effective Business Operations

(register with Human Resources)

June 15 - Evanston

### Acquiring Goods & Services

(register with Human Resources)

June 8 - Chicago

June 22 - Evanston

### Printing Info Session

PRS will announce the specific date, time, and location for this Information Session shortly.



# Contract Information

## HP Printers

Two years ago, PRS established a contract with HP Direct, which reflects very aggressive pricing on HP printers. iBuyNU currently includes a link to the HP Direct punchout. Unfortunately, HP has been experiencing higher than anticipated demand for many of its printer and multi-function products (MFP), causing many Northwestern standard printers to be back-ordered. HP is doing everything possible to correct the availability issues including increasing production at manufacturing facilities and air-freighting product whenever possible. All levels of HP management and senior leadership are aware of the issue and are aggressively working toward increasing availability. HP regrets the inconvenience this has caused loyal customers like Northwestern University and thanks you for your patience while this issue is resolved.

If you have an order for an HP printer/MFP that is back-ordered, please feel free to contact one of the following resources for assistance with transitioning to an in-stock product or escalating your order for priority allocation. HP is committed to doing everything they can to get you the output device you need as quickly as possible:

Matt Elliott, HP Inside Sales Representative: 800-277-8988 ext. 7723146, matthew.elliott@hp.com

Katy Kaufman, HP Account Manager: 312-884-7428, katy.kaufman@hp.com

Cheryl Johnstone, MCPC Sales Specialist: 800-444-0938, cheryl.johnstone@mcpc.com

Mike Kelly: MCPC Account Manager: 800-444-0938 x 5201, Mike.Kelly@mcpc.com



## Apple

The Apple punchout site in iBuyNU cannot be accessed with the latest browser versions of Internet Explorer, Safari, FireFox, Opera, and Google Chrome (see version details below). This issue does not affect older browser versions. Apple has recently implemented security changes that prevent their punchout site from being displayed within a frame. iBuyNU displays punchout sites in frames to ensure a consistent shopping experience.

Affected Browsers:

- IE8 and IE9
- Opera 10.50
- Safari 4
- Chrome 4.1.249.1042
- Firefox 3.5 (with No Script plug-in)

AFFECTED PROCESS/AUDIENCE: Apple punchout in iBuyNU

EXPECTED RESOLUTION TIMEFRAME: We are working with Apple to find a long-term solution and will keep you informed with any status updates to this issue.

WORKAROUND (IF ANY): If you experience the browser issue, please contact Purchasing Resource Services (1-8120 or purchasing@northwestern.edu) or the Café help desk at 1-HELP (4357), opt. 2, or consultant@northwestern.edu.

## Computer Vendors

Before purchasing a warranty from one of our Preferred Vendors for computers (Dell, Apple, CDW-G/Lenovo), confirm that a warranty isn't already included at the contract pricing. For questions, contact PRS at 1-8120.

## H1N1 Preparedness

To support Health Services and University Police in their efforts to make sure the University is prepared for emergencies, three preferred vendors made their H1N1 preparedness supplies highly

visible in their catalogs in iBuyNU, which streamlines the ordering process. These special catalogs are available from North American, Corporate Express/Staples, and VWR. Some of the items available are hand sanitizer products, safety goggles, latex and vinyl gloves, isolation gowns, and filter respiration/surgical masks.

To access the North American H1N1 Preparedness Catalog:

- Access iBuyNU and click on the North American Punchout
- Under Browse & Buy, locate and click on the H1N1 Preparedness Catalog and begin shopping

To access the Corporate Express/Staples H1N1 Preparedness Catalog:

- Access iBuyNU and click on the Corporate Express/Staples Punchout
- At the top of the page, locate and click on the Shopping Lists tab
- Click on the H1N1 Preparedness link and begin shopping

To access the VWR H1N1 Preparedness Catalog:

- Access iBuyNU and click on the VWR Punchout
- Under the Welcome to VWR message, locate and click on the H1N1 Preparedness Catalog and begin shopping

## Office Supplies

STAPLES will be replacing the name Corporate Express in iBuyNU as Staples acquired Corporate Express at the end of 2009. All representative contact information will remain the same.

### Changes to Staples delivery model

Over the last two years, Staples has gone through many of the typical merger steps to bring the two companies together and provide one great solution. Staples, our preferred office supply vendor, continues to work on achieving synergies as a result of the acquisition. In February, Staples changed its delivery team serving the Chicago and Evanston

campuses to be in alignment with their standard delivery strategy for the Chicago area. This move provides a better delivery experience with increased package and driver tracking capabilities. In addition, this will help reduce the number of delivery trucks on campus since Veterans Messenger is also the delivery service for other vendors already delivering to the campus. Not only does this help reduce the carbon footprint, but also helps reduce campus traffic.

Veterans Messenger is a local, family-owned business with experienced, uniformed drivers and a proven track record serving Chicagoland. For several years prior to the acquisition of Corporate Express, all Chicagoland Staples customers were serviced by Veterans Messenger. The partnership has proven to be a solid fit for delivering outstanding service to their customers and it was a logical step to bring this to all of their customers previously purchasing under the Corporate Express name. If you have any questions, concerns, or have

experienced delivery problems, please contact PRS at 1-8120 or purchasing@northwestern.edu.



order office  
supplies from  
staples

## Software

SHI has a new NU Representative: Kevin Farrell; PH: 800-477-6479; e-mail: TeamSHI@SHI.com

## Books

As of May 1, 2010, Barnes & Nobles' discount for iBuyNU purchases has been increased from 5% to 7% off the online price for eligible products. You will still receive free ground shipping on orders of new books. For Customer Service, please contact sales@book.com for all order related questions.

## Filterfresh Coffee Service

Effective April 1, 2010, a small price increase has been implemented. This is the first pricing increase Filterfresh has had since 2008.

## Ice Mountain

Ice Mountain drinking water has a new NU Representative: Birgit Wheeler; PH: 847-400-3668; e-mail: birgit.wheeler@waters.nestle.com.

# iBuyNU Upgrades

Below are some highlights of the latest upgrade of iBuyNU functionality recently implemented:

### Changes To Cart Notification Emails

- New cart notification email will now include the cart name
- Impacts both Shoppers and Requesters

### Access to punch-out suppliers from product search results

- Before, when you performed a general search in iBuyNU and the keyword was included in the keywords for a punchout supplier, the punchout supplier would show in a box under the Refine and Filter Search Box called Other Matches. Now we can display the punchout supplier in the product search results with a link to the punchout site.
- Users now have the option to display the punchout supplier in either the 'Other Matches' (new name 'Suppliers with Matches') box, in the 'Product Search Results' or both.
- Impacts both Shoppers and Requesters



## Helpful Purchasing Tips

### Non-catalog orders in iBuyNU

- There are times when non-catalog orders are issued to preferred vendors that are included in iBuyNU (i.e. Dell). Please note that you still must enter a receiver in order for payment to be generated for non-catalog orders issued to iBuyNU vendors.
- When issuing a non-catalog order to a preferred vendor that is included in iBuyNU, please remember to NOT select the iBuyNU location code for the vendor.

### Blanket Purchase Orders

When creating a Requisition to set up a blanket, provided it meets the policy definition, here are a few things to take into consideration:

- Blanket orders need to be done each fiscal year.
- The Requisition quantity for all blanket orders should be one (1).
- The total dollar amount should be your best estimate as to how much you will spend throughout the entire fiscal year. To determine the best estimate, consider how much the

monthly invoice will be and multiply by the number of months the blanket order will be used. Or, look at the actual amount paid during the previous fiscal year and include this detail in the Blanket Requisition.

- Monitor the blanket PO to ensure you are being charged appropriately.
- Enter a receiver in NUFInancials for each invoice.
- A blanket should NEVER be fully received immediately after it is approved in NUFInancials. Receivers should be done at the time each invoice is received.

## Questions about PRS



If you have any questions about Purchasing Resource Services or the procurement environment, we'd be happy to meet with you and determine how we can best benefit your school or department. 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).

## PRS Welcomes Our New Employees



**Matt Marzillo, Procurement Administrator:** Matt graduated from the University of Illinois with a BS in 2006. He has spent the past several years as an Operations Manager for a medical equipment company in Chicago where he handled a wide array of purchasing responsibilities.

Matt is excited to be a part of the PRS team and will work primarily with the lab community to make sure we have agreements with the right vendors to support their research.



**Alicia Schemel, Procurement Analyst:** Alicia completed her MBA from Loyola University Chicago in 2005. She most recently worked as a Buyer for McMaster-Carr Supply Company. Alicia looks forward to utilizing her procurement skills at Northwestern.

## CONTACT US

### General Purchasing Contact

Chelsea Wagenblast  
Phone: 847-491-8120  
Fax: 847-467-5400  
E-mail: [purchasing@northwestern.edu](mailto:purchasing@northwestern.edu)

### Jim Konrad

**Director of Purchasing**  
Phone: 847-491-8121  
E-mail: [j-konrad@northwestern.edu](mailto:j-konrad@northwestern.edu)

### Sheila Watkins

**Procurement Administrator**  
Phone: 847-491-8125  
E-mail: [s-watkins@northwestern.edu](mailto:s-watkins@northwestern.edu)

### Devi Patel

**Procurement Administrator**  
Phone: 847-491-8122  
E-mail: [d-patel3@northwestern.edu](mailto:d-patel3@northwestern.edu)

### Shari Janoff

**Procurement Administrator**  
Phone: 847-491-5321  
E-mail: [s-janoff@northwestern.edu](mailto:s-janoff@northwestern.edu)

### Betsy Costello

**Procurement Administrator**  
Phone: 847-467-0590  
E-mail: [m-costello@northwestern.edu](mailto:m-costello@northwestern.edu)

### Matt Marzillo

**Procurement Administrator**  
Phone: 847-467-0837  
Email: [m-marzillo@northwestern.edu](mailto:m-marzillo@northwestern.edu)

### Keith Paddy

**eProcurement Manager**  
Phone: 847-467-6963  
E-mail: [k-paddy@northwestern.edu](mailto:k-paddy@northwestern.edu)

### Lori Lehnhardt

**Procurement Analyst**  
Phone: 847-467-0840  
E-mail: [l-lehnhardt@northwestern.edu](mailto:l-lehnhardt@northwestern.edu)

### Dave Zohfeld

**Procurement Analyst**  
847-467-0838  
E-mail: [d-zohfeld@northwestern.edu](mailto:d-zohfeld@northwestern.edu)

### Alicia Schemel

**Procurement Analyst**  
Phone: 847-467-0839  
E-mail: [a-schemel@northwestern.edu](mailto:a-schemel@northwestern.edu)

## HP Laptop Battery Recall

There has been a recent recall notice on HP Lithium-Ion batteries used in HP Laptops sold between August 2007 and July 2008. The recommended action for customers is to immediately remove the referenced batteries from their notebook computer and visit the HP Battery Replacement Program website at [www.hp.com/support/BatteryReplacement](http://www.hp.com/support/BatteryReplacement) to confirm if their battery is included in this recall (even if the battery was previously checked). Customers may also call (888) 202-4320 between 7 a.m. and 7 p.m. CT Monday through Friday.

Customers with recalled batteries will receive a free replacement battery. After removing the recalled battery from their notebook computer, customers may use the AC adapter to power the computer until a replacement battery arrives.

## Look for the following information in our next newsletter:

- Copiers
- Business cards, letterhead, and envelopes
- Pre-qualified list of printing companies
- Pre-qualified list of executive search firms
- Refreshed Dell standards
- The following new Preferred Vendors for lab supplies, which will also be enabled in iBuyNU: Santa Cruz, Rainin, and Clonetech
- Enablement of the following existing Preferred Vendors for office furniture in iBuyNU: Haworth/Kayhan, Steelcase/Office Concepts, and Allsteel/Henricksen



NORTHWESTERN  
UNIVERSITY

### Purchasing Resource Services

University Services  
Northwestern University  
2020 Ridge Avenue, 2nd Floor  
Evanston, IL 60208-4303  
Tel: 847.491.8120  
Fax: 847.467.5400  
E-mail: [purchasing@northwestern.edu](mailto:purchasing@northwestern.edu)  
[www.northwestern.edu/userservices/purchasing](http://www.northwestern.edu/userservices/purchasing)