

NU Dollars & Sense

PURCHASING RESOURCE SERVICES (PRS)
UNIVERSITY SERVICES, NORTHWESTERN UNIVERSITY

Check Out the Latest Improvements to iBuyNU

As a result of user feedback, several system enhancements were recently added to iBuyNU, including:

- New and improved iBuyNU home page
- User-friendly product search results that emphasize key information with large fonts and action buttons
- Option to sort product search results by price
- Ability to edit, move/copy, delete, and add items to an active cart
- Innovative screen layout making management of favorites simple

Visit iBuyNU on the NUPortal at <https://nuportal.northwestern.edu>. Click the **Staff** or **Faculty** tab, then the **Purchasing & Payments** tab. Scroll down to, "Buying at Northwestern."

New Preferred Vendors

PRS recently awarded new contracts in a variety of key areas to help your department or school get the best value on some everyday items and needs. After a thorough, competitive bid process, the following preferred

vendors were established:

Recycled Toner

Cardinal Cartridge, Inc was recently awarded the contract for recycled toner cartridges. Their catalog is available in iBuyNU (conversely, the Genesis catalog has been removed). The new contract offers superb quality product, timely delivery, and a 20% improvement in pricing over the previous contract. Visit the **Toner Cartridges** link on PRS' Preferred Vendors webpage for more information:
www.northwestern.edu/userservices/purchasing.

If you prefer OEM (non-recycled) toner cartridges for your printer, please be advised that the best pricing is available through the peripherals contract, which is with Technology Integration Group (TIG). Their catalog is also available in iBuyNU.

Document Destruction

ShredX by Rentacrate is Northwestern's new preferred vendor for document destruction and storage services on both campuses. The new contract offers considerable flexibility and savings to departments and schools. For ordering information and pricing, please visit the **Document Destruction** link on PRS' Preferred Vendors webpage:
www.northwestern.edu/userservices/purchasing.

John Helm can help departments/schools determine the best ShredX program for their needs:
jhelm@rentacrate.com or 847.312.5077.

IN THIS ISSUE

ANNOUNCEMENTS	
iBuyNU IMPROVEMENTS	1
NEW PREFERRED VENDORS	
RECYCLED TONER	1
DOCUMENT DESTRUCTION	1
FACILITIES SUPPLIES	2
JANITORIAL SERVICES	2
MOBILE COMMUNICATIONS	2
LAB SUPPLIES	2
CONTRACT UPDATES	
PARALLELS SOFTWARE	2
STAPLES RETURNS CONTACT	2
TIPS & REMINDERS	
MAC OSX USERS AND iBuyNU IDT PUNCHOUT	2
PURCHASING TIPS	3
ALERT: MISLEADING CALLS	3
UPCOMING PRS EVENTS	3
USING PREFERRED VENDORS & iBuyNU SAVES NU MONEY	4
POLICY REMINDERS	4
NEW EMPLOYEES	5
CONTACT US	5





Reminder: When ordering ShredX services please check the “Send to Vendor” box after attaching the order form to the requisition.

Facilities Supplies

Five contracts for facilities and maintenance type supplies were recently awarded. A wide-ranging selection of products, next day delivery, significant cost savings, and streamlined ordering processes are key benefits of these contracts:

- North American – janitorial supplies
- Graybar – electrical supplies
- Kimball Midwest – fasteners
- MSC – tools and miscellaneous hardware supplies
- Columbia Pipe & Supply – plumbing supplies

All five facilities and maintenance vendors are in *iBuyNU*.

Janitorial Services

PRS recently conducted a competitive bid for janitorial service, which resulted in two new contracts. LBR was awarded the contract for Facilities janitorial services on the Chicago and Evanston campuses and Aramark was awarded the janitorial services contract for Evanston Athletics.

Mobile Communications

T-Mobile, U.S. Cellular, and AT&T are Northwestern’s new preferred vendors for mobile communications. Formal contract details are being finalized.



Please contact the account representatives directly for questions regarding discounts, benefits, and transferring accounts:

T-Mobile
Robert Cummings: 773.444.5641

U.S. Cellular
Martin Heffron: 847.293.0002

AT&T
Nadir Khan: 312.953.4803

To view a comparison chart of mobile communications providers, visit the **Cell Phones** link on Purchasing’s Preferred Vendors webpage:
www.northwestern.edu/userservices/purchasing.

Lab Supplies

Cell Signaling Technology is the latest addition to the portfolio of lab supplies contracts. The new contract offers free shipping and a 10% discount. Cell Signaling Technology’s catalog is available in *iBuyNU*.



For more information on PRS’ bidding process, please visit the **Purchasing Definitions** link on the PRS website at www.northwestern.edu/userservices/purchasing or contact Purchasing at purchasing@northwestern.edu.

Contract Changes and Updates

PRS recently established a significant discount on software. Please also note some helpful information regarding Corporate Express/Staples product returns.

Discounted Rates on Parallels Software

PRS recently negotiated an agreement with Parallels that offers Northwestern buyers deeply discounted pricing and no minimum order on their software products. This pricing is available through SHI, NU’s preferred vendor for software. SHI’s catalog is included in *iBuyNU*.

Special Discount:
Parallels Desktop 4.0 for Mac + 1 year maintenance
\$33.37 per license
Parallels Part # DMBL0100014

For personal purchases (faculty, staff and students): Contact the SHI Northwestern account team at TeamSHI@shi.com or 732.564.8331.



Contact for Staples/Corporate Express Returns

Any questions regarding Staples/Corporate Express returns, reorders, and shortages can be directed to the Staples/Corporate Express Service Team at 888-CE-Today or 888-238-6329.

MAC OS X Users: IDT Punchout Issues on iBuyNU

IDT has identified an issue with Firefox that can cause some users to receive timeout errors or slow loading pages when shopping through the punchout option on *iBuyNU*. Please use the Safari browser when shopping on IDT with a Macintosh.

Note: some users may be routed to a login screen within the IDT punchout when using Safari. If this occurs, make the following changes to your Safari browser settings to enable cookies:

1. Go to the Safari drop-down menu.
2. Select **Preferences**.
3. Click **Security** in the top panel.
4. Under “Accept Cookies,” select “Always.”
5. Save all changes and restart browser.



For questions or assistance, please contact the Help Desk at 1-4357.

Helpful Purchasing Tips

The following tips will save departments and schools time and money while ensuring purchasing procedures run smoothly.

Tip #1

Assign the requester role broadly and make sure staff is appropriately trained

Make sure system roles have been appropriately assigned. The system works best when the Requester role is assigned to as many people as possible, deep into the organization. This will allow end users to initiate a request to purchase anything they need (iBuyNU or a non-catalog requisition).

All users should receive training based on their assigned roles (shopper, requester, or approver). Find Project Café training information at :

<http://cafe.northwestern.edu/training/matrix.html>.

Tip #2

Change internal business processes

Departments/schools should align their internal business processes with the new system.

Tip #3

Submit detailed, correct requisitions

- When creating a non-catalog requisition, each item being ordered needs to be a separate line item on the requisition.
- Make sure the information entered for each line is detailed (i.e. quantity, description, price).
- Make sure the information is correct by confirming the price with the vendor or requesting a quote. This is the best way to ensure the system includes accurate information so appropriate reports can be run.
- It is not acceptable to simply include one line on a requisition with the description being “per quote number” or “per invoice number.”

Tip #4

Search for items within iBuyNU hosted catalogs

There are two ways to search a supplier’s hosted catalog in iBuyNU. First, click on the vendor’s catalog icon. A search box will appear, then either:

1. Enter a keyword or product number into the search box. If the supplier has items related to that keyword, only those items will appear.

2. Enter the supplier’s full name in the search box. Search results will reflect the supplier’s entire catalog. At this time, this is the only way to view their catalog if you do not know a key word or product number.

Tip #5

Select “special requisition types” only when they apply

Users are given the option to select a special requisition type (blanket, grant subcontract, one-time service) in step one of the requisition process. However, it is only necessary to select one of the special requisition types if it actually applies to the requisition. The majority of requisitions should not have any of the three boxes checked.

Tip #6

Enter one-time service requisitions correctly

When creating a one-time service requisition the quantity should always be one and the price should be the total dollar amount for the service. Entering multiple quantities on a one-time service requisition will result in receiving issues later.

Be Aware of Misleading Phone Calls

Copier Toner

Some departments and schools have received misleading calls from IDCSEVCO/Warehouse Service Center promoting the sale of toner cartridges for copiers. Recipients of these calls have been pressured to place orders after being told that prices would soon be rising.

IDCSEVCO/Warehouse Service Center is **not** a Northwestern contractor for toner cartridges. Additionally, all toner and service is included in the contract for any Northwestern departments that have

a copier from one of our preferred vendors.

IDCSEVCO/Warehouse Service Center has been instructed to discontinue these phone calls. Please notify PRS of any encounters with them.

Microscope Repairs

Important Notice: Please contact PRS if you have been contacted by M&M Microscopes. Please note that Northwestern does **not** have a contract with this company to repair or purchase microscopes.

Look for these Upcoming PRS Events

February

General Purchasing Info Session

March

University Services/PRS Spring Vendor Expo

March 23 (Evanston)

March 25 (Chicago)

April

Sustainability from a Purchasing Perspective

PRS will announce specific dates, times, and locations for the February and April Information Sessions shortly.

How Using Preferred Vendors and iBuyNU Saves Northwestern Money

PRS establishes preferred vendors to save departments and schools time and money. Now that NUFinancials has been live for a year, PRS has been able to reflect on the value that preferred vendors and iBuyNU are providing to the University.

Preferred vendors saved Northwestern \$4.1 million from

December 1, 2008 through November 30, 2009.

A portion of the savings is directly related to improved pricing, in some cases dramatically, by going through a thorough, competitive bid process. The balance is related to a more streamlined procurement to payment process.

PRS is also frequently assisting departments and schools establish contracts that they specifically need. The estimated savings for these additional contracts is \$3.7 million per year.



Policy Reminders from PRS

In an ongoing effort to improve Northwestern's business practices and ensure the procurement process works most efficiently, we'd like to remind you of some important policies and procedures:

Requisitions and Purchase Orders

We have the same expectation that we did prior to go-live. An official purchase order should precede all purchases from outside vendors.



- Initiate a requisition at the time a product or service is ordered, not when payment is due.
- Once a requisition is fully approved, a PO is promptly sent to the vendor.
- An official purchase order begins with the prefix PUR and includes the signature of the Director of Purchasing.

Informal Ordering

Departments/schools should always order goods and services through NUFinancials. Vendors are being notified that if they do not follow appropriate procedures, they may not be paid and could be removed from NUFinancials. Please do not:

- Send an unofficial PO to a vendor.
- Call in an order using the requisition number, unofficial PO number, or recycled PO number.

- Utilize a requisition or DPR to pay an invoice after the fact. Exceptions will be granted on a very limited basis.
- Establish a blanket to facilitate informal ordering.

Blanket Orders

Blanket orders are no longer being approved when it is used as an open line of credit or to support informal ordering. Blankets should be used for ordering an ongoing service or product when no individual ordering takes place, such as:

- Monthly preventative maintenance of equipment
- Regular bottled water delivery

Hold From Further Processing

- The primary use of this option is to allow departments/schools to indicate when they need to have a PO sent to a vendor in a way other than the standard dispatch method included in their profile in NUFinancials
- It is not to be used to pay an invoice after the fact when a PO should have been issued and sent to the vendor at the beginning of the transaction. Exceptions will be granted on a very limited basis. This policy will be more strictly enforced by PRS.



One-Time Service Requisitions

A one-time service requisition should be used in the following situations:

1. When the payment amount due upon completion of the project may differ from the original quote provided by the vendor. Checking the "One Time Service" box allows the department/school to receive by dollar amount, not by quantity
2. For lengthy service projects that involve more than one invoice to be paid over several months.
3. If the project requires a deposit and then a second payment upon completion of the project. By checking the "One Time Service" box, departments/schools can have a PO issued to the vendor for the estimated amount of the project and then multiple invoices/payments can be made against the purchase order if needed.



One-time service requisitions should not be used to pay multiple invoices to a vendor for unrelated projects or to support informal ordering of products (i.e. similar to how blankets were formerly used in CUFs).

When creating a one-time service requisition the quantity should always be one and the price should equal the

total dollar amount for the service that is being ordered. Entering multiple quantities on a one-time service requisition will result in receiving issues later.

Procurement Card

Most purchases of goods and services should be made using NUFinancials so an actual purchase order is issued and sent



to a vendor. Procurement cards should be used on a limited basis. Please do not use the P-card as a means to make all purchases or as a way to order from vendors included in iBuyNU.

For more information about Northwestern's purchasing policy and procedures, please contact Purchasing Resource Services at 847-491-8120 or purchasing@northwestern.edu.

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.

PRS Welcomes Our New Employees

Dave Zohfeld, Procurement Analyst

David graduated with a degree in Business Administration from Illinois Wesleyan University in 2004. He most recently worked as a supply chain analyst for North American Corporation. David's analyst knowledge and technical skills will lend themselves well to his new role with PRS.

Lori Lehnhardt, Procurement Analyst

Lori brings 10 years of purchasing experience to her new position with PRS. She has held several purchasing positions, including managing the P-card program at U.S. Cellular and Navteq. PRS is excited to benefit from Lori's expertise.



Contact Us

Jim Konrad
Director of Purchasing

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

Lori Lehnhardt
Procurement Analyst

Phone: 7-0840
l-lehnhardt@northwestern.edu

Dave Zohfeld
Procurement Analyst

Phone: 7-0838
d-zohfeld@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: 847 467 5400

E-mail: purchasing@northwestern.edu
www.northwestern.edu/uservices/purchasing