A message from the Director...

Office Supplies: As you might have heard we are in the process of switching from WB Mason to OfficeMax because of a University wide competitive bid. This new contract allows the University to save approximately $1.2 million annually…money than can be used to fund our core mission without compromising quality. This is another example of how the campuses can work together to create synergies that help all of us. More information on the change will be forthcoming. See the full article in this edition of BuyLines.

BuyWays: We have recently completed the 1st six months of our new BuyWays eProcurement System and it has been a resounding success according to feedback from the majority of users. It is a very robust and easy to use system that allows users access to more than 15 high volume vendors. Use of the BuyWays system has doubled in the 1st six months and continues to increase each month. More vendors are being evaluated and will be added to the BuyWays system in the next few months.

Please send me any feedback that you have on either of these initiatives.

John O. Martin
Director of Procurement and Campus Services

BuyWays Now Using Phoenix Interface

The BuyWays software is now using a new interface called “Phoenix”. This new interface offers a streamlined approach to enhance the user’s navigation experience. The main difference between the Phoenix interface and the prior interface is the menu structure. Most menu items have been moved from the top of the page to a new “slide out” menu, resulting in a less cluttered workspace. Several new features have also been added, such as “Favorites” and “Menu Search”. We have updated the job aids on the BuyWays website http://www.umass.edu/afsystems/basic-page/umass-buyways/91 to show the Phoenix interface. In addition, we have added a new job aid “Phoenix – Navigation Job Aid” which will help you locate items and functions using the new interface.

Please call the A&F Systems Helpdesk at 413-545-2119 if you have any questions or need assistance with using this new interface.
New Office Supply Vendor Announced

The University System recently completed a competitive bid process for office supplies for all 5 campuses and the Shrewsbury consolidated service center.

The bids received were very competitive and have resulted in the University selecting Office Max as the most advantageous bid received based on pricing, user features and other functionality. The University System will save approximately $1,200,000 per year over today’s costs by going with Office Max. This is a multiyear contract that can extend out 5 years so the savings can exceed $6,000,000 over the contract period.

The contract is in the process of being finalized and we have a target date of mid to late March 2014 to have the Office Max catalog up and ready to use on our BuyWays system. W.B. Mason will stay up on BuyWays until we replace it with Office Max so continue to use Mason until you receive notice of the official start date for Office Max.

Office Max will be setting up a “meet n greet” at the campus center to give all users a chance to meet the Office Max Team...this date will be announced soon by the Procurement Department. They will demo their web site, introduce users to the new rep and driver and also set up individual times to come out and meet with you in your department if desired.

All delivery locations will remain the same...if you have desktop delivery now it will stay the same unless you ask to make changes. Office Max will have uniformed drivers and clearly marked trucks to insure they are easily recognized.

The Office Max web site is very similar to other web sites and should not cause any confusion but Procurement and Office Max staff will be available to answer any questions you may have. There are numerous features on the Office Max web site to enhance the user’s shopping experience. All users will get information on these prior to implementation.

Changes, no matter how smooth they are, always come with some glitches but we hope to minimize these by training prior to implementation. Much more information to come as we get closer to implementation. Please contact the Procurement Department with any questions.
OfficeMax Account Executive

The team from OfficeMax stopped by Procurement to meet some of our staff. Bridget Wozniak will be our primary day-to-day contact and is looking forward to getting started here at UMass – Amherst. Bridget is in her 16th year with OfficeMax and began her career there as a dedicated customer service representative for a national insurance company. Wozniak was promoted to sales in her 3rd year of service where she covers the Worcester area and surrounding cities, as well as Western MA. She has lived in Western MA for 20 years but grew up in Worcester.

Bridget Wozniak
OfficeMax Account Executive

Voucher Match Exceptions—No Receipt

If you get an email notification that a voucher is in match exception, and if that match exception is due to no receipt, your department must receive the item in BuyWays. Please determine if the goods have been received and enter the receipt. If you are not the receiver for your department, please notify your receiver to enter the receipt. There is no need to approve the missing receipt match exception if the match exception is due solely to no receipt. Once the receipt is entered, the match exception and email notifications will go away. If there is a problem with the shipment and you do not wish to receive at that time, you can approve the match exception and add a Comment to the voucher explaining the delay in entering the receipt, so that AP will be aware. Please understand that missing receipts delay the payment process, which can result in the vendor refusing to ship to any campus department until they receive payment.

Additional information concerning match exception notifications can be found in the job aid, AP Email Voucher Match Exception Notifications-when to request an override vs. when to do a change order, which is located at the A&F Administrative Systems website, together with all the BuyWays job aids (http://www.umass.edu/afsystems/basic-page/umass-buyways/91). Thank you for your cooperation in this matter.
The University of Massachusetts Contract for Services long form is a legal document and requires proper execution to avoid litigation. Please contact Procurement if you have any questions or concerns on how to complete the document. Incomplete or incorrect documents will be returned. For policy on when a contract form is required, see Processing Requirements for Purchases on the Procurement website www.umass.edu/procurement under Training & Support.

INSTRUCTIONS FOR COMPLETION

Page 1. Enter a date at the top of the page. This date cannot be after the start date of the contract. Enter the vendor’s complete legal name and address. Post Office boxes are not accepted.

Section 1. Scope of Services - Briefly describe the services that will be rendered by the vendor. For a complex service, a few sentences will suffice, followed by a reference to an attachment that details the services being contracted. The attachment should be referenced as: “Per Attachment A, consisting of (number) pages, attached hereto, and made a part hereof.” The attachment should be marked as “Attachment A”. For more than one attachment (price lists, payment schedules, etc.), reference as Attachment B, C, etc.

Section 2. Contract Amendments - Amendments are documents that change the Terms and Conditions of the University’s contract. Amendments should be labeled and described the same way as the Attachments- “per Amendment A consisting of (number) pages, attached hereto and made a part hereof”, etc.

Section 3. Dates of Performance - Insert Start and End dates of the services to be performed.

Section 4: Responsible University Official - This is the person in your department who exercises managerial and budgetary control for the contract.

Section 5. Payment - This section details how much will be paid, when, and how. If there is a specific payment schedule involved, a reference can be made to an attachment, such as “payment per schedule on Attachment B”. This section also details whether any other expenses, such as travel, supplies, etc. will be reimbursed and to what amount. Section E. is the total of all payments including services and reimbursements that will be made against this contract. No payments will be made over this amount without an executed amendment to the contract.

Page 4. #29 - Complete the section detailing the contact information for the University and the vendor. This contact information is where notices may be made in writing concerning this contract. Mailing addresses, along with telephone numbers, and email addresses can be included. Send the contract to the vendor BEFORE the signature by the University. This enables the vendor to review our Terms and Conditions and raise any concerns before signing. Once the contract has been signed by the vendor and department, it should be attached to the requisition in BuyWays as an External Attachment for processing by Procurement.
Postage Rate Increase

“Postage Rates Increasing 6% on 1/26/14 but Official Metered Mail Qualifies for Discount”

The price of first class stamps will increase from 46 cents to 49 cents, effective Jan. 26, according to Charlie Apicella, manager of Mail and Distribution Services.

“However, there is good news incorporated into this round of postal updates,” he reports. “The University qualifies for a one cent discount on all metered first class letters processed through Mail Services.”

Last year, Mail Services metered more than 600,000 letters that will now qualify for the reduced rate of 48 cents, Apicella adds. “You don’t need to do anything to realize this discount on your university mail. Mail Services handles all the compliance and approvals paperwork and you just need to send your envelopes out as usual. All mail that is picked up by Mail Services staff that includes a speed type number and requiring a meter imprint will qualify. Postage recharges will decrease by one cent for each letter mailed.”

WL&D Class Scheduled for May

Whether you have recently joined the University, moved to a new position or just want a refresher on policies and procedures, you may want to consider joining the Procurement Staff at our next Workplace Learning and Development class scheduled for May 15, 2014 – 9am – noon. This session will cover Procurement department functions; including purchase order (PO) requirements, contracts and policies for purchasing, contract for services, requests for bids, ProCard/Travel Card, in addition to Mail and Print Services. Come meet some of the Procurement & Campus Services staff at this informative session.

Participants who attend this session and the subsequent one on Disbursements and Receipts will receive a certificate of completion for the Financial Transactions Series. Registration can be completed from the WL&D website – http://www.umass.edu/wld/procurement .

Hope you can join us!
Account Codes for 
Equipment Maintenance Agreements

How do you find the correct account maintenance code for an Equipment Maintenance Agreement? Well, there is no single code that is appropriate for equipment maintenance agreements. The maintenance codes are used for both one-time repairs as well as maintenance service agreements. The word “maintenance” in each description covers it all. The code selected depends on the kind of equipment that is being repaired – not the type of service (agreement or one-time repair). For example, in the case of photocopier equipment, the code would be 768550 for either a one-time repair or a service contract. In the case of the repair of, or maintenance agreement for, a spectrophotometer, the code would be 768210. In the case of a maintenance agreement for, or the one-time repair of, an electronic filing system, you would use 768500. ETC.

The codes are broken out by equipment type for reporting purposes and are in keeping with those used by the Commonwealth.

Excerpted from the Numeric List:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code Type</th>
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<td>Computer Equip Maintenance</td>
<td>UU</td>
<td>B - Equip Main</td>
</tr>
<tr>
<td>768100</td>
<td>Computer Software Maintenance if not included in a Software License or Software Upgrade</td>
<td>UU</td>
<td>B - Equip Main</td>
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<td>Software Maintenance if not included in a Software License</td>
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<td>B - Equip Main</td>
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<tr>
<td>768150</td>
<td>Telecom Equip Maintenance</td>
<td>UU</td>
<td>B - Equip Main</td>
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<tr>
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<td>Research/Ed Equip Maintenance</td>
<td>LL</td>
<td>B - Equip Main</td>
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<td>Facility Equip Maintenance</td>
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<td>B - Equip Main</td>
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<td>Office Equip Maintenance</td>
<td>LL</td>
<td>B - Equip Main</td>
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<tr>
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<td>Print/Copy Equip Maintenance</td>
<td>LL</td>
<td>B - Equip Main</td>
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<td>Office Furnish Maintenance</td>
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