BuyWays: To register for a Buyways Training, please visit the Workplace Learning & Development website for our current session. [http://www.umass.edu/wld/](http://www.umass.edu/wld/)

Procard: Procard User training is available through an online training module. A link to this training will be made available upon receipt of the Procard application. Please submit your Procard application to or contact Holly Lankowski by Phone: 545-1748 or via Email: lankowski@admin.umass.edu

Procard Reallocation: Training is arranged on request. Contact Holly Lankowski by Phone: 545-1748 or via Email: lankowski@admin.umass.edu

BuyWays New Interface : Phoenix

UMass BuyWays is introducing a new user interface (UI) called Phoenix. Phoenix will replace the current user interface that is referred to as Classic. The Phoenix UI offers a streamlined approach to enhance the user’s navigation experience. The main difference in the Phoenix interface is in the menu structure. Most menu items have been moved from the top of the page to a new side ‘slide out’ menu, resulting in a less cluttered workspace. Several new features have also been added, such as ‘Favorites’ and ‘Menu Search’.

We have added two new job aids to the BuyWays Web Site, [http://www.umass.edu/afsystems/basic-page/umass-buyways/91](http://www.umass.edu/afsystems/basic-page/umass-buyways/91) in order to help our users make the transition to Phoenix. The first job aid “Phoenix - Switching the User Interface” shows you how to switch your user interface to Phoenix. The second job aid “Phoenix – Navigation Job Aid” shows you where to find and access items within Phoenix.

The Amherst Campus will be required to switch to the Phoenix Interface at the end of the work day on January 31st. After this date the Classic view will be permanently removed from use. We are providing you this advanced notice to give you an opportunity to use and familiarize yourself with the new interface before January 31st.

We recommend that you follow the “Phoenix – Switching the User Interface” job aid and change your current interface in BuyWays to Phoenix, as soon as possible to allow adequate time to become familiar with the new interface.
Amazon.com Sales Tax Change

Amazon.com will be charging MA State Sales Tax effective 10/31/2013. To apply for tax exempt status follow the instructions listed below. Please note, this can take up to 3 days to process.

REMINDERS:

Procard may be used to purchase products from Amazon.com that are not available from a vendor on an established contract, provided the purchase is in accordance with Procard policies.

When a purchase is made through Amazon.com, you are able to store your credit card number for future use. It is HIGHLY recommended that you DO NOT do this. Some staff use their accounts for both UMass business purchasing as well as personal purchasing. The credit card used for the last purchase will be the default unless you override this. There have been instances where staff have made personal purchases that have been charged to their UMass Procard. This is a strict violation of Procard policy. It is strongly recommended that you hold one account for business purposes and a separate one for your personal needs. An individual personal purchaser CANNOT use the University tax exemption certificate on file to avoid paying taxes on personal items. This is a violation of the University' tax exemption.

To apply for tax exempt status:

- Log in to Amazon.com
- Click on Your account
- Under SETTINGS: click on Amazon Tax Exemption Program
- Follow the instructions and upload tax exempt forms required
- The ST-2 can be found at - http://www.umass.edu/procurement/FORMS/ST-2.pdf
- The ST-5 can be found at— http://www.umass.edu/procurement/FORMS/Form%20ST-5%206-2010.pdf

You will see a message "You've successfully uploaded your tax exemption information". If you do not get this message try it again.

Procard Monthly Archiving and Reconciliation

It is now possible to submit your monthly Procard Reconciliation report electronically. Once your report is complete and signed off you may email it to PROCARDAUDIT@admin.umass.edu. A regular monthly submission relieves the records manager of the custodial responsibility for the Procard records. Once a successful transfer of records occurs receipts may be disposed rather than filed. Please contact Angel Falcon at 5-1429 if you have any questions or would like to participate in this method of archiving Procard records.
Going out to bid pays off for the Minuteman

The old sousaphones that the Minuteman Marching Band had were well worn and had done their time. So, when Timothy Todd Anderson, Director of the Minuteman Marching Band came out of his meeting with Chancellor Kumble Subbaswamy and was told that there was funding to support some new instruments for the band, he was elated! In September we went out to bid for twenty-two (22) new sousaphones (RFB# AA14-RH-4858). With the cost savings that Dr. Anderson received from the purchase of the new sousaphones, he was able to go out to bid and purchase sixteen (16) new baritones, too! (RFB# AA14-RH-4864).

The University Minuteman Marching Band, known as the “Power and Class of New England”, has been chosen to perform in the annual 2013 Macy’s Thanksgiving Day Parade, a nationally televised event that draws more than 50 million viewers and 3.5 million live spectators. “Being selected for the Macy’s Thanksgiving Day Parade is a great honor for the Minuteman Marching Band,” said Timothy Todd Anderson, director of the 350-strong ensemble. “The Minuteman Band has a proud history, but this is something we’ve never done before. The selection is a fitting tribute to the many great people who have made the Minuteman Band what it is today: Professor George Parks, Thom Hannum, Michael Klesch, Colin McNutt and many others, not to mention all the wonderful students who have marched in our ranks over the years. For everyone who has ever been a part of the Minuteman Marching Band, this invitation is for you!”

Congratulations on the shiny new instruments and the honor to play at the 2013 Macy’s Thanksgiving Day Parade!
The BuyLine

All hardware, software, applications, leases and services are subject to an Information Technology (IT) review to ensure compliance with federal, state and university policies. In order to satisfy the UMass Board of Trustees audit requirement relating to the IT Procurement Review policy, we are instituting an “Information Technology Acquisition & Lease Review Checklist” along with 2 new commodity codes. All IT purchases must have this form attached to the requisition and will be reviewed on a post audit basis. The form and an explanation document are attached; please review them carefully.

We will begin the staggered rollout of this requirement in BuyWays beginning Monday, November 18, 2013 with non-academic departments. We have been piloting and tweaking this process for over a year and we believe it is as streamlined as possible while still meeting the audit requirements. Please forward this announcement, and the documents, to all your BuyWays requisitioners and shoppers. If there are any questions please contact Patty Roper at 7-3045 or roper@admin.umass.edu.

Thank you for your assistance.
John O. Martin - Director of Procurement & Campus Services

http://www.umass.edu/procurement/docs/IT%20Checklist_v7.pdf
http://www.umass.edu/procurement/docs/IT%20Checklist_v7_explanation.pdf

To Non-Academic Department Liaisons

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John O. Martin - Director of Procurement & Campus Services

http://www.umass.edu/procurement/docs/IT%20Checklist_v7.pdf
http://www.umass.edu/procurement/docs/IT%20Checklist_v7_explanation.pdf

Attention!!
McKesson has been added as a Catalog Vendor in BuyWays

UPS Account Updates and Contacts

To open a new UPS account or Update an Existing Account please email William Seidler or Darrell Clark with the following information:

- Primary contact’s name
- Phone #
- Email
- Address
- Procard #, Cardholder Name, and Exp Date
- List of Users for accounts (include names and email addresses)

For immediate technical assistance please contact our Preferred Customer Team 800.377.4877

Darrell Clark
Sales Representative
800.550.3611 x 3708
darrellclark@ups.com

William Seidler
Account Manager
413.335.1391
wseidler@ups.com
NEW FEATURE!

Sales generated quotes: These are 9 digit quotes created by the Dell Sales Representative for users requesting non-catalog items. These quotes are also known as:

1. Non-catalog
2. Non-punchout
3. Non-standard
4. Sales Generated or DOMS Quote (Dell Order Management System)
5. Adhoc orders

There are two ways to retrieve a non-catalog quote during a punchout session.

The first method is called “Non-Standard Quotes” and requires action by your sale representative. Once the quote has been created, it will be added manually to your punchout catalog. This is the more stable of the two processes. [NOTE: The second method is not given.]

Here is a sample of the email the user will receive from Dell:
Your Quote number xxxxx has been added to the University of Massachusetts BuyWays Punchout Site. Quotes will remain on the site for 30 days then they will be removed.

To access the saved quote, please access Dell’s Catalog via your University of Massachusetts BuyWays Punchout site. Once on the Dell Catalog, please follow these easy steps…

1.) Please click on “My Premier”
2.) Next, choose “Custom Links”
3.) And, then click on “Non-Standard Quotes”
4.) Next, click the “Add to Cart” next to your Quote number (listed above) to add the items to your cart.

After you have added all of your quotes into the cart, please choose “Create Order Requisition”. Once completed, you will be returned to your order requisition screen within your eProcurement system.
Returns to Home Depot

We have run into a little issue with returns for Home Depot.

**WHAT’S HAPPENING:** Users return their goods directly to a store.

**ISSUE:** The credits are being applied to the UMass account, versus against the purchase order.

After having a conference call with Home Depot, here is what needs to happen for returns:

**RETURN PROCESS:**

Do not return the item to the store. Users should call Customer Service at 800-292-4208, advise PO# and item(s) they are returning. Home Depot will arrange for pickup. The item(s) will be credited back to the Purchase Order. Home Depot does support electronic credits for catalog orders. It is important that users follow this return procedure, or the credits will not be applied back to their Purchase order.

Procurement Staff Announcement

We are pleased to announce the promotion of Carol Blajda to Clerk IV and the appointment of Rebecca Schwartz to Clerk III.

Carol and Rebecca will support the Travel and Procard Programs in addition to various Procurement support responsibilities. Carol has worked in Procurement for over 20 years wearing many hats while anchoring our front desk. Rebecca is no stranger to UMass having working in Auxiliary Services and at the Textbook Annex. Please stop by to congratulate Carol on her new duties and welcome Rebecca to our staff.

BuyWays Reminders

The *eProcurement Memorandum of Understanding*, which was in effect for PeopleSoft Versions 7.5, 8.9, and 9.1, has been replaced by the document, *BuyWays Basic Purchasing Policies and Department and End User Responsibilities*. To view/print, go to the Procurement Department website/Policies -


The replacement document outlines the purchasing policies and procedures for which the Requisitioner and Department are responsible, especially for those purchases that do not require the prior review of Finance. The replacement document requires no signatures but anyone that goes thru BuyWays training and receives access to BuyWays agrees to follow the policies and procedures. These policies and procedures are for the user’s informational purposes and to meet audit requirements so users are encouraged to familiarize themselves with the contents.