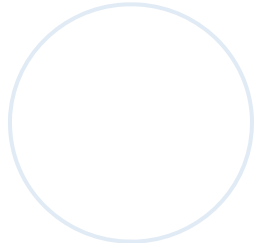




The BuyLine



October 2009



Volume 1, Issue 5

Training Dates

- eProcurement Training on Thursday—November 19th—contact Joe Pickul at jpickul@admin.umass.edu or 545-2119
- Procard Trainings to be held on Monday—November 16th and Tuesday—December 1st—contact Leasa Roberts at 545-0363 or lroberts@admin.umass.edu
- Procard Reallocation Training is arranged as needed—contact Holly Lankowski at lankowski@admin.umass.edu or 545-1748

Cost Savings Ideas

In these difficult economic times, the University faces many challenges. We thought it would be a good idea to use our newsletter as a forum to solicit and share suggestions on ways to reduce supply and equipment costs in the workplace. Perhaps your department has already taken measures to identify and reduce such costs. Have you created workarounds? Have you started using a generic product that works fine and saves money? If so, please share your ideas or suggestions with us.



Please email your ideas or suggestions to jomartin@admin.umass.edu for publication in a future newsletter. If we use your idea, we will acknowledge your contribution. If you prefer not to have your name mentioned, just let us know.

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Recycling Supplies available through HP



We have noticed that the newer HP printer ink cartridge boxes do not all have recycling envelopes in them.

We did a little research on the HP site and found a link to their recycling programs. We ended up ordering recycling bags that can hold up to 6 cartridges. The program is free and the envelopes are postage paid by HP.

What a great way to keep our campus a little greener and recycle these cartridges. Once

you set up an account, you can re-order as needed.

The recycling details can be found at - <http://www.hp.com/hpinfo/globalcitizenship/environment/recycling/product-recycling.html>

Corporate AT&T Account Information Request/Contact Info



should be the direct contact person for your area.

Did you know that UMass has a corporate contract for wireless phone services with AT&T? Under the terms of the contract, corporate users of AT&T service receive aggressive pricing and dedicated support. AT&T offers many phones that support UMass email and mobile data usage to increase communications and productivity, including Blackberry and Apple iPhone devices! Contact Brian Krause, UMass AT&T corporate account representative directly at 617-365-6926 or brian.j.krause@att.com today.

OIT/Telecom has been working with AT&T Wireless on an on going basis to resolve changes to the accounts/ devices approval workflow. We are now at the point where we need Departmental feedback. If your department/group has one or more accounts with AT&T, please contact Brian Krause, UMass AT&T corporate account representative directly at 617-365-6926 or brian.j.krause@att.com with your account number and who

Both AT&T and OIT/Telecom appreciate your assistance in this matter.



Mary Pelis of Physics sporting the sweatshirt she won by naming our newsletter.

Bottled Water Contract

In our May issue of The BuyLine, we announced our Campus Bottled Water Contract. There are two vendors to choose from:

- DS Waters / Belmont Springs
- Nestle Waters / Poland Springs

There are no rental fees or other monthly charges allowed for coolers and no deposit charges allowed for the bottles. The supplier is also responsible for service and cleaning for all water coolers supplied to the University. More details can be found at <http://www.umass.edu/procurement/contracts/bottledwater.htm> The chart below is an excerpt of the contract pricing.

		DS Waters - Belmont Springs	Nestle Waters—Poland Springs
Product	Package Size	Price	Price
5-gallon Purified Water	5-gallon bottle	\$2.29	\$2.29
5-gallon Spring Water	5-gallon bottle	\$2.29	\$2.29
1-gallon Purified Water	6 per case	\$3.50	N/A
1-gallon Spring Water	6 per case	\$3.50	\$6.99
24 oz Purified Water	24 per case	\$5.99	N/A
24 oz. Spring Water	24 per case	\$5.99	\$6.99

University Records Retention

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Records Management,
Retention and Disposition
Standard)

A link pointing to the Presidents Office Policy on Records Classification and Retention Matrix is available on the Procurement Home Page under Policies. From this Matrix, there is also a link to the State Records Retention Schedule. Our Legal Department has recommended that we review both and take the one with the longest term.

This matrix summarizes the following information for common University records:

- Record
- Data Security Classification (i.e., Confidential, Operational Use Only, or Unclassified)
- Retention Period
- Official Records Custodian
- State Schedule Reference (page and section)
- Whether Record is considered a vital record (as defined in University

University staff is responsible for properly creating, accessing, using and disposing of University data based on the data's classification. Data security classification and retention periods are applicable to University records regardless of their medium (e.g., paper, fiche, film, electronic, audio, video, etc.). When data is in micrographic (i.e., microfilm or fiche) or electronic format, no additional paper or other hard-copy or eye-readable copy needs to be kept except where specifically required by statute. This includes scanned images of documents

University data shall be accessed for approved purposes only. Staff shall understand the data they are accessing and the level of protection required. Aggregates of data should be classified as to the most secure classification level (e.g. when data of mixed classification exist in the same database, file, report, etc., the classification of that database, file, or report should be that of the highest level of classification).

The retention periods in this matrix are in compliance with University data and computing standards and are based on the current Massachusetts State-wide Records Retention Schedule. Please note that not all record types are included in this Matrix. If you are seeking information related to a record type not included in this Matrix or if you need a more comprehensive description of a record, please check the Massachusetts State-wide Records Retention Schedule.

Links are included for the following types of Records:

- Administrative
- Affirmative Action/EEO
- Construction
- Environmental
- Facilities
- Faculty
- Fiscal/Financial
- Information Technology
- Insurance
- Legal
- Payroll
- Personnel
- Procurement
- Student
- Other

The University has standards for records and data storage...the Classification and Retention Matrix help to explain this process.

Staff Profile.....who are you going to call...



Rosemary Hassay
Purchasing Manager

Many of you already know Rosemary because she is

responsible for the majority of the Requests for Bids (RFB) that leave the Procurement Department. Whether you need a piece of equipment or a service Rosemary can help you structure a specification that will insure that you will get the quality required at the best total cost. She will also review the vendor terms & conditions to in-

sure that the University is following applicable policies and laws. Contact Rosemary at 545-1094 or email her at rhassay@admin.umass.edu and she'll be ready to assist you with your project.

Amherst Procurement Department

407 Goodell Building
140 Hicks Way
Amherst, MA 01003-9334

Phone: 545-0361

Fax: 545-1643

E-mail:

procurement@admin.umass.edu

We're on the web - [http://
www.umass.edu/procurement/](http://www.umass.edu/procurement/)

UMass—Amherst - Off-Site Employee Equipment Form

Our campus uses the Off-Site Employee Equipment Form to assist departments with accounting for equipment owned by the University of Massachusetts that is taken off-site. Equipment can only be signed out when it is required for specific University business purposes. University personnel must exercise reasonable care to protect equipment owned by the University. Equipment that is no longer being used off-site for its intended business purpose needs to be returned to campus.

This form applies to all university property and equipment, regardless of the source of funds from which the items were acquired. Example of University equipment that needs to be signed out includes research equipment, laptop computers, desktop computers, cameras, and audio devices. Computer and the data stored in them need to be maintained in a secure environment. Confidential University data can not be put at risk by being taken off-site. University personnel may be held personally liable for damaged or lost equipment at the option of the Head of the Department.

This form can be found on our Home Page under Policies at
http://www.umass.edu/procurement/policies/source/Equipment_Off_site.doc

FAQ—Frequently Asked Questions

- **Which Account Code do I use on my Requisition and what, if any, documentation do I need to provide to Procurement?**

Account and Category Codes are used in the on-line electronic purchasing system at the line level to identify the type of purchase that is being made, determine the documentation that is required to make the purchase, manage the receiving requirement, and control payment tolerances. Although the Account and Category Codes are separate fields in the purchasing system, they mirror each other. Account Codes used by the University are adapted from those established by the Commonwealth, which are mandated for use by all State Agencies.



The Procurement website includes the following link that contains a short description for all Account Codes with links to the processing requirements—

[Alpha-Numeric List of Account Codes w/Links to Processing Charts, 05/2009](#)

The list is searchable and it also contains a link to the Expenditure Classification Handbook, which includes more detailed descriptions. Choose the code description that best fits the product or service requested and click on the Purchase Type link next to it, which brings the user to the applicable Processing Requirements Chart. The last step is to find the line with the appropriate dollar amount and purchase type (contract, non-contract, sole source), and follow the documentation instructions.

- **How do I find out who is my Buyer in Procurement?**
Go to the Procurement website (www.umass.edu/procurement) and click on Buyer Assignments. The Department ID's are listed with the Buyer's name next to it.
- **How can I view my US Bank—Corporate Travel Card account activity on line?**
You can view your account activity by using U.S. Bank's Access Online software. A guide on how to register for this software can be found on the Procurement Department Web Page. Click on the following links, Travel Card Program, Individual Travel Cards, How To Access Your Account Information Online.
- **What do I need to do to apply for a Procard?**
To obtain a Procard, you need to attend training and complete an application form. The Procard Application can be found at -
http://www.umass.edu/procurement/Procard/Application_2009.doc

Here's the link to the Procard Training Schedule -

<http://www.umass.edu/procurement/Procard/training.htm>