



The BuyLine

September / October 2011

Volume 3, Issue 3

NEW UNIVERSITY CONTRACT

RFP# UW11-JD-0012

Training Dates

- eProcurement Training to be held Thursday, October 20, 2011-contact Leasa Roberts via E-Mail: ljroberts@admin.umass.edu or Phone: 545-0363
- Procard Trainings to be held on Thursday, September 22, 2011 Monday, October 3, 2011 Tuesday, October 18, 2011 and Wednesday, November 2, 2011 Please contact Leasa Roberts via E-Mail: ljroberts@admin.umass.edu or Phone: 545-0363
- Procard Reallocation Training is arranged on request — contact Holly Lankowski via E-Mail: lankowski@admin.umass.edu or Phone: 545-1748
- WL&D—Procurement Overview—part of the Financial Transactions Certification Series— Thursday, November 3, 2011— 9:00 to 12:00.

UMass Awards Technology Contract to OfficeMax Technology Solutions!

After a formal RFP and evaluation process by the University of Massachusetts System, Office Max Technology Solutions has been selected as the preferred supplier for technology related products.

This is not a contract for office supplies and should not be used as such.

Orders previously placed with CDW, PC Connection, GovConnection, Insight, etc. for these items should now be directed to OfficeMax Technology Solutions. You can access the contract from the Procurement Home page: (www.umass.edu/procurement) under "Contracts Access" (Campus, University, State, MHEC)...scroll down until you see "technology related products" ... click on the link and it will show all covered products and their specific markup from cost.

This contract is based upon a cost plus model that provides aggressive prices, free ground freight for items under 100 lbs. and deliveries within 2-5 days from order placement. OfficeMax Technology Solutions is providing UMass with a custom website and a team of technology specialists to assist us with our technology needs.

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More information regarding this program will be forthcoming in the next few weeks via E-mail. If you would like to obtain a login to access this UMass website prior to the formal launch in mid-September, please access: <http://www.surveymonkey.com/s/779PLDY> to submit your contact information. Once you complete the survey, you will receive an e-mail from OfficeMax within 24-48 hours with your username and instructions to set your password. After you receive your login information, you will need to set your password within 24-hours to activate your login. If you have any questions on this program, you can contact any of these OfficeMax Technology Solutions Team Members:

- Bob Sullivan, Technology Specialist; 781-389-9279; robertsullivan@officemax.com
- Jeff Koncor, Inside Technology Sales Specialist; 800-425-0977 x 1105329; jeffjoncor@officemax.com
- Gail Bell, Program Manager; 978-590-4912; gailbell@officemax.com

If you have any questions on the contract itself please contact: John O. Martin in the Procurement Department at 545-0361.



Procard and Department Travel Card Tips and Reminders

PROCARD RESTRICTED



Procard is not allowed to be used for the purchase of any OTC (Over the Counter) medications. OTC medications include Tylenol, Acetaminophen, Ibuprofen, Advil, Aspirin, Pepto-Bismol, Alka-Seltzer, Cold-Eeze, Imodium, Physicians Care Allergy and many other similar products.

PROCARD—RECORDS MANAGER RESPONSIBILITIES

Many of you have someone other than yourself named as your Records Manager for your Procard statements. Some of you handle your own record keeping. **If you manage your own card records, we now require you to have your supervisor sign and date your statement each month indicating their approval.**

PROCARD & DEPARTMENT TRAVEL CARD—CITIBANK STATEMENT RETREIVAL

As you were informed when we delivered your Citibank card, paper statements are no longer being mailed. You need to register your card to have access to your statements online. The Citibank registration Document can be found at - [Citi Registration Handout](#). Once your card is registered, you will receive email alerts after the close of the monthly cycle advising a statement is available. If you do not have activity during a specific monthly cycle then there will be no statement and no email alert.

To download your statement, log-in to your Citi account and scroll down on the home page to the red button: **View Statement**. Click on this button. Your most recent statement will be available. Next, scroll to the far right and click on the **RED** button labeled **Download** [DO NOT use the Print Icon]. You will be prompted to choose the PDF file. Click on "**Download**". A message appears advising that the statement has been cached to your local machine. The following will appear—"If your download does not start automatically, please click **here**." A file download message will appear and you should select "Open". Older Statements are also available on the **View Statement** tab. Use the ▼ next to Statement Date to see previous cycles.

DEPARTMENT TRAVEL CARD—CAR RENTAL



Rental cars for guests of the University may **not be paid** for with the Department Travel Card. However, this card may be used to pay for rental cars that will be driven by a student. When University students rent vehicles for University business, they must include "University of Massachusetts" next to their names on car rental contracts. This helps to ensure that the University's Hired and Non-Owned Excess Liability Policy will provide excess liability coverage, if warranted.

DEPARTMENT TRAVEL CARD—BUSINESS ENTERTAINMENT CLARIFICATION

A recent email from Bob Liebowitz, Interim Controller provided clarification regarding entertainment expenses. It seems that there is a perception that as long as a non-employee is in attendance a Department Travel Card can be used. Bob states that in order to comply with University Policies, all employees must use their Individual Travel Card and not the Department Travel Card to pay for entertainment expenses when taking a guest out to dinner.

Policies require extra documentation when employees entertain which the Controller's Office verifies if processed on an Individual Corporate Travel Card but does not for Department Corporate Cards. The Controller's Office often has to report amounts employees spend on Travel and Entertainment which can be done for expenses incurred on individual cards but cannot when incurred on a department card. Here are some examples:

Individual Travel Card

Employee entertainment should be on an Individual Corporate Card. Some examples are an employee taking candidates, speakers, colleagues, collaborators, donors out to dinner in a restaurant or entertainment such as a sporting event.

Non-employee Expense, Department Card

Cost of transportation, lodging, food for a non-University employee incurred while employee is not present as the host. Cost of transportation, lodging, food for students participating in a University event or function. The cost of an employee, chaperoning or facilitating may be included as an incidental and would not have to be on their Individual Corporate Card.

Things are always changing. Whether you have just joined the University or have been here for a long time, it is helpful to stay on top of changes big and small in Procurement. The Procurement Department in conjunction with Workplace Learning and Development (WL&D) will be conducting a workshop on Thursday, November 3, 2011 from 9:00 to 12:00. This session is one of two sessions that make up the Financial Transactions Certificate Program. Participants will learn:

- ◆ An overview of the Procurement Department's functions and responsibilities.
- ◆ Purchasing procedures.
- ◆ Contracts and Contracts for Services.
- ◆ How to navigate and locate resources on the Procurement web-site.
- ◆ Print and Mail Services

During this workshop you will hear from and meet many of the Procurement Staff including the Director, Associate Director, Assistant Director, Purchasing Manager, along with the Managers for Procard, Travel Card, Print Services and Mail & Distribution Services. We have received positive feedback from staff in many campus roles who have found this session helpful and informative.

This session is not just for new hires. Please consider joining us.

Registration is available on the WL&D Web-site at: <http://www.umass.edu/wld/registration.php>



Learn from the mistakes of others..... there's not enough time to make them all yourself !

Come and meet Buyer Advertising under RFB# UA11-RC-4123

OPEN HOUSE: Buyer Advertising, the University vendor for print and on-line advertising services, (RFB# UA11-RC-4123) will be hosting an "open house" on October 6, 2011 from 11:00 am to 2:00 pm in Room 903 of the Campus Center. You can access the contract from the Procurement Home page: (www.umass.edu/procurement) under "Contracts Access" (Campus, University, State, MHEC) ... Most Commonly Used Contracts: Advertising Services: Print and On-Line. Click on the link and it will show all covered services and contact information under this bid.



They will be reviewing the new contract details as well as showing the various ways they can assist campus departments with placing ads that will draw the most responses. Their services run the gamut from placing the standard ad in the local newspapers to creative and interactive Facebook ads. They have experience with all major web-sites as well as thorough knowledge of minority web-sites that will increase responses from many different markets.

And in case that isn't enough to get you there, they will have refreshments also! Stop by and hear what they have to say.

SAVE THE DATE –

W.B. Mason will be back on campus for another Vendor Show on November 2, 2011.

15-20 + Manufacturers represented will include Smead, Pilot, Bic, MMM, Brother, Fellowes, Allsteel, Hon and more!

Free Samples! New Product Information! Raffle Prizes!

So, mark your calendars for: Wednesday, November 2, 2011 from 10:00 am to 12:30 pm at the Campus Center; Concourse Level ; Reading Room (across from the Blue Wall). **See you there!**

**WHO BUT
W.B. MASON**

13th Annual MHEC Vendor Expo is in September!

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/>

Come to the MHEC Vendor Expo - September 15 & 16, 2011 at the Sturbridge Host Hotel.



This is a great opportunity for you to meet over 118 of the MHEC's supply partners in person and view their latest products. There is **no cost to member attendees**; both days include free breakfast, lunch and parking as well as a reception on Thursday evening. And since this year's theme is **Pep Rally**, you can show your school pride by wearing your school's colors or apparel!

In addition to all of the valuable information you will walk away with, you will have the opportunity to meet Wally the Green Monster. Yes, the official mascot of the Red Sox will be at the expo both days with 100 complimentary autographed cards. **Don't delay, register now!**

Still not convinced? For more information visit www.mhec.net and click on the "Expo" button on the right hand side of the home page. There you can preview the Program (which includes the schedule of events as well as lists of the participating vendors and members), register for the expo, and even check out photo's from last year's expo.

We look forward to seeing you there!

Free Stuff!

FREE TONER! A&F has upgraded their copier and has four (4) cartridges of toners up for grabs.

Cartridge Type / Compatible Copier Models:

Canon (GPR-1) toner Cannon 1390A003AACanon
ImageRunner 550, 60, 600, 600v, 7200, 7270N, 8070
Canon GP555, GP605

***** These items are available on a first come first serve basis *****

For more information contact: Jane Welsted, Admin. & Finance;
Phone: 545-3136; E-Mail: welsted@admin.umass.edu



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Dear Procurement,

Dear Procurement,

In July I entered several purchasing requisitions for FY'12 that were Blanket Orders. These were the same Blanket Orders that I have entered into the system year after year. This year the blanket orders were held up in Procurement. Some were processed and others I was asked to put those purchases on to our department Procard. Blanket orders are so much easier for me because I enter one purchase order and I am done for the year. Now, I have to use my Procard more often causing extra work for me.

Why are you being so picky on Blanket orders all of a sudden?

Busted on Blanket Orders

Dear Busted on Blanket Orders,

Thanks for the email...we get this question often. Blanket orders are one of those good news/bad news issues...they definitely have a place in the procurement process when you need to have an order open to purchase products that cannot be obtained with a description only po or a Procard. For instance, when you lease a copier or other piece of equipment, blanket orders are a great tool to track the 12 equal monthly payments. The issue is when a blanket order is requested for unknown quantities...i.e. a blanket order for \$2,000 to purchase supplies as needed from a local plumbing supply company. Because of these issues Procurement has found it necessary to restrict the use of blanket orders for the purchase of supplies and certain services.

At one time, we had hundreds of blanket orders in the system—many of which had closed out long ago—and yet departments continued to charge against them. You can imagine the problems this created for vendors and Accounts Payable. Payments fell way behind and we had vendors who threatened to cut us off altogether. We had no way to track what was purchased and Accounts Payable was inundated with literally hundred of extra invoices every month. All this became such an audit and processing issue that Procurement and Accounts Payable had to assign staff to closely monitor it.

Our Procard program is the perfect payment method for certain types of small purchases and we encourage its use whenever possible instead of a blanket order. Holly Lankowski, Procard Manager, will assist you if you don't currently have a Procard.

Please understand that we do look at each case on an individual basis and do make certain exceptions if sufficiently justified. We understand your frustration and hope that this helps to clarify the issue.