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**FY13 PeopleSoft Financials Requisition Dates:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 17</td>
<td>The PeopleSoft Financials Purchasing Marketplace closed on ..........................</td>
</tr>
<tr>
<td>June 7</td>
<td>Purchase requisitions that require Procurement approval must be in a fully approved</td>
</tr>
<tr>
<td></td>
<td>status with a valid budget check on a BuyWays vendor address by ........................</td>
</tr>
<tr>
<td>June 21</td>
<td>We will continue to process purchase requisitions that require only departmental ap-</td>
</tr>
<tr>
<td></td>
<td>proval and have been fully approved by the department, have a valid budget check</td>
</tr>
<tr>
<td></td>
<td>and a vendor address updated for BuyWays until .........................................</td>
</tr>
</tbody>
</table>

Access to enter or edit requisitions in PS Financials will be removed at Noon on .......

In order for a requisition to source to a purchase order, it must be fully approved, have a valid budget check and have a vendor address updated for BuyWays. On June 17, Procurement will begin to cancel requisitions that do not meet these criteria, and departments will be responsible for re-entering the requisition(s) for FY14 in BuyWays. A list of the canceled requisitions will be posted at the Procurement Department Website at http://www.umass.edu/procurement/ on July 3rd.

Please keep in mind that any requisition that requires Procurement approval and support documentation or bids will not be approved by Procurement unless all processing requirements are met. Such requisitions will be among those canceled should it become necessary to do so.

**PLEASE NOTE:** These processes and dates may change pending the results of our fiscal year-end testing. Communications will be sent out with any updates. BuyWays training is in process, and departments may enter into BuyWays as soon as they complete their training. Details will be provided during training.

A complete listing of FY13 year-end closing and FY14 Opening Dates for non-state funds may be found at the Procurement Department website.

Go to [http://www.umass.edu/procurement/](http://www.umass.edu/procurement/) and select:

- PO Closings_FY07_FY13_06_13_13.xlsx (non-State).
University-Wide Cell Phone Optimization Project

The University is combining all AT&T and Verizon university-issued cell phone plans in order to achieve savings through the pooling of minutes and data plans. This University-wide initiative leverages the buying power of cell phone usage to reduce the total cost to the campus. Sprint and other carriers are not included in this initial plan and will continue to operate with no changes.

The impacts of this change for AT&T and Verizon Cell phone users are the following:

1. Cell phone users will see no changes in their existing functionality, carriers or coverage.
2. Cell phone monthly invoices currently paid by departments will be paid centrally and costs will be re-charged similar to landline telephone service.

By this date, your department should have been contacted by a Telecom rep to obtain your speedtype/account# to process any recharges. If you have not yet been contacted, please email cellphones@oit.umass.edu or 413.545.2355 to set this up.

3. Departments will no longer need to process monthly usage payments on Procards or any other method.
4. Reports and details of cell phone usage will still be available on-line for departments and authorized staff.
5. The University will continue to monitor usage to ensure cell phones and data units are on the appropriate plans. Plans can be adjusted to ensure an appropriate cost for a given level of use. Savings will be reflected in the monthly re-charge.
6. Any new cell phone plans must be coordinated through Telecom. Please call Telecom at 545-2171 for assistance.

The University has hired Ovation Wireless to help manage the project and to ensure the best prices are negotiated with our carriers. The University and Ovation Wireless will monitor on-going cell phone usage to maximize cost savings to the campus.

Please contact John O. Martin, Director of Procurement & Campus Services @ jomartin@admin.umass.edu or Randy Sailer, Director of Telecommunications @ randy.sailer@oit.umass.edu with any questions.
The BuyLine - Volume 5, Issue 3

TRANSITIONING TO BUYWAYS

We are taking several steps to prepare for the University – wide transition from the PeopleSoft Financials Purchasing module to the SciQuest, BuyWays, eProcurement system in July. Several of these steps are listed below.

Pilot Program

We started a BuyWays pilot program with several of our departments in April. This pilot program has given us the opportunity to identify potential problems and find effective solutions to these issues. We have received positive feedback from our pilot users regarding the BuyWays software.

Closing Purchase Orders

As explained in the liaison/data entry operator meeting held in February, and in the March-April issue of Procurement’s BuyLine Newsletter, a massive cleanup is underway of PeopleSoft Financials purchase orders in preparation for the new BuyWays purchasing system. Many purchase orders have already been closed out, and will continue to be closed out, through the month of June.

The following types of PS Financials purchase orders have already been, or will be, closed:

- Any purchase order that Purchasing was not asked to leave open by liaisons or their departments through FY12
- Purchase orders with invalid vendor codes (impacts the above request to leave open). The list of invalid vendor codes is fluid, and increases as need arises.
- Purchase orders that have a mix of open blanket and non-blanket order lines with partial payments
- All Xerox purchase orders

FY13 open POs will be converted to BuyWays, provided they do not fall under one of the above categories.

Go to http://www.umass.edu/procurement/ and select PO Closings FY07_FY13 or click PO Closings FY07_FY13_06_13_13.xlsx for detailed information.

Training

There are four roles in the BuyWays software: Shopper, Requisitioner, Approver and Receiver. As a result, we have designed a training class for each one of these roles. The roles of a Requisitioner, Approver and Receiver perform the same tasks in BuyWays, as they currently do in PeopleSoft. The new role in BuyWays is the Shopper role. A Shopper creates a shopping cart in BuyWays and adds items into the cart that they want to purchase. When the Shopper has completed their shopping cart, they have to send their cart to a requisitioner. The requisitioner will then decide if the Shopper’s cart will be turned into a requisition. A requisitioner can also create their own requisitions. You should determine the roles that you will need in the BuyWays system and sign up for training classes. This training will be held in June and you can sign up on the Workplace Learning and Development Web Site.

Commodity to Account Code Crosswalk

Each purchase requisition line that is created in the BuyWays purchasing system requires the assignment of a commodity code and an account code. A commodity code describes the type of item that you are purchasing and an account code identifies where you are charging the item in our PeopleSoft financial records.

In order to help you identify the commodity code that you should use with each PeopleSoft account code, we have posted a Commodity to Account Code Crosswalk on the Procurement Department Web Site. This table will help you identify the potential commodity codes that can be used with each account code. Go to http://www.umass.edu/procurement/ and see Procurement Workflow and Commodity to Account Crosswalk – as of 06.03.13

Commodity Code to Procurement Department Reviewer Listing

In our current PeopleSoft purchase requisition process, the responsibility for reviewing purchase requisitions in the Procurement Department is assigned by department. As a result, all of the requisitions submitted by a department that require Procurement review would be reviewed by the Procurement Department purchasing analyst that is responsible for that department.

In BuyWays all the requisitions submitted by a department that require Procurement review will be reviewed by the Procurement Department purchasing analyst that is responsible for the commodity. If a requisition has two or more commodity codes, the requisition will be reviewed by the purchasing analyst that is responsible for the commodity code that has the highest total monetary value on the requisition.

In addition, all requisitions that contain special commodities will be reviewed by either Procurement or some other area that is responsible for that commodity code. These assignments are listed at the Procurement Department website. Go to http://www.umass.edu/procurement/ See Procurement Workflow and Commodity to Account Crosswalk – as of 06.03.13
Xerox Alert: Just because you get an invoice, it does not mean that you have to pay it!

This is a reminder that if you purchase or lease a copy machine from Xerox, the initial training is included in the purchase or lease price. Many departments across campus informed us that they are receiving invoices for the initial training. In each case, the department purchased or leased a copy machine from Xerox and the initial training was included in the price. The bills are sent from Xerox Corporation with the description of “Work Center Consulting” or “Hodaka Consulting”. If you purchase or lease a machine from Xerox and receive a bill for training, please contact Rosemary Hassay, Purchasing Manager in Procurement at 1-413-545-1094 or via E-mail: rhassay@admin.umass.edu. Thank you.

Procard Purchases on Amazon.com

When a purchase is made through Amazon.com, you are able to set up an account for future use. There is an option to store your credit card number as well. Some staff use their accounts for both UMass business purchasing as well as personal purchasing. A word of caution needs to be offered. 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 recommended that you hold one account for business purposes and a separate one for your personal needs. If you do share an account, please be sure to verify the credit card used for each and every purchase. If you discover an error, please contact Holly Lankowski, Procard Manager immediately at 413.545.1748 or lankowski@admin.umass.edu.

Mail Services Launches Sesquicentennial Postage Meter Imprint

Mail Services In collaboration with University Relations, has equipped each postage meter with an indicia Celebrating 150 Years of Service as the State’s Flagship Public University.

The indicia prints on all outgoing mail.

Travel Card Reminder

Update Your Own Profile

Please remember, you are always able to update your own personal and business information on the Citibank website as a travel card holder. This means anytime your contact information changes, you should log-in to Citibank to update all changes under “My Profile”. Citibank will only be able to provide you with critical alerts, notices, and documents, if your most recent contact information is provided to them. It only takes a few moments so please help us keep your information current.

Contracts in BuyWays

Not all contracts were transferred over from Peoplesoft to BuyWays during the pilot program. If you find that a contract you normally reference is not showing up in BuyWays, please send an email to Carol Thurlow: cthurlow@admin.umass.edu with the vendor name, vendor code and contract number, and she will add it.
Xerox Purchase Orders through BuyWays

As we prepare for the University-wide transition from the PeopleSoft Financials Purchasing module to the SciQuest BuyWays eProcurement system, we need to close all open PeopleSoft purchase orders to Xerox that are against the Master Lease. If left open, these purchase orders would present processing issues in BuyWays. This also allows us to have accurate Xerox purchase orders in the BuyWays system effective July 1st. This is important so that going forward the information provided in the purchase orders will be uniform and processing invoices will be much easier for departments, and accounts payable staff.

As long as there are sufficient funds remaining on the closed PO to cover the remaining FY13 payments, they will be done as Direct Payments by Accounts Payable staff. If there are insufficient funds remaining to cover FY13 payments, the signature of the individual in your department who exercises budgetary control over the budget charged on the Xerox invoice will suffice.

Please do not replace your closed Xerox POs to cover FY13 payments. Replacement requisitions/purchase orders to Xerox for FY14 may be entered in BuyWays once you have received your training.

Charges for any subsequent years on the lease will be done by departments as Change Orders to the replacement FY14 purchase order at the end of the respective fiscal year.

The Following example (done in BuyWays) shows the type of information that must be included in your replacement BuyWays FY14 Xerox requisition line items against the Master Lease:

The requisition must contain:
◊ the FY13 purchase order number that the new PO replaces
◊ the Xerox Model and serial number
◊ Note: a separate requisition for each machine in the department must be done
◊ the Xerox Work Order number (WU) for each respective machine
◊ the dates of service that the new PO covers
◊ the estimated quantities as depicted in the example. **No blanket order lines, please.**
◊ the Commodity Code referenced in the example
◊ the account code (should be 767550-A for all lines)
◊ the contract identifier UD50-SC-0006, as referenced in the example
◊ a copy of the original signed Xerox Services and Solutions Order Agreement(s) should be attached to the requisition for each Work Order

**When can we begin entering requisitions into BuyWays for Xerox leases for FY14?**

You can enter requisitions into BuyWays for FY14 Xerox leases just as soon as you are trained in BuyWays. A separate requisition for each Xerox machine in the department needs to be done.

Please remember when you enter the Xerox requisitions for FY14 to reference the following information:

**Be sure to check your Services and Solutions Order Agreement when filling in the pricing amount for each of the following lines.**

<table>
<thead>
<tr>
<th>Line #</th>
<th>FY14 Description</th>
<th>Pricing Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FY14 - Net Monthly Base Charge</td>
<td>$____ per month. Enter number of months x $_____ per month</td>
</tr>
<tr>
<td>2</td>
<td>FY14 - Overages Black &amp; White Estimated Copies</td>
<td>$_____ per copy. Enter number of estimated copies x $_____ per copy</td>
</tr>
<tr>
<td>3</td>
<td>FY14 - Overages Color Estimated Copies</td>
<td>$_____ per copy. Enter number of estimated copies x $_____ per copy</td>
</tr>
</tbody>
</table>

If your Xerox machine makes color copies, please add Line #3

<table>
<thead>
<tr>
<th>Line #</th>
<th>FY14 Description</th>
<th>Pricing Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>FY14 - Overages Color Level 3 Estimated Copies</td>
<td>$_____ per copy. Enter number of estimated copies x $_____ per copy</td>
</tr>
</tbody>
</table>

If your Xerox machine makes Color Level 3 copies, please add Line #4

***Questions concerning this Xerox announcement may be directed to Rosemary Hassay, Purchasing Manager, at rhassay@admin.umas.edu***
BuyWays FAQs

For BuyWays Job Aids go to; http://www.umass.edu/af/systems/UMassBuyWays/index.html

Which documents are considered internal and which external?

<table>
<thead>
<tr>
<th>Internal Documents</th>
<th>External Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Sole sources</td>
<td>-Vendor’s quote</td>
</tr>
<tr>
<td>-When getting 3 or more quotes, the 2 quotes from other vendors would be internal and the quote being used would be an external attachment.</td>
<td>-Copy of invoice</td>
</tr>
<tr>
<td>-Employee status form</td>
<td>-Agreements</td>
</tr>
<tr>
<td>-IT From (if applicable)</td>
<td>-Licenses</td>
</tr>
</tbody>
</table>

BuyWays Blanket Orders
When creating a blanket order in BuyWays make sure each line has a quantity of 1; a quantity greater than one will result in an error during the export of the PO to PeopleSoft. You will not realize this until you check History in BuyWays on the PO. If this happens, the only fix is for a system administrator to uncheck the blanket PO checkbox and resend the order to PeopleSoft Financials.

Can I add a contract to apply to all lines?
At this time, no. An enhancement will be done at a later time to add this feature to BuyWays.

***If you are unable to find a contract in BuyWays, please contact Carol Thurlow or Alex Therkelsen in Procurement with the contract information and they will add the contract into BuyWays.***

Can I still use my Procard?
As long as the vendor from whom you are purchasing is not a catalog vendor on BuyWays, you can continue to use your Procard.

I understand that a Procard holder can become a “shopper” in BuyWays.
Yes, any staff including Procard holders can become shoppers in BuyWays. The role of “Shopper” allows staff and faculty to create a shopping cart in BuyWays and add items to the cart that they want to purchase. Before this cart can be converted to a purchase order, it will be forwarded through workflow to a department “Requisitioner.” The Requisitioner will complete the required fields for the Commodity, Speed Type and Account Codes. Once complete the Requisitioner will submit the requisition to workflow.

Do all my department’s Procard holders have to be shoppers on July 1?
No, we realize that many faculty and grad students are unavailable over the summer. In addition, creating requisitions using BuyWays catalogs instead of Procard transactions is a business process change for departments. We recommend you select several Procard holders who do a significant amount of purchasing with the catalog vendors and bring them on as shoppers first. Over the rest of the summer and into the fall you can continue to roll on more shoppers.

How long does it take to match if I put in a receipt and I made a mistake?
Just as in PeopleSoft, if an invoice is waiting, matching happens immediately. You will need to contact AP if you do not want an invoice paid.
How do I get shopper access added for staff in my department?
Please email the campus security administrator at afs-secadmin@admin.umass.edu with the name and employee ID number of your shopper(s). Please indicate the names of any requisitioners that should be added to the shopper profile to create a short list. If you have significant numbers of shoppers to add, request a copy of the upload spreadsheet from afs-secadmin@admin.umass.edu

How quickly are catalog orders processed?
As soon as a PO is created your order is fulfilled much like ordering online with your Procard.

As a Requisitioner, can I assign a cart to another person if the cart was assigned to me?
Yes

If the Requisitioner is working on the cart I assigned, can I unassign it or will I get an error?
The Requisitioner will lose the ability to submit the requisition to workflow if the cart is unassigned while the Requisitioner is making the edits.

If I’m out and I forgot to assign a substitute, can someone move my assigned carts to another person?
Yes the campus security administrator can do this.

If I’m a shopper and I don’t know my vendor or how much an item costs – can I just put in the line items and let the Requisitioner figure it out?
This depends on your business office’s procedures. At this point, if you are a shopper, the only requirement to use BuyWays is for catalog vendors.

What if I need to ship to someplace that is not in the system?
There is a Ship to called “OTHER” that you can use that will allow you to “free form” a Ship To address.

Do BuyWays purchase orders roll-over from year to year?
The BuyWays PO is connected to the PeopleSoft PO, which is where the encumbrance is maintained. The BuyWays POs themselves do not roll, but their PeopleSoft counterpart does.

I need to make a change to a requisition that is still pending, but I can’t access the edit buttons.
Go into the requisition and click on the PR Approvals tab to check to see who is scheduled to approve the requisition next. Contact that person and have them go into the requisition and select “Return To Requisitioner” under the Available Actions dropdown.

PeopleSoft to BuyWays Conversion:

Will my PeopleSoft Financials POs convert to BuyWays?
Purchase orders dated prior to FY13 were closed unless departments asked to leave them open prior to the April 1, 2013 deadline. Then, there are various other reasons that will prevent a PeopleSoft Financials purchase order from converting to BuyWays. Please see the Procurement website, PO Closings, for detailed information.
http://www.umass.edu/procurement/
The PO Closings document will continue to be updated weekly through the month of June.

I have some PeopleSoft Financials POs that should convert to BuyWays POs on July 1. What will my converted BuyWays PO look like, and how will I find it?
Converted PO numbers will start “A0Z” followed by the rest of the PeopleSoft Financials PO number; e.g., PeopleSoft Financials PO 0001288521 would be numbered A0Z1288521. Only open PO lines and the remaining PO balance will convert. PeopleSoft Financials will still be open for inquiry after July 1. So, to view the original PO you would view it in PeopleSoft Financials, PO Inquiry. The converted PO will be available for viewing in both PeopleSoft Financials and in BuyWays.

***Please Remember***
1. You can find our updated weekly FAQ sheets on our Procurement home page from now through the July 2013 implementation of the BuyWays system.
2. The BuyWays Procurement Workflow and Commodity to Account Crosswalk is now on our home page.
   http://www.umass.edu/procurement/

Amherst Procurement Department
407 Goodell
140 Hicks Way
Amherst MA, 01003-9334
Phone: 413.545.0361 Fax: 413.545.1643
Procurement@admin.umass.edu