This issue of our newsletter is full of articles regarding changes that we are implementing to make processing your orders easier and more efficient. There is an article on raising the limit required before the University Contract for Services is required—currently at $2,000 for the long form we are increasing this to $10,000 so that we can streamline the paperwork and reduce the processing time required. There is another article on electronic signatures...this explains how we will now be able to route contracts and agreements 100% electronically.

Our goal is to eliminate most of the remaining paperwork with-in 6 months and deal only with electronic documents. We realize all departments may not be able to move that quickly so we will work with you to insure a smooth transition.

You might have heard of a project involving eProcurement and a project called BuyWays. This is an exciting project that will allow all departments to access over 25 contracted vendors’ catalogs via the web to order supplies and commodities. This is a University wide project that is being implemented on all 5 campuses and is aimed at simplifying the way users access products under University contracts. Patty Roper is our campus lead and she has written a nice article explaining the project.

I hope you take the time to read the articles in this issue and contact us if you have ques-
BuyWays ... purchasing made easy

The UMass BuyWays system is a one-stop shopping center for eProcurement users. This center will provide you with an easy route to all your purchasing needs and will be where you complete all your day-to-day purchasing activity. It will replace requisitions and purchase orders in PeopleSoft Finance.

The project kicked off mid-summer and will take most of the fiscal year to implement. Training, timelines and other information will go out via BuyLines, email, and various meetings over the next few months as the implementation progresses.

We introduced UMass BuyWays at an initial PO Operators meeting on September 24, 2012. This month we address some common questions that have been coming in since that meeting:

**Will I still be able to get a copy of the printed PO?**
You will be able to see a full view of the purchase order that simulates the fax document. However, printing of POs will be an exception. Most will get sent to the vendor via email, fax or electronically via cxml language.

**Will all my vendors be in BuyWays?**
There will be a synch of vendors from Finance to BuyWays so most vendors should be available in BuyWays. However, in order to be able to access your vendor in BuyWays, an email address or fax number must be in the vendor’s record in the finance system Vendor File.

**Should I be asking my vendors for their email and fax numbers?**
Any new W-9 requests should include an email and fax for the address. An effort is ongoing to contact existing vendors to gather and populate this information so you do not need to do this yourself.

**What if I don’t want the vendor to get a copy of the PO?**
This situation occurs enough, especially for confirming purchase orders, that we are addressing it as a requirement for BuyWays to handle.

**Will I use PeopleSoft Finance for anything?**
All requisitions, purchase orders and PO invoices will be in BuyWays so for the most part, if all you handle is requisitions and purchase orders, you would not need to login to Finance at all. However, POs and Vouchers will be loaded into Finance for encumbering and payments.

**If I have a question or concern about the new system, who should I contact?**
The best way to send an email to roper@admin.umass.edu with BuyWays in the subject line. The project team will find answers and those answers will appear in this section of future issues of the BuyLine Newsletter. Additional information will be sent our through project email notifications and meetings as the implementation progresses.
Electronic Bid Process

In order to become more efficient and process bids faster the Procurement Department has eliminated the use of paper for Requests for Bids (RFB) and has been posting general bids on our web-page for over a year. More recently we have started to post construction bids electronically to complete our goal of paperless RFB documents. We will soon be accepting bids electronically, also. We are occasionally asked if we can send out paper RFB’s to certain vendors because they are “used” to getting them that way. We cannot selectively send out paper RFB’s because it creates confusion with vendors when they get a paper RFB one time and are instructed to go to the Procurement web page to review RFB’s the next time. On occasion we will send out an e-mail notice to vendors that we know might have an interest in a specific type of RFB with a message to go to our web-page.

By posting all RFB’s on-line and communicating that message to the vendors they will become accustomed to checking our web page on a regular basis for open RFB’s.

Electronic Signatures:

Departments now have the ability to download an electronic version of the University contract for services, as well as several other common forms, from the Procurement web page, fill out the details electronically and email it to the vendor. The next step to fully automating this process is to allow the vendor to sign and return the CFS to the department electronically as well.

Starting November 1, 2012 Procurement will accept electronic signatures on all contracts except construction related contracts. Once the department receives the contract back from the vendor they can also electronically sign the cfs or other contract form and forward it on to Procurement electronically. If needed the department can print off the form, sign it and manually forward it to Procurement but we recommend keeping the document electronic. If Procurement receives the documents electronically we can forward them on when additional signatures are required (i.e. legal, Vice Chancellor) without printing a paper copy. After all signatures are acquired we will also electronically forward the vendor their executed copy with a purchase order and archive our copy. Our goal is to eliminate all paper contracts within the next 6 months and utilize electronic storage for all of our documents.

Electronic signatures for construction related contracts will be Phase II of this process. More to come on these.....
Citibank Cardholder Homepage Enhanced

The Citibank cardholder homepage has been enhanced for overall improved usability. Now, ProcCard and Travel cardholders will be able to access more pertinent account information quickly and efficiently.

The following is the list of enhancements:

- **Message Center Display:** Messages will now pop up on top of the CitiManager homepage so cardholders do not have to navigate back to their homepage after viewing the desired message(s).
- **Quick Links:** Now relocated to the right of the “Message Center” section.
- **Current Account Summary:** A quick summary of the account is listed with the following fields – Current Balance, Credit Limit, Next Payment Date, Available Credit, Pending Authorizations and Last Payments Received.
  
  **NOTE:** These fields are still included on the Account Summary page, and have just been added to the homepage for ease of reference.
- **Transactions since Last Statement:** Displays the last five transactions within the current statement cycle on the account.
  
  **NOTE:** These transactions are still included on the Unbilled Transactions page, and have just been added to the homepage for ease of reference.
- **The last three Past Statements:** Displays the following five fields for the last three statements on the account – Previous Balance, Balance Due, New Transactions, Payments Received, Payment Due Date.
  
  **NOTE:** These statements are still included on the Statements page, and have just been added to the homepage for ease of reference.
- **Card Information:** Displays the cardholder’s demographic information stored on the account.
  
  **NOTE:** Refer any updates for this section to the ProcCard Manager (Holly Lankowski — lankowski@admin.umass.edu)

Cardholders can now navigate on the “Unbilled Transactions” and “Statements” pages quickly and more efficiently. The enhancements to these pages allow for cardholders to use the control buttons such as “Print” and “Download” at the top and bottom of each page.

Reminder:
The current contract for Bottled Water is the State Contract: GRO26.

Please check the Procurement and State Web-sites for details on this contract.

www.umass.edu/procurement
www.comm-pass.com

Auto-Registration for Cardholders

When a ProcCard or Travel Card is delivered, the cardholder is given details of how to register their card at Citibank. If registration is not done prior to the first transaction being logged in CitiManager, cardholders will now automatically receive a Registration ID/Passcode e-mail to complete this task. This enhancement will help remind cardholders to track their account activity online, allowing them access to their account details and statements.

To gain access to CitiManager, the cardholder needs to access [https://home.cards.citidirect.com/CommercialCard/Cards.html](https://home.cards.citidirect.com/CommercialCard/Cards.html) then click on the “Self-Registration for Cardholders” option. A screen will appear with two options to choose from in order to continue with the registration process:

1. **Registration ID/Passcode:** Pertains to those cardholders who have received the Registration ID/Passcode e-mail and are proceeding to register their account. A screen will appear, asking for the credentials included in the e-mail they received. Data will be pre-filled as they walk through the required steps to complete registration.

2. **Fill the card’s data:** Pertains to those cardholders who are registering their card ahead of any transactions. They will need to fill in the required fields manually as outlined in the registration handout.

This is another helpful feature on the Citibank system. As a reminder, cardholders should be accessing their account regularly to monitor transactions, obtain statements and review account balances.
Like Batman & Robin our Mail and Print Services make a dynamic duo!

Recently, Mail Services and Print Services were called upon to print and distribute over 200,000 informational packets for the UMass Extension Nutrition Education Program, in collaboration with the Massachusetts Department of Transitional Assistance, the Massachusetts Department of Agricultural Resources and the USDA’s Supplemental Nutrition Assistance Program.

The goal of this massive mailing was to provide valuable nutrition information to low income families throughout the state of Massachusetts. Operating within the parameters of a budget, as well as a tight deadline, the Print and Mail Services departments went to work immediately to determine the most efficient and cost-effective methods for orchestrating a campaign of this magnitude. Although larger in scale than many of the projects we typically manage, our departments were able to oversee the entire project from production of the materials to sending out the mailing. Thanks to our knowledgeable, hard-working staff we were able to deliver the job under budget and on-time.

To learn more about the capabilities of the Print and Mail Services, please visit our websites at umass.edu/print, and umass.edu/mail. We look forward to working with you on your future projects, big and small!

Remember…Print Services is under new management and has acquired new state of the art equipment…let them show you what they can do…and…they offer a money back guarantee if you aren’t satisfied with their work.

Pardon Us

“If you find mistakes in this publication, please consider that they are there for a purpose. We try to print something for everyone and some people are always looking for mistakes.” (quoted from a weekly paper in Clermont, Florida)