



University of Massachusetts
Amherst

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MEMORANDUM

Date: February 26, 2010 (Revised 6/2010)
To: All Staff and Faculty
From: John O. Martin, Director of Procurement
Subj: New University Copier Vendor – Contract UD10-SC-0006

As announced in December the University has awarded a five year comprehensive contract to Xerox for the sale, lease and service of all copiers and multi-function devices. **This contract was effective January 1, 2010 and remains in effect until December 31, 2014. This contract applies to all new campus copiers that are purchased or leased on our campus from January 1, 2010 forward. It does not affect the copiers currently leased from another vendor until that lease expires. The current vendor will continue to service their equipment until then.**

The Amherst campus participated in the University-wide bid to leverage purchasing power to achieve projected savings of more than \$250,000 for the campus.

Xerox was selected because they offered the best price and selection, the most comprehensive service plan and the best software to track and monitor the cost of the units. Highlights of the contract include:

- Full range of machines to select from to meet every need in a department
- State of the art energy efficient equipment
- Fully featured copy/print/fax/document storage and state of the art scanning
- Compatible with Image Now document scanning software used on campus
- Existing non-Xerox copiers will continue to be serviced by your current vendor *
- Xerox offers a cost evaluation of a department's current copier and desktop printers

All requisitions/orders against this contract should be addressed to Xerox Corporation, P. O. Box 827598, Philadelphia, PA 19182, which is the second address listed in the Create Requisition Vendor Search Page.

The contract detail summary and contract pricing are available on the Procurement website or can be viewed by clicking on: [Xerox Copier Contract Pricing Effective 01-01-10](#). If you have any questions please call 545-0361 or email me at jomartin@admin.umass.edu.

Questions concerning this document should be directed to Susan Green in Procurement at 5-0361. Please pay attention to detail so as not to delay the processing of your purchase.

Instructions for using the contract and an example for setting up a requisition follow.



UMass/Xerox: Order Process and Support

Step 1 - Contact Xerox for a complete assessment of your needs, proposals and contract.

- Solutions Executive: Ted Sheridan,
Edward.sheridan@xerox.com or 617-963-9275 -OR-
- Inside Sales Executive: Emily Mcpherson,
Emily.mcpherson@xerox.com or 877-348-7984
- Your call or e-mail will be responded to within 24 to 48 hours.

Step 2 - Written Quote, Contract, and Purchase Order: A quote will be provided to you by Xerox in basic Excel Format. The format will mirror the actual UMass/Xerox awarded pricing.

- (1.) Review and approve the quote and submit it to your Xerox contact.
 - Upon receipt of the approved quote, two original copies of the contract will be provided to you by Xerox (Services & Solutions Order).
- (2.) Immediately enter a purchase requisition in the Financials on-line purchasing system to cover the lease and maintenance/supplies. This requisition will be reviewed by Procurement to insure all information is per the contract.
 - The requisition should consist of two lines. One line for the lease; the other for the maintenance/supplies. See the following pages for an example of how the requisition should be set up. This document is also available at our website:
 - Link to Procurement Department website:
<http://www.umass.edu/procurement/>
 - Link to Xerox Contract and instructions:
<http://www.umass.edu/procurement/docs/Xerox%20Announcement%2002-26-10rev.doc>
 - Sign both copies of the contract and send one original and a copy of the Quote referencing the requisition number to the Procurement Department.
- (3.) Submit the other **signed original contract** to Xerox under separate cover.
- (4.) Once the PO is available Procurement will send a copy of the PO to our Xerox contact.
 - Due to UMass/Xerox contract requirements **your order cannot be processed by Xerox without a valid purchase order number.**



Step 3 – Network Person:

During the assessment period you will be asked the name of your in-house network person. Your Xerox representative will communicate the name of this person to Tom Sullivan. Tom is the Xerox analyst who will be on-site to network your new unit once it arrives. Tom will engage your network person to gain information which will assist with networking your new device. Thomas.Sullivan@xerox.com

Step 4 - Delivery: All Xerox deliveries are provided by Ryder Transport. You will be contacted by Ryder Transport regarding the delivery date 3 to 5 days prior to delivery.

Step 5 - Delivery Day: The delivery personnel will set-up the new unit and make sure that it is making copies before moving on to their next delivery. Tom Sullivan will arrive soon after to network your new device.

Step 6 - Training: You will be contacted by phone, by a member of the Xerox Superior Training Group. At that time you will be able to set up a time to be trained on your new system.

Security: Please note that any device leaving campus must have the system's hard drive cleaned or the hard drive removed. Please contact the Procurement Department for information regarding this process.

Requesting Service or Ordering Supplies:

When requesting service or ordering supplies, please have the serial number of the machine available. The serial number can be found on the display panel of your device. On the display panel, press the machine status button, and your serial number will be displayed.

- **Service and Supplies: 1-877– 321-9932 (toll free)**
- We now have a full-time Xerox DocuCare specialist on campus, his name is Richard Casey. Richard's role is to provide basic support services for all the Xerox copiers on campus. He can assist with toner replenishment, common operational questions, preventative solutions, etc. Richard is not a repair technician but will be able to trouble shoot and resolve many issues. He will be dispatched by Xerox when you call the 800#.

Additional Contacts:

For technical/networking concerns, end user help, IT questions and How to....
www.xerox.com/support or 1-800-821-2797.

Primary Analyst – Thomas Sullivan, Thomas.Sullivan@xerox.com

Secondary Analyst – Stephanie Holt, stephanie.a.holt@xerox.com Cell: 781-389-9144

Example of a completed requisition against this contract follows:



1. Example of a completed Create Requisition – Define Requisition - page:

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UMass Amherst [UMASS Reg info](#)

*Requester: Green, Susan *Currency:

Requisition Name: Priority:

Line Defaults

Vendor: Vendor Location: Contract ID:

Buyer: Category: Unit of Measure:

Shipping To: [Modify Shipping Address](#)

Due Date: Attention:

Accounting Information

Location	GL Unit	SpeedChart Key	Dept	Program	Class	PC Bus Unit	Project
<input type="text" value="GDA040"/>	<input type="text" value="UMAMH"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: All requisitions/orders against this contract should be addressed to Xerox Corporation, P. O. Box 827598, Philadelphia, PA 19182, which is the second address listed in the Create Requisition - Vendor Search Page.

2. Example of a completed Create Requisition - Add Items and Services - page – Line 1:

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#)

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

*Vendor ID: XEROX CORPORATION

Vendor Item ID: *Vendor Location:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher



NOTE: the contract end date cannot extend beyond the end of the Master Agreement, which expires December 31, 2014. In this case, the contract started March 1, 2010, so it becomes a 58 month contract.

An attempt should be made by the department to leave the purchase order open for the duration of the contract by issuing a Change Request at the beginning of each subsequent fiscal year to increase it to cover the payments during that fiscal period. Check your balances periodically throughout the year to ensure there are sufficient funds remaining on the order so it does not close.

3. Example of a completed Create Requisition - Add Items and Services page – Line 2:

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description: SERVICE AND SUPPLIES TO BE BILLED ON A MONTHLY BASIS AT .009 PER COPY.

*Price: 45.00000 *Currency: USD

*Quantity: 4.0000 *Unit of Measure: MON

*Category: 766550 Due Date:

*Vendor ID: 0000025984 XEROX CORPORATION

Vendor Item ID: *Vendor Location: 003

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

SERVICE AND SUPPLIES TO BE BILLED ON A MONTHLY BASIS AT .009 PER COPY. IT IS ESTIMATED THAT DEPARTMENT WILL DO APPROXIMATELY 5,000 COPIES/MO. [.009x5,000=\$45.00]

4. Example of the Review and Submit page:

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UMAMH UMass Amherst

Requester: ASGREEN Green, Susan *Currency: USD

Requisition Name: Xerox Lease Hold From Further Processing Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	58 MONTH LEASE OF A XEROX W	XEROX CORPORATION	4.0000	Month	158.390	633.56
2	SERVICE AND SUPPLIES TO BE	XEROX CORPORATION	4.0000	Month	45.000	180.00
Total Amount:						813.56 USD

Select All / Deselect All

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher