From the Director ....

This issue of our newsletter has a few important topics that I want to point out to you...1st the BuyWays eProcurement System program is coming on line July 1st...the Pilot started April 1st with about 175 users...we’re all excited to finally have it operational. 2nd - Nancy Rule, one of our Procurement Analysts is marking her 30th year with us...congrats to her...her contributions are very much appreciated. 3rd is a more somber topic...we are losing Bob Clukay, Assistant Director for Procurement, to retirement. He will be sorely missed by all of our staff and the many others across campus who have interacted with him over his many years at the University.

As always, I welcome your feedback and comments. Thanks and have a great Spring!

Implementation of the new BuyWays electronic Requisitioning/Ordering system is continuing on schedule and is due to go live for the campus in July 2013. A meeting was held on February 28, 2013 to update the campus liaisons and data entry operators. Go to http://www.umass.edu/procurement/ to view the latest information on this new and exciting endeavor. The majority of this meeting was a demo of the new BuyWays Requisitioning/Ordering System.

Some points that came up:

If someone is a Shopper and doesn’t know the vendor they want, can there be a generic vendor?

YES, we will look to create one and incorporate this into training.

Can I combine multiple shopping carts to the same vendor and submitted to me into one requisition:

You can take and move all the items into a new cart and process it as one requisition but then the shopper will no longer be able to see the requisition/PO or get email notifications.

When will training happen?

Training will be in June and July and people will be able to register through Workplace Learning & Development.

Because training will need to go into July, we ask that Liaisons assist with prioritizing attendees to the requisition training, as we have done in the past for finance and HR upgrades. A separate email will go out in the next couple of weeks.

Will I have to re-enter all my purchase orders?

No, there will be an effort to automatically convert open orders to BuyWays. However, as part of this effort, every campus has committed to closing as many POs as possible so that we do not bring forward vendors we do not need. Liaisons were sent a list of all open purchase orders entered in FY12 and earlier. Deadline to return the list of POs to keep open is March 1. Beginning March 4, purchase order cleanup will begin starting with the oldest orders.

If I have to use BuyWays and not procard for Mason, will I still get next day delivery?

Yes, any order on a catalog vendor under $2,500, not subject to additional commodity workflow, such as equipment, will not require any approvals. POs will go to the vendor as soon as the requisition is submitted and passes budget validation. You will get an additional 3% discount from Mason when you order via BuyWays.

How can I tell if my vendor is set up for BuyWays?

See the new document: Is my vendor in Buyways.doc, located on the Procurement Website.

If my vendor is not in BuyWays, how do I get it into BuyWays? See the form Buyways Vendor Information (also located on the Procurement website). You can use this form starting now.

We strongly recommend that you review your common vendors and get this information so that they are available to you on Day 1. The University vendor team has been working hard for several months, but they have been gathering the information for the high volume University vendors, which may not necessarily be your most commonly used vendors.

If you have any questions that were not answered at the meeting or you’ve thought of since, please email Patty Roper at: roper@admin.umass.edu. We try to review any questions and put answers in the BuyLines newsletter.
In order to have access to the University pricing on the W. B. Mason web pages, you need to have a user log in set up. Your profile for this set-up includes your department name, campus address, email and phone.

If you move to a new department, change your campus location, get a new phone number or have your email account updated, W. B. Mason needs to update your profile. Please email all changes to:

Judy Balicki at judy.balicki@wbmason.com.

Judy will coordinate your profile update, verify the revisions are complete then email a confirmation that the update is in place. Keep in mind that any update to your email will update your Username. Your password will remain the same.

If you need to obtain a W. B. Mason log-in, complete the Internet Access Form found at WB MASON Amherst-sign up and fax it to W. B. Mason at 1-800-262-1622 to the attention of WEB SET-UP. A W. B. Mason service representative will set up your account and email your initial password and some reference information.

Again, Judy Balicki is our campus Sales Representative; any issue should be referred to Judy at judy.balicki@wbmason.com or by phone – Office - 1-888-926-2766, Ext. 8057 or Cell - 413-326-0668.
**CREDIT CARD CHARGES AND MERCHANT SURCHARGE**

As a result of a legal settlement to resolve claims brought by a group of U.S. merchants, merchants in the U.S. and U.S. territories may add a surcharge to certain credit card transactions, starting January 27, 2013. A payment card surcharge, also known as a checkout fee, is an additional fee that a merchant adds to a consumer’s bill when a credit card is used for payment. Surcharging may only be applied to credit card transactions and not for debit or prepaid card transactions. This will apply to our Travel card and Procard Programs.

Merchants are only allowed to charge a fee equivalent to what they pay to accept the credit card, which in the U.S. is typically between 1.5% and 3% of the total purchase. The fee may not be greater than 4%.

**Do any states prohibit these checkout fees?**

Checkout fees are prohibited entirely in California, Colorado, Connecticut, Florida, Kansas, Maine, Massachusetts, New York, Oklahoma and Texas. Consumers who are subjected to checkout fees in states where those fees are prohibited by law may want to discuss this with the retailer or report the retailer to their state attorney general’s office.

**How will I know if a checkout fee will be applied if I use a credit card?**

All retailers, both stores and online merchants, who intend to charge a checkout fee, must clearly advise you about the fee prior to making any purchases. Consumers should look for signs or postings at the store entry point and the point of sale warning them of the merchant’s fee. Additionally, the amount of the fee must be clearly noted on your receipt as a separate charge from the purchase amount and any sales tax.

**Will the surcharge be displayed on the cardholder statement?**

It will not be displayed as a unique transaction. The surcharge is embedded in the total sale amount coming from the merchant processor. On a return, the full purchase amount plus the checkout fee will be credited to you.

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**RICOH MAINTENANCE SERVICE CONTRACTS ON CANON BRAND EQUIPMENT WILL NOT BE RENEWED.**

In January 2013, UMass Amherst received written notification from Glen Mandernacht, Senior Vice-President of Ricoh North Americas Corp. stating that Ricoh will no longer be in the position to renew maintenance agreements for Canon-brand business equipment. The letter reads in part:

“Under the terms of our agreement with Canon USA, Inc., Canon is only obligated to provide Ricoh with parts and supplies for Canon-brand business equipment through April 30, 2013. After April 30, 2013, Ricoh may experience delays or be unable to secure the parts and supplies needed to maintain Canon-brand equipment. As a result, Ricoh is not in a position to renew maintenance service on your Canon-brand equipment. Therefore, your maintenance agreement with Ricoh for the Canon-brand equipment will terminate at the end of its current term and will not be renewed for an additional contract period.”

Copier Maintenance Service Contracts are available under the MHEC Contract # F07 – Copiers, Digital Duplicators, Fax Equipment, and Supplies & Maintenance. Here is the contact information for some of those vendors. If you have questions please contact Procurement at 5-0361 for assistance.

**Canon Solutions American, Inc.**
Enterprise Services & Solutions, ESS
Attn: Mr. Steve Hock, Major Account Executive
845 Brook Street
1-91 Tech Center, CT 06073
Phone: 1-860-257-2862
E-Mail: shock@csa.canon.com

**Konica Minolta Business Solutions**
Attn: Mr. Brett Heffernan
Mr. Chris Spagnoletti
2 Wells Avenue
Newton, MA 02459
Phone: 1-800-456-5664
E-Mail: bheffenan@kmbs.konicaminolta.us
cspagnoletti@kmbs.konicaminolta.us
Procard Reallocation—Multiple Lines at One Time

When multiple Procard or Department Travel Card charges are being reallocated to the same Speed Chart and same Account Code, use of the distribution template function can be a big timesaver.

The steps are easy to follow:

- On the Reconcile statement page click on the "View All" on the right side of the dark blue bar just above the transaction list.
- Next select the transactions you want by clicking on the checkbox to the left of the transactions.
- The distribution template will apply the Speed Chart you enter in the next panel to all checked transactions, so be sure that only those transactions you want to reallocate have the checkbox lit.
- Once you have your transactions selected, click on the blue "Distribution Template" hyperlink located near the bottom of the screen.
- The "Distribution Template" will appear. Enter your Speed Chart number; then click the magnifier. Select the blue hyperlink under the header Speed Chart Key by double clicking. Add the account code; then double-check the displayed chartfield information for accuracy.
- Click OK. You will return to the Bank statement screen.
- Next, approve your transactions by clicking on the "Approve" button. This will change the status field for all checked transactions from Staged to Approved. (Note—the checkbox remains selected for the transaction lines you applied the template to.)
- Click on the "Save" button.
- You can validate that the template was applied correctly by clicking on the distribution icon on any line but this is not necessary.

Try this out and see how much faster you can get through your reallocation list.

Reminder:

Procard cannot be used to purchase OTC (Over the Counter) medications for department first-aid kits or otherwise. OTC medications include:

Tylenol, Acetaminophen, Ibuprofen, Advil, Aspirin, Pepto-Bismol, Alka-Seltzer, Cold-Eeze, Imodium, Physicians Care Allergy and many other similar products.

Talk about Patriotism!

The University boasts Patriotism on a day-to-day basis. Patriot's Day is another day to be proud to be a part of this iconic New England University!! Patriot's Day is observed this year, 2013, on April 15th.

Did you know…

The nickname Minutemen has been in place since the 1972-73 academic year. It was decided on by the student body from a poll taken by the Student Senate.

Nancy Rule Celebrates 36 years!

Nancy Rule, Procurement Analyst, will soon celebrate her 36th year as a University of Massachusetts employee. Of these 36 years, Nancy has been an invaluable member of the Procurement Department for 30 of them. Nancy is a great asset to the University, so please help us in congratulating her on her many years of hard work and dedication!

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)

For the latest updates, please visit us on the web at:  http://www.umass.edu/procurement
Does the Public Bidding Process Save Money?

This is a difficult question to answer because of issues that have lead to today’s heavily regulated Procurement environment. Many areas of Procurement are mandated by Massachusetts law. One of the most heavily regulated areas is labor & materials for construction.

The methods run the gauntlet for calculating savings. A popular method is calculating the difference between the highest and the lowest bidders and using that sum as the savings. While others used an average of all bids and subtracting the lowest bid and using that as the savings. Others used the estimate and subtracted the lowest bid. While all of these have merit, they all lend themselves to debate. Was the estimate current or accurate? Would someone use the highest priced vendor? And what method of calculating average would be used? Mean, Medium, or Mode? Each would give very different results.

We have decided to be conservative in our quest to measure savings by taking the lowest bid and subtracting it from the second lowest bid. During the fiscal year 2012 the savings on Construction contracts has been calculated at $2,718,234.13 for 12 months using this method. While this is an impressive number using the same model for filed sub bids the additional savings were $3,800,810 for a combined total of $6,519,044.

Obviously, there is real value in the public bidding process. The best way to leverage this process is by allowing the vendor’s time to secure materials from suppliers that can offer cost competitive products. Vendors that are looking to buy off the shelf often pay a premium for this convenience. If they do not have adequate time to review the bid documents on large projects, vendors may include additional costs to cover any oversights they may have made in fear of missing a high cost item. Allowing vendors adequate time for preparing their bids will result in better pricing for the University. During these tight economic times, everyone should do what ever it takes to realize the best possible value. Of course, we realize that there will be occasions when time is also a premium.

The Procurement department is an excellent resource to secure the best pricing, overall costs, and help with ensuring that pertinent laws are met. It’s easier to break a policy or law than it is to fix the damage it causes. Procurement can offer suggestions that can save time and money, as well as, make the process flow easier.

Call us with any questions.

UPS Account Set-Up and Updates

Mail and Distribution Services provides convenient, hassle free UPS service to all depts. Simply leave your package in campus mail with a note attached indicating “UPS”. Contracted rates are guaranteed and payment is done through recharge.

If you prefer to set up your own and pay with your procard:

Brett Castellano is the UPS Account Executive for UMass – Amherst.

Procard can be used to pay for UPS charges and an account can be set up to allow charges to automatically post against your card. You can allow other staff in your area to ship through this account without having access to your Procard. You can run a monthly activity report that can serve as your Procard documentation, in place of individual receipts.

Contact Brett to set up a new account, bcastellano@ups.com or 413.386.3258. Brett is on campus 1-2 times a week and is available for staff assistance and training.

When requesting a new account, please provide the following:

- Department Name
- Contact Name and Phone (Responsible Cardholder for the account)
- Department Room Number and Building Name
- Campus Street Address
- City, State and Zip (plus four included)

Brett will provide you with a secure contact to call to provide your card number.

For changes to the Procard information on any existing accounts, contact Hector De Leon at: 855.350.2446, Ext. 5201.

For Any Dangerous Goods or Hazardous Materials Shipments (Chemical/Biological etc.) and for Export and customs review of research materials

Contact Jim Field at jmfield@ehs.umass.edu or 5-5122 to ensure that all rules and regulations pertaining to the packaging and shipping of Hazardous Materials are followed. Also, visit the Hazardous Materials shipping section on the EH&S website.

For “Freight Over 150 lbs. (a single piece or traveling on a Pallet):

Contact Jim DeRoy at distribution Services deroy@admin.umass.edu or phone (413) 545-5082 to coordinate pick ups or deliveries on campus and to ensure that you receive discounted pricing put in place by UPS Freight.

Each year Earth Day is celebrated on April 22nd, raising awareness of environmental issues that impact our lives and the future of others. Remember, every little bit counts. What will you contribute this year? Dedicate time for volunteer work in your community? Or will it be something as small as committing to use less electricity? Even the smallest changes, when accompanied with many, make a BIG difference!
Bob Clukay, long time University staff member retires…

Bob Clukay, Assistant Director of Procurement has announced his retirement after a long and successful career.

Bob started in the University Procurement Offices back around 1985 but not as a University employee…for those “old timers” still around they probably remember that the MHEC started out in the University Procurement Offices with Jake Bishop wearing both University and MHEC hats. Bob spent about 12 years working for MHEC before coming over to “our” side in Procurement. The consistent thing with Bob, whether with MHEC or the University, was that he was always calm, polite and a warehouse of knowledge and experience. Bob never shied away from a task or project no matter how difficult it was. His quiet demeanor and subtle sense of humor made him one of the most requested staff members of our department when projects came along that required someone that could be counted on, to analyze and guide the group involved with a steady hand.

What some people have to say about Bob…

Bob has that wonderful ability to get along with anyone. Genghis Khan would have invited him in for a brew! We have all enjoyed the benefits of his good humor. ~Charlie Gibson, Retired Director of Procurement

I have so enjoyed working with Bob. His in-depth knowledge and great sense of humor were a perfect balance in managing the tasks at hand. I will miss our chats on the wildlife in our back yards, ‘shrooming and house projects. Goodbye tension, hello pension! Bob, be well and live well. ~Holly Lankowski, Procard Manager

Bob will always be remembered for his nighttime walks in the woods looking for tracks and animal stories. ~Linda Hiesiger, Procurement/Auxiliary Svcs Director of Smith College

Working with Bob has been just terrific – he’s always ready to help with getting through the procurement process and will always have good advice. I am going to miss him. ~Ruth Yanka, Executive Director, A&F Operations

PROCARD USER ONLINE TRAINING UP AND RUNNING

After many requests, and to provide greater flexibility to non-traditional work schedules, Procard User Training is now offered online through the OWL (Online Web-Based Learning) platform supported through the Center for Educational Software Development. University staff members who apply for a Procard will complete their Procard User training online based on their schedule.

Holly Lankowski, Procard Manager for the Amherst Campus developed and implemented this online module. The training content is comprised of Instructional Units covering an Overview of the Procard Program, the Purchasing Process & Procedures, Restricted Commodities, Records Management and the Procard Audit Process. Launched in late February, the feedback to date has been very favorable.

To obtain a Procard, a Procard Application needs to be submitted. The link to the online training will be provided upon receipt of the Procard application.

We are pleased to offer this new option as part of our on-going program development.