

# URIC Administration Meeting

February 23, 2021

Procurement Update

Jim Konrad, Executive Director

# Agenda

- Invoice system
- Campus wide print management solution
- Travel credits
- Open labs
- DocuSign
- PPE

# Invoices

- We did get behind processing invoices in December and January
- Additional staff are now working on invoices
- Backlog has been reduced by 2 weeks
- Expect to be back to a 1-2 week processing time by the end of March

# New Invoice System

- All iBuyNU invoices will still be sent to us electronically, processing is automated
- We are implementing a new invoice system that is scheduled to go live on May 15 for other invoices emailed or mailed to Accounts Payable
- Vendors will be told to email their invoices to a single email address
- Departments will be told to do the same if they receive the invoice
- Those that come in the mail will be scanned and sent to the same email address by Accounts Payable staff

# New Invoice System

- This new system has several benefits:
  - Invoices and non-catalog POs that match will be staged for automated processing in batch (Accounts Payable will not have to key them)
  - PDFs of invoices will be loaded directly into On-Base (Accounts payable will not have to image and index them) and can be accessed through NUFinancials
  - Transparency into the receipt of invoices will be greatly improved
  - Invoices that cannot be processed automatically will be placed on a dashboard that will be managed by Accounts Payables Analysts

# Campus Wide Print Management

- We recently completed an RFP to move from our current three vendor preferred vendor approach to copiers to a single to implement a campus wide print management solution
- After an extensive evaluation and considerable collaboration with several other schools and departments, a new contract was awarded to Ricoh

# Campus Wide Print Management

- Ricoh best demonstrated their capabilities and ability to successfully implement this program. The award recommendation was based on a best value assessment of the following key aspects of each vendor's proposal:
  - quality of proposed brand of equipment
  - experience of the leadership team and key personnel
  - proposed implementation plan
  - service and support
  - technology (to support maintenance, accurate billing, 'follow me print' infrastructure, identity management, e-fax, etc.)
  - experience implementing similar programs elsewhere
  - commitment to sustainability
  - past performance at Northwestern
  - pricing

# Campus Wide Print Management

- There are two primary goals for this project:
  - Standardize the copier fleet across Northwestern on one brand, which will achieve a greater economy of scale and significant 'cost per click' savings over the current three-vendor model
  - Leverage the single-vendor relationship to implement universal printing infrastructure across campus, with a single chargeback per page
- Universal printing will allow any Northwestern employee or student to send a document to print and release it on any device in the program
- This ultimately allows us to dramatically improve the overall print landscape on campus, decrease the amount of staff time needed to manage fleets of copiers, and ultimately save the University several hundred thousand dollars annually



# Campus Wide Print Management

- We will be working with all departments and schools on campus that currently have copiers from our three current preferred vendors (Ricoh, Gordon Flesch, and Regal) to transition them to the new campus wide contract
- We will be in touch with each department that currently has Ricoh copiers to transition their units into the program as soon as possible.
- For those that have copiers from Gordon Flesch and Regal, they will be transitioned upon expiration of their current lease
- The implementation of the entire program will likely take 1-2 years
- Senior leadership is fully supportive of this transition (both the Provost's Office as well as Business and Finance)

# Travel Credits

- Those that booked their travel through **T100** should work directly with them to utilize credits
- Travel that was booked through **Egencia** should be visible in the travelers profile
  - Those that booked their own travel should be able to access the credit
  - Using a credit for another traveler would have to be done by calling Egencia
  - Procurement will work on generating a report for each department or school to identify all of the credits that exist in their department or school

# Traveler redeeming own credit

## REDEMPTION IS DONE ONLINE

- Verify the credit in the traveler's account. You will see this on the home page, and also in the profile under Payment Type.
- Search for new flights, using the same airline. Continue through the booking path.
- You will be prompted to apply the credit value to the new ticket; click the option.
- Continue to checkout; the value is deducted from the new fare.
- In some cases, airline rules don't permit online redemption. In this case you will be prompted to phone Egencia for assistance.
- Need help? Here's a link to full info:

<https://corporate.expediacustomer.com/help-center/article/207>

The screenshot shows the Egencia website's flight search interface. At the top, there's a navigation bar with 'EGENCIA', 'Book', 'Trips', 'Tools', 'Help', 'Feedback', and 'Vincent Raj'. Below the navigation bar is a 'Search for Flights' section. A notification banner at the top of the search area reads: 'UPDATES ON COVID-19 (CORONAVIRUS): Egencia is closely monitoring the coronavirus situation and we'll share regular updates with you. To support you during this time, we've got the latest news, alerts, and information on how to stay safe while traveling. [Learn more](#)'. The search form includes a user profile for 'Vincent Raj (ndura@egencia.com)', trip type options (ROUND TRIP, ONE WAY, MULTI-CITY), origin and destination fields (Houston, TX (HOU-All Airports) and Dallas, TX (DAL-Love Field)), departure date (6/1/2020), and departure time (Anytime). There are also advanced search options for 'Search for airlines', 'All flights', 'Non-stop', 'Up to 1 stop', 'Refundable', 'Alliance', and 'Class'. A 'SEARCH FLIGHTS' button is at the bottom right. On the right side, there's a 'Test auto Air US' button and a table titled 'Airline Credits'.

AIRLINE	EXP DATE	VALUE
American Airlines	11/13/2020	\$206.19
Southwest Airlines	5/28/2021	\$128.98
American Airlines	1/1/2022	\$218.14
American Airlines	11/13/2024	\$280.60
United	11/13/2025	\$387.64
American Airlines	11/13/2025	\$250.60

The screenshot shows a dialog box titled 'Redeem an airline credit' with the instruction 'Please choose one of the options below'. There are two radio button options: 'Southwest Airlines' (selected) with 'EXPIRES May21' and '\$129', and 'No, proceed to checkout'. At the bottom, there are 'CANCEL' and 'CONTINUE' buttons.

# Apply credit to different traveler

## REDEMPTION IS DONE OFFLINE

- Your travel manager will supply information on the available credit. Note the Egencia itinerary number and airline ticket number.
- Log on Egencia and select your new flights. **Do not** complete the purchase; on the checkout page click *Save for later* and note the itinerary number.
- Phone the Egencia service center at (702) 939-2532.
- Advise your agent that you would like to complete a new booking using a name change credit. Quote the Egencia itinerary number of your new trip and the trip containing the credit.
- Egencia agent will verify validity of the credit and complete the new booking.

The screenshot shows a checkout page with the following elements:

- TRAVELER INFORMATION** section:
  - Traveler E-mail (changes to this field will not be reflected in the traveller profile) \*
    - Email: user@nu.edu [checked]
  - Other recipients (Optional)
    - Email: travel@northwestern.edu [checked]
- Total: \$90.20
- Buttons: "Save for later" (highlighted in green) and "Book now" (crossed out with a red diagonal line).
- Text at the bottom: "Important information about your booking"

### Validity:

Credits on NU preferred carrier United are generally eligible for free name change.

Other airlines will have varying policies; the Egencia agent will advise if the credit can be applied to a different traveler. There may be an airline fee for the transaction.

# PPS Open Labs

- Scheduled monthly
- The schedule is published at <https://www.northwestern.edu/procurement/about/open-labs.html>

Date	Time	Location
Thursday, March 11, 2021	11 AM-noon	Enter the Zoom Meeting: <a href="https://northwestern.zoom.us/j/93962357420">https://northwestern.zoom.us/j/93962357420</a>  Dial-in option: +1 312 626 6799 US (Chicago) Meeting ID: 939 6235 7420
Tuesday, April 20, 2021	9-10 AM	Enter the Zoom Meeting: <a href="https://northwestern.zoom.us/j/94088999094">https://northwestern.zoom.us/j/94088999094</a>  Dial-in option: +1 312 626 6799 US (Chicago) Meeting ID: 940 8899 9094

# DocuSign

- The University has recently made the decision to establish DocuSign as our digital signature standard platform
- A campus agreement has been implemented, which will allow all departments and schools to utilize the technology on documents that require a formal digital signature
- It is to be used when an official, formal signature is required
- An implementation plan is being developed, more information will be sent out soon.
- If you have any questions, please contact Keith Paddy at [k-paddy@northwestern.edu](mailto:k-paddy@northwestern.edu)

# PPE

- Order from Procurement and Payment Services using the order form on the following website:
  - <https://www.northwestern.edu/procurement/purchasing/purchasing-strategic-sourcing/ppe-supply-ordering.html>
- Items being provided at no charge to faculty and staff:
  - Return to Campus kit (bag with hand sanitizer and 2 re-usable branded masks)
  - Re-usable cloth masks (non-branded)
  - Disposable 3-ply surgical masks
  - Hand sanitizer pump bottle
  - Disinfectant wipe canister
  - Personal use digital thermometer
- Supplies are also available for students at Jacobs
- If you have a need for specialty type PPE supplies (such as clear masks, N95 masks, KN95 masks, or face shields) please reach out to PPS at [procurement@northwestern.edu](mailto:procurement@northwestern.edu)

**Questions**

**Thank You**