



P-Card Transition Update

The conversion from GE MasterCard to American Express has been a relatively quiet one. So far, the transition has been smooth. That being said, we understand if you still have concerns. Purchasing is working hard to see the transition through without incident. Amex has also done their best to assist us any way they can.



will not change in any way – only the name of the card will change.

- Purchasing has identified commonly used vendors who do not accept Amex and Amex is in the process of implementing programs with a number of those vendors.

If you have concerns about a specific vendor who does not accept Amex, e-mail the

Here is what we know:

- The new p-cards should arrive at your campus Purchasing department by March 13.
- You will be notified by your campus p-card manager regarding the distribution of the new cards.
- You do not need to turn in your old card to Purchasing; however, Purchasing recommends that you cut up your old card after you receive your new card. Both cards will remain active until March 28, at which time you will no longer be able to make purchases with the Master Card.
- The reporting structure and customer service representatives you work with

vendor's name and contact information to Marsha DeVol at mdevol@indiana.edu and Purchasing will do whatever is possible to encourage the new vendor to accept the new p-cards. We'll be notifying p-card users of new developments via e-mail and posting updates to our blog as the implementation date approaches.

Purchasing sincerely appreciates everyone's patience and willingness to work with us through this process. At IUPUI, direct questions about the p-card conversion to Claudette Canzian at ccanzian@indiana.edu. All other campuses should contact Melonee Bristoe, at mbristoe@indiana.edu.

Source: Melonee Bristoe

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Follow the latest Purchasing News on our New Blog

iuprocurement.wordpress.com



Stay informed with the latest Purchasing news through the IU Procurement Blog. As of press time, the blog has registered more than 1,400 page views.

Purchasing staff members regularly post updates to the blog on a wide variety of topics. Learn how to save your department money, read the latest news about the P-Card transition to American Express, and stay up-to-date on the latest Purchasing training opportunities.

Respond to the postings with your comments to let us know how we can use the blog to better serve you.

Save Money with Electronic Payments

Purchasing reported in the January Newsletter that sending paper checks to vendors costs approximately \$1.62 cents more per check to process than electronic payments. A study recently conducted by the Aberdeen Group suggests that the savings could be even more substantial. They found that best-in-class companies spent an average of \$10.84 on each paper-based check transaction, compared with an average electronic payment processing cost of \$6.71 – a savings of 38 percent! Even more reason to encourage vendors to sign up for electronic ACH (direct deposit) payments.

Direct vendors who would benefit from receiving payments directly to their bank account to <http://www.fms.indiana.edu/ap/ach-form.asp>. The website provides a link to the ACH form, information about where to send the signed authorization, and details about who to contact with questions.

Please keep in mind that there are unique disbursement situations where ACH is not a desired option; examples include utility payments and most payments to universities.

Source: Karin Coopersmith and Charlie Sinex

Could this be you?

Know How to Handle Critical Information

A visit by a Purchasing staff member to a department's office uncovered tax documents that were saved in an insecure location. Not only were the documents not in a safe place, but there was no business reason to collect the documents.

Please check your department's filing practices and cross shred any documents that contain critical information. Critical information is defined as social security numbers, bank account numbers, credit and debit card numbers, driver's license numbers, or state identification numbers.

For large quantities of documents, a list of approved destruction companies can be found at <http://www.indiana.edu/~purchase/contract/contracts.html> under the Document Destruction section. These companies meet HIPPA, FERPA, and other regulations for safe document destruction.

If a security incident is uncovered, report it to it-incident@iu.edu. For more information, contact your purchasing contract manager for assistance.

Source: Marilyn Kisters and Karin Coopersmith

Protect Yourself: Know the Personal Gift Policy

It is not uncommon for those in positions who make purchasing decisions to be offered free gifts. The offers come in different shapes and sizes, from t-shirts to basketball tickets to complementary lunches; but they all have the same intention – to give us something for free in hopes of doing business with Indiana University. As harmless as these gifts appear, please do not fall victim to these forms of enticement.



In fact, beware of these enticements! It is against University policy for a University employee to use his or her purchasing authorities for personal gain. According to policy P-3.4, "University employees may not accept personal gifts that may influence decisions relating to the commitment of University funds and resources."

Source: Pam Copenhaver

Avoid Recurring Payments on a P-Card

P-cards are for small-dollar, one-time purchases made with a vendor who is not in EPIC or will not accept purchase orders. The primary function of the p-card is to supplement the purchase order process, not replace it.

For those transactions that occur month after month a purchase order is the appropriate mechanism. The purchase order will allow the vendor to invoice the University.

Examples of recurring p-card payments that Purchasing has identified in the past few months include payments for trash removal, data backups, interior plant maintenance, and other recurring services. These transactions should not be placed on p-cards, but should instead be placed on purchase orders.

Additionally, p-cards should never be used for "stacked" payments. Stacked payments are payments broken up over several transactions so they fall under the designated dollar limit assigned to the p-card. Monthly reports are run to review these activities and consistent use of this practice could result in a suspended p-card. Your cooperation in this issue will go a long way in helping Purchasing reduce costs to the University, and ultimately, save your department money.

Source: Ethan Ax, Claudette Canzian, Jill Schunk

Random Sustainability Facts



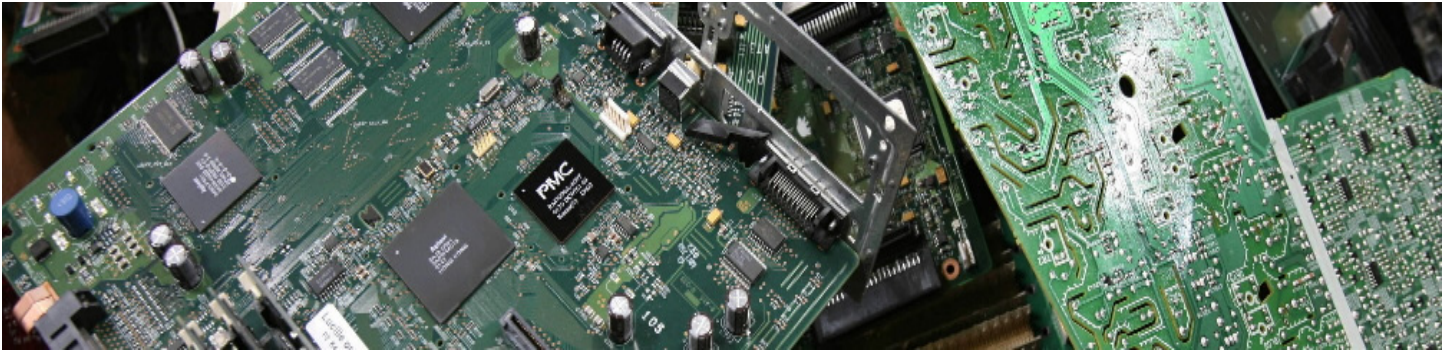
Recycling one ton of paper saves 17 trees and three cubic yards of landfill space.



Buildings produce 35 percent of the country's carbon dioxide emissions – the chief pollutant blamed for climate change.

Electronic Waste Collection Days

A free event sponsored by Indiana University Bloomington and IUPUI



Electronic Waste Collection Days, a free electronic waste recycling drive sponsored by

Indiana University Bloomington and IUPUI, will take place in both Bloomington and Indianapolis on April 30 through May 2. The program will be open to all public and private schools, universities, businesses, and non-profit organizations on Thursday, April 30, through Friday, May 1, from 9 a.m. to 2 p.m. The program will be open to the general public on Saturday, May 2, also from 9 a.m. to 2 p.m.

In Bloomington, the collection event will take place in the parking lot to the north of Memorial Stadium. The drop-off location for Indianapolis will be the parking lot directly south of the Indiana State Fairgrounds at the corner of 38th Street and Coliseum Ave.

The event is not without precedent in Indianapolis – IUPUI holds a Tox Away Day e-waste collection event every spring. While Tox Away Day typically draws a large crowd,

officials in Indy expect E-Waste Disposal Days to see much higher participation thanks to an aggressive grassroots effort to encourage local municipalities, businesses,

phones or computers, will be shredded. 100 percent of donated products will be recycled and kept out of landfills.

SPECIAL NOTE FOR FACULTY AND STAFF



Campus departments are encouraged to participate in this event; however, the guidelines are different than for the general public. More details will be provided as the date approaches. Until then, direct questions to your campus Surplus Store:

IUPUI: surplusp@iupui.edu
www.purchasing.iupui.edu/surplus
IUB: jmcauley@indiana.edu
www.indiana.edu/~surplus

and nonprofits to recycle their expired electronics.

None of the electronics will be processed for resale. Anything that could potentially contain sensitive data, such as cell

According to a recent report by the Environmental Protection Agency (EPA) Office of Solid Waste, in 2007 only 18 percent of electronic products that had reached the end of their lifecycle were recycled. In addition, the EPA estimates that about 235 million electronic products sit unused in homes nationwide.

E-waste Collection Days is possible thanks to the generous involvement of Apple Inc. Apple will manage the collection of the e-waste and its transportation to a secure recycling facility. Apple is providing this service free to Indiana University.

Other universities have conducted similar events across the country. The

University of Hawaii collected 1.5 million pounds of e-waste in 2008 and the University of Michigan collected 145 tons of e-waste in 2005.

Source: Ethan Ax

Facial Tissues and Hand Sanitizer now Allowable Through HP Products

Now that flu season is upon us, Purchasing has received several inquiries regarding facial tissues and hand sanitizer. In the past, these items were considered personal in nature and therefore blocked in EPIC.

However, there is an appropriate and acceptable use of these items in areas that have a high volume of student or visitor traffic. It is consistent with Indiana University's mission to foster a healthy campus environment for our guests. Facial tissues and hand sanitizer

are an important part of preserving that mission.

Going forward, departments will be able to Purchase both facial tissues and hand sanitizer through HP Products. The Purchasing Department asks that you act responsibly in purchasing these items. Facial tissues and sanitizer bought with University funds should only be used for high-traffic areas, such as waiting rooms, and should not be purchased for private offices. Lotion and other personal care items will continue to be restricted.

Source: Phil Cole and Tim Rice

Reminder: Beware of Toner Scams

Purchasing has once again been advised of the return of the "Toner Phoners." This type of scam makes the rounds at all universities. Regardless of the tactic used, be aware that Indiana University does not buy copier toner from cold call phone sales people. Our B2B vendors in EPIC provide University negotiated contracts which should be used for these purchases. When in doubt, please do not hesitate to call Purchasing for assistance with this issue.

Source: Cynthia Hughes

What's New In Travel

Editor's Note: This will be the last Purchasing newsletter to include Travel news. Click here to subscribe to the new Travel Newsletter.

New Travel Newsletter

In response to increased demand for more frequent news updates from Travel Management Services, the decision was made to create a quarterly newsletter solely dedicated to travelers and arrangers.

The first newsletter was distributed to travelers in January. If you did not receive the January newsletter but would like to be added to the Travel listserv for future newsletters, e-mail travelbl@indiana.edu.

Source: Travel Management Services



Travel@IU is Coming

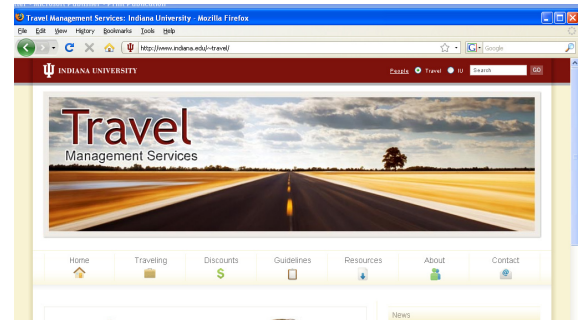
Click to learn more.



Travel Management Services Launches New Website

Travel Management Services (TMS) is proud to announce the release of a new website: www.indiana.edu/~travel. The content has not significantly changed; you will still find links to travel forms, a list of our preferred vendors, guidelines, and other resources. What has changed is the look of the site and navigation.

TMS felt that it was important to modernize the look of the website prior to the approaching implementation of Travel@IU. There is space devoted to news where TMS will post information about the implementation and other hot topics. There is also a link to the State Department Travel Warnings website which can be used for those who are traveling abroad, as well as a host of other tools to help trav-



elers be as productive as possible.

Please send feedback about the site to travelbl@indiana.edu. Let us know what you like about the site and if there is anything we can do to improve it.

A note of appreciation goes out to the development team of Brian Becker, Tammy Bean, and Ethan Ax.

Source: John Harner

Campus News



Bloomington Campus

Attend the Bloomington Copier Fair: April 2

Purchasing and the Copy Machines Department will host a copier fair on April 2, from 10 a.m. to 3 p.m. in the IMU Georgian Room. Interested in new copier technology? Current lease expiring? Have your departmental copier needs changed? Join us for an informative event. Refreshments will be provided.

IU's major copier suppliers and manufacturers will give presentations and showcase a wide variety of equipment designed to meet your needs and budget. Departments will be able to request literature and quotes at the Copy Machines Department information table. Representatives from Purchasing and Copy Machines will be on hand to assist departments and answer questions.

The event will give departments a first-hand look at what the latest copier models have to offer, including scanning, faxing, duplexing, and black and white and color printing. Departments will also learn how they can save several cents per page by using newer, more energy-efficient models.

No registration is required. Attendees can come any time between 10 a.m. and 3 p.m. For more information, contact Karin Coopersmith at kcoopers@indiana.edu.



The following vendors have announced that they will participate in the Copier Fair:

- IKON, featuring Ricoh products
- Jim Gordon, Inc., featuring Sharp products
- Copyco, featuring Xerox products
- HPS (Triple M), featuring Toshiba products
- Konica Minolta
- Cannon IV, featuring Hewlett Packard products
- Maxwell's

Source: Karin Coopersmith

Bloomington Campus (cont.)



In November, we announced that Purchasing negotiated a new contract with FedEx. Since then, hundreds of faculty and staff members have enjoyed dramatically lower shipping costs. Here is some additional information to help you get the most out of the new contract:

Pick Up Fees

- Air shipments – no pickup fees.
- Ground shipments – no pick fees. However, fees will still be assessed for third-party pickups. A third-party pickup means that the scheduled pick-up location is different than the address provided for the account when it was set up.

TIPS:

- If you have a location from which you will be requesting regular pickups and it is not the same address that was used when setting up your account, consider setting up a new account # for that location to avoid the pick-up fees.
- Compare air shipment fees to ground shipment fees. If you will incur the \$12 pick up fee for a third-party ground shipment, the air fee may be less since there are no pickup fees with air shipments.

Signature Required

- Standard FedEx practice is to obtain a signature when delivering to a commercial address, but not residential. Selecting “signature required” when creating a shipping label is often not necessary but will result in a small additional fee on both ground and air shipments.

More details can be found at http://www.indiana.edu/~purchase/contract/fedex_bl.html.



Advertising includes many different types of media, from billboards to newspapers, TV to radio, and everything in between. Regardless of the medium, buying advertising can be tricky. Special rates are often available to nonprofits, and because Indiana University spends a large amount on advertising each year, we are usually able to negotiate an even lower rate.

IU Bloomington and IU Southeast should follow the procedure below to place an ad (all other campuses please contact your purchasing department for information).

1. Obtain a copy of the rate card and its associated terms and conditions and a copy of the quote, insertion order, or contract.
2. Prepare your advertising copy as per the requirements of the media.
3. Prepare your requisition and forward the advertising copy; rate card with terms and conditions;

and quote, contract, or insertion order to the Purchasing Department, Attn: Karin Coopersmith (IUB) or Ed Kochert (IUS).

All materials will be reviewed. The contract or insertion order will be signed by Karin Coopersmith (IUB, kcoopers@indiana.edu) or Ed Kochert (IUS, ckochert@indiana.edu). Coopersmith or Kochert will also prepare the purchase order. The advertising company will receive all materials at the same time.

This procedure ensures that the advertising company has all of the information necessary to create an accurate invoice for Accounts Payable.

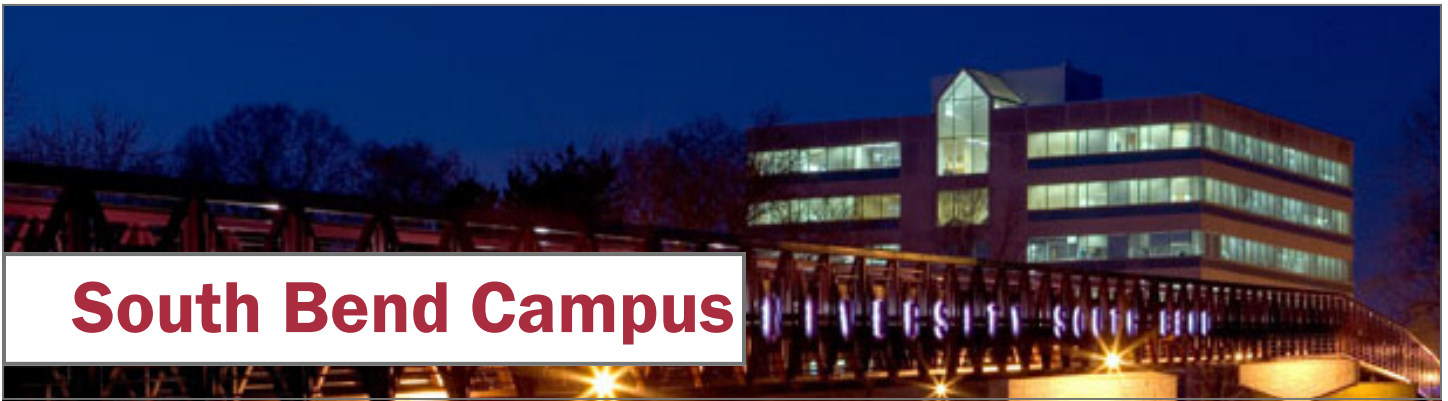
Please direct specific questions to your campus Purchasing Department.

Source: Karin Coopersmith

Setting up New Accounts

- There are three steps required when setting up a new FedEx account. In several instances, step two is being missed. It is important to complete all three steps to avoid delays in payments.
 1. Submit application form
 2. **Notify Accounts Payable of your FedEx acct# and your dept acct#**
 3. Create your log-in

Source: Tom Ellis and Dawn Bodle



South Bend Campus

Be the First to Know with IU South Bend's New Purchasing Blog

Follow the latest Purchasing news at IU South Bend through the IU South Bend blog:

<http://iuprocurement.wordpress.com/category/south-bend/>

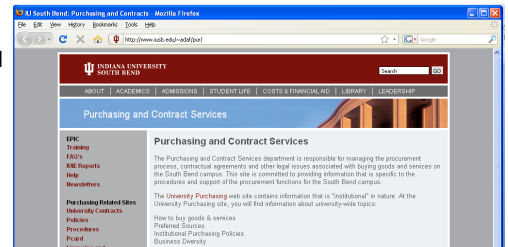
Not only will you find information about Purchasing news for all campuses, but also information specific to events at IU South Bend. Subscribe to the blog's RSS feed to receive notifications each time there is an update and be the first to know about procurement news on our campus.

We hope this blog serves as a useful tool for sharing information and creating dialogue with the faculty and staff who rely on the Purchasing Department at IU South Bend.

Source: Tom Westerhof

New Website Features Updated look, Streamlined Navigation

As you may know, the South Bend campus recently updated the format/layout of their website. The Purchasing Department quickly followed suit, updating our own site in the new style. The site went live just this past week. The new site provides more information and streamlined navigation. Please feel free to post comments to our blog and let us know what kind of information you'd like to see on the new site. Our number one priority is that the site be user-friendly for our faculty and staff. We look forward to hearing your thoughts!



Source: Tom Westerhof

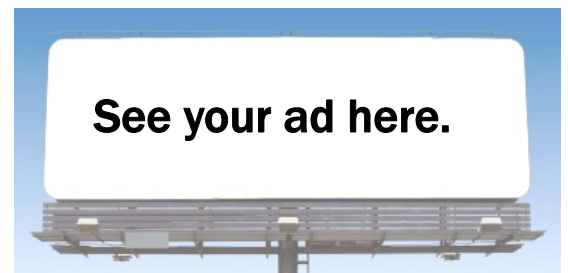


Southeast Campus

Let Purchasing Help you Advertise

Buying advertising can be tricky. To help you navigate the process, the Purchasing managers at IU Southeast and IU Bloomington have established a procedure that will allow you get the best rate possible. To learn more, see *Let Purchasing Help you Advertise* on page six.

Source: Karin Coopersmith and Ed Kochert





EPIC

Your Campus EPIC Contacts

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 (765) 973-8233

IUPI
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 ehowe@iuk.edu
 (765) 455-9233

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Cindy Kurpis
 ckurpis@iun.edu
 (219) 980-6865

IUS
 Mike Kerstiens
 mjkersti@indiana.edu
 (812) 941-2596

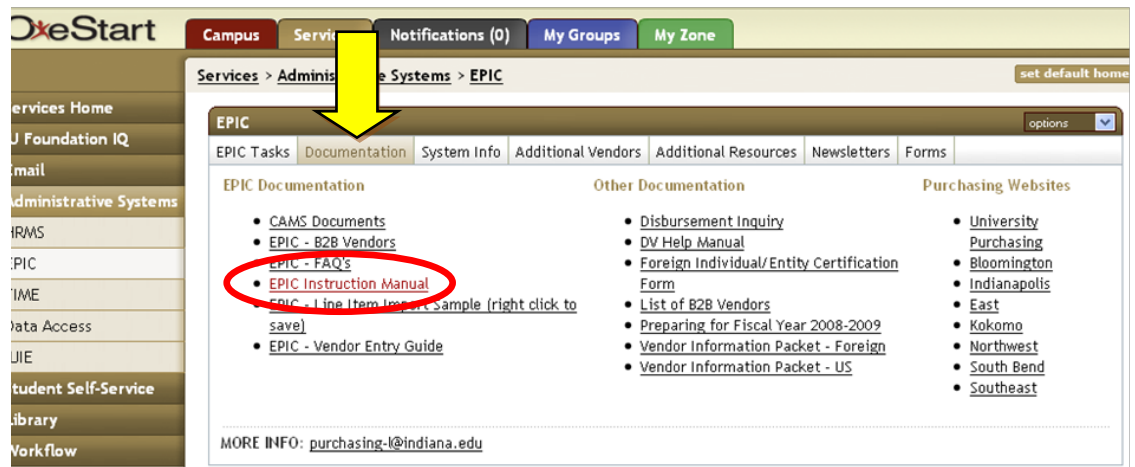
Ed Kochert
 ckochert@ius.edu
 (812) 941-2338

IUSB
 Debbie Richards
 drichard@iusb.edu
 (574) 520-4580

Updated EPIC Instruction Manual

The EPIC Instruction Manual has recently been updated. The latest document features simplified language and better information for learning about basic features in EPIC.

This document can be found in Onestart under the Documentation tab in the EPIC section. The link is titled EPIC Instruction Manual (see below).



Training Opportunities

An Introduction to EPIC

Indianapolis
 March 12
 9 a.m. to 12 p.m.
 Union building, Rm. 544
 North Side of Building
[Register Now](#)

April 9
 9 a.m. to 12 p.m.
 Union building, Rm. 544
 North Side of Building
[Register Now](#)

Bloomington
 March 26
 8:30 a.m. to 10:30 a.m.
 Poplars Building, Room 183
[Registration Now](#)

Subscribe to the EPIC Listserv

To receive updated information and announcements about EPIC, you can subscribe to the listserv by:

- Sending an e-mail to: listserv@indiana.edu
- Place "subscribe EPIC-L" in the body of the message (no subject).

EPIC (Cont.)

Understanding Restricted Items

When a requisition is submitted, it will be routed in one of two ways.

First, if the requisition meets certain requirements then it will bypass the Purchasing Department and become an Automatic Purchase Order (APO). Here are just a few of the requirements that, if they are all met, will lead to an APO:

1. The requisition is less than the APO spending limit.
2. The vendor is selected from EPIC's vendor system.
3. No item is marked as restricted.

Second, if the requirements above are not met, then the requisition does not become an APO; instead, it is routed through Purchasing for review and approval. There may be times when you want to force the requisition to be reviewed by Purchasing. A common reason to force the

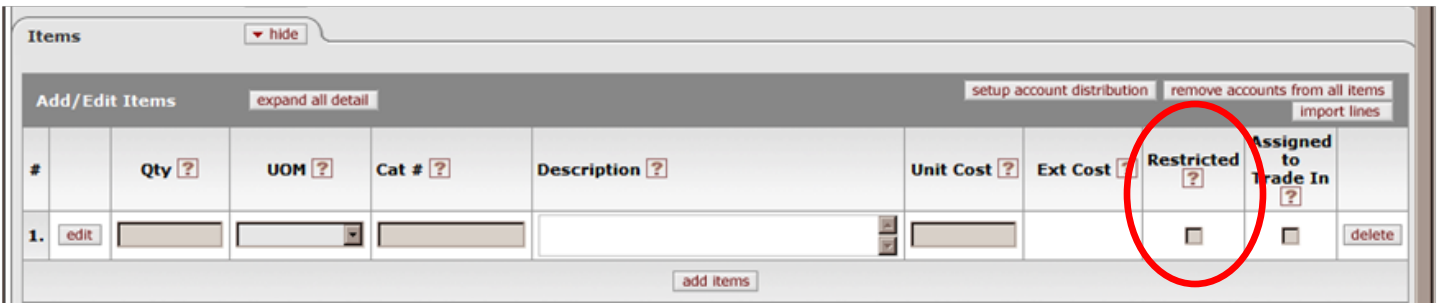
requisition to be reviewed by Purchasing is if a check or other paperwork needs to accompany the order. To force the order to go through Purchasing, place a check mark in the Restricted column of a line item (shown below).

Always place a check mark in the Restricted column if the line item falls into any one of these categories:

- Animals
- Equipment
- Furniture, furnishings
- Florists
- Purchases involving trade-in
- Radioactive materials
- Recurring payments, such as leases, rentals, standing orders, blanket orders, continuous purchases

- Reimbursements to Indiana University employees
- Travel or travel-related expenses
- Reimbursement for travel or travel-related expenses
- Weapons and ammunition
- If a check needs to accompany the order
- If additional paperwork needs to accompany the order (i.e. subscriptions, reprints)
- Payment of invoices

Any time you mark a line item as restricted also include a note in the requisition explaining why you want Purchasing's assistance. As an added safeguard, send an e-mail to the appropriate Purchasing staff member letting them know to keep an eye out for the requisition.



Learn How to Add Vendors with New Vendor Entry Guide

A new Vendor Entry Guide is available for advanced EPIC users who would like to learn how to enter new vendors into the system. Adding new vendors yourself can expedite the approval process and result in efficiencies in invoicing.

The Vendor Entry Guide can be found in Onestart under the Documentation tab in the EPIC section. The link is titled "EPIC - Vendor Entry Guide" (see below).

