Managed Print Services Training

August 2022
Agenda

• Overview of the Managed Print Services Program
• Expectations & Timing
• Punchout and Quote & Question Form (BuyWays)
• Q&A (Feedback & UMass Dartmouth Stakeholder Role)
• Summary/Next Steps
Overview

• UMass has partnered with SupplyLogic a tech-enabled managed service provider specializing in supply chain optimization of marketing, procurement, and execution within print, POS, and branded merchandise.

• The team has worked with your campus stakeholders to identify you major suppliers and commodities to ensure that these are part of the Managed Print Services Program.

• The training will focus on walking you through 2 different channels to purchase print commodities within BuyWays

  • SupplyLogic Portal (via BuyWays): Standardized customizable stationery (business cards, envelopes, letterheads) and other collateral (flyers, booklets etc.)

  • Quote & Question Form: For custom print ‘Quotes” or general ‘Questions” regarding print needs

• Future functionality deployments: branded merchandise.

• Additional information on this deployment can be seen in this FAQ document.
Expectations & Timing

• You must purchase your stationery (envelopes, business cards, letter heads, etc.) needs from SupplyLogic punchout in BuyWays

• From **Monday, September 5**, all print orders not placed through SupplyLogic will be rejected

• Print purchasing needs will be:
  
  • Routed to SupplyLogic using the BuyWays Punchout
  
  • Discussed during a bi-weekly/monthly meeting during the launch stabilization phase with Hillary Sylvia, Michael LaGrassa and Kevin DeAquair

• Feedback on the performance and quality of this program should be routed to UPST with this subject, **Managed Print Program: UMass Dartmouth**

• SupplyLogic communication on quotes and question responses will come from the email below, please ensure it doesn’t go to your spam or get blocked by your campus firewall:
  
  • **Email Name:** UMASS Orders
  
  • **Email Address:** umassorders@supplylogic.com
Before We Start

• Ensure you have the appropriate access to BuyWays (Requisitioner or Shopper Role)

• Be comfortable navigating BuyWays and are up to date with the changes that have occurred there over the last 12 months

• Knowledgeable of how punchout catalogs work

• Knowledgeable of how to access UPST Resources on UPST website
Getting Started

• Log into **BuyWays**
  • Click: BuyWays Login
  • Use your UMassD single sign-on credentials

• On the BuyWays landing page:
  • Under Purchasing Categories section
  • Click on the “Office Supplies and Services” icon
  • Under the “Preferred Supplier” section, click on the SupplyLogic icon
Punchout and Quote & Question Form Demo
(Punchout/Portal)
Punchout: Home Page

The Home Page is the main navigation screen.

**Navigation Bars**
There are two navigation bars that will appear on every page. The very top navigation bar has the Cart overview, with the number of items and total amount due. Click on the cart icon, Items or the total to proceed to the checkout process.

The second navigation, commonly referred to as the Main Navigation, will be used most frequently as this is how users will route to catalog, orders and reports.

- **Home** navigates to the Home Page where featured categories and products are advertised.
- **Catalog** navigates to all products. Products are categorized into folders based on commonalities.
- **Order** navigates to past order statistics.
- **Account** navigate to the account details and Favorite links to the list of orders that are marked as favorite.
On the Product’s page, versioned products can be customized to meet a user’s needs while maintaining brand integrity.

The product page in this case is known as the **User Form**. In order to purchase a Versioned product, a user must:

1. Enter a value in all required fields on the user form, required fields are marked with an asterisk. Click the SAVE button to save the information entered.
2. View the proof of the product by clicking on **View PDF**
3. Click the **check box** acknowledging that the proof is accurate
4. Click **Add To Cart** to proceed with the order.
Product Category: Stationery

Key to note when purchasing stationery:

1. Free text is **not enabled** for Center/School/Department section. Always use the drop-down feature.

2. If your Center/School/Department’s name is not there, you will have to make use of the Quote and Question form to provide details of your need for SupplyLogic and Marketing to process.

3. Work in progress to push in more Center/School/Department names.

4. Work in progress to add additional stationery items (notepads) and types (window envelopes).
Product Category: Collateral

The Collateral category will allow you to upload your own art file to place orders for products that have approved specifications, set pricing and are connected to local suppliers.

It is recommended that you review all products for size, presswork and style options in advance of finalizing your art file. (If additional options are needed, please return to the Home Page and submit a custom quote.)

To begin, choose an item from the category list. This list will update as additional items are added.

If additional sizes or styles of an item are available, you will see multiple images to choose from.

Click View Product to begin building your collateral.
Upon entering the product window you will see a brief item description, lead time and diverse supplier information.

Begin building your item by clicking the product description on the far right. This window will expand to show item options.

Clicking the first dropdown will take you to the next page to choose the various stock, ink and finishing options.

After selecting your options – click **OK**
Product Category: Collateral

Now it’s time to upload the file(s) that correspond to the specifications you have chosen.

Click the plus (+) sign located within the document icon on the left side and choose Local File to locate the file. This category supports various file options.

Click **Browse** to locate the file for upload.

If the item chosen prints 2 sides, repeat these steps and upload the 2nd side file of your item.

Click **Next** when done. Note that an error will pop up if production errors are detected. These errors may include incorrect art size, low resolution, missing fonts or missing pages.

In some instances, the system will allow you to convert the file for print. It is recommended that errors are corrected in a new art file and re-submitted for print.
After uploading an acceptable file, you will be taken to the quantity and proof page. Most products are available in either Packs or Eaches.

Enter in the number (of either packs or eaches) you would like to order. If you need to exceed the quantity limit listed, please return to the Home Page and submit the Quote & Question form for a custom order.

If entering a quantity higher than 1, click **Recalculate** to update the price. All pricing is based on the specifications chosen in the previous windows.

Before placing the order, click **Proof** to view the art file uploaded. Close the proof window and check the box to confirm that the proof reflected what will be printed.

Click **Confirm** to proceed.

To add the built item to your cart – click **Add to Cart** on the next page.
The Promotional category is a selection of products and colors, pre-approved by UMassD Marketing department to order with the standard UMassD campus logo.

To begin, choose Category>Promotional Items that will pull up images of offered items. This list will update as additional items are added.

Click View Product to view color options and begin your order.

Upon entering the product window you will see a brief item description, lead time and quantity breaks.

Color options can be found under the product image on the left. Click to view each color option.
Product Category: Promotional Items

All products and colors are tied to blank product inventory levels available.

Choose a quantity break for one or more colors based on quantities available.

After choosing your quantity break, click **Add to Cart** to complete your order.

If you are looking for a color not available or have a special event logo, contact us at the email below to inquire about lead times or alternate product / logo options.

UMASS Orders umassorders@supplylogic.com

```
<table>
<thead>
<tr>
<th>Color</th>
<th>Quantity Available</th>
<th>Price</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black</td>
<td>5961</td>
<td>$3.22</td>
<td></td>
</tr>
<tr>
<td>Navy-Blue</td>
<td>11468</td>
<td>$3.22</td>
<td></td>
</tr>
<tr>
<td>Orange</td>
<td>20644</td>
<td>$3.22</td>
<td></td>
</tr>
</tbody>
</table>
```

**Add To Cart**
**Cart**

Within the **Cart**, products can be reviewed, modified or deleted before placing an order.

The Cart can be accessed at any time by clicking on the Cart icon, “ITEM(S)” box or the $ amount.

To Update Individual Item Quantities, simply click into the Total Quantity input field for the specific line item and modify the amount. **Please note** that the Total Price of the line item will be updated based on the Quantity and Unit price.

To Delete/Remove Individual Line items, clicking the red box next to each line item will remove the line item from the order. To remove all products from an order, select the “Cancel Order” button.

To add more products to a shopping cart before placing an order, select the “Continue Shopping” button or select the catalog to navigate back to the catalog section.
Time to Check Out

Your Shopping Cart will now open showing the item(s) you added:

- Note: SupplyLogic appears as DSSL Holdings within Buyways
- It is recommended that you Name your cart to assist with finding the correct cart during future searches.
- To add the Commodity Code, click on the drop-down arrow to the right of the list field. The commodity list will pop open allowing you to choose the correct commodity code (printing/copying)

Hint: Typing the first letter of the commodity name will bring you to that section of the list.

Review all the information in your shopping cart for accuracy then click "Proceed to Checkout".
Order History

To review past order details, use the navigation bar and select “ORDERS”.

**Standard Orders**
The standard order section shows all order activity categorized by the order status.
- **Open** orders have been placed and pending fulfillment.
- **Completed** orders were produced and shipped as expected.

**Search Orders**
To generate an order search, at least one search field must have a value to generate a search.

**Search Results**
To view and order’s details, select an order ID from the ID column and it will re-direct to the order’s page where all order details are listed.
Process & Form Demo

(Quote & Question Form)
Click the “Quote and Question Form” Box to initiate a quote for items not found on the portal, such as mailings or special projects.

To begin: Choose your campus
Choose Quote Request or Question
Quote Request

Project Details Section

- Provide the title and description for this project
- Choose the *Project Type* that best fits this request
- Specifications Preferences
  - We understand that you may not have all specifications at this time. To assist you with these details, please choose:
    - **Yes** if you have all specifications and would like to use the specific spec fields.
    - Or choose **No** if you prefer to give details only on the specs you have so far.
  - Choosing **Yes** will bring up all specification fields.
  - Choosing **No** will allow you to provide us with the details you have currently. SupplyLogic will provide additional guidance on specifications needed.
- Quantity:
  - Provide the expected Order Quantity for the Quote.

*Note that a quote cannot be provided until all specifications have been determined and agreed.*
Quote Request

Scheduling

- Enter your expected In Hands Date. This is the date the shipment is expected to arrive by.
- Choose an estimated date if you do not know the schedule currently.
- If product is for an event, enter the Event Date

Contact Information

- Complete this section with contact information

File Upload

- Upload a pdf of your art file if available (excel and word versions are also accepted). Note a max. of 10 files

    Drag and drop files here or browse files
Question

Project Details

- Provide a description of your project.
- State the question with as much detail as possible.

Contact Information

- Complete this section with Campus and contact information.

File Upload

- Optional (however if needed ensure it is in pdf format)
Click Submit!

• Upon receipt of the request, you will receive a confirmation of your successful submission.

• SupplyLogic will review the details provided and contact you if additional information is needed.

• Questions will be responded to within 24 hours (working days) via email or phone.

• Quotes will be provided within 48 hours (working days) pending the complexity of the project.

• The Quote sheet will contain details regarding schedule confirmation, how to submit art files, SupplyLogic contact information and a reminder to submit a BuyWays PO to SupplyLogic in order to proceed with production.

• Please use the quote from SupplyLogic to create a Non-Catalog: Goods Only Purchase

We look forward to working with you!

For additional questions, please contact us at UMASS Orders umassorders@supplylogic.com
Q&A
Next Steps

• The Punchout/Portal and Quotes & Question Form are active – please submit your next print order through them in BuyWays.

• Send feedback on the punchout/form and performance to UPST: upst@umassp.edu with this subject: Managed Print Program: UMass Dartmouth

• Review the FAQ document and make recommendations on questions you believe should be answered. You can access the document here: Managed Print Services Program FAQ

• For any catalog order that you do not see your department name as a default (Letterheads and envelopes) please use the Quote and Question form for your quote as this will be pushed in later

• We will continue to provide additional updates on the additional punchout capabilities as the implementation progresses.
1. General questions about the ordering process and BuyWays system:
   Email UPST (upst@umassp.edu)

2. Questions about order status and quotes for custom work:
   Email SupplyLogic (umassorders@supplylogic.com)

3. Questions about the UMassD brand or the design of UMassD stationery:
   Email UMassD Brand (umassd.brand@umassd.edu)