Guided BUying Reference Sheet

How Do I Purchase Goods & Services

Guided BUying is a procure-to-pay tool designed to streamline the process of ordering products and services. The process starts with creating a Purchase Requisition (PR) to generate a Purchase Order (PO) which will flow into invoicing and payment.

Types of Orders

Catalog vs. Non-Catalog Orders:

- **Catalog order:** A PR created when you shop through a catalog in **Guided BUying.**
- **Non-Catalog order:** A PR you create when you cannot find what you need in a **Guided BUying** catalog.

Standard vs. Amount-Based Orders:

- **Standard**: The order type for a PR based on a quote from a supplier when you cannot find what you need through a catalog in **Guided BUying**.
- **Amount-Based:** The order type for a PR based on a quote or agreement from a supplier when the final amount is estimated, or multiple invoices are expected (e.g., services).

Note: Only Non-Catalog orders can have the Standard or Amount-Based order type

Placing an Order

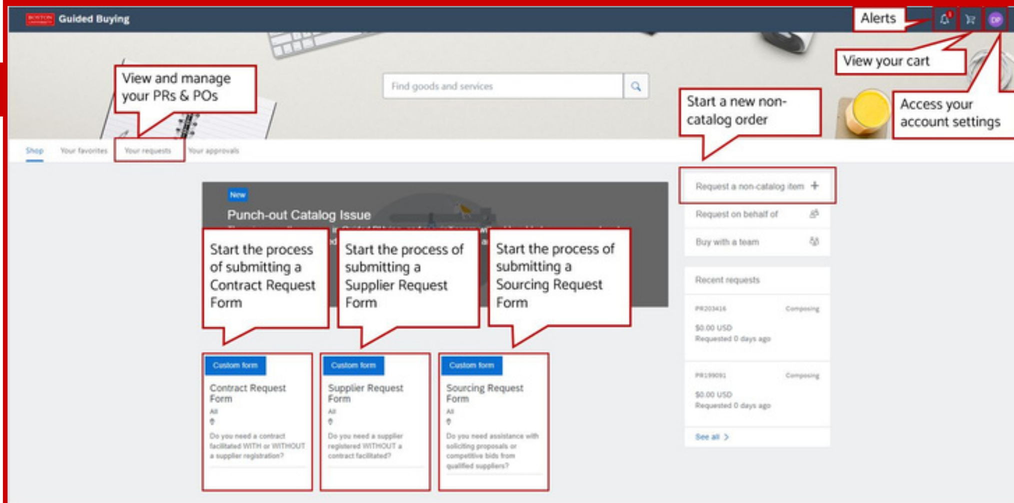
Catalog Orders

1. Locate the supplier you intend to do business with using the Catalog Suppliers tile and category tiles on the **Guided BUying** homepage. **Note**: The search bar at the top of the home page can be used to search for suppliers, catalogs, and catalog items.
2. Navigate through the supplier's page and add the items you wish to purchase to your cart.
3. Check out via the shopping cart inside the catalog. Checking out through the catalog will then add the item to your cart inside **Guided BUying**. **Note**: Checking out in a catalog does not complete your order. You must then submit a PR for the items in **Guided BUying**.
4. Click on your cart in **Guided BUying** and choose to check out. Doing so will start the standard PR process.

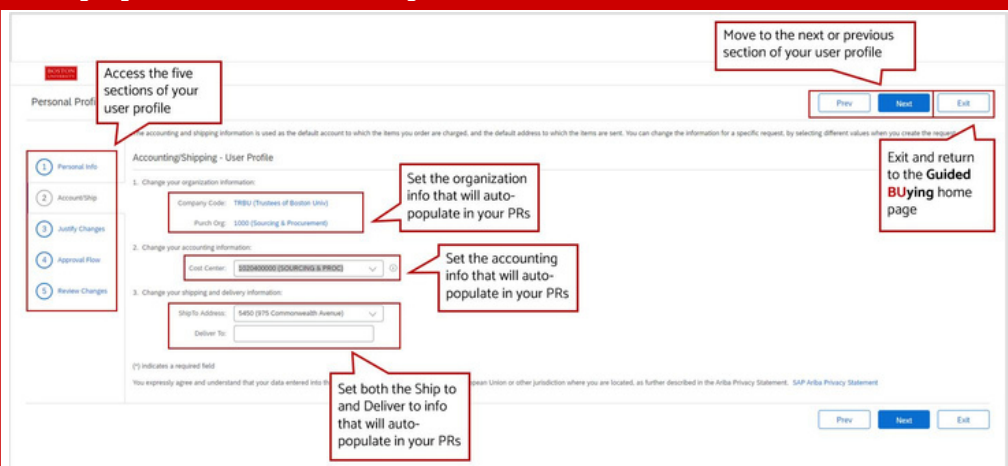
Non-Catalog Orders

1. Click the Request a Non-Catalog item button on the **Guided BUying** homepage. Alternatively, navigate to the appropriate category tile and select the Non-Catalog/ad-hoc request option (**Note**: Category code will populate if selected through a category tile).
2. Enter the Product name.
3. Click on the drop-down box under the category section and then select Browse all.
4. Search for the most accurate category code.
5. Click Choose to assign the category code if the section is unpopulated.
6. Provide a detailed description of the product or service.
7. Enter the Quantity, Unit of measure, and Unit price for the order.
8. Select a recommended supplier if applicable or click View all suppliers. **Note**: PRs cannot be submitted without a supplier assigned.
9. If you chose View all suppliers, search and click Choose next to the appropriate supplier.
10. Once complete, Click Add to cart.
11. Click Check out on the prompt. Information entered in the form will flow to PR.

Guided BUying Homepage Overview



Changing Your Account Settings



Searching for Suppliers

Where Can I Find a List of Our Registered Suppliers?

Requisitioners can find a list of our registered suppliers through the following link. https://www.bu.edu/sourcing/supplier-searchable-dashboard/

Searching for Catalog Suppliers

The Catalog Suppliers tile on the homepage of **Guided BUying** contains all catalog suppliers listed in alphabetical order. If you do not know the exact name of the catalog supplier you are searching for, use the category tiles (such as General Goods & Services) to help narrow your search.

How Do I Add Others to My Order

How Do I Add Team Members to My PR?

Approvers and Watchers can be added to the approval flow during checkout or after PR submission. Watchers can view requests, but no action is required. Approvers must approve requests before they can move forward.

Note: System-generated approvers cannot be removed.

Policies

Competition and Supplier Selection for Products and Services Policy

Sourcing & Procurement is responsible for ensuring competitive practices and supplier selection for the purchase of products and services in a manner that achieves the Best Total Value for Boston University.

Please use the following link to read Boston University's Competition and Supplier Selection for Products and Services Policy.
https://www.bu.edu/policies/competition-and-supplier-selection-for-products-and-services-policy/

Ordering and Contracting Policy

To see a complete list of commodities and ordering methods, consult the Ordering Method Matrix hosted on Boston University's website through the following link.
https://www.bu.edu/policies/files/2021/04/Ordering-Method-Matrix-Updated-4_12_21.pdf

Signatories

Trustees of Boston University have authorized signatories who are the only ones allowed to sign contracts on behalf of the university. To ensure your contract is signed by an authorized signatory, please complete a Contract Request Form, and S&P will facilitate the contract and have it executed.

After Your Order

When to Submit PO Closeout Request Versus Canceling the PO

- **When to cancel a PO:** You should only cancel a PO (you can do this by clicking "Cancel request" in the PR in **Guided BUying** under the Your Requests tab.) after you have confirmed with the supplier that they have neither shipped nor invoiced the items you ordered. Once you cancel the PR, it will automatically cancel and close the PO and send a PO cancellation confirmation to the supplier.
- **When to submit a PO closeout request:** Submit a PO closeout request when a PO has been partially invoiced and no further invoices are expected for the PO. These instances should be rare now that you, as the requisitioner, have the ability to edit PRs. If a supplier short-ships a PO due to a lack of inventory, or a change in the order, you can adjust the PR to the amount shipped, and the PR will automatically close when the total quantity has been invoiced and paid.

Note: In **Guided BUying**, an Amount-Based PR will systematically close once it has been fully invoiced for the total amount on the PR.

How Do I Search for a PR or PO?

PRS and POs can be viewed in **Guided BUying** under the Your Requests tab. Navigate to the Your Requests tab to view detailed information on your Purchase Requisitions, including status, approval workflow, history, and to add any additional comments or attachments.

What Is the Status of My Order?

If your order has been approved, but the supplier hasn't received it, please contact the supplier or submit a ticket to the customer service portal.

Editing Your PR

How Do I Edit My PR?

Requisitioners can edit a PR if it has not been fully invoiced. Changes can include increases in total cost or changes to the ship to address, requestor, supplier, accounting (e.g., cost center number, internal order number, or WBS Element), or commodity code. Changes to the PR will prompt re-approval of the PR.

What Will Happen if I Change the Cost Center?

If you change the cost center after an invoice has been posted, charges to the cost center will be applied to invoices moving forward. However, the commitment will remain with the original cost center.

FAQs

How Do I Gain Requisitioner or Approver Access?

Please contact your Department Security Administrator (DSA). If you are unsure who your DSA is, contact Information Security at buinfosec@bu.edu.

Shopping Through Amazon

To access and shop via the Amazon catalog in **Guided BUying**, Requisitioners must have the Shopper Role. If you need access to **Guided BUying**, please reach out to your DSA.
https://s1.ariba.com/gb/?realm=BU-1&locale=en_US

How Do I Obtain a Quote for a Product?

If you are familiar with the supplier you would like to request a quote from, contact them directly. If not, Sourcing & Procurement has partnered with Fairmarkit to provide BU with a streamlined machine-learning tool to quickly and efficiently solicit competitive quotes for purchases under $100,000.
https://app.fairmarkit.com/login?isForceAction=true

Forms

Contract Request Form

Complete a Contract Request Form to submit an unsigned contract that needs to be negotiated and signed by the correct authorized signatories of Boston University. These forms are routed to Sourcing & Procurement. Please allow a minimum of 2 weeks for negotiation with the supplier and General Counsel. Once you have submitted the Contract Request Form, use the comment section to converse with Sourcing & Procurement.

Supplier Request Form

If you cannot find a supplier in our Registered Supplier Database, submit a Supplier Request Form. New supplier registration is a complex process that takes on average one to two weeks. Suppliers must sign up for the SAP Business Network with a free standard account, provide tax documents, and agree to Boston University's Terms and Conditions for Goods or Services. Requisitioners should only consider new suppliers for rare products or services that aren't available from one of our registered suppliers. Requisitioners must submit the Supplier Request Form before engaging the supplier.

Sourcing Request Form

Submit a Sourcing Request Form to request help on a sourcing project. The form will be routed to Sourcing & Procurement, who can assist with an assessment of your current spend, market research including an assessment of the supply chain, a total cost analysis with identification of suitable suppliers, the development of a sourcing strategy, negotiation, and contracting, as well as tracking and managing supplier performance.

Contracts

How Do I Know if a Contract Needs to Be Executed?

Special risks require Sourcing & Procurement to put a contract in place for special purchases to protect the university. Please consult the slide show on the FAQ page linked below for when to submit the Contract Request Form.
https://www.bu.edu/sourcing/faqs/

If I Have a Contract With a Supplier That Is up for Renewal, Should I Submit the Contract Request Form?

Please submit a Contract Request Form for any contract renewals.

How Do I Have a Contract Reviewed and Signed?

Complete a Contract Request Form to submit an unsigned contract that needs to be negotiated and signed by the correct authorized signatories of Boston University.
https://www.bu.edu/sourcing/contract-request-form-5/#mylocation

After the Fact Orders

What if I Have Already Received an Invoice Before Placing an Order?

In the event you have received an invoice for a product or service but have not submitted a PR, you must take the following steps:

1. Create a Non-Catalog PR in **Guided BUying**
2. Add a comment, visible to the supplier, stating **DO NOT DUPLICATE, INVOICE IN HAND**
3. Attach supporting documentation, such as the invoice, contract, and quote, and check the box to share with the supplier (don't forget to click Add)

Once the supplier receives the PO, they should invoice the University through the Ariba Network for payment. **Note**: Requisitioners must place all orders on a PO. Calling or emailing to place an order is strictly prohibited.

Important Sites

How to Place Orders

The central hub for **Guided BUying** information and the additional resources we offer.
https://www.bu.edu/sourcing/h2po/

Guided BUying Training

The first step in learning how to navigate Ariba **Guided BUying**. Visit the page to find videos, training documentation, and information on how to sign up for monthly live training sessions.
https://www.bu.edu/sourcing/guided-buying-training/

What Do You Need?

This page contains a list of category cards containing information on where and how to place orders with our preferred suppliers.
https://www.bu.edu/sourcing/wdyn/

Guided BUying Announcements

Sourcing & Procurement sends periodic communications to assist the community in navigating **Guided BUying**. Check here for our most recent newsletters.
https://www.bu.edu/sourcing/sap-ariba-guided-buying/

Customer Service Portal

Browse our knowledge-based articles for frequently asked questions or submit your questions online through the Financial Affairs (FA) Customer Service Portal. They will be routed to the right people with the right answers.
https://bu.service-now.com/fa

Invoices

Approving Invoices in Guided BUying

Ariba assigns approvers automatically based on the requisitioner's profile. These system-generated approvers cannot be removed. Approvers can approve or deny an invoice via email or within the Ariba Network (SAP Business Network) tool for purchase orders. If approving via email, you will need to click the Approve/Deny button on the email notification. If approving through your computer, access the "your approval" tab in **Guided BUying**, which contains all invoices over $5,000.

What Is the Status of My Invoice?

Suppliers should send invoices electronically via the Ariba Network. Invoices and inquiries sent to Sourcing & Procurement cannot be processed as we do not have access to the Accounts Payable system. All inquiries should be brought to AP via the Customer Service Portal.
https://bu.service-now.com/fa

How Can I Check for Posted Invoices on My PO?

Once a PO has been generated, it will be visible on the associated PR. The PO can be accessed through the PR by clicking on the PO# beginning with 55xxxxxxxx. Click the PO# and view the Invoices and Payments tabs to see if an invoice has been posted or paid. Invoices under $5,000 can be found within the BUworks central portal under the work list tab and will auto-approve within three days. Accounts Payable (AP) can put these invoices on hold within that period. Contact AP to put an invoice on hold. Invoices over $5,000 are accessed in **Guided BUying** and require approval before payment is made.

Invoice Training

For resources regarding invoice training, please visit the BU AP **Guided BUying** page through the following link. https://www.bu.edu/ap/ariba-guided-buying/

Use the link below to download AP's **Guided BUying** requisitioner invoice approval and exception training guide.

Ariba Guided BUying Requisitioner Invoicing Guide