

# Guided **BU**ying



Sourcing & Procurement

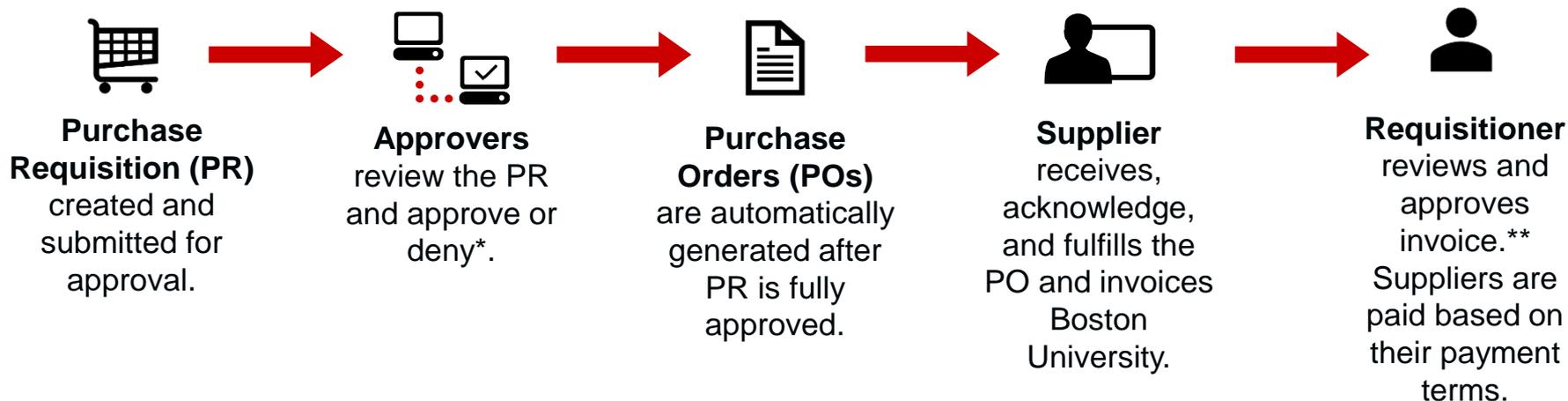
# Agenda



- **Procure-to-Pay Process**
- **Approval Thresholds**
- **Canceling vs. Closing POs**
- **Viewing PRs and POs**
- **Setting Accounting**
- **Forms in Guided **BU**ying**
  - **Supplier Registration Process**
  - **Contract Request Process**
- **Resources**

# Procure-to-Pay Process in Guided **BU**ying

**Guided **BU**ying** allows requisitioners at Boston University to purchase products and services from a variety of suppliers. The procure-to-pay process includes the following steps: PR, Approval, PO, Invoicing, and Fulfillment.



\*PRs will go through a series of approvals based on the dollar amount and commodity code.

\*\*Invoices <\$5,000: Requisitioners are notified as a watcher and invoices can be viewed **under Your Approvals → To watch**. Payment will release within three days.

Invoices ≥\$5,000 will be routed to Requisitioners' **Your Approvals → To approve** for review and approval.

# Ordering Policy



Ordering Methods	Summary of Usage
Purchase Requisition and Purchase Order	<ul style="list-style-type: none"> <li>• Products or services from registered suppliers and to-be registered suppliers</li> <li>• Purchases involving contracts</li> </ul>
PCard	<ul style="list-style-type: none"> <li>• Low-risk product purchases not available in <b>Guided BUying</b></li> </ul>
Travel Card	<ul style="list-style-type: none"> <li>• Travel, entertainment, and event expenses</li> </ul>
Disbursement	<ul style="list-style-type: none"> <li>• Direct payment of purchases deemed allowable for non-registration</li> </ul>
Internal Service Requests (ISR)	<ul style="list-style-type: none"> <li>• Service orders from other BU departments</li> </ul>
Facilities Service Requests (FSR)	<ul style="list-style-type: none"> <li>• Facilities service orders</li> </ul>

Download the **Ordering Method Matrix\*** for ordering methods by commodity code. Click the link below to be taken to the policy page. <http://www.bu.edu/policies/finance/ordering-and-contracting/>

# Approval Thresholds



Purchase Requisitions and Invoices in **Guided BUYing** will go through a series of approvals based on the dollar amount and commodity code.

Purchase Requisition Approval Threshold	
Dollar Amount	Required Approvers
Any Dollar Amount	<ul style="list-style-type: none"> <li>• Functional Approver*, if applicable</li> </ul>
≥\$500	<ul style="list-style-type: none"> <li>• Departmental Financial Approver</li> </ul>
≥\$5,000	<ul style="list-style-type: none"> <li>• Property Management</li> </ul>
≥\$10,000	<ul style="list-style-type: none"> <li>• Sourcing &amp; Procurement</li> </ul>

Invoice Approval Threshold	
Dollar Amount	Required Approvers
<\$5,000	No approval required. Requisitioner notified as a watcher
≥\$5,000	Requisitioner

# Canceling vs. Closing a PO



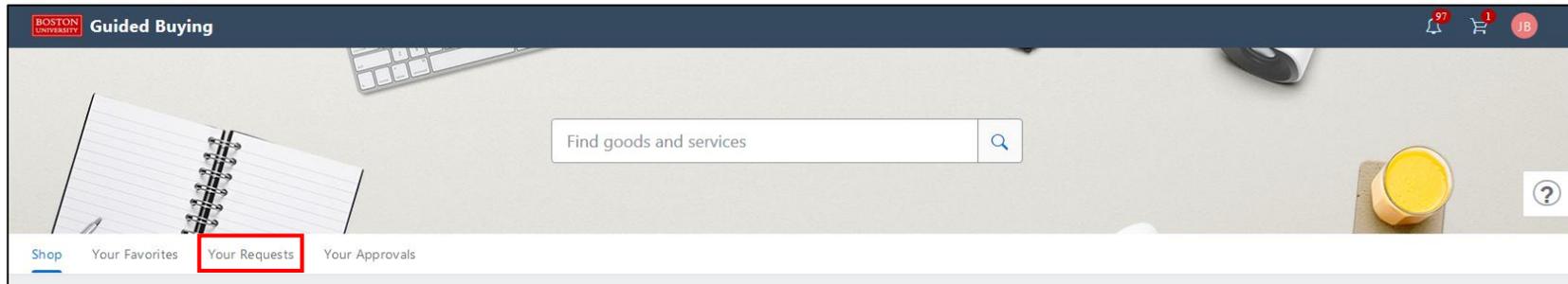
In **Guided BUYing**, it is possible for all Requisitioners to cancel their own PRs.

Guidelines for Canceling vs. Closing a PO	
Canceling PO	Submitting the PO Closeout Request*
<ul style="list-style-type: none"> <li>Only cancel a PO after you have confirmed with the supplier they have neither shipped nor invoiced the items you ordered.</li> </ul>	<ul style="list-style-type: none"> <li>A PO has been partially invoiced, and no further invoices are expected for the PO.</li> </ul>
<ul style="list-style-type: none"> <li>Click “Cancel request” in the PR. Once you cancel the PR, it will automatically cancel and close the PO and send a PO cancellation confirmation to the supplier.</li> </ul>	<ul style="list-style-type: none"> <li>Submit the PO Closeout Request via the <a href="#">Financial Affairs Customer Service Portal</a>.</li> </ul>

# Viewing PRs and POs



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 PRs including status, approval workflow, history, and to add any additional comments or attachments. If a PO has been generated, it will display under the PR name.



View associated PR and PO#.

Requested	Amount	Status
PR2208 WB Mason Punchout	\$53.34 USD	Composing
PR2201 McMaster PunchOut Purchase orders: 550000945	\$12.40 USD	Ordered

# Setting Accounting



Accounting information can be set at the header or line level of a PR. Cost Centers set at the Personal Profile level will flow to the accounting section at checkout for every PR you create. Internal Order Numbers and WBS Elements must be set at checkout.

**Split Accounting:** PRs can be split between the same Cost Object Type (e.g., Cost Center to Cost Center) by percentage, quantity, or amount. If charging a cost center and a Sponsored IO#, 100% of the cost must be charged to the Cost Center, then do a Journal Entry to charge the Sponsored IO#.

Items (1)			
	Quantity	Price	Net Amount
 <b>Breakfast Blend Coffee K-Cup Pods, 24/BX</b> 0010000800 (WB Mason Company)	2 box	\$26.67 USD	\$53.34 USD
			Gross Amount ⓘ \$53.34 USD
Supplier Location ⓘ WB Mason Company 647 Summer Street Boston, MA 02210 United States		Supplier Part Number GMT6520	
Supplier Auxiliary Part ID C-61482672 5830147607			
> Accounting	GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE))		
> Shipping	ShipTo(Plant) (5004 (1 Raleigh Street))		
> Comments			
> Attachments			
> Others			

✓ Cost Center (1020400003 (SOURCING & PROC))	Percentage 50 %	Quantity 1.00	Amount \$26.67 USD	
GL Account ⓘ 0000510030 (CONSUMABLE SUPPLIES ...	Cost Center ⓘ 1020400003 (SOURCING & PROC)			
✓ Cost Center (1202020000 (BIOLOGY))	Percentage 50 %	Quantity 1.00	Amount \$26.67 USD	
GL Account ⓘ 0000510030 (CONSUMABLE SUPPLIES ...	Cost Center ⓘ 1202020000 (BIOLOGY)			

# Forms in Guided **BU**ying



Reporting, Help and Forms

## Request for Assistance on a Sourcing Project

- Sourcing Request Form
- A Sourcing team member will reach out about next steps based on your request.

## Request for Contract Signature

- Contract Request Form
- A buyer will receive the completed form. Once a contract is negotiated and signed, the buyer will instruct the Requisitioner to create a PR.

## Request to Register a New Supplier

- Supplier Request Form
- Complete the form **before** engaging the supplier.
- Once supplier is registered, the buyer will instruct the Requisitioner to create a Non-Catalog Request and select the new supplier.

# Supplier Registration Process



Reporting, Help and Forms

BU offers a variety of diverse registered suppliers to provide the products and services at the **Best Total Value**\* to you and your department. We work with our top suppliers to negotiate discounted prices and reduced risk of liability.

Always look to our registered and contracted suppliers for products and services before considering unregistered suppliers. If a Requisitioner needs to engage a new supplier, submit the Supplier Request Form in **Guided BUYing** before setting up a PR.

## Process to Register a New Supplier



# Contract Request Process



Reporting, Help and Forms

Requisitioners should submit the Contract Request Form in **Guided BUying**. Please engage Sourcing & Procurement as early as possible—ideally, as early as the planning stages—as the process takes some time and is largely dependent on the suppliers' responsiveness. Expectations should be set at a minimum of two weeks.

## Process to Route a Contract



# Criteria for Submitting the Contract Request Form

Please use the grid below as a guide for when to submit the Contract Request Form.

**Note:** The list below includes some of the special risks that may require Sourcing & Procurement review. If you are unsure, please submit the Contract Request Form.



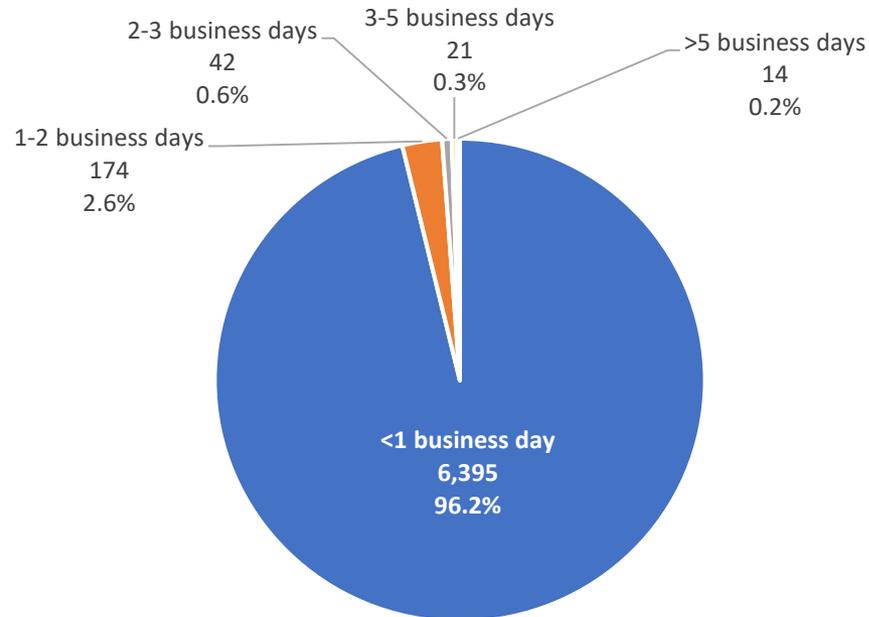
Reporting, Help and Forms

Criteria	Submit Contract Request Form
Long-Term Engagement of Services with Supplier	√
Engaging a new Supplier for Services	√
Fabrication of Materials or Development of Software	√
Supplier Provides Their Own Agreement*	√
Student Information	√
Teaching	√
HIPAA Covered Entity	√
Involves Minors	√
Speaker or Performer	√
Student Travel	√
Legal Council and Auditors	√
Construction	√

# Financial Affairs Customer Service Portal



Cases Resolved by S&P thru 11/23/20 by Business Elapsed Time  
(n=6,646)



Business days are 9am-5pm and exclude weekends and holidays. For example, a case opened at 12pm on a Friday would be <1 business day if resolved before 12pm on Monday

Elapsed time is paused when S&P is awaiting a reply to a follow-up question and when a solution is proposed

Outliers frequently start as cases for another group, and reassignment to S&P may take one or more days

# Resources



## Training Sessions

- Training sessions will be held on a monthly basis. Stay up-to-date on training information by [subscribing](#) to the Sourcing & Procurement Newsletter.

## Guides & FAQs

- [How to Place Orders](#)
  - Step-by-Step Guides
  - Video Tutorials
- [FAQs](#)

## Contact Us

- Ordering Information: Submit a ticket to Sourcing & Procurement via the [Financial Affairs Customer Service Portal](#).
- Invoice & Payment Information: Submit a ticket to Accounts Payable via the [Financial Affairs Customer Service Portal](#).