Guided **BUying**: Overview & Key Terms

Guided **BU**ying Features

Guided BUying provides comprehensive tools to streamline the process to order products and services starting with creating a Purchase Requisition (PR) to generate a Purchase Order (PO) which will flow into invoicing and payment.

Intuitive User Interface	Quick and easy creation of PRs to increase efficiency.	
Easy Searching	Enhanced search capability via online catalogs with increased visibility to suppliers, products and services.	
Preset to Defaults	Ability to customize your Personal Profile which flows to the PR.	
Configurable Business Rules	Approval process based on BU's business rules.	

Ordering Policy

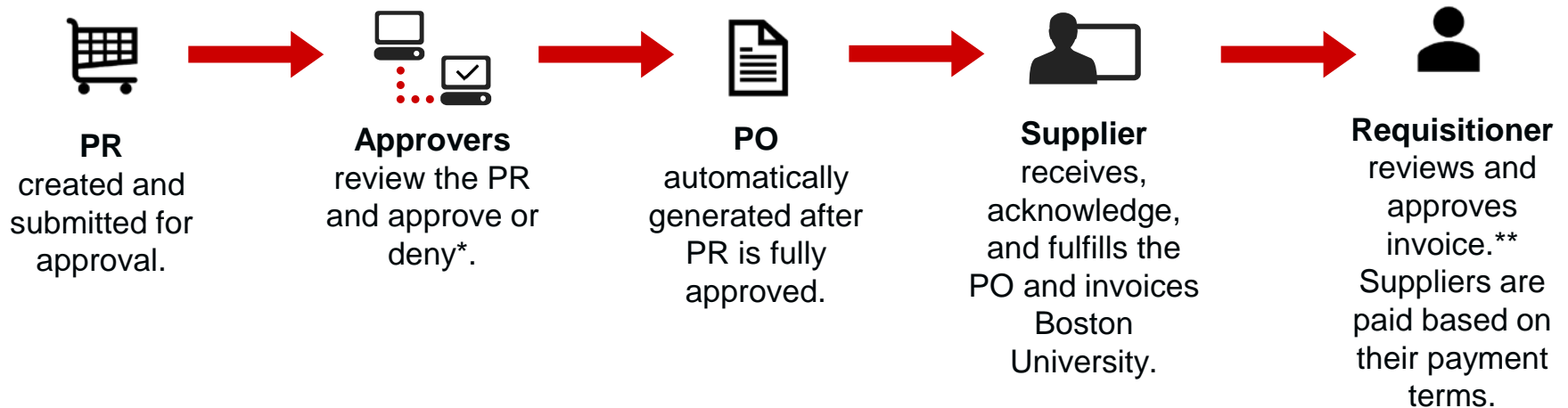| Ordering Methods	Summary of Usage
Purchase Requisition and Purchase Order	• Products or services from registered suppliers and to-be registered suppliers • Purchases involving contracts
PCard	• Low-risk product purchases not available in **Guided BUying**
Travel Card	• Travel, entertainment, and event expenses
Disbursement	• Direct payment of purchases deemed allowable for non-registration
Internal Service Requests (ISR)	• Service orders from other BU departments
Facilities Service Requests (FSR)	• Facilities service orders

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/

*Payment methods in Ordering Method Matrix is subject to change on a case-by-case basis.

Procure-to-Pay Process in **Guided BUying**

Guided BUying 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.

PR
created and submitted for approval.

Approvers
review the PR and approve or deny*.

PO
automatically generated after PR is fully approved.

Supplier
receives, acknowledge, and fulfills the PO and invoices Boston University.

Requisitioner
reviews and approves invoice.** Suppliers are paid based on their payment terms.

*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.

Approval Process in **Guided BUying**

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

PR Approval Threshold	
Dollar Amount	**Required Approvers**
Any Dollar Amount	• Functional Approver*, if applicable
≥$500	• Departmental Financial Approver
≥$5,000	• Property Management
≥$10,000	• Sourcing & Procurement

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

*Functional approvers include Property Management, Environmental Health & Safety (EH&S), Animal Science Center (ASC), and Payroll.

Key Roles in the Procure-to-Pay Process

Requisitioners

Individuals who purchase products or services, for themselves or another individual, from an external supplier.

Approvers

Approvers are campus stakeholders with the authority to review and approve requisitions (e.g., cost object approvers).

Buyers

Buyers are seasoned professionals who work in the Sourcing & Procurement Department and are charged with negotiating terms, conditions, pricing, and bringing you the best total cost of ownership for the products and services procured by the University requisitioners. They work closely with requisitioners and suppliers to facilitate contracts and purchase orders to fulfill the needs of the BU community.

System Administrator & Trainers

The System Administrator and Trainer are the backbone of the support team to help manage the system, data, and catalogs. They manage the training programs for requisitioners and approvers and assist with responding to questions.

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Guided BUying Terminology

Guided BUying provides an intuitive shopping experience, streamlined approvals, and the ability to easily view PRs and POs.

Guided BUying
A central location to purchase a wide selection of products and services from a variety of registered suppliers.
SRM Term: Terrier Marketplace

Personal Profile
User settings including delivery address, floor and room number, and cost center.
SRM Term: Personalization

Approval Workflow
Sequence of steps wherein approvers can edit and must approve or deny a PR.

Ariba Network
A marketplace for suppliers and buyers to transact digitally.

PR Terminology

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Purchase Requisition (PR)
Process to purchase products/services.
A PR generates a PO.
SRM Term: Shopping Cart

Purchase Order (PO)
Document issued by the University to a registered
supplier which commits the University to the
purchase of products/services and in most cases,
establishes the terms and conditions.
PO numbers follow the pattern 55xxxxxxxx.

Guided BUying Catalog Order
Requisitions created to purchase
through catalogs in **Guided
BUying**.
SRM Term: Terrier Marketplace Cart

Ad Hoc Request (Standard)
Requisitions created when you cannot
find what you need in **Guided BUying**.
SRM Term: Material Cart

Ad Hoc Request (Amount Based)
Requisitions created when you are
unsure the final amount to be spent.
SRM Term: Limit Order

Blanket Purchase Order (BPO)
Process used to purchase products/
services off a contract which suppliers can
invoice directly against. **Note**: BPOs do
not encumber funds and are only set up
by Sourcing & Procurement.

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Forms in **Guided BUying**

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 an Ad Hoc Request and select the new supplier.

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FAQs: Getting Started

How do I gain access to **Guided BUying**?
  ✓ If you had shopper or approver access in SRM, you will have Requisitioner or Approver access in **Guided BUying**. If you do not have access and require the role, please reach out to your Department Security Administrator (DSA). If you are not sure who your DSA is, please contact Information Security at buinfosec@bu.edu.

How do I login to **Guided BUying**?
  ✓ Navigate to myBUworks (http://www.bu.edu/mybuworks) ☐ Select **Guided BUying**.

What browser should I use to access **Guided BUying**?
  ✓ Please use Firefox or Chrome to access **Guided BUying**. Internet Explorer is not supported.

Where can I find training materials?
  ✓ Navigate to the Sourcing & Procurement website for training materials and frequently asked questions.

I have a question, how can I reach Sourcing & Procurement?
  ✓ Please contact us by submitting a ticket to the Financial Affairs Customer Service Portal.

How can I stay informed on important system updates, training information, and program announcements from Sourcing & Procurement?
  ✓ Complete this form to be added to our newsletter.

How do I know which suppliers have negotiated terms and pricing with the Boston University?
  ✓ Within **Guided BUying** there are category tiles which highlight products and services and preferred suppliers. The What Do You Need Page on the Sourcing & Procurement website is another resource.

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