Guided **Buying**: Overview & Key Terms
Guided Buying: Overview & Key Terms

**Guided Buying 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.

- **Preset to Defaults**
  - Ability to customize your Personal Profile which flows to the PR.

- **Easy Searching**
  - Enhanced search capability via online catalogs with increased visibility to suppliers, products and services.

- **Configurable Business Rules**
  - Approval process based on BU’s business rules.
**Ordering Policy**

<table>
<thead>
<tr>
<th>Ordering Methods</th>
<th>Summary of Usage</th>
</tr>
</thead>
</table>
| 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/](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.*
**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, acknowledges, 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 BUning

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

<table>
<thead>
<tr>
<th>Dollar Amount</th>
<th>Required Approvers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Dollar Amount</td>
<td>• Functional Approver*, if applicable</td>
</tr>
<tr>
<td>≥$500</td>
<td>• Departmental Financial Approver</td>
</tr>
<tr>
<td>≥$5,000</td>
<td>• Property Management</td>
</tr>
<tr>
<td>≥$10,000</td>
<td>• Sourcing &amp; Procurement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dollar Amount</th>
<th>Required Approvers</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$5,000</td>
<td>No approval required. Requisitioner notified as a watcher</td>
</tr>
<tr>
<td>≥$5,000</td>
<td>Requisitioner</td>
</tr>
</tbody>
</table>

*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.

**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.

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

**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.
Guided BUy-ing Terminology

**Guided BUy-ing** provides an intuitive shopping experience, streamlined approvals, and the ability to easily view PRs and POs.

- **Guided BUy-ing**
  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

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*

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

Non-Catalog 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.
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 a Non-Catalog Request and select the new supplier.

*Note: If you need to register a supplier and have a contract signed, the only form you need to complete is the Contract Request Form.
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.