

## Purchase Requisition (PR) Generation via **Guided BU**ying Catalog Order

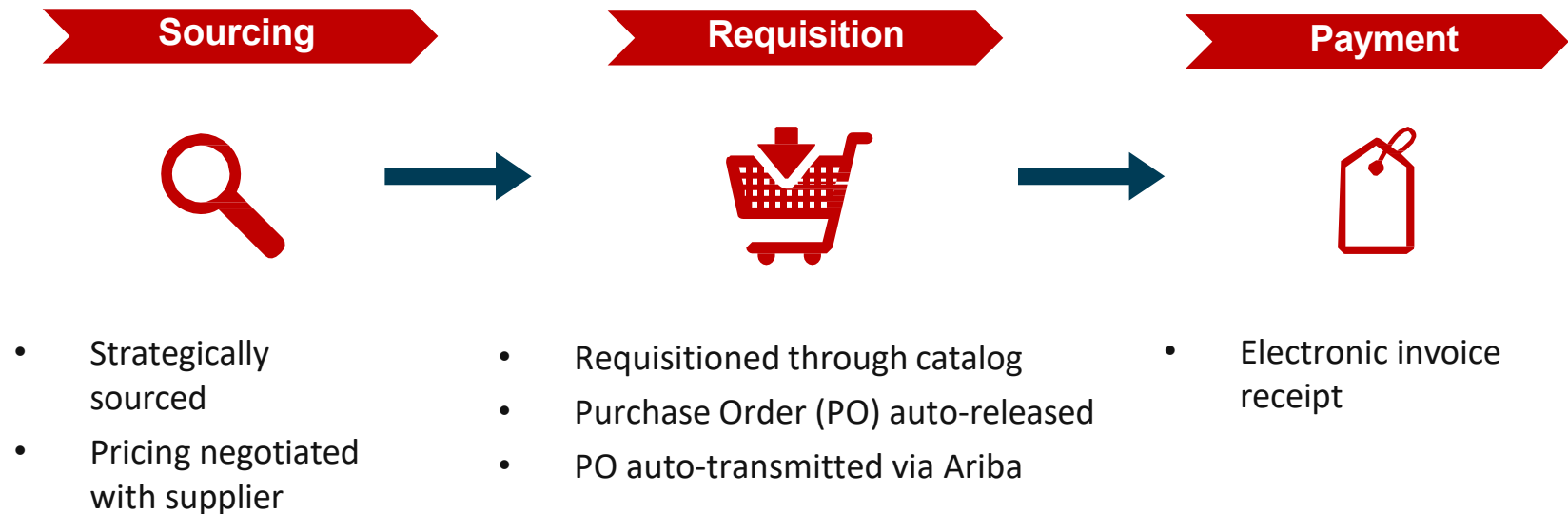


## PR Generation via Guided **BU**ying Catalog Order – Process Flow

**Guided **BU**ying** offers a central location to purchase a wide selection of products and services from a variety of suppliers at competitive prices that are considered competitively bid.

- To purchase from a catalog, search within **Guided **BU**ying** and punch out to the supplier website to add products or services to your cart.

### Process Flow



# PR Generation via Guided **BU**ying Catalog Order – Search and Punch Out

Search for products, services, or suppliers within **Guided **BU**ying** and punch out to the supplier's website to purchase.

The screenshot displays the Guided Buying interface. At the top, a search bar is highlighted with a red box and labeled 1A. Below the search bar, a grid of category tiles is shown. The 'General Goods & Services' tile is highlighted with a red box and labeled 1B. To the right of the category tiles, there is a sidebar with options like 'Request ad hoc item', 'Request on behalf of', and 'Recent requests'. Below the category tiles, a detailed view of the 'General Goods & Services' category is shown, with a grid of sub-category tiles. The 'Office Supplies' tile is highlighted with a red box and labeled 2.

**1A** Use the search bar to find the product, service, or the supplier catalog.

**1B** Alternatively, click the relevant category tile to find the product or service you need.

**2** Specific categories will display.

Select the category associated with the product or service for purchase.

## PR Generation via Guided **BU**ying Catalog Order – Search within catalogs

Each category tile displays methods for procuring products & services and shares supplier information.

< | Office Supplies



Sourcing & Procurement has partnered with W.B. Mason to bring you competitively-priced, quality office supplies with a focus on sustainable options and practices. Our contract with W.B. Mason offers discounted prices, same-day delivery, and streamlined ordering through Guided Buying. In addition to office supplies, W.B. Mason is also the preferred supplier for water filtration systems, desktop printers, and toner. Please see [Sourcing & Procurement's Office Supplies page](#) for more information.

3



WB Mason Punchout

Buy from Supplier



Ad Hoc Office Supplies



WB Mason Company  
Boston, MA

3

Hover over the supplier catalog and click **Buy from Supplier**.

### Note:

BU has preferred suppliers across categories.

If available, always select one of the preferred suppliers.

More information can be found on the [Sourcing & Procurement Website](#).

# PR Generation via Guided **BU**ying Catalog Order – Add item to cart

Search for the desired product within the PunchOut catalog.

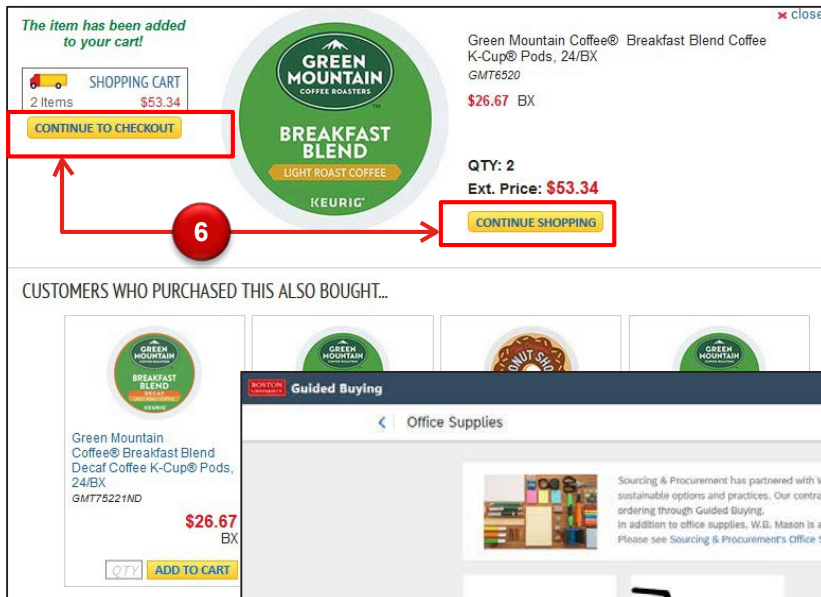
4 Once in the catalog, search for the desired product(s).

5 Enter quantity and click **Add to Cart**.

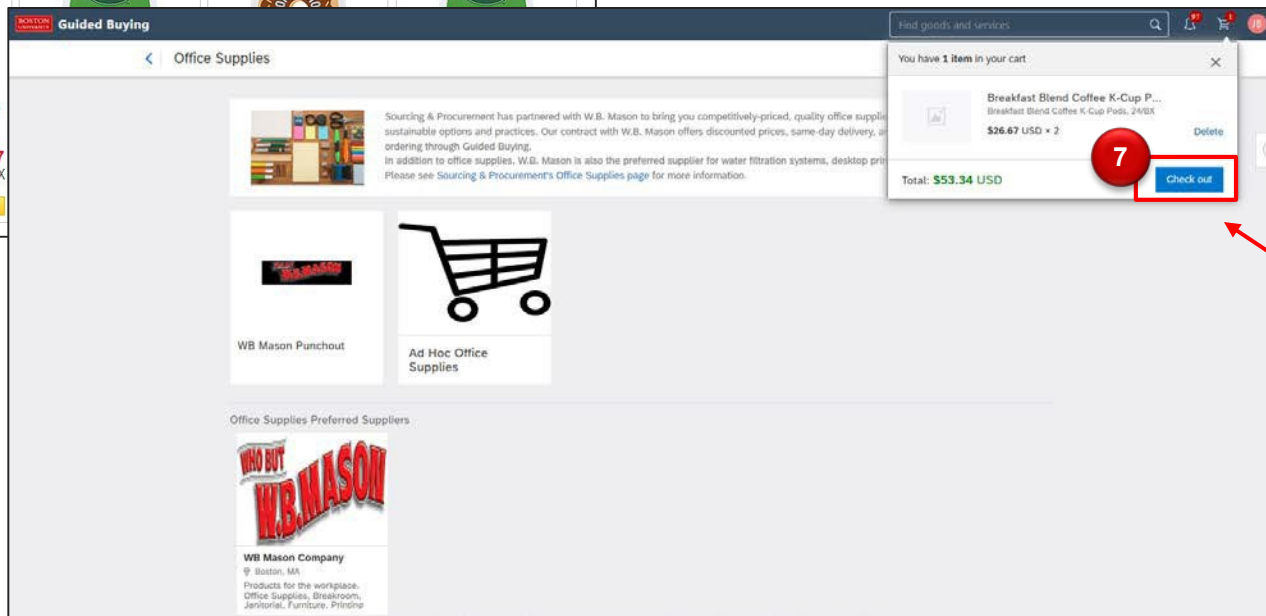
The image displays two screenshots of the Boston University Guided Buying catalog interface. The top screenshot shows the search bar with the text "coffee k cups" entered, highlighted by a red box and a red circle with the number 4. The bottom screenshot shows the search results for "COFFEE, TEA & COCOA / K-CUP". A red box highlights the "ADD TO CART" button for the "Green Mountain Coffee® Breakfast Blend K-Cup® Pods, 24/BX" product, with a red circle containing the number 5. A red arrow points from the text "Add to Cart" in the instruction block to this button. The Boston University logo is visible in the bottom left corner of the bottom screenshot.

## PR Generation via Guided **BU**ying Catalog Order – Checkout

Follow the steps to select the necessary item(s) from the supplier catalog and continue to check out in **Guided BU**ying.



- 6 Click "**Continue Shopping**" to add more items to your cart or select "**Continue to Check out**" if you have no other items to add to your order.



After you click **Continue to Check out** in the catalog, you will be brought to **Guided BU**ying.

- 7 Click **Check out** on the prompt.

# PR Generation via Guided **BU**ying Catalog Order – Review Header Info

Start by reviewing header information, which populates based on your Personal Profile\* and applies to all items in the PR.

8 Click “Manage locations” to update the **Ship to** information.

Click "Manage details" to update the **Charge to** information.

9 Enter a **Need By Date\***. The system requires a date; we suggest adding 5 days from the date you are submitting the PR.  
Note: this date is not binding

10 Update **Deliver To** if necessary. (e.g., John Doe Room #404).

11 Update **Requestor** if necessary.

**Guided Buying**

WB Mason Punchout  
Checkout / PR2208

Send request Save and exit

**Header Level**

**Ship to** Manage locations  
1 Raleigh Street  
Boston, MA 02215  
United States

**Charge to** Manage details  
GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE))

**Total Cost** \$53.34 USD  
**Net Amount** \$53.34 USD

**Need-by Date** ⓘ  
⚠ Need By Date must be set

**Deliver To** ⓘ  
Shopper 1

**Requester** ⓘ  
JILL BROWN

**Company Code** ⓘ  
TRBU (Trustees of Boston Univ)

Is Team Requisition ⓘ  
☐ Yes ☒ No

Hide advanced options

**Line Level**

Items (1)

⚠ This item contains missing or incorrect information.

|   | Quantity | Price       | Net Amount  |
|---|----------|-------------|-------------|
| Breakfast Blend Coffee K-Cup Pods, 24/BX<br>0010000800 (WB Mason Company) | 2 box    | \$26.67 USD | \$53.34 USD |

Gross Amount ⓘ  
\$53.34 USD

## Note:



- Errors noted in red are **required fields** you must address in order to submit the PR.
- Ship to, charge to, deliver to, and requester flow from Personal Profile. If you are shopping on behalf of someone, settings will flow from their Personal Profile.
- Need-by Date**: We recommend 5 days after the date you are submitting the request. This is a system requirement but does not bind a supplier to that date. Click the tool tip icon ⓘ to learn what needs to be entered in that field.



## PR Generation via Guided **BU**ying Catalog Order – Review Line Level detail

Review line level detail. Tabs include Accounting, Shipping, Comments, Attachments and Others.


Items (1)


|   | Quantity | Price       | Net Amount                    |
|---|----------|-------------|-------------------------------|
|   Breakfast Blend Coffee K-Cup Pods, 24/BX<br>0010000800 (WB Mason Company) | 2 box    | \$26.67 USD | \$53.34 USD                   |
|   |          |             | Gross Amount ⓘ<br>\$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

12 Click the arrow to expand at the line level. Quantity, pricing, and supplier information will display at the top. If a supplier has multiple locations ([e.g., Fisher Scientific](#)), be sure to select the correct address.

13 Select the three dots to delete the line item.

14 Select the arrow next to each tab to view details and make changes.

### Note:

- Errors noted in red are **required fields** you must address in order to submit the PR.
- Ship to, charge to, deliver to, and requester flow from Personal Profile. If you are shopping on behalf of someone, settings will flow from their Personal Profile.
- Need-by Date: We recommend 5 days after the date you are submitting the request. This is a system requirement but does not bind a supplier to that date. Click the tool tip icon ⓘ to learn what needs to be entered in that field.



## PR Generation via Guided **BU**ying Catalog Order – Accounting details

Accounting details will populate based on header information and Personal Profile.

**Accounting** GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE))

Account Type  
Expense

Bill To  
TRBU (Boston University)  
25 Buick Street Boston, MA 02215 United States

Account Assignment \*  
K (Cost center)

GL Account  
0000510030 (CONSUMABLE SUPPLIES ...)

Cost Center  
1471780000 (RADIO BOSTON)  
Clear selection  
1202020000 (BIOLOGY)  
1471780000 (RADIO BOSTON)  
1511940000 (BUWorks)  
Browse all

Split accounting

(1 Raleigh Street))

Cost Center

Description biology

| Cost Center | Description        |
|-------------|--------------------|
| 1202020000  | BIOLOGY            |
| 2572030000  | BS--MICROBIOLOGY   |
| 1202020020  | Biology LA Program |

- 15 Click the drop down to select the **Account Assignment** (i.e., Cost Center, Project/WBS Element, Order).
- 16 The **GL Account** populates based on the commodity.
- 17 Click the drop down to change the **Cost Center**. History will display. Click **Browse all** to view options.
- 18 Specify search criteria (i.e., Description or Cost Center). Search and click "**Choose**."

## PR Generation via Guided **BU**ying Catalog Order – Split Accounting

PRs can be split between the **same cost object type** (e.g., Cost Center to Cost Center) by percentage, quantity, or amount.

**Note:** Costs can only be split between the same cost object type (i.e., between two cost centers; two internal orders; two WBS elements).

### **IMPORTANT:**

If charging a cost center and a Sponsored IO#, **100% of the cost must be charged to the Cost Center.** Then, create a Journal Entry to charge the Sponsored IO#.

**19** To split the order between cost object types, click **Split Accounting**.

**20** Assign the **Split Accounting type**.

**21** Select the drop down next to each cost object type to assign the **Percentage** and **Cost Center**.

Accounting GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE))

Account Type Expense Bill To TRBU (Boston University)  
25 Buick Street Boston, MA 02215 United States

Account Assignment \* K (Cost center) GL Account 0000510030 (CONSUMABLE SUPPLIES ...)

Cost Center 1202020000 (BIOLOGY)

**19** Split accounting

**20** Split accounting type Amount to split Allocated percentage 100.00 %  
Percentage \$53.34 USD Unallocated percentage 0.00 %

Clear selection

Percentage Percentage  
Quantity 100 % Quantity 2.00 Amount \$53.34 USD  
Amount Invalid allocation

**21**

|   |                 |  |                    |
|---|-----------------|--|--------------------|
| 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)         |                    |

+ Add split

## PR Generation via Guided **BU**ying Catalog Order – Shipping Details

View shipping details and make necessary updates.

> Accounting Cost Center (1020400003 (SOURCING & PROC))/Cost Center (1202020000 (BIOLOGY))

✓ Shipping ShipTo(Plant) (5004 (1 Raleigh Street))

ShipTo(Plant) \* ⓘ

5004 (1 Raleigh Street) ✓

1 Raleigh Street Boston, MA 02215 United States

Need-by Date ⓘ

6/10/20

Deliver To \* ⓘ

Erika Lonardo - Room #404

Purchase Group

103 (PGroup 103) ✓

**22** Select the drop down under **ShipTo(Plant)**. Previously used addresses will display. Click **Browse all**. Change search criteria from **ID** to **Street** or **Name**.

**23** Search for the address. Click **Choose** next to the appropriate address.

**Deliver To** and **Need-by Date** flow from header level. Update at line level if necessary.

To add a **non-BU delivery address**, click **"New,"** enter the address, and **add a comment that this is being sent to a non-BU address**. The Cost Center approver will see this as an ad hoc address and will review and approve.

ShipTo(Plant) \* ⓘ

1000 (General Plant) ^

Clear selection

900001 (0 Carlton Street)

900018 (1010 Commonwealth Avenue)

900013 (Boston University)

900161 (Boston University)

**Browse all**

ShipTo(Plant)

Street ▾ buick

New

| ID   | Name            | Street          | City   | State | Postal Code | Country |               |
|------|-----------------|-----------------|--------|-------|-------------|---------|---------------|
| 5007 | 10 Buick Street | 10 Buick Street | Boston | MA    | 02215       | US      | <b>Choose</b> |
| 5168 | 25 Buick Street | 25 Buick Street | Boston | MA    | 02215       | US      | Choose        |



## PR Generation via Guided **BU**ying Catalog Order – Comments/Attachments

Add any necessary internal or external comments and/or attachments for this line. Comments and attachments can also be added at the header level.

**24** Comments

Write your comment...

**25** ☐ Share with supplier **Add**

**JB** JILL BROWN  
5/28/20  
Internal Note: This purchase was approved by the department.  
[Remove](#)

**JB** JILL BROWN  
5/28/20 **Shared with supplier**  
Supplier-Can you please ship these items by 6/4?  
[Remove](#)

**26** Attachments

Drag and drop file here, or [browse](#) to upload **26**

**27** ☐ Share with supplier **Add**

**JB** JILL BROWN  
5/28/20 **Shared with supplier**

WB Mason Orde...

**24** Enter **Comments** in text box if necessary.

**25** Check "**Share with supplier**" and click "**Add**" to make comment(s) visible to supplier. Leave unchecked to keep comments visible internally only.

**26** In the Attachments section, click "**Browse**" to identify document to upload.

**27** Check **Share with supplier\*** if necessary, then click "**Add.**" Comments/ attachments shared with suppliers are noted in blue.

## PR Generation via Guided **BU**ying Catalog Order – “Others” section

Further information for the line item can be found in the “Others” section drop-down.

28

Others

Commodity Code

SUPPLIES-OFFICE

Material Group

44120000 (Office Supplies)

Item Category \* ⓘ

Material

Payment Terms

Z140 - 2% 10 days, Net 30

Incoterms Code

Free On Board

Incoterms Location

Purch Org

1000 (Sourcing & Procurement)

Line Item Text ⓘ

Contract ⓘ

(no value)

Order Type \*

Standard

28

Expand the **Others** section. Review other details for the product.

### Contract:

Certain items are associated with BPO contracts.

### Order Type:

For Ad Hoc Requests, select "Standard" or, if you do not know the total amount to be spent for time & materials, select "Amount Based."

**Do not change this for catalog orders.**



Moveable Capital Equipment: When purchasing moveable capital equipment, use the **CAPITAL – MOVEABLE commodity code** to automatically add Property Management to the approval. More information can be found [here](#).

## PR Generation via Guided **BU**ying Catalog Order – Remove Sales Tax

Review your cart for a line item entitled Sales tax (auto-generated). If found, please delete the sales tax section before you check out.

The screenshot shows the Ariba Buying interface. At the top, the header includes the Boston University logo and 'Ariba Buying'. Below the header, there's a navigation bar with 'Request details' and 'PR'. The main content area displays a line item titled 'Sales tax (auto-generated)' with a net amount of \$309.42 USD. A red box highlights the three dots menu next to the net amount, and a red circle with the number '1' is placed next to it. Below the line item, there's a section for 'Supplier Location' and 'Supplier Part Number'. At the bottom, there's a 'Deleting last item' dialog box with a red box around the 'Delete' button and a red circle with the number '2' next to it.

**1**

**2**

To delete the sales tax line item:

1. Click on the three dots to the left of the line item (near Net Amount and Gross Amount)
2. Select “Delete” and then confirm that you’d like to delete and return to shopping.



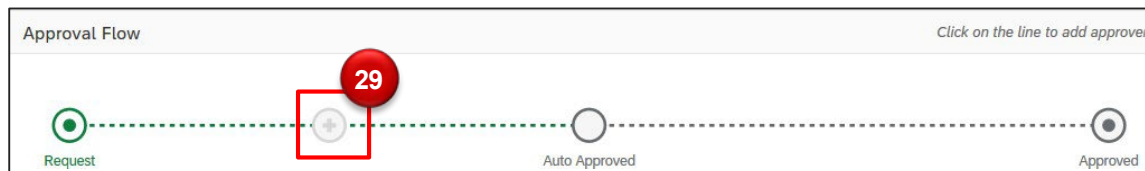
# PR Generation via Guided **BU**ying Catalog Order – Approval Flow

View the approval flow.

- System-generated approvers cannot be removed.
- You can add approver(s)/watcher(s) to the workflow if necessary.

**Approvers** must approve requests before they can advance in the workflow.

**Watchers** can view requests, but no action on their end is required.



Add Approval Request

Add this approval request as ☒ Approver ☐ Watcher

Provide a reason: Optional

Email Address bacci

| Email Address | Name       | ID     |
|---------------|------------|--------|
| mbacci@bu.edu | MARY BACCI | MBACCI |

Choose

Cancel OK

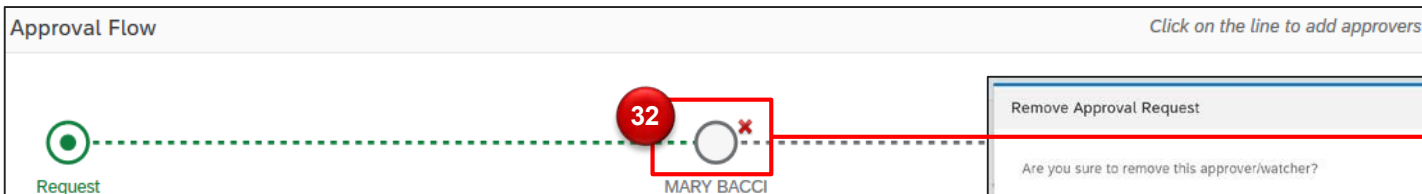
29 Hover over approval workflow and click the + icon where you want to add an approver/watcher.

30 Click the radio button next to **Approver** or **Watcher**.

31 Search & click "Choose" next to the appropriate name. Click "OK."

32 **Removing Approver/Watcher:**  
Click the remove icon next to the name to remove. Click "Remove."

View updated approval workflow.



Remove Approval Request

Are you sure to remove this approver/watcher?

Cancel Remove



**Note:**

- Add **watchers** if other team members need to see your PR, but their approval is not required.
- **Only added watchers/approvers can be removed.**



## PR Generation via Guided **BU**ying Catalog Order – Send Request

- When you are ready, click the three dots to validate request before you click **Send Request**.
- Once submitted, the first approver in the workflow will receive the request.

WB Mason Punchout  
Checkout / PR2208

Total Cost **\$53.34** USD

Contract (no value) Order type Standard

**33** Send request Save and exit Validate

Comments

Write your comment...

☐ Share with supplier Add

Attachments

Drag and drop file here, or [browse](#) to upload

☐ Share with supplier Add

Approval Flow

Click on the line to add approvers

Request Auto Approved Approved

Continue shopping

**33** Once review is finalized and all required fields are completed, click the **Validate** to validate and check for errors.

Resolve any errors and click "**Send Request.**" The request will move to the first approver in the workflow.

### Other Actions:

#### (1) Save & exit:

To save and finish PR later. Saved PRs can be viewed under the **Your Requests** tab.

#### (2) Continue shopping:

To add additional items.

## PR Generation via Guided **BU**ying Catalog Order – View Requisition

- Once submitted, you will receive a confirmation on the screen and via email.
- The first approver in the workflow will then receive the PR.

The screenshot displays the 'Submitted' status of a requisition. A confirmation message states: 'Your requisition has been sent for approval.' Below this message are two buttons: 'Done' and 'View requisition'. A red circle with the number 34 is positioned over the 'View requisition' button. The 'Approval Flow' section shows a timeline with three steps: 'Request' (completed), 'BUWTA' (in progress), and 'Approved' (pending). A red circle with the number 35 is positioned over the 'Your Requests' tab in the bottom navigation bar. The 'Your Requests' tab shows a grid of categories: General Goods & Services, Campus Planning & Operations, Marketing & Advertising, and a 'Recent requests' section with two items: 'PR645 Fisher Scientific Punchout Catalog' (Submitted) and 'PR643 Fisher Scientific Punchout Catalog' (Composing).

34 View confirmation. Click **Done** or **View Requisition**.

35 You will receive an email notification when the PR is approved. You can also navigate to the **Your Requests** tab on the homepage of **Guided BU**ying to view previously placed PRs and their statuses.

### Next Steps:

- You will receive an email notification if the PR is approved. Once a PR is **approved**, it automatically generates a PO.
- If the PR is **not approved**, the requisitioner will need to modify and re-submit.
- Navigate to the **Your Requests** tab on the homepage of **Guided BU**ying to view previously placed PRs and their statuses.