

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

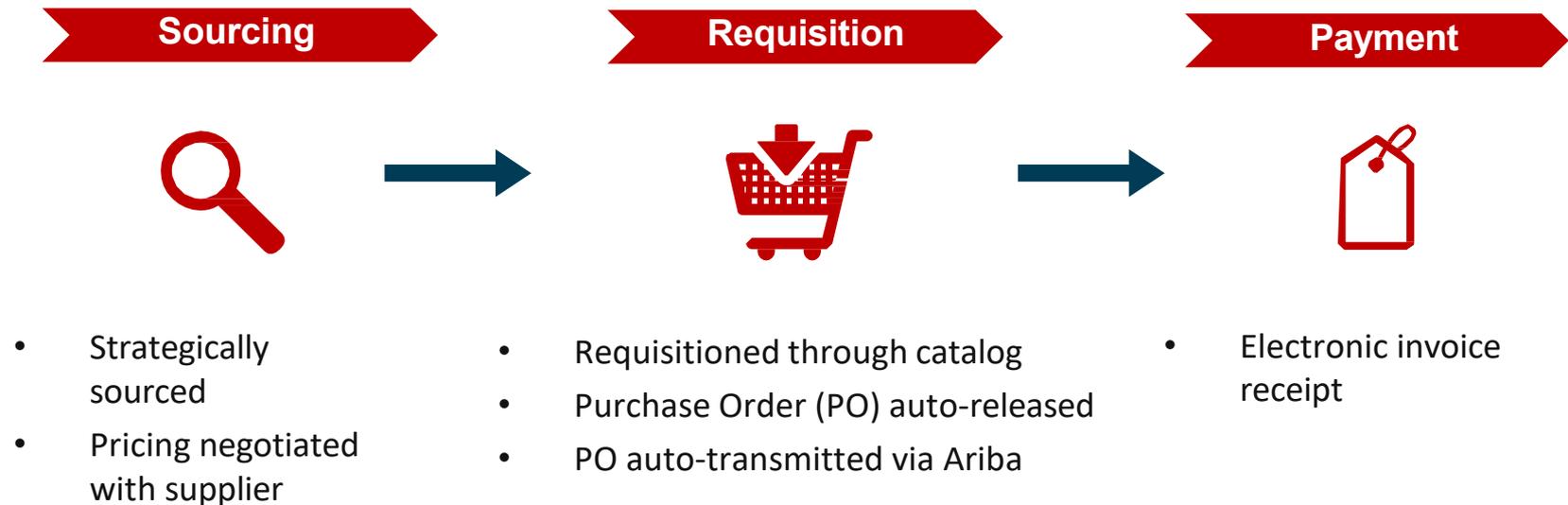


## PR Generation via Guided **BU**ying Catalog Order – Process Flow

**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 web application interface. At the top, a search bar is highlighted with a red box and labeled '1A', containing the text 'Find goods and services'. 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'. A second screenshot shows the 'General Goods & Services' category page, where the 'Office Supplies' tile is highlighted with a red box and labeled '2'. The interface includes navigation tabs like 'Shop', 'Your Favorites', 'Your Requests', and 'Your Approvals'. A sidebar on the left lists categories such as 'Technology', 'Travel', 'Research', and 'Report'. A right-hand panel shows options for 'Request ad hoc item', 'Request on behalf of', and 'Recent requests'.



**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.

WB Mason Punchout

Ad Hoc Office Supplies

Buy from Supplier

WB Mason Company  
Boston, MA

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

**Note:**  
BU has preferred suppliers across categories.

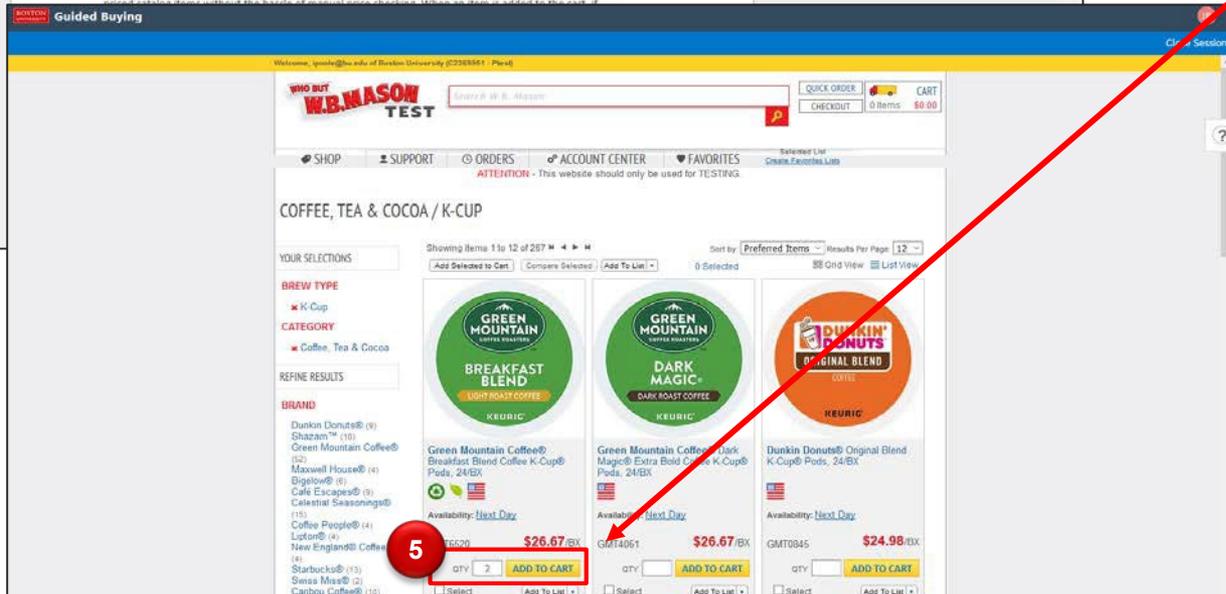
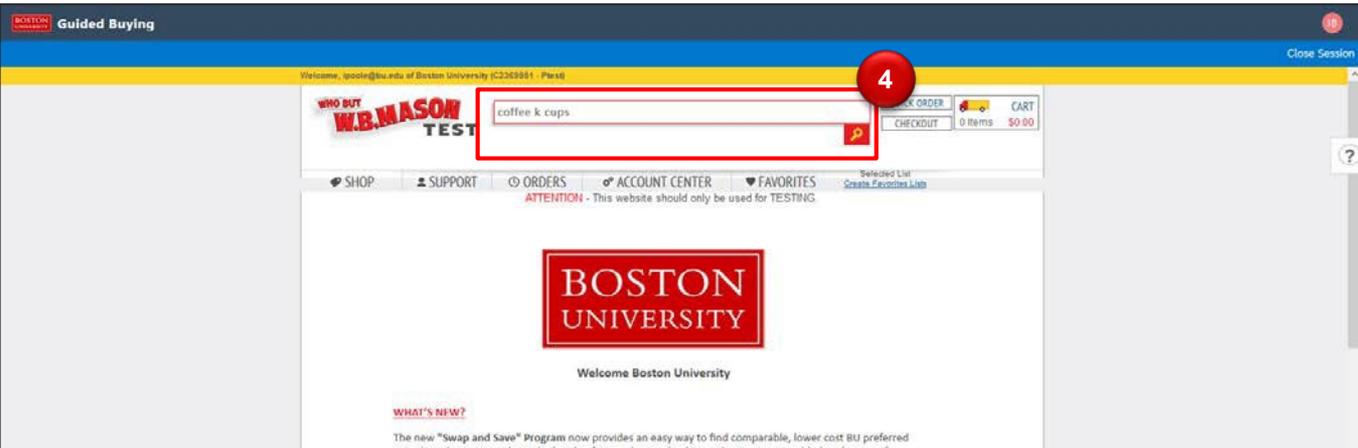
**If available, always select one of the preferred suppliers.**

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

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

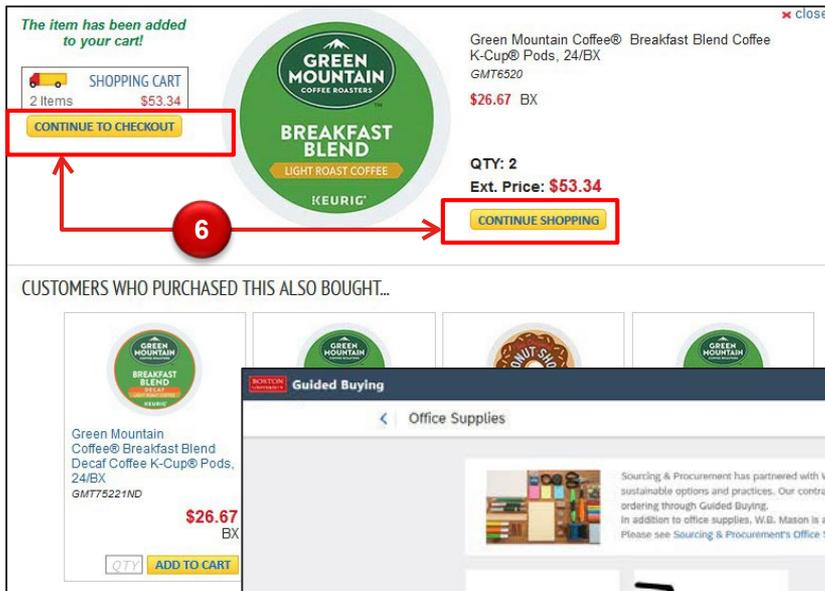
Search for the desired product within the PunchOut catalog.

- 4 Once in the catalog, search for the desired product(s).
- 5 Enter quantity and click **Add to Cart**.

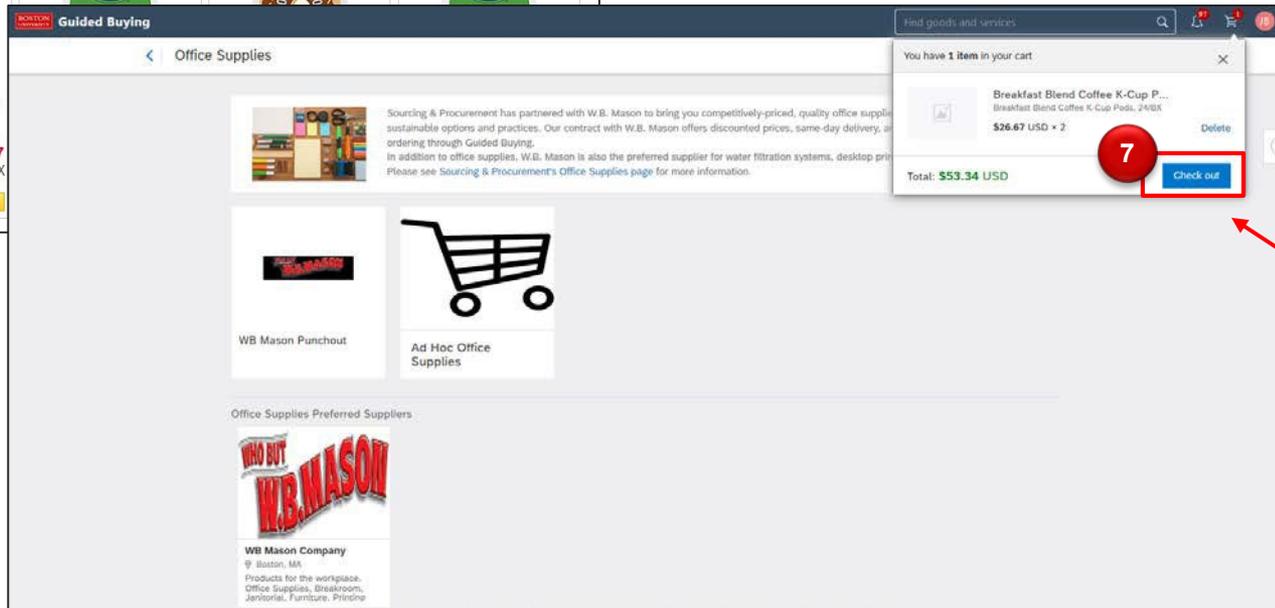


# PR Generation via Guided **BU**ying Catalog Order – Checkout

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.

The screenshot shows the 'Guided Buying' interface for a 'WB Mason Punchout' (Checkout / PR2208). The interface is divided into 'Header Level' and 'Line Level' sections.

**Header Level:**

- Ship to:** 1 Raleigh Street, Boston, MA 02215, United States. A red box highlights this field with callout **8** pointing to the 'Manage locations' link.
- Charge to:** GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE)). A red box highlights this field with callout **8** pointing to the 'Manage details' link.
- Total Cost:** \$53.34 USD
- Net Amount:** \$53.34 USD
- Need-by Date:** A red box highlights this field with callout **9**. A warning icon and text 'Need By Date must be set' are visible below the field.
- Deliver To:** Shopper 1. A red box highlights this field with callout **10**.
- Requester:** JILL BROWN. A red box highlights this field with callout **11**.
- Company Code:** TRBU (Trustees of Boston Univ)
- Is Team Requisition:** Yes (radio button), No (radio button, selected)

**Line Level:**

- Items (1):** A red box highlights a warning message: 'This item contains missing or incorrect information.'
- Item:** Breakfast Blend Coffee K-Cup Pods, 24/BX (0010000800 (WB Mason Company)).
- Quantity:** 2 box
- Price:** \$26.67 USD
- Net Amount:** \$53.34 USD
- Gross Amount:** \$53.34 USD

Red arrows and boxes highlight specific areas: a red arrow points to the breadcrumb 'WB Mason Punchout', and red boxes group the 'Header Level' and 'Line Level' information.

**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 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](#)



**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 \* (15): K (Cost center)

GL Account (16): 0000510030 (CONSUMABLE SUPPLIES ...)

Cost Center (17): 1471780000 (RADIO BOSTON)

Split accounting

(1 Raleigh Street)

Cost Center Search Modal (18):

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

**BOSTON UNIVERSITY**

- 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: Percentage

Amount to split: \$53.34 USD

Allocated percentage: 100.00 %

Unallocated percentage: 0.00 %

Split accounting type	Percentage	Quantity	Amount
Percentage	100 %	2.00	\$53.34 USD

Invalid allocation

**21**

<input checked="" type="checkbox"/> Cost Center (1020400003 (SOURCING & PROC))	Percentage: 50 %	Quantity: 1.00	Amount: \$26.67 USD
GL Account (0000510030 (CONSUMABLE SUPPLIES ...))	Cost Center (1020400003 (SOURCING & PROC))		
<input checked="" type="checkbox"/> 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

Deliver To \* ⓘ

Erika Lonardo - Room #404

Need-by Date ⓘ

6/10/20

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.

The screenshot displays the PR Generation interface with the following elements:

- Comments Section:** A text box for entering comments (callout 24). Below it, a checkbox for "Share with supplier" and an "Add" button (callout 25). Two example comments are shown: one internal note and one shared with the supplier.
- Attachments Section:** A dashed box for uploading files with the text "Drag and drop file here, or browse to upload" (callout 26). Below it, a checkbox for "Share with supplier" and an "Add" button (callout 27). One example attachment is shown.

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.



Requirement: Orders of  $\geq \$10,000$  require an attachment before the PR can be submitted. View the Competitive Bid Requirements on the [Policy Website](#).

## 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 / PR' and a 'Buy again' button. The main content area displays a cart item: 'Sales tax (auto-generated)' with a net amount of \$309.42 USD. A red box highlights this item. To the right of the item, there's a menu with a 'Delete' button, also highlighted by a red box. Below the item details, there's a section for 'Supplier Location' and 'Supplier Part Number'. At the bottom, there's a confirmation dialog box titled 'Deleting last item' with a 'Delete' button highlighted by a red box.

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.

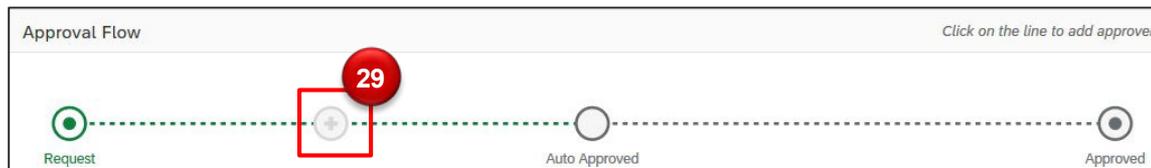
# PR Generation via Guided **BU**ying Catalog Order – Approval Flow

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.



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

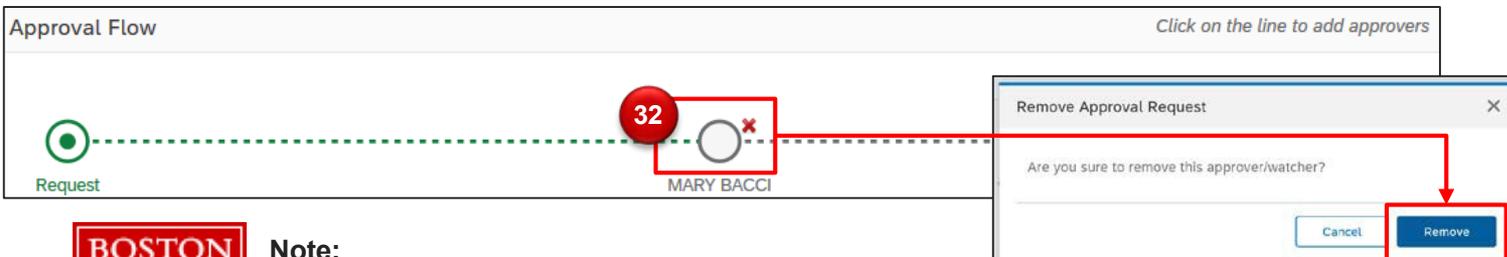
**29** Hover over approval workflow and click the + icon where you want to add an approver/watcher.

**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.



**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.

The screenshot displays the 'WB Mason Punchout' checkout page for PR2208. The total cost is \$53.34 USD. A red box highlights the 'Send request' button, with a red circle containing the number '33' above it. A red arrow points from the 'Send request' button to the 'Validate' button, which is located to its right. The 'Validate' button is also highlighted with a red circle containing the number '33'. Below the buttons, there are sections for 'Comments', 'Attachments', and 'Approval Flow'. The 'Approval Flow' section shows a process starting with 'Request', followed by 'Auto Approved', and ending with 'Approved'. A 'Continue shopping' link is visible at the bottom right.

**33** Once review is finalized and all required fields are completed, click the  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. An 'Approval Flow' diagram shows the process from 'Request' to 'BUWTA' (with a 'Success' checkbox) and finally to 'Approved'. A confirmation message states: 'Your requisition has been sent for approval.' Below the message are buttons for 'Done' and 'View requisition'. A red circle with the number '34' highlights the 'View requisition' button. Below this, another screenshot shows the 'Your Requests' tab in the system's navigation menu, with a red circle and the number '35' highlighting it. The main content area shows various requisition categories like 'General Goods & Services', 'Campus Planning & Operations', and 'Marketing & Advertising', along with a list of recent requests including 'Fisher Scientific Punchout Catalog'.

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.