

# Guided **BU**ying: Overview & Key Terms



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## Guided **BU**ying Features

**Guided **BU**ying** provides comprehensive tools to streamline the process of ordering products and services, from creating a Purchase Requisition (PR) to generating a Purchase Order (PO) that 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.



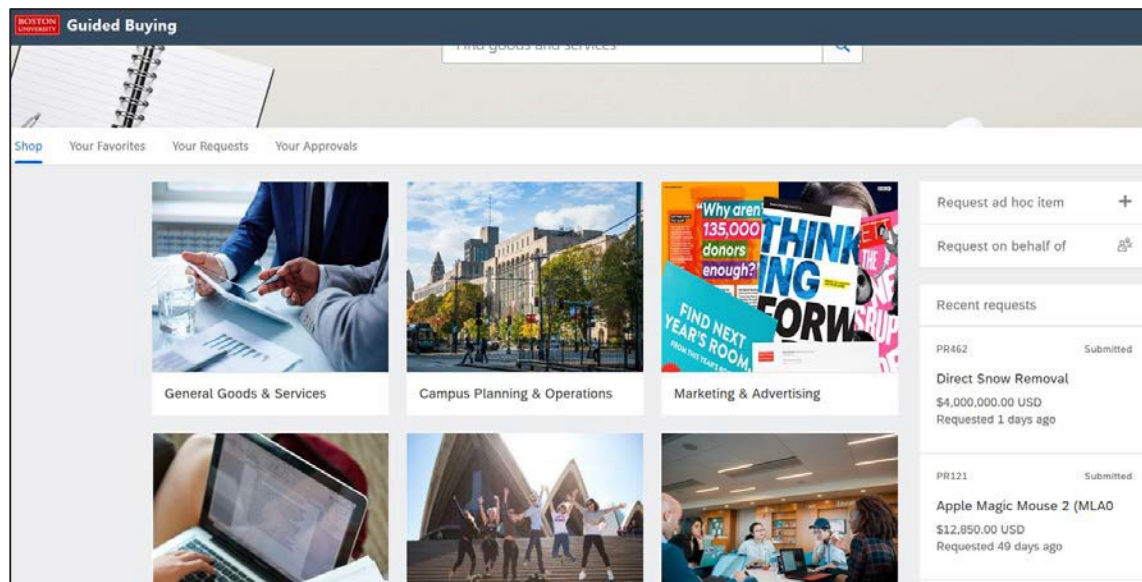
### Preset to Defaults

Customize your Personal Profile and your information will flow to the PRs you create.



### Configurable Business Rules

Approval process based on BU's business rules.



### 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.

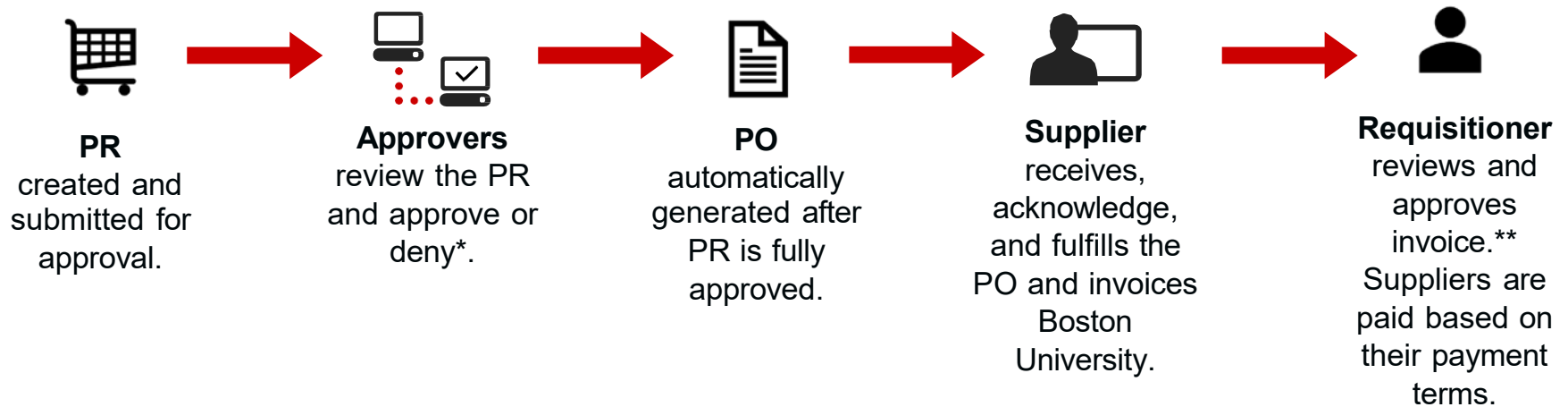
Click [here](http://www.bu.edu/policies/finance/ordering-and-contracting/) to view the policy page  
(<http://www.bu.edu/policies/finance/ordering-and-contracting/>)

## Guided **BU**ying: Overview & Key Terms

# 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 watchers and can view invoices in the **Your Approvals** tab. No approval required.

Invoices ≥\$5,000 will be routed to requisitioners' **Your Approvals** tab to be reviewed and approved.

## Guided **BU**ying: Overview & Key Terms

### Approval Process in **Guided BU**ying

PRs and invoices in **Guided BU**ying 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	<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>• Procure to Pay</li></ul>

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 Procure to Pay department and are responsible for negotiating terms, conditions, and pricing to bring 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; they help manage the system, data, and catalogs. They develop and execute training programs for requisitioners and approvers and assist by responding to questions.

# Guided **BU**ying Terminology

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



### Guided **BU**ying

A central location to purchase a wide selection of products and services from a variety of registered suppliers.



### Personal Profile

Update and save user settings such as delivery address, floor and room number, and cost center.



### 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.



### 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 55xxxxxxx.



### Guided **BU**ying Catalog Order

Requisitions created to purchase through catalogs in **Guided BU**ying.



### Non-Catalog Request (Standard)

Requisitions created when you cannot find what you need in **Guided BU**ying.



### Non-Catalog Request (Amount Based)

Requisitions created when you are unsure the final amount to be spent.



### 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 Procure to Pay.



### Forms in Guided **BU**ying

Do you need to request assistance on a sourcing project?



Complete and submit a  
**Sourcing Request Form**

A member of the Sourcing team will reach out with next steps based on your request

Do you need to request a contract signature?



Complete and submit a  
**Contract Request Form (CRF)**

A buyer will receive the completed form. Once a contract is negotiated and signed, the buyer will instruct the requisitioner to create a PR.

Do you need to register a new supplier?



Complete and submit a  
**Supplier Request 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.

## Guided **BU**ying: Overview & Key Terms

# FAQs: Getting Started

How do I know if I can access **Guided BU**ying?

- If you had shopper or approver access in SRM, you will have requisitioner or approver access in **Guided BU**ying. 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](mailto:buinfosec@bu.edu).

How do I login to **Guided BU**ying?

- Navigate to [myBUworks](http://www.bu.edu/mybuworks) (<http://www.bu.edu/mybuworks>) and select **Guided BU**ying.

What browser should I use to access **Guided BU**ying?

- Please use Firefox or Chrome to access **Guided BU**ying. Internet Explorer is not supported.

Where can I find training materials?

- Navigate to the Procure to Pay website for [training materials](#) and [frequently asked questions](#).

I have a question, how can I reach Procure to Pay?

- 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 P2P?

- Complete [this form](#) to be added to our newsletter.

How do I know which suppliers have negotiated terms and pricing with Boston University?

- In **Guided BU**ying there are category tiles highlighting products, services, and preferred suppliers.
- The [What Do You Need Page](#) on the Sourcing & Procurement website is another resource.