

Before You Begin

(Click for [Introduction Video](#))

- What **products or services** are you buying?
 - the quantity of each
 - requested delivery date
- What is the **Product Category**?
- To what **Cost Objects** will you charge?
 - Cost center (1XXXXXXXXX)
 - WBS Element
 - Internal Order (9XXXXXXXXX)

Default Settings-Personalization

- Click the **Procurement** tab in the navigation bar
- Click the **Personalization** link
- Click the **Attribute** drop down menu
- Select the **Attribute** for which you would like to assign default values
- Click the **Edit** button
- Click **Add Line** button
- Click within the **Value** field and use the pop-up search tool to browse for your attribute
- Click the **Standard** radio button
- Click **Save** button

Home Employee Self-Service Organizational Chart Finance ACCT XWalk Reporting **Procurement** Worklis

Overview Personalization **Set default attributes (i.e., cost center and delivery address)**

Work Overview

Place and Manage Orders

Services

Help (P2P Guide)

Advanced Search

Create Documents

- 3 Step Shopping
- **Shopping Cart**
- Shopping Cart Template

Active Queries

Shopping Carts All (0) Saved (0) **Awaiting Approval (0)** Public Template

Purchase Orders All (0) Saved (0) Awaiting Approval (0) Rejected (0) Ordered (0) Confirmations per

Document Output Last 7 Days (1595)

Click here to begin shopping

Check on the status of any cart you created

Hide Quick Criteria Maintenance

Shopping Cart Number: [] To []

Shopping Cart Name: []

Item Description: []

Name: []

Date: Last 30 Days [] To []

Status: []

Role: []

PO Number: []

Product Category: []

Partner Product: []

Including Product Category Hierarchy:

Items requiring your attention

Create Free-Text Carts

Access the Terrier Marketplace

Place orders

Helpful Tips

(Click for [Library of tutorials](#))

- Use a **Free Text item** to order items not available from Terrier Marketplace.
- The **Product Category** is important because it determines the **G/L Account**, try to select the correct one.
- The **Product Category** defaults to 999999 and **MUST** be changed when creating the cart.
- If the dollar value of the free-text shopping cart **exceeds \$5000**, a Sourcing and Procurement Buyer will need to approve the cart.
- Do **NOT** combine Free Text items and catalog items in the same shopping cart.
- Remember to use the **Check** button to check for any errors.
- There is a **20-minute idle time** limit – remember to **save** shopping carts before you leave your desk.
- Do **NOT** assign a supplier to a limit order.

Keep This In Mind When Choosing a Vendor

DO NOT USE

You may suggest a preferred supplier to the purchasing department

Preferred Supplier: [] Supplier Master Record: [Display](#)

Supplier: 10000647 [] **Assign Supplier**

USE

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location

Identification

Item Type: Material []

Product ID: []

Description: * ThinkPad X220 12.5-inch

Product Name

Product Category: 43171800 [] Computers **Product Category**

Order as Direct Material:

Subcontracting:

Company Code: TRBU [] Trustees of Boston Univ

Supplier Product Number: 4291G96 **Manufacturer #, Part # or Item #**

Organization

Purchasing Group: Purchasing Group [] Show Members

Values, and Pricing

Quantity / Unit: 15 EA [] each **Quantity** **Units of Measure**

Open Quantity / Unit: 0.000

Open Quantity / Unit: 15 EA

Price / Currency: 1,092.00 USD [] Price Unit 1 **Unit Price**

Not to Exceed Price:

Delivery Priority: 00 []

Not Separately Priced:

Goods Receipt:

Invoice Receipt:

Goods Receipt Non-Valuated:

Tax / Amount: 10 0.00 USD

Service Master Record: [Display](#)

Service and Delivery

Delivery Date: 07/14/2011 [] **Requested Delivery Date**

Location / Plant: 102 [] General Plant

Storage Location: []

Inco term Key/Location: []

Goods Recipient: 17283 [] JUSTIN WAN

Incremental Funding Active:

Creating a Cart

Hosted Catalog Items

(Click for [Screenshot guide](#))

- Click the **Procurement** tab
- Click **Place and Manage Orders** in the menu
- Click **Shopping Cart** in the menu listed under **Create Document** category
- Click **Add Item** and **Terrier Marketplace** link and browse by **Supplier, Category**, etc.
- Click **Add to Cart** button when item is located
- Click **Check Out** link to bring the item back to BUWorks cart
- Click **Save** button to save your work
- Click **Edit Cart** to continue working
- Click **Check** to review cart for errors before clicking **Order**

Punchout Catalog Items

(Click for [Screenshot guide](#))

- Click the **Procurement** tab
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- Click **Add to Cart** button when item is located
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- Click **Check** to review cart for errors before clicking **Order**

Non-Catalog Items

(Click for [Screenshot guide](#))

- Click the **Procurement** tab in the navigation bar
- Click **Place and Manage Orders** in the menu
- Click **Shopping Cart** in the **Create Document** menu
- Click **Add Item** and select either **With Free Description** or **Limit Item**
- Input a description for the first line item in the **Description** box
- Click **OK**
- Click **Save** button to save your work
- Click **Edit Cart** to continue working
- Follow **Modifying a Cart** instructions that follow in the next column

Looking for a vendor in SAP?


- Go to S&P website to see how to search suppliers in BUWorks:
<http://www.bu.edu/sourcing/shoppers-guide/shopping-cart-training-2/shopping-cart-creation/assigning-the-supplier-2/>
- If a supplier is not registered, **add an Internal Note on your shopping cart** providing the supplier name and email contact information.

How use a pop-up search button

Best used to find:

- Product categories
- Supplier IDs

Click this pop-up to search

Product Category: 

Modifying a Cart

Assigning Item Details

(Click for [Screenshot guide](#))

- Click the **line item Details** button in shopping cart view
- Click the **Item Data** tab
- Input the product/service name in the **Description** field
- Click the pop-up search tool¹ button to assign a **Product Category** number
- Use two wildcards² to search for a **Product Category** in the **Description** field
- Input a model number in the **Supplier Product Number** field (if applicable)
- Assign an **Order Quantity**
- Use the pop-up search tool¹ button to assign a unit of measure
- Assign unit price under **Price/Currency**
- Assign a requested **Delivery Date**

Assigning Account to Charge

- Click the line item **Details** button in shopping cart view
- Click the **Account Assignment** tab
- Click on the **Account Assignment Category** drop-down arrow and select the **Cost Object Type (Cost Center or Order)**
- Input the **Cost Object** in the **Assign Number** field
- Click **Save** button to save your work
- Click **Edit Cart** to continue working

Adding Notes and Attachments

(Click for [Screenshot guide](#))

- Click the **line item Details** button in shopping cart view
- Click the **Notes and Attachments** tab
- Click **Supplier Text** to send a note to the supplier
- Click **Internal Note** to send a note to the Buyer

Uploading Attachments

(Click for [Screenshot guide](#))

- Click the **line item Details** button in shopping cart view
- Click the **Add Attachment** button to access the **Attachment Browser** pop-up tool¹
- Click the **Browse** button to find and upload your file
- Assign a file name in the **Description** field
- Click **OK**

Setting Delivery Location

(Click for [Screenshot guide](#))

- Click the **Set Values** next to the **Default Settings** at the top of the cart
- Use navigation box in the corner to see a list of all tabs and select **Delivery Address/Performance Location**
- Click the pop-up search button¹ in the **Name** field to search delivery addresses
- Use two wildcards² to search for street name in the **street** field
- Click **Start Search**
- Select the desired delivery address and click the **OK** button
- Assign **end username** in the **Additional Name** field
- Assign a **Phone Number, Email Address, Room** number and **Floor** number

Modifying a Cart (Continued)

Assigning a Vendor/Changing a Vendor

(Click for [Screenshot guide](#))

- Click the **line item Details** button in shopping cart view
- Click the **Sources of Supply/Service Agents** tab
- Click the pop-up search tool¹ button in the **Supplier** field
- Use two wildcards² to search vendor in the **Name 1** field
- Click **Start Search**
- Select your desired supplier and click **OK**
- Click the **Assign Supplier** button
- (Click **Remove Assigned Supplier** button and repeat process to change vendor)

Tracking an Order

Finding an Order

(Click for [Screenshot guide](#))

- Click the **Procurement** tab
- Click **Place and Manage Orders** to view **Active Queries**
- Click **Show Quick Criteria Maintenance** under the **Shopping Carts-All tab**
- Check the **Including Completed Shopping Carts** box in the criteria section
- Click **Apply** and browse shopping carts

Viewing Approval Status and History

- Once you have found your order, click on the **Approval Process Overview** tab in the **Details** view of your cart

Confirming Purchase Order Number

(Click for [Screenshot guide](#))

- Once you have found your order, click on the **Related Documents** tab in the **Details** view of your cart
- If a PO has been generated for your cart, it will show in the **Backend Document Number** column

Canceling an Order

Canceling a Cart Awaiting Approval

(Click for [Screenshot guide](#))

- Click the **Procurement** tab in the navigation bar
- Click **Awaiting Approval** link in the **Active Queries** section
- Highlight the line items you would like to cancel
- Click the **Delete** button

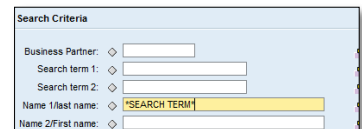
How to Use a Wildcard Search

Wildcard Usage

This is what a wildcard looks like: *

This is what two wildcards look like: **

This is how you use two wildcards: *Apple*, *Computer*, *Visual*, *Dell*



Search Criteria

Business Partner:

Search term 1:

Search term 2:

Name 1/last name:

Name 2/First name:

Looking for Help?

Contact Sourcing & Procurement:

- sourcing@bu.edu or 617-353-2370