

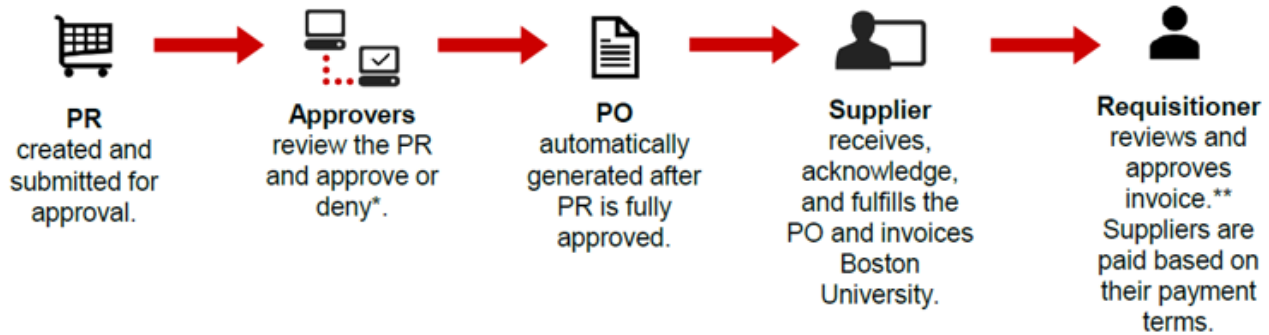
Onboarding: Procurement and Payment Introduction

Understand the procurement process, identify the correct payment method, and process transactions

Procurement Process

Procure-to-Pay Process in Guided BUying

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.



System view

PR #, workflow begins	PO # generated and sent to vendor	AP enters data into BUworks
Reporting view	Commitment generated	Commitment reduced; expense posted

*Be sure to determine if your PR meets the criteria to require a contract. If a contract is required, an unsigned contract must be submitted through the Contract Request Form in Guided Buying. **Contracts signed by individuals in Questrom are not valid.**

Payment Methods

Purchase Requisition	Disbursement	P-Card	Travel Card/ Reimbursement
<i>*Preferred method*</i>	<i>*Used when a PO is not required*</i>	<i>*Low dollar transactions*</i>	<i>Travel and meetings</i>
Materials and supplies	<i>*decided by AP/Sourcing*</i>	<\$1,000	Accommodations
Contracted services	Honoraria	SaaS (Software as a Service)* If	Local Meals
Chartered buses	Awards	Vendor cant be registered*	Taxis
Any contract or agreement	Performers	<i>Cannot be used for Alcohol</i>	Membership fees

Purchase Requisition

Activity: Personalization

- Set Delivery Address
- Set Default Cost Center

Activity: Create a Purchase Requisition to order pens from Guided Buying

- Open new PR
- Follow along with the Purchase Requisition Catalog Order Guide from the Admin Toolkit under the Procurement Section
- On step 29, add Carol Desimone and Montanna Freeman as Watchers to the Order
- Add Carol Desimone as the Approver to the Order, for Orders less than \$500 (and, for Orders being Shipped to a Non-BU address)
- Complete the Order
- PR will be saved in your profile and can be used for future reference**

Disbursement

Disbursement online form available at the Accounts Payable website

Required Information

- Payee Name and Address
- Requestor Contact Information
- Disbursement Request Type
- GL and Cost Object; Amount
- **Approver:** Carol Desimone, **Email:** gstadmin@bu.edu
- Attachments: W-9 and Invoice (if honorarium, use memo with details of speech instead)
- Attachments For Wires (International Disbursements only): Invoice, bank letter that validates the bank account on bank letterhead, & W8-BEN (for individuals) or W8-BEN-E (business)

*Note: **Disbursement Requests for Prizes:** Disbursement type= Non-Employee Prizes and Awards
GL- 500730 AWARDS- UNALLOWABLE.

Disbursement Requests for Honoraria: Disbursement type = Honorarium
GL: 500740 – HONORARIA -US CITIZEN, or 500745 – HONORARIA – FOREIGN

Internal Service Request (ISR)

Used to request Internal Services (catering, events and conferences, police detail)

Activity: ISR Form

- Open BUWorks > Procurement Tab > Internal Service Request Tab
- Select Service Provider
- Input Requestor Information
- Add Details of Order to Text Field** (***not notes: This field feeds into the BW Report***)
- Add Cost Distribution
- Attach Event Sheet (if available)

Facilities Service Request (FSR)

Used to request and pay for Facilities Services (event set up and clean up)

Activity: FSR Form

- Open BUWorks > Procurement Tab > Internal Service Request > Facilities Service Request
- Click Event Setup/Cleanup
- Click "Express Request and Skip Estimate"
- Complete Address and Contact Information
- Add Details, including Estimated Cost, and Select Cost Object