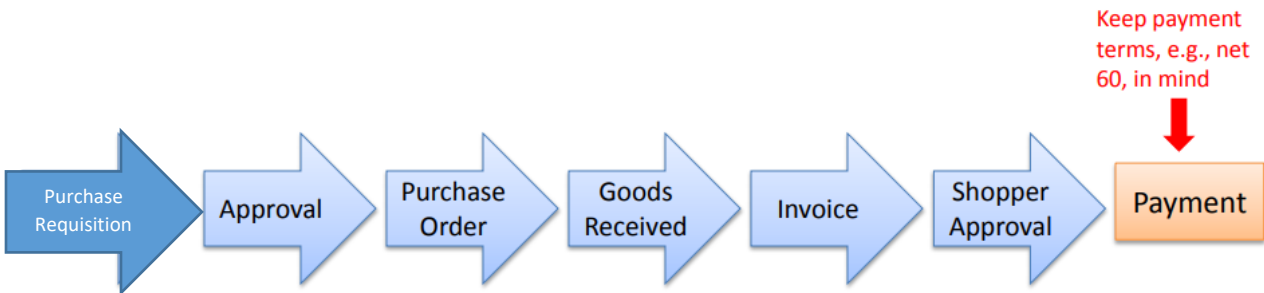


Onboarding: Procurement and Payment Introduction

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

Procurement Process



System view

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

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	Books/Materials	Local Meals
Chartered buses	Awards	Advertising	Taxis
Any contract or agreement	Performers	SaaS (Software as a Service)* If Vendor cant be registered*	Membership fees
		<i>Cannot be used for Alcohol</i>	

Activity: Determine best payment method

My department expenses

Payment method

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
- GL and Cost Object; Amount
- Approver: List a Finance & Administration staff member and use email gstadmin@bu.edu
- Attachments: W-9 and Invoice (if honorarium, use memo with details of speech instead)

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)
- 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