



## **Introduction for Approvers**

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## What is buyWays?

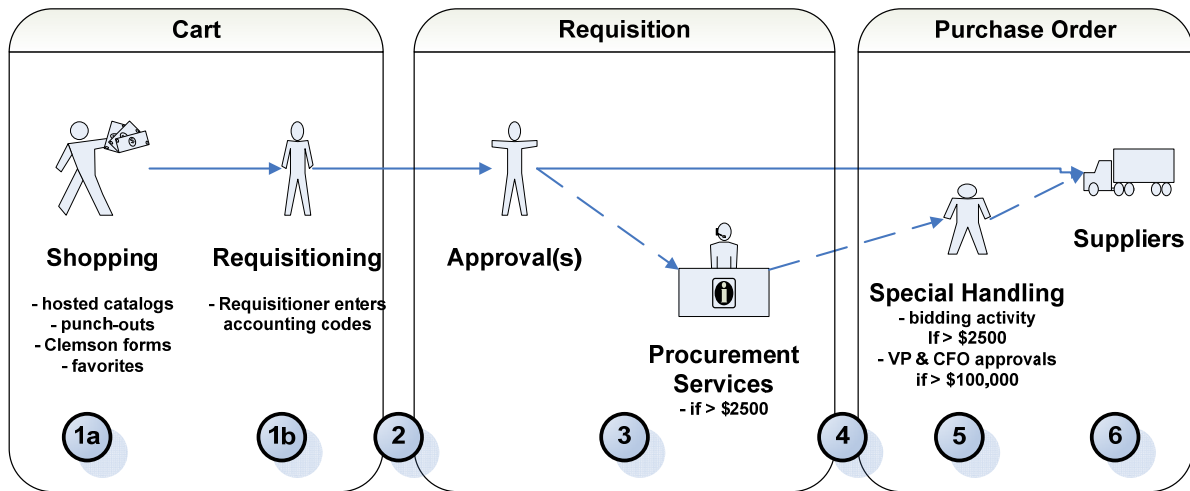
### buyWays solution is comprised of

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- A Clemson marketplace; which contains access to
  - Clemson's top suppliers with their available goods and services at Clemson's contract pricing (either state or Clemson-specific pricing)
  - All other Clemson suppliers to round out your purchasing needs
- Interfaced to PeopleSoft; which allows buyWays to
  - have up-to-date account codes
  - have budget checking capabilities;
  - conduct encumbrance and final account code postings
- Application capabilities; such as
  - Product searching across multiple vendors
  - Price comparisons
  - Automatic sending of the purchase order to the supplier (via either fax, email or cXML) taking the grunt work away from your shoppers
  - Budget checking at the point of requesting goods/services and again after the final approval
  - Access to history – all in one spot
  - Paperless transactions
  - And much more...

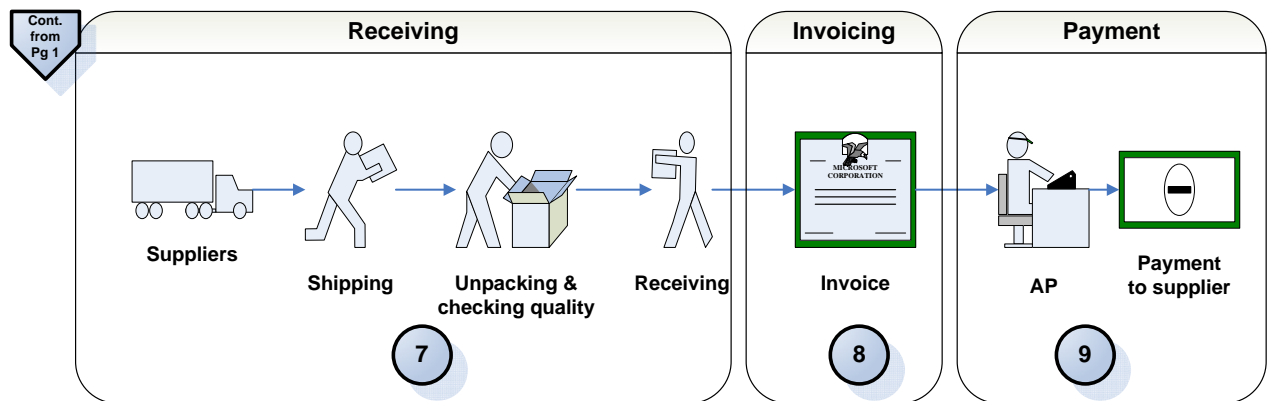
**buyWays is built upon the same technology used at 33 out of the top 50 research universities and 13 out of the top 25 public schools (as of Oct 2009).**

**Progression of a buyWays transaction**



Cont. Pg. 2

- Notations**
- 1a: Shopper selects their goods and/or services
  - 1b: Requisitioner enters the proper accounting codes
  - 2: PeopleSoft validates chartfields and conducts a budget check
  - 3: Approval process is executed based on the requisitions characteristics
  - 4: PeopleSoft conducts budget check for PO's < \$2,500
  - 5: Special handling step for PO's requiring bidding or high dollar approvals. Budget check & encumbrance of funds occurs when special handling is complete
  - 6: PO is automatically sent to the supplier via buyWays



Cont. from Pg 1

- Notations**
- 7: Receiving is required for all buyWays transactions; equivalent to the "okay to pay" signature required today
  - 8: eInvoices may arrive simultaneously with the package because the supplier's system electronically sends the invoice at the same time they start the shipment of the goods
  - 8: For paper invoices, the invoice is entered into buyWays
  - 9: Payment to the supplier happens only when the PO, receipt and invoice match; CUBS determines the appropriate supplier payment date

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## Importance & Benefits of buyWays to Clemson University

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buyWays will combine Clemson University's need for improved visibility and control over the purchase of goods and services with ease of use and cost savings.

- **Efficiencies**

- 24 x 7 access via the internet; allowing for shopping and approving while traveling – even abroad
- Paperless transaction utilizing electronic signatures for approvals
- Delegation of approval to a designee for purchase orders up to a specified dollar value is available to approvers to offload their approval authority on lower risk purchases
- Ability to designate self approval levels for a responsible requisitioners up to a specified dollar threshold to achieve a faster purchasing transaction
- On average, 75% of purchase orders are processed in the same day (shopping – approvals – submitted to suppliers)
- Purchase requisitions are quickly routed to the appropriate individuals across Clemson based on a preconfigured workflow and based on the characteristics of the purchase request; eliminating the need for the colleges to learn who needs to approve each type of purchase or to chase down individuals for signature
- Eliminates timely work for department accountants such as: no reconciliation necessary for buyWays transactions; some vendors are able to send their invoices electronically to Clemson, eliminating invoice processing; reduction of corrective journal entries
- Colleges and department chairs have the ability to move the shopping capabilities to the person requesting the goods/services (e.g. faculty, PI's, lab technicians) without burdening them with accounting code responsibilities; accounting codes will be entered by the department accountant
- Automatic routing of PO's greater than \$2500 to purchasing – speeding up the bidding process.
- Endorsed by auditors; auditors will conduct their reviews online so no paper copies are necessary
- Sponsored Programs will also view their information online so no paper copies are necessary

- **Visibility to contract pricing for everyone at Clemson**

- As shoppers search for their goods, buyWays provides visibility to state and/or Clemson-specific contracts, ensuring shoppers receive the negotiated pricing.
- Visibility at the item level to pricing & volume by supplier gives Clemson the ability to continue negotiating preferred pricing & terms with new and existing suppliers; allowing this better pricing to be passed along to your area.

- **Compliance and controls are obtained**

- buyWays performs a budget check at time of submitting the requisition for approval(s) and after approval; ensuring budget control.
- Enforces contract compliance.
- Enforces front-end accounting; eliminating time-consuming activities on the back end and allowing departments to spend more time on value-add services.
- Supports audit (internal and external) and records retention policies.
- buyWays clearly identifies minority and women owned and funded businesses, as well as small

businesses, to help us satisfy compliance goals associated with some grants and awards.

- **Visibility to requisition, purchase order and Invoice history – all in one spot**
  - Ability to view all historical information regarding a certain transaction or set of transactions (i.e., project, department).
  - Eliminates the need for paper copies of requisitions, purchase orders and packing slips to be saved and filed; supporting Clemson’s green initiative and supporting the buyWays foundational practices of paperless transactions.
  - Eliminates the need for spreadsheets to be created for future referencing.
- **buyWays supports vendor quotes**
  - When a purchase is needed from a non-buyWays vendor or of a unique product, buyWays allows the shopper to enter this special quote and have it routed through the appropriate approval channels.
  - For certain purchases (as outlined on the Procurement Services website), a P-card can be used outside of the buyWays solution to purchase goods and services.

## buyWays Roles

All roles within buyWays are able to shop to select goods and services.

**Roles:**

- Shopper/Receiver:
  - Individual who shops within buyWays to select goods and services via catalogs, punch-outs or forms and submits their cart to a requisitioner for completion. Shoppers do not enter account code information.
  - Receipts - If the shopper conducts receiving:
    - Receipts are required for all goods and services.
    - The shopper is responsible for acknowledging the receipt of acceptable goods on behalf of Clemson by entering the receipt within buyWays.
    - Note: Receiving should be conducted within 1-3 days of receiving the goods. This ensures the university is able to pay our valued vendors within the acceptable timeframes we established with the vendor.
- Requisitioner/Receiver:
  - Accounting codes: Individual which enters the proper accounting code information. When the requisitioner selects “submit cart” the cart is transformed into a purchase requisition and sent through the proper approval workflow. A budget check is conducted prior to converting the cart into a purchase requisition.
  - Receipts - If the requisitioner conducts receiving on behalf of others:
    - Receipts are required for all goods and services.
    - The requisitioner is responsible for receiving/obtaining acknowledgement from the recipient of the goods that the goods were received in good working order on behalf of Clemson.

- **Note:** Receiving should be conducted within 1-3 days of receiving the goods. This ensures the university is able to pay our valued vendors within the acceptable timeframes we established with the vendor.
- It is recommended that the requisitioner take on the responsibility of running a standard report of receipts outstanding to assist with tracking down missing receipts that are holding up timely supplier payments.
- **Approver:** Individual that is responsible for ensuring the purchase requisition is allowable, allocable and reasonable. buyWays will conduct a second budget check after approval is granted and prior to converting the purchase requisition into a purchase order.
- **Invoice Handler:** Individual that enters the supplier's invoice into buyWays.

## Impacts to You

### Pre-approval and Proper Account Coding Prior to Purchase

buyWays will have a greater impact across Clemson than prior financial system changes and will impact people in all roles and positions.

buyWays enforces pre-approval and account coding of the purchase before placing the order with suppliers. This process change may be new to some departments/labs and for these departments/labs a certain amount of thought needs to be taken to address this change. Our early users have shown that the impacts on the labs are greater as you start out and then smooth out as you become more familiar with the system.

For instance, here are a few examples of impacts within the labs:

- **Shoppers**, many of whom are researchers, post docs, PI's and faculty, will need to know how to utilize buyWays to select their goods and services and understanding will be needed on how to handle their special quotes.
- **Requisitioners** will need to know the proper account code to complete the purchase requisition. Coordination with the shoppers on project/fund designations will be needed to ensure department/labs with multiple projects can be handled efficiently.
- Due to the pre-approval process of buyWays, **high volume Approvers** will need to establish time frames each day where they go in to approve requisitions – so as to keep the ordering process moving forward. **Low volume Approvers** will receive email notification that a requisition is waiting for their review. It is recommended that for PI's that have a significant number of time-sensitive purchases and that are unable to have timely access to the internet should designate an approval proxy to ensure the requisitions are handled on a timely basis.
- Wherever possible, it is recommended that receiving be handled by the **Shopper/Requisitioner** rather than a central person. However, a central person for receiving is still acceptable.
- For **Administrators**, relief of the approval process around invoices coupled with appropriate account coding on the front end should off-set the time necessary to do the pre-approvals.
- **All roles**, buyWays retains complete information and audit trail of a transaction – therefore paper copies are no longer required. Supporting a paperless environment may take additional communication, training and support to impact this large change within your college.

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## Delegations and Self Approval Limits

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buyWays allows the department/labs to balance the control of purchasing with the speed of the transaction by allowing for delegation of approval authority where appropriate.

Delegations: Delegations are effective in maintaining the speed of the purchase when an approver is unable to conduct timely approvals while still maintaining control over the purchase. So as noted in our Disbursement Policy, a department head or other individual with spending authority is able to delegate their approval authority. This delegation needs only to be documented in some manner. It should be noted that delegates should be identified as someone to act on behalf of an approver. That delegate should have knowledge of the appropriate budget, projects, purchases, etc. and should have an appropriate skill set so they can take on the responsibility of acting for, and being responsible for, the approver delegating to them.

Self approval limits: buyWays allows the capability to mirror spending capabilities as granted to responsible individuals on campus via a p-card. For example, if all departmental faculty and staff are approved to spending up to \$2,500 on a p-card, this same delegation limit (“self approval”) should be reflected in a memorandum and then mirrored in that department’s workflow in buyWays. This self approval can be set up to any reasonable limit by department or grant if properly delegated. Procurement is committed to working with departments to ensure their workflows in buyWays truly reflect what they want to approve and not, as well as ensuring documentation is in place to annotate any delegations.

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## Receipts

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Our policy is that receipts are required for all purchases made. The receipt is the acknowledgement that goods or services were received by the individual. In buyWays the “receipt” is the systematic equivalent to the “okay to pay” signature that was required on an invoice. It is only upon entry of the receipt that the buyWays system will be able to match the invoice to the PO and upon the match (within tolerance) a payment will be made. For a vendor electronically invoicing, that is the last step in the process for the end user – no further action required.

It is important for the college/department and lab leadership to enforce timely receiving of goods and services to ensure the transaction is completed appropriately.

## Common Terminology

The training session will cover these in detail, however to help you begin your orientation, here are some common terms used with the buyWays system.

Cart: A transaction record that is work in progress. A cart has not been submitted for approval.

Requisition: The electronic document that contains the shopper’s items and accounting coding and which goes through the review and approval process. A requisition may contain items from more than one supplier.

Purchase Order: The electronic document created when a requisition is approved that contains the shopper’s order detail. A unique purchase order is created for each supplier on the requisition. For all buyWays Supplier purchasing processes, the PO# and detail are automatically transmitted to the supplier.

Enabled Suppliers: Suppliers which Clemson University has enabled within the buyWays solution. They are comprised of “hosted catalog” and “punch-out” suppliers

- Hosted Catalogs Suppliers: Most of the suppliers that we have enabled within the buyWays solution provide us with an electronic catalog of the goods we purchase at our Clemson price. These “hosted catalogs” will be searchable within buyWays and you will also be able to do comparison pricing across suppliers that provide the same goods.



- Punch-out Suppliers: A few of our suppliers have a shopping website instead of a hosted catalog. buyWays will allow you to link (“punch-out”) to their website. By accessing their website through buyWays, the website will know who you are and will provide you with the Clemson price. It is important to note that each punch-out supplier site is different and you will need to familiarize yourself with site you use. Some punch-out supplier sites will allow you to establish favorites to speed up shopping.

Favorites: For buyWays hosted catalog purchases that you frequently make, buyWays allows you to establish favorites to speed up the purchasing of these common items. Favorites can be administered by the department. Favorites can be organized by college, department and lab or even down to a project. The structure is very similar to Microsoft folder views.

User Profile: buyWays allows the users to set up certain preferences that speed up their ongoing shopping experiences. Here are a few of the key items held in the user profile; bill-to address, ship-to address, email preferences, short list of common used accounting codes

Clemson Forms: You may have special items (non-catalog items) or special conditions (such as sole source) that are not found within the buyWays solution. Clemson forms are used to address these needs.

Check Out: A term often used within a supplier punch-out site that indicates you are finished shopping with the supplier and want to be returned to the buyWays solution to conduct additional shopping or to submit your requisition for approval.

## Recommended Preparation Prior to Using buyWays

### Approvers:

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1. Review the training materials that are available to assist you as you ramp up your knowledge on how to approve within buyWays. Here is the link to the training materials: [Clemson University : Procurement Services : Training Opportunities & Guides](#). It is recommended that you review the training materials for Approvers and that you print out the Quick Reference Guide which has a section on approving orders in buyWays.
2. General note: buyWays will provide you with an email message when a requisition is waiting for your approval.
3. Understand that you can delegate your approval authority (“assign substitute”) when you are out of the office and will not have access to buyWays.

## buyWays Online Information and Support

buyWays online information located:

- [Clemson University : Procurement Services : Clemson E-Procurement Solution - buyWays](#)

Sign up for buyWays Bullets:

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Sending an email with no subject to [listserv@clemson.edu](mailto:listserv@clemson.edu) with the following content in the body of the message:

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