

buyWays Training

For Requisitioners and Invoice Handlers

Last updated July 2011

Benefits of BuyWays

1. Confidence of buying on-contract

- State and Clemson-specific contract pricing within buyWays
- Search results guide you to right contract suppliers

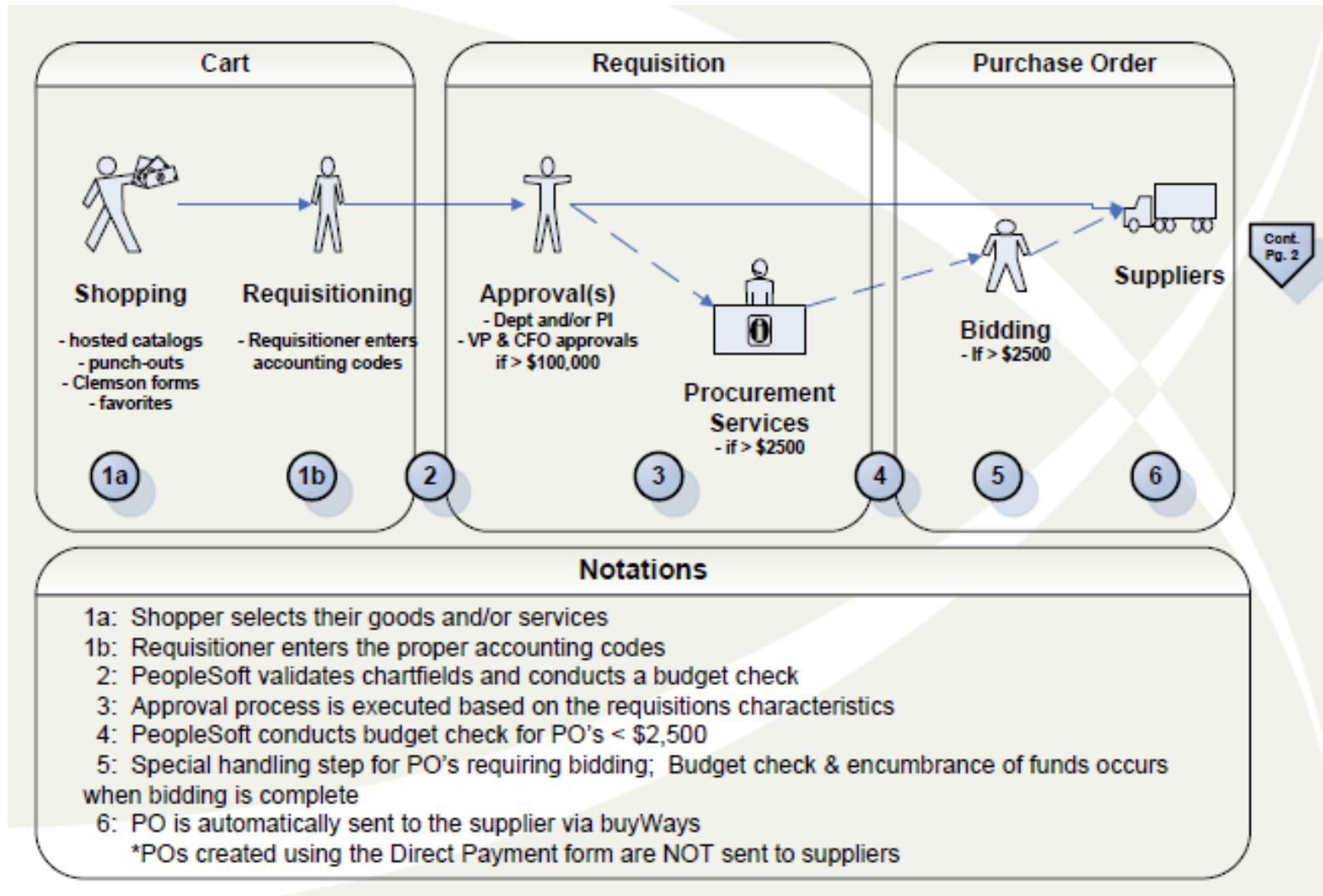
2. Gained efficiencies

- When the shopper researches and selects the goods/services they need without having to convey this information via email or paper messages to you
- When the shopper receives their goods within buyWays
- Receiving eliminates the need for an “okay to pay signature” on the invoice
- Electronic invoices eliminates invoice data entry

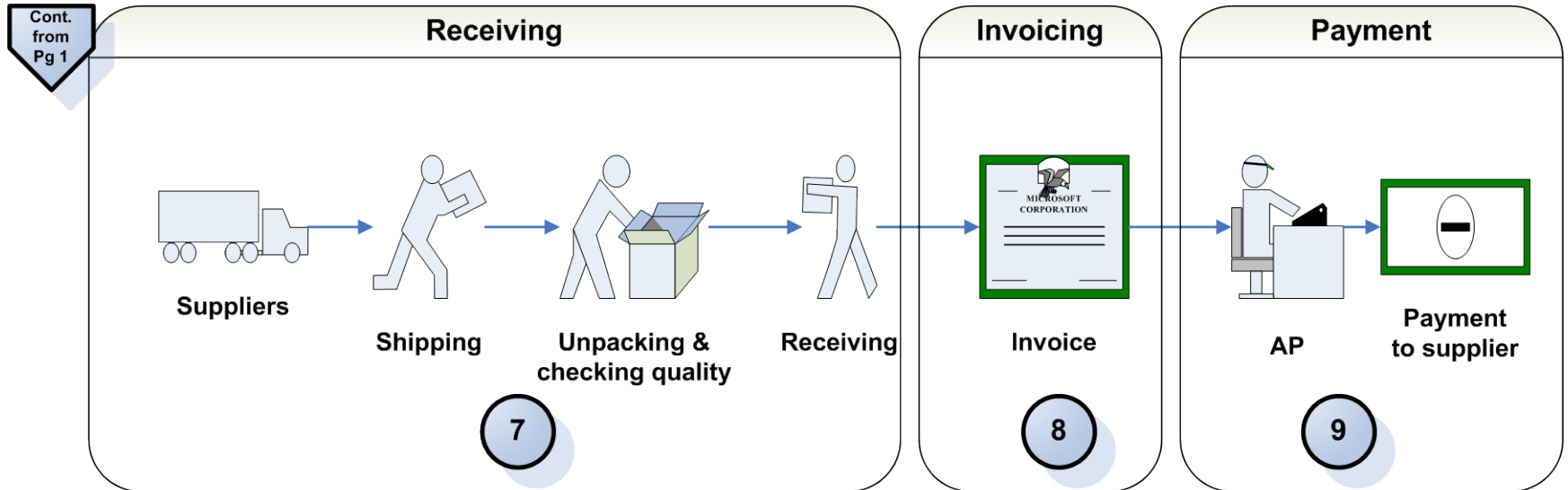
3. Compliance and Controls

- Pre-approval and budget checking prevents back-end adjustments
- Auto-approval limits provides an approved segregation of duties, allowing you and the department chair to balance speed and control
- buyWays ensure departments comply with approval and audit guidelines without having to train employees on the ins-and-outs of Clemson’s procurement policies

Progression of a buyWays Transaction



Progression of a buyWays Transaction



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

Requisition Approval Workflow Steps



Requisition Approval Workflow Steps

Based on the characteristics of the requisition (amount, types of purchases and form type), the workflow is programmed to obtain appropriate approvals based on the criteria noted below.

Note: The majority of your requisitions will have a limited number of approval steps.

Approval Step	Activated by	Approver
Auto Approval	\$ limit set by department	Requisitioner (upon submit)
Department	\$ limit set by department	Department approver
Project	\$ limit set by department	Project approver
Project Coordinator	\$ limit set by business office	Grants coordinator
SPAA	If fund 20 & accounting code=7004, 7005 & 8xxx	Sponsored Programs
Form approvals	<i>Dependent on the form</i>	
Buyer 46	>= \$2,500 and < \$10,000 & not on contract	Certified buyer 46
Director of Procurement	Sole source or vehicle or trade-in	Mike Nebesky
Purchasing Gatekeeper	>= \$2,500 & not on contract	Mike Nebesky or Scott Pigeon
Purchasing Agent Review	>= \$2,500 & not on contract that requires bidding	Buyer
Comptroller	Sole source	Charles Tegen
Notifications	These do not stop the approval process	
Hardware/Software	Hardware or software purchase >= \$2,500	CCIT
EH&S	Controlled substance, recycled, hazardous, radioactive, rad-minor, select agent, toxin, energy star & green	EH&S
Equipment Inventory	Accounting code = 8xxx and >=\$5,000	Property Control

☐ New On-line Reference Tools available to you and your users

- Browser Guidelines
- buyWays Bullets
- Decision Tree
- General Navigation Details
- Icon Descriptions
- Invoicing Nuances
- Progression of a Transaction
- Workflow Approvals
- Quick Reference Guide
- Quick Reference For Reporting
- Supplier Reference
- User Guide

Accounting Code Set up in Profile

- ❑ This feature is new as of July 25, 2011
- ❑ Users can store combinations of favorite accounting codes in their profiles and access them on the cart.
- ❑ Users who buy for different projects and/or split purchases across different codes, can store these frequently used combinations in their profiles and quickly select to use them during checkout.

A code favorite is given a name by the user in order to be easily identified on the profile of the cart.

Users have a new tab on their profile called Code Favorites in the profile under the Purchasing Custom Fields tab.

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Account	Fund	Dept	Program	Class	Project
7201 Supplies:Office	15 CU - State - E and G	5365 Procurement Services	602 Fiscal Operations	130 SC App E&G and Deptl Revenues	1500000 Departmental Default

☐ Hosted catalog *

- Search items by entering known information in the “Shop: All” section
 - Description, SKU or Supplier in the Shop Bar
 - Notes about searching:
 - The plural of a word (beakers versus beaker) can impact search results; recommend using plurals
 - Search results scan item descriptions and categories; so you may get unexpected results because of the category the item falls within
 - Upon receiving your search results, refinements can be made using the left section (drill down by supplier, category, packaging UOM)
 - If you are not finding what you need, select “Advanced Search” and check “Similar Items” or utilize the other advanced search features and try your search again
- Another approach is to start your search by utilizing the “additional search options” and drill down by Supplier or Category
 - Category search allows you to drill down multiple levels to get to the search results you desire

☐ Hosted Catalog – other features

- Quick Order feature is available if you know your catalog numbers (SKU); allowing you to skip the searching for items
- Ability to compare prices across several items
- Ability to save frequently purchased items as favorites; allowing you to speed up your purchasing in the future

- Notes:
 - Our punch-out suppliers have provided us with product/category descriptions, so their punch-out will appear in the search results and guide you to their site when they provide the searched item
 - For contracted items that are not hosted catalog items or punch-outs, buyWays will provide a Contract Vendor Form with the contracted supplier information and contract number filled in for your convenience
 - If you did not find your item, it is possible that Clemson may not have a contract for these goods/services. Feel free to click the link on the left side of the home page labeled “Can’t find what I am searching for” and Procurement will assist you.

☐ Hosted catalog example *

- **Exercise:** Buy standard bond white paper from our contract supplier – Staples
- **Exercise:** Buy an item when I know the SKU #
 - If you do not know a SKU #, use 11310-668 which is surgical tape
 - If you used the example of surgical tape - please note that two options came up. One is a box and one is a case. It is important to select the item with the proper unit of measure for what you are buying.
- **Exercise:** Drill down from a category and select an item of your choice
- **Exercise:** Drill down from a supplier and select an item of your choice

☐ Favorites *

- Expedites shopping for frequently purchased items from electronic catalogs or Clemson Forms
 - Shared Folders are typically set up at the department or college level and the users must be granted administration rights to set up shared folders
 - Contact cubuyWays@clemson.edu if you are unable to set up folders within your college
 - Personal Folders are for you to establish your frequently purchased items
- **Exercise:** Select the item you purchased earlier when entering a SKU # and add this item to your favorites

Punch-out *

- Special Quotes
 - Most punch-outs allow you to pull up a special quote prepared by a sales rep so it can be brought back into buyWays without re-entering the items (Examples: Fisher, VWR, Dell, CDW-G, Sun, ThatWorks, Young Office)
- Availability
 - Most punch-outs will provide you with the product's availability in your shopping cart
- Favorites
 - Most punch-outs allow you to save frequently purchased items on their site
- Order status
 - Most punch-outs provide you the ability to view your order status (back orders, etc.)

☐ Punch-out example *

- **Exercise:** Buying highlighters for the office
 - Select Office Max punch-out
 - Item: Highlighters
 - Select your favorite highlighter
 - Follow the suppliers instructions to bring the item(s) back to your active cart

- ❑ Clemson Forms are custom order forms for buyWays suppliers with unique shopping requirements that would not fit the catalog or punch-out approach
 - Carpet/Flooring Request Form - Use this form to order carpet under the Clemson carpet contract
 - Car Rental Payment Form - Complete this form for invoices that need to be paid to Enterprise Leasing Co Southeast
 - Cancel/Close PO Request – Use this form to notify Procurement Services of needed PO changes or to close a PO
 - Delete/Hold Invoice Form - Use this form to notify Procurement to cancel or hold an invoice
 - Direct Payment Form - Complete this form for any recurring or ongoing payments for which a previous PO has not been completed
 - Name Badge Form - Complete this form to place a name badge order
 - Non-catalog Form -- Use this form to add products/services to your cart that are not available through a punch out supplier or from a hosted catalog supplier
 - Procurement Certification Form -- Use this form to place Exemption 44 (Grant Specified Procurement) orders
 - Payment Request Form - Complete this form for any ONE TIME payment for which a previous PO has not been completed. The amount of this PO **WILL NOT** be encumbered
 - Sole Source Form -- Use this for to request a sole source procurement
 - Trade-In Form -- Use this form when requesting a purchase where a vendor will be giving Clemson credit for an item we will give them as a trade-in
 - Vehicle Purchase Form -- This form should be used to request the purchase of a new vehicle
 - Vendor Quote Form -- Use this form when you have received a special quote from a vendor. Using this form will ensure proper handling of the quote

- ❑ Bolded items are required fields – all other fields are optional
- ❑ Available Actions for all Clemson Forms *

 - Add and go to cart - allows you to add the item and returns you to the cart
 - Add to cart and return - allows you to add multiple items to the cart and clears the fields so you can enter another item
 - Add to Cart – allows you to add multiple items and preserves the data just entered so that you can modify this record for your next entry into the cart
 - Add to Draft Cart or Pending PR/PO – allows you to add to an existing draft cart that has not yet been submitted
 - Add to Favorites – allows you to save a frequently purchased item with this form for quick shopping in the future

☐ Non-catalog Item versus Non-catalog Form *

- Non-catalog Item
 - Useful for entering known items into your cart when there is no need for adding a detailed explanation
- Non-catalog Form
 - Best for anything greater than \$2500 because the form allows for a detailed explanation to be added to the requisition to assist with the bidding process
- Note: If you do not know the right supplier to purchase your item from, select “Supplier Unknown” and Procurement Services will assist you

☐ Useful approach for utilities, temporary help, etc. *

- **Exercise:** Temporary Help charges of \$15,000 for the year. Your temp help charges vary each month.
- Create a Clemson Form with a Quantity of 1 for a Unit Price of \$15,000.00
- This allows you to do partial **cost receipts** and partial invoices for the varying amounts each month
- This speeds up the payment because the invoice will flow through the required invoice matching process without hitting a tolerance exception
- Allows departments get approval for the entire fiscal year and to encumber yearly amounts for recurring monthly payments without having to process a form monthly

Procurement Certification (SPAA 44)

- Include the portion of the grant document that pertains to this purchase on the “internal attachments” link of the form
- If you have the same payment over a period time,
 - For instance, 12 payments of \$1200 over the year
 - Enter Quantity=12 and Unit Price=\$1200
 - Receive and invoice a Quantity of 1 for \$1200 each month
 - This minimizes the need to do a separate Procurement Certification form each month

Change Order Request *

- Form notifies Procurement Services that an action needs to be taken
 - Close a PO
 - Payments may have been made and there will be no more activity against the PO moving forward
 - Relieves the remaining encumbrance
 - Cancel a line
 - Item was not shipped and will not be shipped
 - Cancel a PO
 - PO is not needed anymore
 - NOTE: If a chartfield correction is needed, the following options are available
 - Cancel the PO and reissue a new one OR do a journal entry

Edit the Cart

2010-10-28 jtonkin 01 | 100 item(s), 374.50 USD

Cart - Draft Requisition

home/shop | favorites | clemson forms | **my carts** | search history | my profile | more >>

active cart | draft carts | favorites | my requisitions

Continue Shopping

Shopping Cart 100 Item(s) Subtotal: 350.00 USD

Add Non-Catalog Item Save Proceed to Checkout or Assign Cart to Requisitioner

Cart Name: 2010-10-28 jtonkin 01 Out to Bid:

Description:

Priority: Normal

Supplier / Line Item Details

Show line details For selected line items Add To Favorites Go

Bruce Air Filter Company more info... Contract Number: no value PO Number: To Be Assigned

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Air filter more info...		EA	3.50	100 EA	350.00 USD
Supplier subtotal					350.00 USD

Shipping, Handling, and Tax charges must be entered by the Requisitioner. The values entered here will be budget checked and workflow routed accordingly. Values will also be given to vendor on PO.

Subtotal: 350.00
Sales Tax: 24.50
Use Tax: 0.00
Shipping: 0.00
Handling: 0.00
Total: 374.50 USD

Save Proceed to Checkout or Assign Cart to Requisitioner

See configuration for this requisition view carts

NEW Cart Options
Proceed to Checkout
or Assign Cart to
Requisitioner

- Option to modify the cart name to something more descriptive
- Option to enter a description (i.e., noting the grant/project or lab)
- Click the Proceed to Checkout to review your cart or Assign Cart to Requisitioner

Cart Review

NEW Guided Checkout - This guide will ensure that you have completed the required fields before assigning your cart. You can click on any of the guide boxes to review or modify the default information. Most users have preset default information that was provided by their department. The default information can be modified here or can be modified in your profile at anytime. Click on the **my profile** link next to your name in the upper left corner of buyWays to update your profile before your next purchase.

active cart | draft carts | favorites | my requisitions

General
 Shipping
 Billing
 Accounting Codes
 Internal Notes and Attachments
 External Notes and Attachments
 Final Review
 [Assign Cart to Requisitioner](#)

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account

Requisition | Req Approvals (VIEW ONLY) | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

General	Shipping	Billing
Cart Name 2010-10-28 jtonkin 01 edit Description no value Priority Normal Requisitioner Jennifer Tonkin Contact Phone Number no value Shopper Jennifer Tonkin Out to Bid x	Ship To edit Attn: Jennifer Tonkin Fl/Rm/Ste: - Procurement Svcs Administrative Svcs Bldg 108 Silas N. Pearman Blvd Clemson, SC 29634-5365 United States Delivery Options edit Requested Delivery Date no value	Bill To edit Attn: Jennifer Tonkin Fl/Rm/Ste: Procurement Svcs Administrative Svcs Bldg 108 Silas N. Pearman Blvd Clemson, SC 29634-5365 United States Billing Options edit Accounting Date no value

Accounting Codes

Account	Fund	Dept	Program	Class	Project
no value x Required field	15 CU - State - E and G	5365 Procurement Services	602 Fiscal Operations	130 SC App E&G and Deptl Revenues	1500000 Departmental Default

The bill to and ship to information *should* default for you, if it does not default, click the **edit button** to select the appropriate Bill To and Ship To address – see more info on next slide

Bill To and Ship To addresses

- Are set up for most users by default
- If this information does not default for you, click the edit button to select the appropriate Bill To and Ship To address
 - Search by your four digit department # OR
 - Type in your building name in the description box to select
- “Fl/Rm/Ste” line
 - Only the room number should go in this field
 - Do not duplicate building name
 - Supplier interfaces have limitations that we must accommodate and our guidance will ensure you get your item successfully

Internal notes

- Only viewed by Clemson buyWays users
- Useful for conveying what grant/project, lab or purchase justification

External notes

- Use sparingly or not at all
- Most supplier’s systems automatically place the PO with an external note into their exception queue which is then reviewed, entered and placed into fulfillment manually which slows down the fulfillment of your order
- So placing “urgent” into this field does the exact opposite- it slows it down

☐ Accounting codes

- Approaches *

 - Selecting from user profile
 - Selecting from CU list of accounting codes
 - Just typing it in

- Splits at the header or line level *

 - by price
 - by quantity
 - % of price
 - % of quantity

Tax

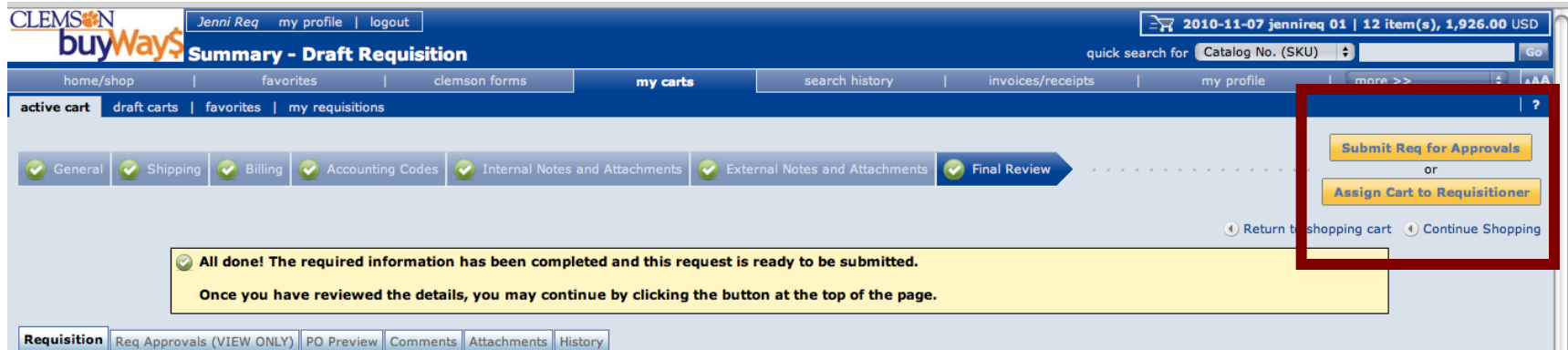
- Default is 7%
- If items are being delivered to a county that is not 7%
 - Override the tax % to the appropriate %
- Clarification: Labor and materials are both taxable items

Shipping and handling

- Contracts typically include shipping and handling, so you should not be including shipping and handling on contract purchases
- All non-contract purchases – the shopper should be requesting this info from the supplier
 - If doing an estimate, go high with the S&H estimate so you do not have to do a new order
 - We recommend that you ask for this information when you are talking to the vendor

Verify requisition and submit for approval

No need to print requisition – paperless transaction supported by internal audit, sponsored programs and records retention policy



Ability to **submit requisition for approval** or to **assign cart to another requisitioner**

Approvals

- Requisitioners cannot be approvers – those that have both requisitioner and approver roles will have the approval role removed
- Auto approval levels set by the department chair - If requisition amount is within the auto approval level, the requisition will be approved upon “Submit Req for Approvals”
- This places the requisitioner in compliance with the separation of duties policy

No need to print PO – paperless transaction support by internal audit, sponsored programs and records retention policy

Receiving

Receiving is required for all buyWays transactions; equivalent to the “okay to pay” signature required today. Receiving may take place as an “assumed receipt” 5 days from invoice in accordance with the Negative Assurance of a Receipt policy for small dollar orders (<\$2500).

A receipt is required for all buyWays transactions

To complete a receipt do the following steps:

- Review/open your PO by using the quick search in the upper right section of buyWays
- Choose **create quantity receipt** or **create cost receipt** from the **Available Actions** drop down menu on the top right of the PO
- Enter a packing slip # - if there is not a packing slip, simply enter in “none”
- Enter the date that items were receive
- Receiving items
 - Ensure the quantities reflect what was received
- Click the **Complete** button near the top of the page

Partial receipts

- Only receive the lines that were delivered
- Remove all lines that have not been delivered

Returns – notify the supplier immediately when a return/exchange is necessary

- Click on the Receive and Return link below the quantity field and then fill in how many items were received and how many items are being returned then select the **Complete** button

Helpful tips

- You should not scan the packing slip - It is not needed by internal audit nor for the records retention policy
- Delivery section is not required – do not take the time to fill this in since it is not currently being used

Invoicing

Invoicing is necessary for payment to be made to the supplier. Invoicing can be electronic or manual. It is imperative to review the PO Summary tab **before** creating an invoice for a PO.

- ❑ **Paper invoices** – defined as an original non-electronic, paper invoice for payment of goods or services
 - To Create an invoice or credit memo complete the following steps:
 - Review PO Summary tab **before** creating an invoice
 - Select **Create Invoice** from the **Available Actions** menu on the right of the PO
 - Enter the **Supplier Invoice Number** and **Invoice Date**
 - Review the taxes, shipping, line amounts and total
 - Click **Save**
 - Click **Review**
 - Scan and attach the invoice in the **Internal Attachments** section – preferred step but not required at this time
 - Click **Complete** – by clicking complete, you are submitting the invoice for payment. Failure to click the complete button, and only saving the invoice, will create a draft invoice only. Draft invoices can be submitted or deleted.

Partial invoices *

- Invoice only the lines that are on the invoice
- Remove any lines that are not on the invoice
- Tax needs to be recalculated based on the partial invoice – header only
- Shipping needs to be adjusted based on the partial invoice – header only
- Accounting codes cannot be changed at this stage of the process
 - Modify the amounts on the **accounting codes tab** when partial payments are being made. Especially when there are accounting code splits at the header or line level.

Delete Invoice Form

- Complete and submit the Delete Invoice Form when:
 - a mistake has been made on the entry of the invoice.
 - a duplicate invoice has been created
- Deletes can be avoided by reviewing the Invoice tab on the PO History prior to creating an invoice

❑ **Exercise:** Enter an invoice utilizing the PO number on the slip of paper handed out to you

❑ Invoice status

- In process – completion of the invoice
- Payable – matched but not paid
- Paid * (Example: Invoice 1077815)
 - Interface will bring back the check information
 - Internal audit will have what they need from , there is no longer a need for you to inquiry and record this information for your records
- Canceled

❑ Payment Information – can be viewed by opening the invoice

- The check or electronic payment information will be populated on the invoice after the payment process has completed. Allow 24 hours for this information to be populated.

- ❑ eInvoicing suppliers are identified with these icons
 - E-invoicing supplier for all orders in buyWays
 - E-invoicing for punchout and hosted catalog orders only
- ❑ Review website of eInvoice vendors *
- buyWays Bullets will notify you of additions
- ❑ Electronic invoicing “eInvoice”
 - No invoice entry is required
 - Review the PO Summary tab to eliminate duplications when an eInvoice has already been created
 - However a receipt is required

History/Search

Tracking your requisition or PO

- Search history > My Requisitions > Requisition History

Reporting/inquiries on your history

▪ Search history

- PO history
- Requisition history
- Receipt history
- Invoice history

▪ Missing receipts report

- Required report for monitoring this important activity

▪ Missing invoices report

- Required report for monitoring this important activity

▪ Report on PO's that are still open

- FY end report

▪ Exports

Refer to the **Quick Reference Guide for History and Reporting** available in the training section of the buyWays Information Portal:

<http://www.clemson.edu/cfo/procurement/buyWays/training.html>

buyWays online information located:

- <http://www.clemson.edu/cfo/procurement/buyWays/index.html>

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 - Sending an email with no subject to listserv@clemson.edu with the following content in the body of the message:

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Your Name

buyWays support:

- Email: cubuyways@clemson.edu
- Phone calls: buyWays help desk @ 656-5581