buyWays Training

For Requisitioners and Invoice Handlers

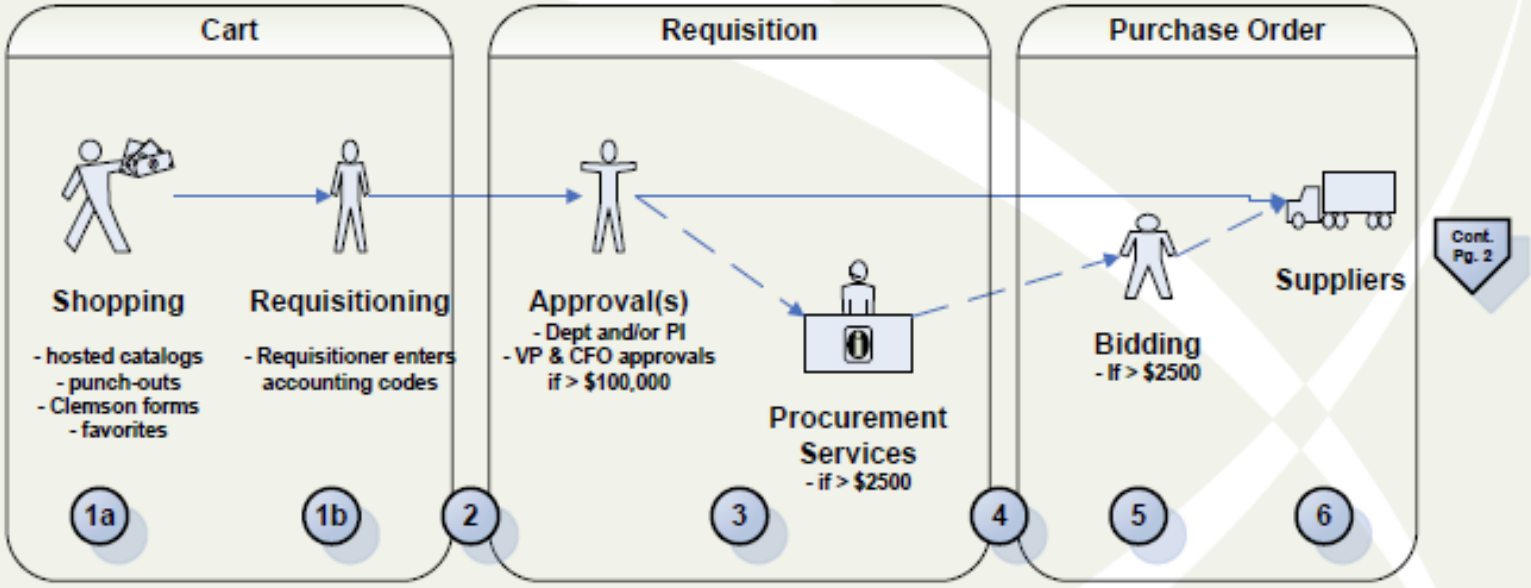
Last updated May 2012

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

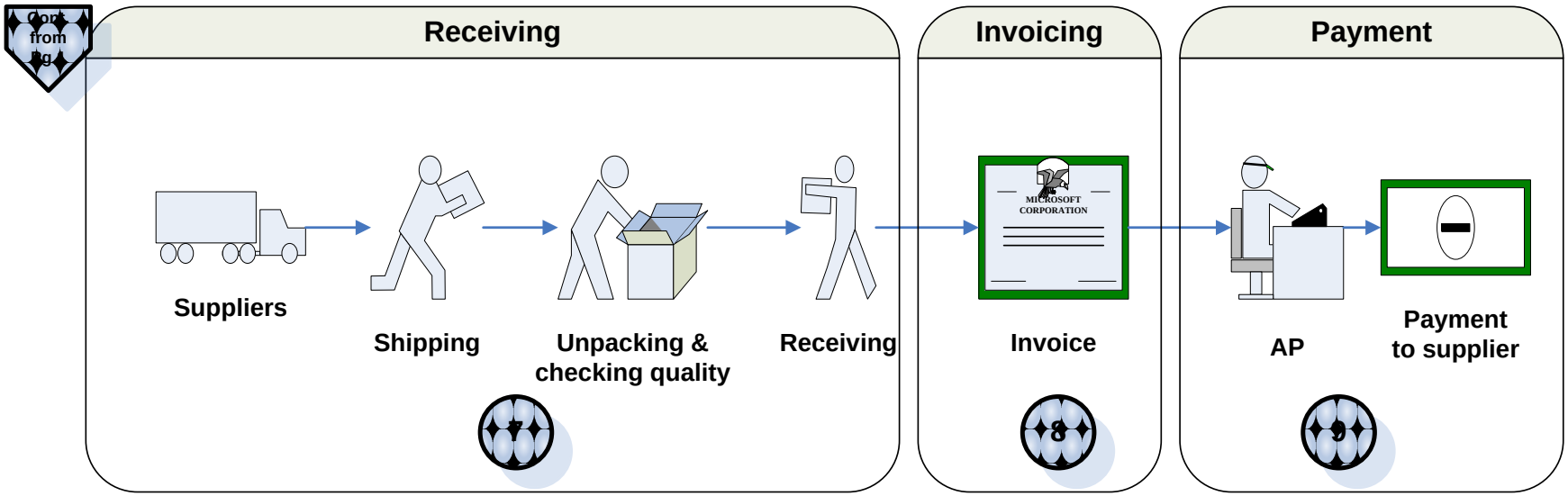
Progression of a buyWays Transaction



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; Budget check & encumbrance of funds occurs when bidding is complete
6: PO is automatically sent to the supplier via buyWays
*POs created using the Direct Payment form are NOT sent to suppliers

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.

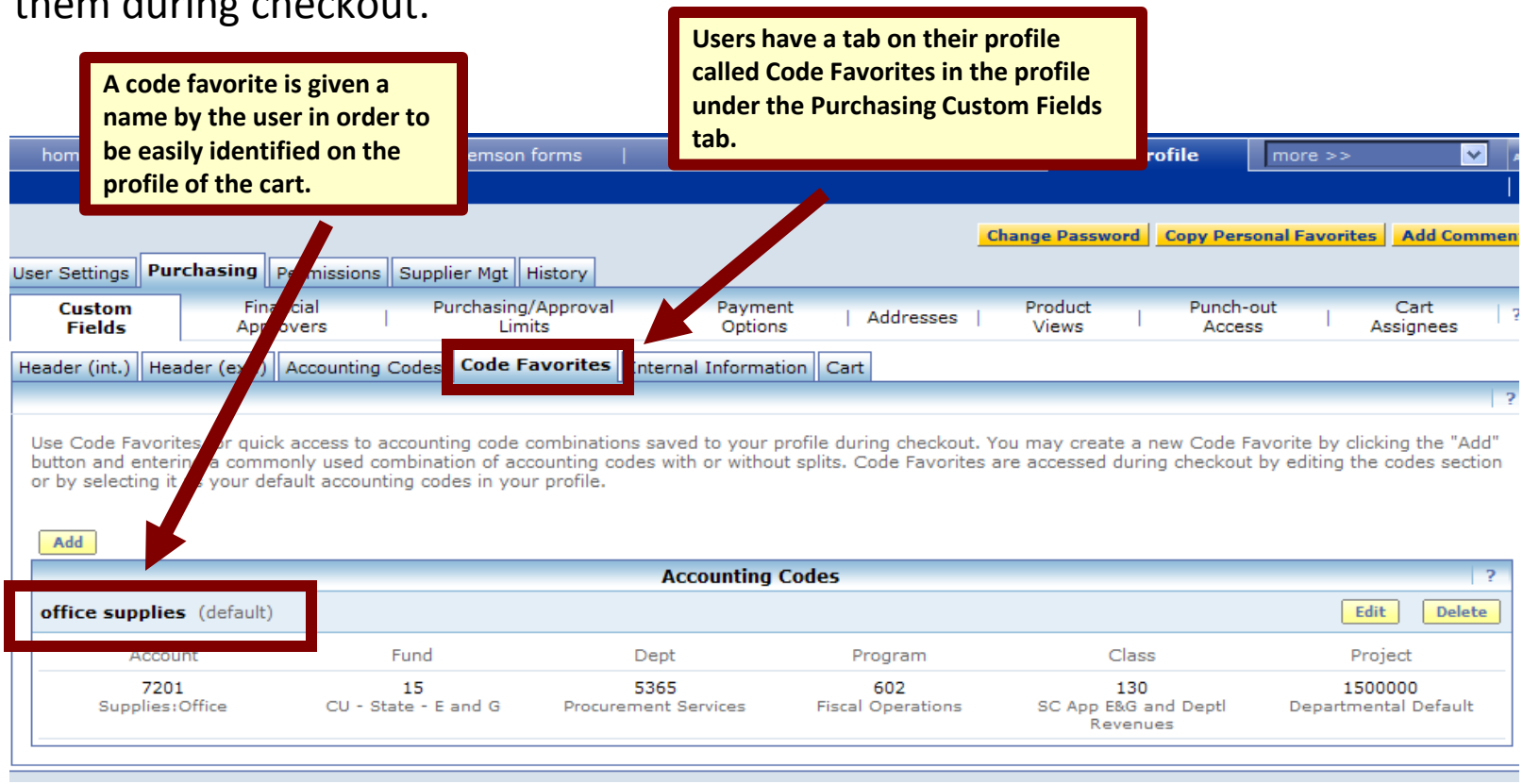
Approval Step	Activated by	Approver
Auto Approval	$ limit set by department	Requisitioner (upon submit)
Department	$ limit set by department	Department approver
Project	$ limit set by department	Project approver
Project Coordinator	$ limit set by business office	Grants coordinator
SPAA	If fund 20 & accounting code=7004, 7005 & 8xxx	Sponsored Programs
Form approvals	*Dependent on the form*	
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

buyWays Overview

- 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

- 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.



Shopping

❑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 searches 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

Shopping

❑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.

Shopping - Exercise

- 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

Shopping - Favorites

❑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

Shopping

❑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, 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.)

Shopping – Exercise

- 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

Shopping – Clemson Forms

- 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 Purchase 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

Shopping – Clemson Forms

- 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

Clemson Forms

❑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

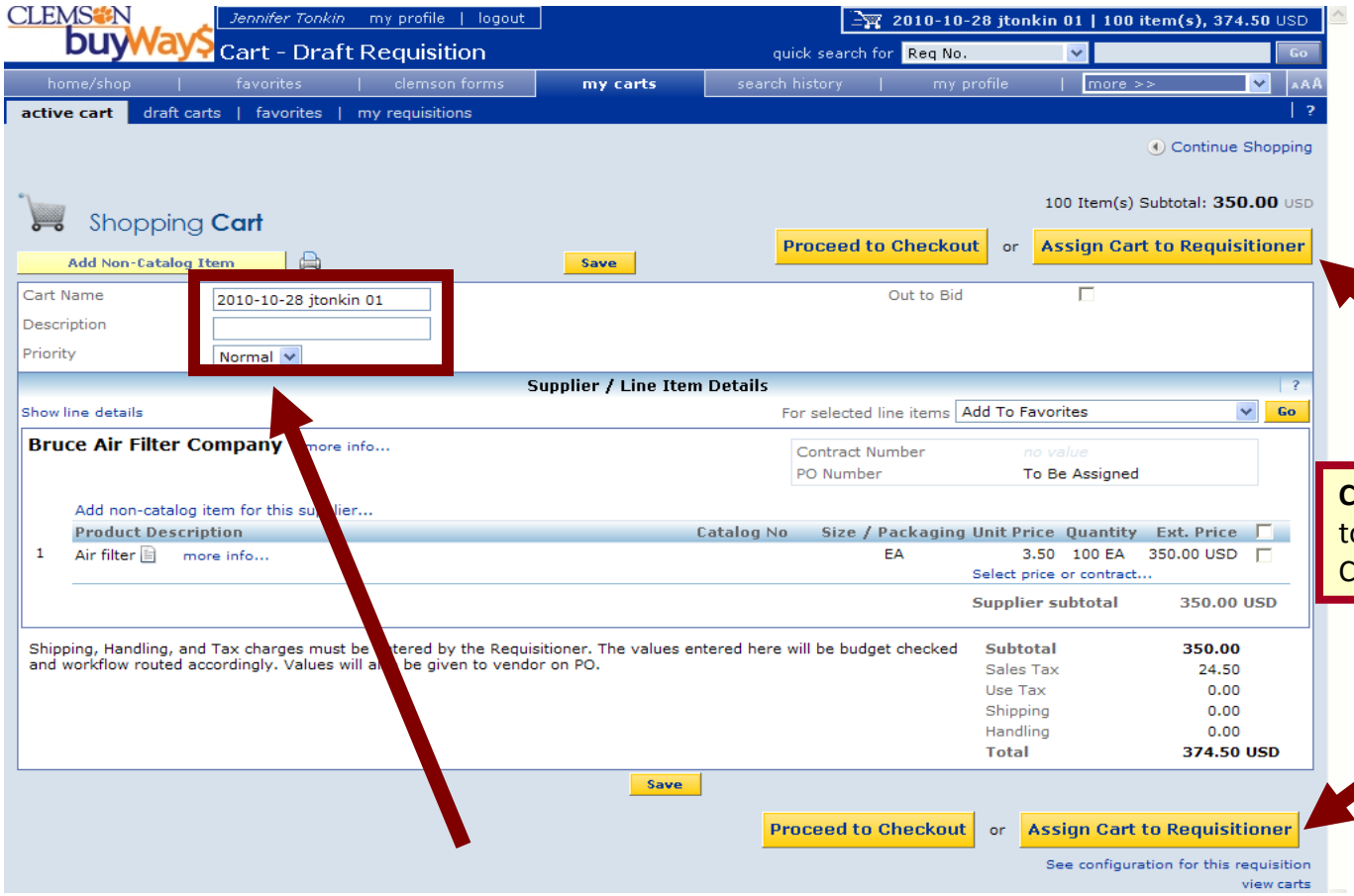
❑Useful approach for utilities, temporary help, etc. *

- 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

Clemson Forms

- 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
- Cancel/Close PO 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

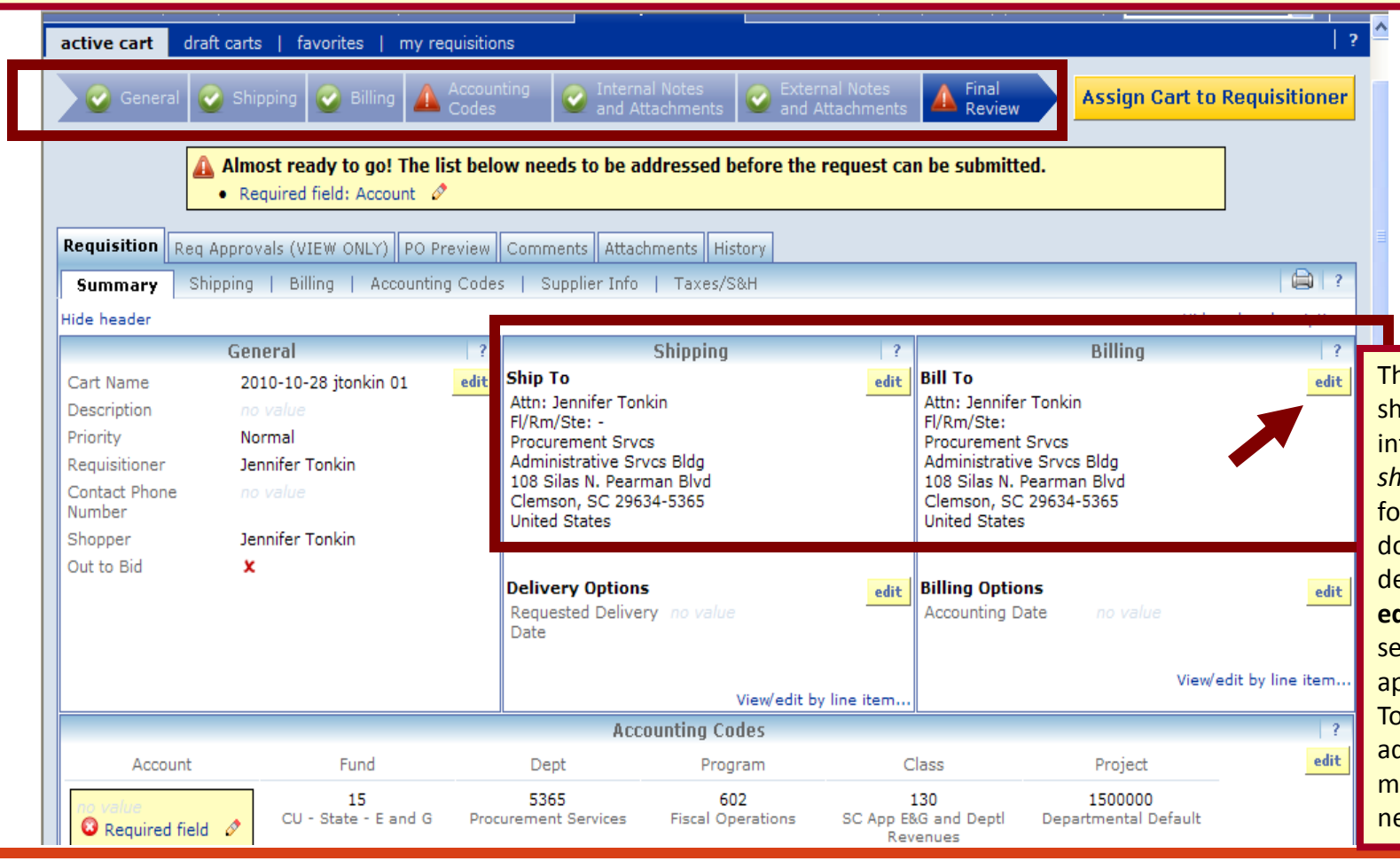
Edit the Cart



- 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 by 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.



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

Shopping – General Information

- 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

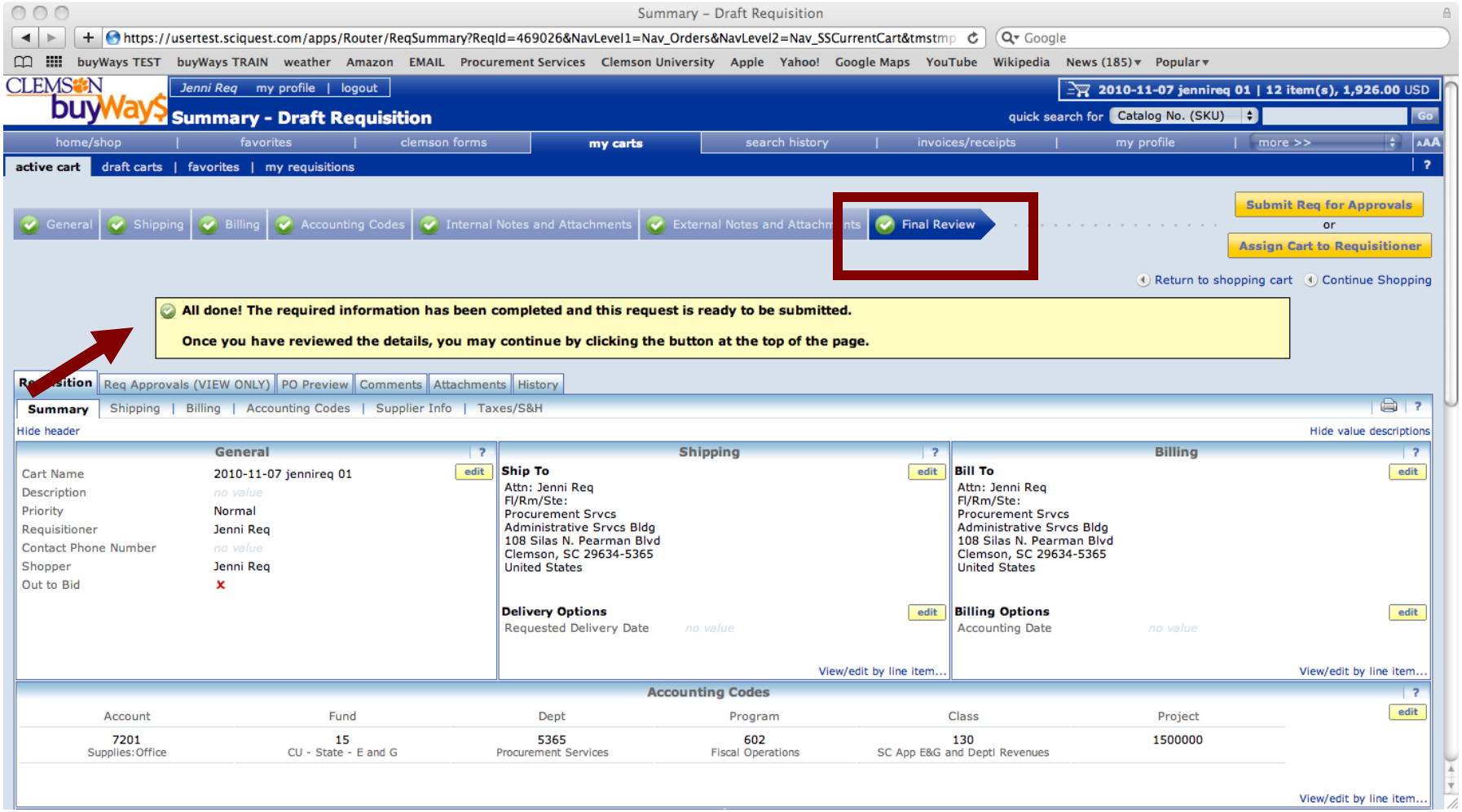
Requisition Activities

- Accounting codes
  - Approaches *
    - Selecting from user profile
    - Selecting from CU list of accounting codes
    - Selecting from User Favorites
    - Just typing it in
  - Splits at the header or line level *
    - by price
    - by quantity
    - % of price
    - % of quantity

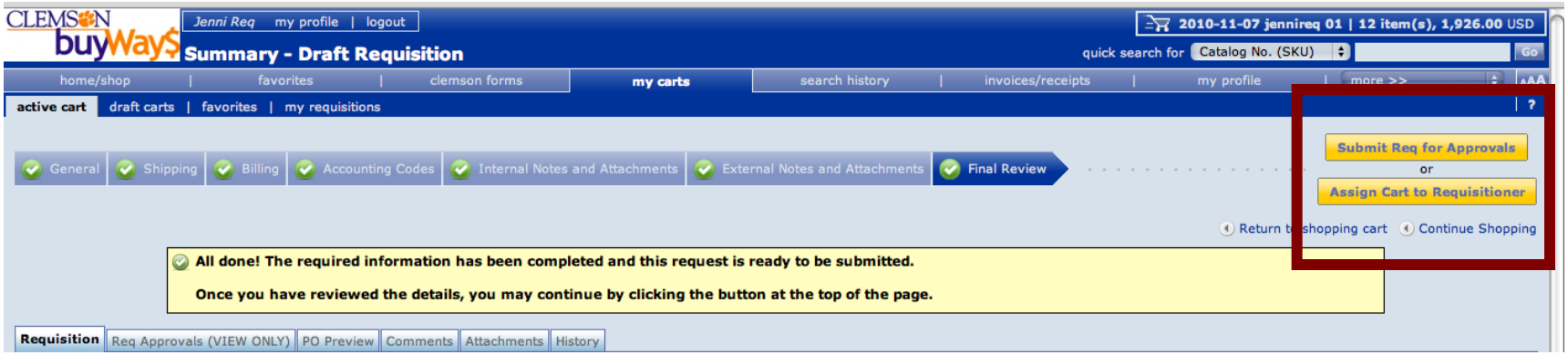
Requisition Activities

- 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

Requisition Approvals



Submit cart or Assign cart



- ❑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).

Receiving

- A receipt is required for all buyWays transactions over $2500.
- To complete a receipt do the following steps:
  - Review/open your PO by using the "quick search for" 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, then click Go
  - 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.

Invoicing

- **Paper invoices –** defined as an original non-electronic, paper invoice for payment of goods or services
  - To Create an invoice 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.

Invoicing

❑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/Hold Invoice Form

- Complete and submit the Delete/Hold 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

Invoicing

- 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.

Invoicing

- 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 for orders over $2500.

History/Search

Information, History and Exports

- Tracking your requisition or PO
  - Record Search for "All Records" – simple search or advanced search
  - My requisitions
  - My purchase orders
  - My Invoices
- Reporting/inquiries on your history
  - Record search
    - 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 Support and Reference Materials

- buyWays online information located:
  - http://www.clemson.edu/cfo/procurement/buyWays/index.html
- Sign up for buyWays Bullets:
  - You can sign up to receive this publication in your email by:
    - Sending an email with no subject to **listserv@clemson.edu** with the following content in the body of the message:

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