



## UNIVERSITY OF MASSACHUSETTS DARTMOUTH PROCUREMENT MANUAL

### Section 2.1 - The BuyWays eProcurement Solution

**UMass BuyWays:** The UMass BuyWays system is a one-stop shopping center for eProcurement that provides users with an easy solution to process all procurement requirements.

**BuyWays Implementation:** The Board of Trustees mandated the President's Office to find and implement a user friendly system to accommodate all purchases. A Request for Proposal was done, and numerous vendors and systems were intensely reviewed by a project team consisting of members from each campus. The system and vendor that was selected was Sciquest, the #1 vendor in the industry used by educational institutions all over the world to accommodate their purchasing needs. SciQuest was branded as UMass BuyWays and implemented in July of 2013.

**Functionality:** BuyWays offers broad procurement functionality several highlights of which are listed below.

- Allows the creation of electronic requisitions which, once approved, become purchase orders that are electronically distributed to the vendor.
- Allows for electronic workflow and approval of requisitions based on speedtype, dollar amount and commodity type.
- Allows for hosting of vendor catalogs that a user can shop from and then prompt the system to automatically convert their shopping list into a requisition and, once approved, a purchase order that can be submitted to the Vendor.
- Provides an Amazon-like shopping experience for the purchase of goods through a number of Punch-out and Hosted Catalogs.
- Provides real time status information on requisitions and purchase orders.
- Improves processing times through electronic processing of purchase orders.
- Gathers information which will allow for leveraging of spend across all campuses to obtain lower overall average costs.

**Access:** Faculty, Staff and Administrators gain access to BuyWays by completing the User Access Security Form which can be found online at <http://www.umassd.edu/peoplesoftfinance/forms/>

**Training:** Prior to being granted access to BuyWays, users are required to attend a training session to become familiar with the system. Training is scheduled on a regular basis and is posted online under the "Training Opportunities" webpage within the UMassd Portal. In order to view training opportunities and register for courses please follow the following steps:

1. Login to the UMassD Portal
2. Navigate to the dropdown menu under "Staff" located towards the top left portion of the screen
3. Within the dropdown menu select "Training Opportunities"



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4. Select from either the short list available on this screen or select “Full Calendar” at the bottom of the page for additional training opportunities
5. Click on a course to see a full description
6. Once you are ready to register for a course select “Register for this Event” and complete the online registration process

**NOTE: In order to streamline training and maximize time devoted to training activities, required training is separated into separate groups that focus on the most applicable topics for each group. In order to gain access to BuyWays, Shoppers must complete Shopper training, Requisitioners must complete Requisitioner Training and Approvers must complete Approver training. For more information on these roles refer to the sections below.**

**Roles:** There are 3 roles that a user can be assigned within the BuyWays System which are briefly explained below.

- **Shopper:** This role grants access to an individual to create a “shopping cart” in BuyWays for the items that they are looking to purchase and to assign it to a “**Requisitioner**” for review, assignment of accounting codes and submission as a “requisition” for approval by the budget authority. This role is a valuable resource for departments with many employees involved in the purchasing process. It allows the shopping process to be done by the end user who best understands the requirements of their area while simultaneously requiring that a “requisitioner” who is generally a administrative assistant reviews all department purchases and assigns them to the appropriate account codes prior to any orders being placed.
- **Requisitioner:** This role grants all privileges assigned to a shopper but also includes the ability to submit carts as requisitions to the appropriate budget authority for approval without needing to assign the cart to another user first.
- **Approver:** This role is assigned to individuals with “budget authority” and grants those individuals the ability to approve the expenditure of funds from their assigned budgets through the internal requisition process. Approvers are able to review and either “approve” or “return” requisitions submitted against their budget(s) by a requisitioner. Additional approval roles can be granted such as “fund” or “commodity” approvers as determined and approved by Procurement. Based on the dollar threshold and type of purchase, Procurement may review requisitions approved by an “Approver” prior to issuing a purchase order to the vendor, however for most small dollar common purchases, the system will generate a purchase order automatically following department approval.