UMass Medical School BuyWays Employee Training

October 2016

Introduction

- UMMS BuyWays is an electronic requisition/order system

- BuyWays is a database system for buying goods and services at UMMS

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Agenda

How UMMS BuyWays works in terms of:

- Roles

- Catalogs and Vendors

- UMMS Financial Systems Integration - Terminology

- BuyWays Job Aids

- How it Works – Step by Step Training Guide (7 Sections) including BuyWays Examples

- User Support

- After Webinar

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Roles

- Each user in BuyWays has specific roles that define what the user is able to do in the system

  - **Shopper –** Can shop for items, add order information and assign cart to a Requisitioner (BuyWays Training Guide Sections 1- 5)

  - **Requisitioner** – Creates requisitions and is responsible for reviewing/updating their Shopper's carts (BuyWays Training Guide Sections 6 – 7)

  - **Receiver** – Creates receipts

  - **Approver** – Can approve or return a requisition to the requisitioner

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Catalogs and Vendors

- **Hosted Catalogs** are housed directly in BuyWays. They are updated periodically based on the contract with the supplier.

- **Punch-Out Catalog** are not housed within the BuyWays site. Selecting a Punch-Out vendor's catalog will bring you to the vendor's site with UMass contracted items.

- **Non-Catalog Order** are orders not available through hosted catalogs or punch-out catalogs.

- **UMMS Worcester Form (Worcester Encumbrance-CFS Request)** is a template form used only for Contracts for Professional Services requisitions equal to or greater than $10,000.

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UMMS Financial System Integration

- BuyWays Terminology

  - **Chartfields** – Chartfields are the individual components, or fields, that when combined make up a Chartfield String.

  - **Chartfield String** – The Chartfield String is the combination of chartfield values that together define a departmental cost center or other accounting entities to varying levels of detail. The chartfield string may contain the following codes: Business Unit, Fund, Department, Program, Project/Grant, and Class Code. This budget information is specific to your department.

  - **Speedtype** – A six digit code that ties to a specific Chartfield String. The Speedtype is used to simplify data entry by eliminating key strokes.

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UMMS Financial System Integration

- BuyWays Terminology

  – **Accounting Codes** – A six digit code used to categorize actual expenses. This code describes the nature of the goods or services purchased, e.g. Computers, Capital Equipment, etc.

  – **Commodity Code** – It routes your requisition through the approval workflow, it also sets AP tolerances, and the receiving requirements; See Commodity Code Crosswalk for more information.

  – **Vendors** – A vendor must be established as a vendor in UMMS Financial System to be used in BuyWays. If you cannot find the vendor you are searching for when searching on a non-catalog requisition, please obtain a W-9 from the vendor and submit to the Accounts Payable Dept, see Financial Services, AP forms.

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BuyWays Reference Documents

- Before you access the BuyWays Test Site, access and print the following reference documents you will need as you go through the Test Site:

  - **UMMS 2016 BuyWays Step by Step Training Guide and the included BuyWays Examples (part of Guide):**

    - **BuyWays SHOPPER Example I** – Fisher Scientific: Create an External (PUNCH-OUT) CATALOG Order (Shopper)
    - **BuyWays SHOPPER Example II** – Sigma Aldrich: Create an External NON CATALOG Order (Shopper)
    - **BuyWays REQUISITIONER Example I** – Fisher Scientific: Act on Your Fisher Shopper Cart (Requisitioner)
    - **BuyWays REQUISITIONER Example II** – Sigma Aldrich: Act on Your Sigma Aldrich Shopper Cart (Requisitioner)
    - **BuyWays REQUISITIONER Example III** – Create a Blanket Order (Requisitioner)

  - **UMMS Crosswalk from Account Code to Commodity Code**

  - **UMass Medical School BuyWays Employee Training Power Point Presentation**

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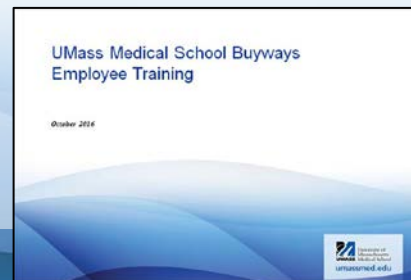
How It Works

- Have the following printed items on your desk:
    - UMMS 2016 BuyWays Step by Step Training Guide with BuyWays Examples (**included w/ Guide**)
    - UMMS Crosswalk from Account Code to Commodity Code
    - BuyWays Employee Training Presentation

- Access the <u>UMMS BuyWays test environment link here</u> or go to
    - Human Resources website\Learning and Development, then "Employee Training" left tab, click BuyWays training

Role	Shopper	Requisitioner
Login:	wtrn2	wtrn17
Login	wtrn3	wtrn18
Login:	wtrn4	wtrn19
Login	wtrn5	wtrn20
Login:	wtrn6	wtrn21
Login	wtrn7	wtrn22
Login:	wtrn8	wtrn23
Login	wtrn9	wtrn24
Login:	wtrn10	wtrn25
Login	wtrn11	wtrn26
Login:	wtrn12	wtrn27
Login	wtrn13	wtrn28
Login:	wtrn14	wtrn29
Login	wtrn15	wtrn30

- Login to the test environment per Role
    - Username:
        - Shopper Role– **see chart**
        - Requisitioner Role – **see chart**
    - Password for each role: **password**

- Review the "Training Guide" as you go through UMMS BuyWays Test Environment. Then, go to the "BuyWays Examples" (at end of the Guide) and apply the practice scenarios. Begin:
    - Sign in as a Shopper
    - Go to "BuyWays Example I" – Fisher Scientific
    - Through to "BuyWays Example III" – Create a Blanket Order

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User Support

- New User Support – Access Additional Training/Job Aids
  - Follow this path:
    - Human Resources Website
    - Learning & Development Horizontal Menu Tab
    - Employee Training Left Navigation Menu Tab
    - BuyWays
      - By Role
        - Screencasts
        - Job Aids
        - Interactive Tutorials
- Experienced User Support - Access Additional Training/Job Aids
  - Follow this path:
    - UMMS Website (Intranet)
    - Purchasing Left Navigation Menu Tab
    - BuyWays Information
    - BuyWays Job Aids and Forms
      - Alphabetically, by verb and noun

- Questions? Contact Information:
  - BuyWays@umassmed.edu
  - Phone 6-3900

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After Webinar

- Webinar Registration Captures your BuyWays Webinar Participation
  - Upon completion of the BuyWays Webinar your registration is sent to Worcester Finance Security

- Manager Approval
  - Your Manager will approve your BuyWays access by completing the required Finance Security Form

- Worcester Finance Security will:
  - Assign your roles
  - Send you an email notification (with a link)

- You Should:
  - Login to BuyWays production using your network username and ID
  - Set up your user profile
  - Refer to job aids and the help desk: buyways@umassmed.edu or phone: 6-3900

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