

VPF POLICY CHANGES

And other updates

VPF POLICY CHANGES REGARDING RECORD RETENTION

1. Electronic Imaging

- “Starting **February 1, 2018**, the new policy will allow you to discard paper records after uploading a complete and legible electronic image to a VPF-managed application (Concur, B2P, ProCard Inbox, eRFP, or Journal Vouchers). There will be no need to retain paper copies of these records.”

How will this change our process in the Chemistry Department?

- **After you have uploaded receipts into Concur or the eRFP system and confirmed that they are complete and legible, you may discard the hard copies.**
- There will be **no change** to our ProCard approval process.
- We will **not** upload electronic images of records into the B2P system.

VPF POLICY CHANGES REGARDING RECORD RETENTION (CONT.)

2. \$75 Threshold for ProCard Receipts

- “Currently, Procurement Card (ProCard) holders must keep receipts for all purchases, while Travel Card purchases of \$75 or under generally do not require receipts. Starting February 1, 2018, our new policy will extend the \$75 threshold already in place for the Travel Card to the ProCard. ”

How will this change our process in the Chemistry Department?

- There will be **no change** to our Procard process. Receipts still required for charges under \$75.

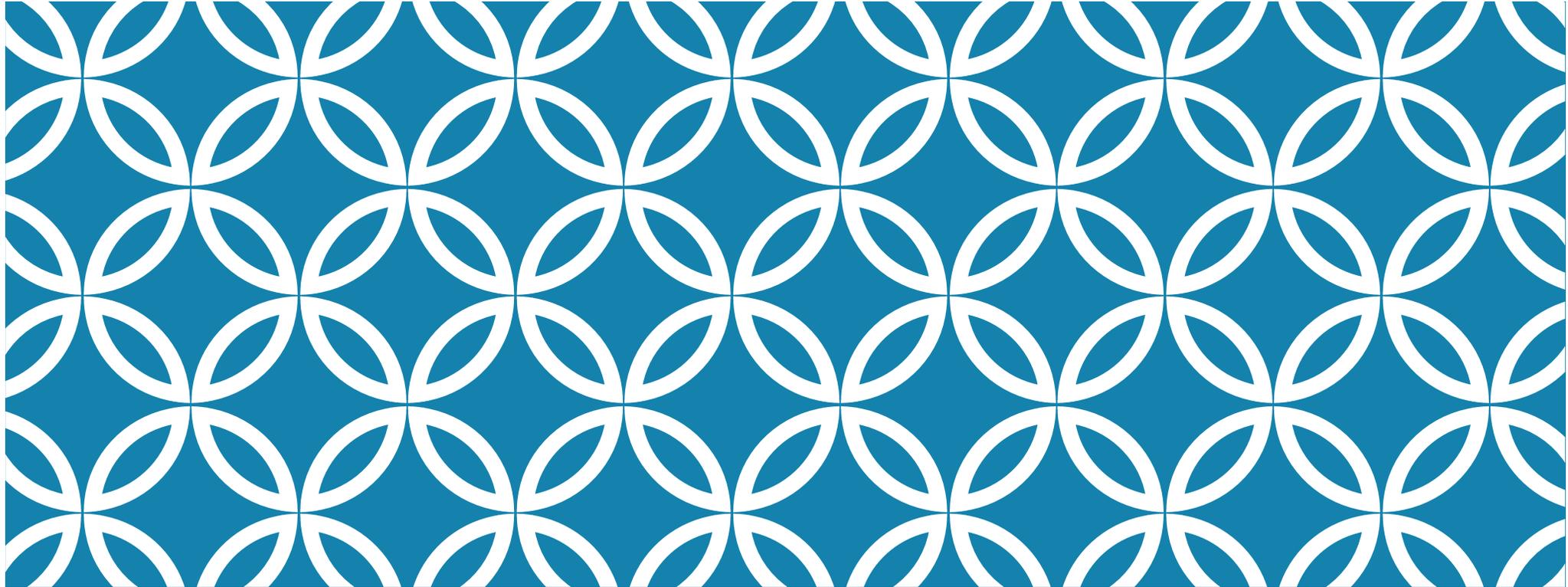
VPF POLICY CHANGES REGARDING RECORD RETENTION (CONT.)

3. B2P Receiving

- “The B2P system includes a "Receive" feature that you can use to mark the date/quantity received and confirm the items are in satisfactory condition. Once you have done so for all items listed on the packing slip, you may discard the paper packing slip. Invoice approvers in B2P are able to see whether orders have been marked Received.”

How will this change our process in the Chemistry Department?

- **We will be taking advantage of this policy change and going paperless!**



B2P RECEIVER ROLE

And other updates

RECORDING RECEIPT IN B2P

1. Receiving feature of the B2P system allows us to:

- Mark items or services “Received” or “Partially Received”.
- Note quantity of item or dollar amount that has been received.
- Note date received.
- Accurately track partially received/missing items.

Why is this important?

- This will allow us to more accurately track the status of all B2P orders.

RECORDING RECEIPT IN B2P (CONT.)

2. Who should receive items?

- Person who placed the order.
- Person with a receiver role who places orders for entire lab.
- AA with a confirmation from the purchaser that item/s have been received.

When marking on behalf of someone else:

- **If receiver is entering items for another lab member, they must indicate in the comments who the order was for, condition received, any issues and date. For example: “Per John Doe, item was received in good condition on 8/18/17.”**
- **If authorization is needed, submit request for ‘B2P central receiving role’.**

RECORDING RECEIPT IN B2P (CONT.)

3. Before disposing of physical packing slip:

- Have items been received in good working condition?
- Have all items received been marked in B2P under corresponding PO?
- If there is an issue, has the supplier been contacted?
- If there is an issue, has a comment been added to the PO?
- If item no longer available, has a change request been submitted?
- Has the paperwork been checked for invoices?

Why is this important?

- **Using B2P “Received” functionality is proof of receipt, a sufficient substitute for paper and is considered a digital signature, accuracy is essential! If you can’t mark it, don’t toss it.**

RECORDING RECEIPT IN B2P (CONT.)

4. Packing slips that need to be saved.

- Any non-B2P packing slips.
- **Blanket orders.** Since there is currently no way to mark individual items received for a blanket order, we must continue to collect packing slips. A solution to this is to close the blanket and pay these charges with a PCard if allowable and within credit card limits. Some vendors unfortunately don't accept credit card payments (Airgas, because it's only 2018, why would they?)
- Common blanket vendors: Airgas, Dry Ice Corp, Robertson Microlit, Harvard CNS, etc.
- File packing slips by Faculty>Account>Non-B2P.

RECORDING RECEIPT IN B2P (CONT.)

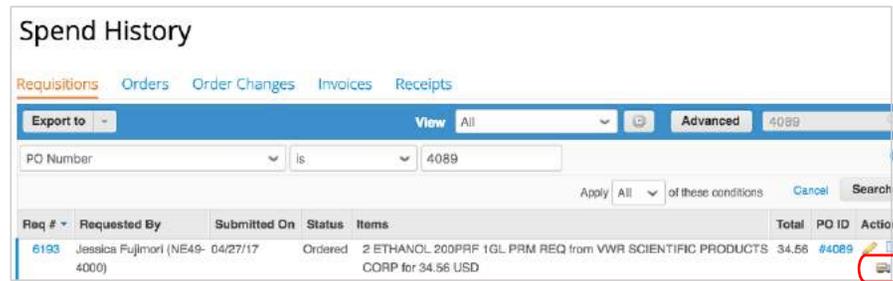
5. Benefits of new process

- Improved order tracking.
- More easily accessible information for FRCs.
- Less time digging through packing slips when researching FRC items.
- Better tracking of outstanding orders.
- Reduced filing time.
- More efficient/faster invoice approval (except for blankets).
- More time to concentrate on other important tasks.

Example 1: Receiving an Order You Placed

When an order you placed is fulfilled (items are received or services are rendered), you can mark it Received through your Spend History page.

1. Go to your name at the top right and click **Spend History**.
2. Click **Advanced** to search for the B2P PO.



3. Click the Receive  icon to enter the Receiving screen.



Example 2: Receiving an Order Someone Else Placed

- Go to the **Inventory > Receive** tab and click **Advanced** to search for the B2P PO.
 - To Receive multiple orders at once, change the filter to **Apply Any of these conditions** and click the  icon to search for other POs.
 - To create a saved, custom filter by cost object, PI name, or other criteria, go to the **View** dropdown and select **Create View**.

Receive

To specify asset tags or other details, please click the "Detailed Receipt" icon. Partial receipts are allowed in both "Quick Receipt" and "Detailed Receipt".

Export to: [dropdown] View: All [dropdown] Advanced [dropdown]

PO ID: [dropdown] is: 4151 [dropdown]

PO ID: [dropdown] is: 4152 [dropdown]

Apply: Any of these conditions [dropdown] Search

PO ID	Line	Req	Item	Supplier	Qty	UOM	Price	Line Total	Need by	Received	Receipt Date	Quick Receipts	Attachments	Actions
4152	1	6310	10 RCT Basic Gial Cells Kit	LONZA WALKERSVILLE INC	1	Piece	180.00	180.00	None	0	[input]	[input]	All	Add File
4151	1	6275	Lab Supplies	VWR SCIENTIFIC PRODUCTS CORP	1	Each	150.00	150.00	05/25/17	0	[input]	[input]	All	Add File

- For each PO, enter a receipt date and quantity received, or check All.

PO ID	Line	Req	Item	Supplier	Qty	UOM	Price	Line Total	Need by	Received	Receipt Date	Quick Receipts	Attachments	Actions
4152	1	6310	10 RCT Basic Gial Cells Kit	LONZA WALKERSVILLE INC	1	Piece	180.00	180.00	None	0	05/22/17	1.0	All	Add File
4151	1	6275	Lab Supplies	VWR SCIENTIFIC PRODUCTS CORP	1	Each	150.00	150.00	05/25/17	0	05/22/17	1.0	All	Add File

- Scroll down and click **Save**.
 - The receipts are saved and accessible via the **Detailed Receipt** icon under Actions.
 - If you mistakenly Receive an order, you can **Void** the receipt by going to Inventory > View Receipts, locating the receipt, and clicking Void under Actions.

CREATE A CHANGE ORDER IN B2P

1. Person who created orig. Req. can submit a change order to update:

- Commodity Code (GL)
- Cost Object
- Quantity of items
- Price for services
- Delete or add line items
- Add attachments to line items
- Add approvers or watchers
- Add comments

CREATE A CHANGE ORDER IN B2P (CONT.)

- 2. It is important to do these updates especially if the order total changes. For example, if an order was originally meant to receive 10 items but only 5 were delivered and the remaining 5 were cancelled. The order will need to be updated. If it is not, then the remaining 5 items will continue to show up as unreceived items.**

Create an Order Change

1. From the **Spend History - Orders** tab, search for and open the Purchase Order you wish to change.
2. Scroll down to the bottom of the purchase order window to the action buttons and click **Request Change**. The line item fields open.

The screenshot displays the 'Lines' interface with the following data:

Type	Item	Qty	Unit	Price	Total	Received
1	Caper Stacking Chair	20	Each	256.680000	5,133.60	0

Fields below the table include:

- Need By Date: [Empty]
- Source Part Num: WC420P-BK-G1-U5-BK-6V-01
- Commodity: Furniture
- Account: MIT COA
- Period: [Dropdown]
- Attachments: Add File | URL | Text

Summary: Total 20 Units, 5,133.60 USD

Annotations:

- For items, you can change Quantity. For services, you can change Price.
- You can change the Billing. Click the magnifying glass icon for single billing, or the split icon for split billing.
- Attach documents

UNRECEIVED ITEMS REPORT

- 1. AAs will run report weekly/bi-weekly depending on the lab size.**
 - Regularly running the report will reduce the number of unmarked items.
 - A report template has already been created. AAs will need to update the information before saving and running the report for the first time.

Unreceived Orders

Total Unreceived: 665,888,507.28 USD

PO ID	Req #	Line	Requested By	Order Date	Item	Supplier	Account Code	Qty	Price	Remaining	Unreceived Total
122628	138263	1	Travis Marshall-Roth	02/20/18	GLOVE POWDE	VWR SCIENTIFIC PRODUCTS CORP	420214-6932374 (Surendranath, Yogesh)-SG_CHEM70 (D_CHEM) [A]-SPON	1	98.63	1	98.63
122628	138263	2	Travis Marshall-Roth	02/20/18	GLOVE POWDER FREE ALOE NITRILE L	VWR SCIENTIFIC PRODUCTS CORP	420214-6932374 (Surendranath, Yogesh)-SG_CHEM70 (D_CHEM) [A]-SPON	1	98.63	1	98.63
122628	138263	3	Travis Marshall-Roth	02/20/18	KECK CLIPS 14 20 14 35 PK10	VWR SCIENTIFIC PRODUCTS CORP	420214-6932374 (Surendranath, Yogesh)-SG_CHEM70 (D_CHEM) [A]-SPON	2	23.31	2	46.62

View Chemistry-Not Receiv

- Chemistry-Not Received**
- Unrecieved (MIT)
- Unrecieved RBG
- Create View

Editing data table view

General

Name

Visibility Only Me
 Everyone
 Restrict by content group

Editable by all

Start with view

Created By David D'Amore (6-333)

Conditions

Apply of these conditions:

contains

Columns

IMPORTANT!

Supplier Country

Supplier Payment Type

UOM

Default Sort Order

Sort by in ascending order.

Cancel

 Delete

Save as New

Save



Unreceived Orders

Total Unreceived: 665,898,876.50 USD

View
Jamison-Not Receiver
Advanced
Search

Order Date
between
12/01/17
and
02/01/18
Apply All of these conditions Cancel Search

PO ID	Req #	Line	Requested By	Order Date	Item	Supplier	Account Code	Qty	Price	Remaining	Unreceived Total
112130	34860	1	Kelley Danahy	01/25/18	CHIRALCEL OD-H 4.6X250MM 5UM	FISHER SCIENTIFIC CO LLC	420214-6933684 (Jamison, Timothy F)-SG_CHEM46 (D_CHEM) [A]-SPON	1	1,518.00	1	1,518.00
110331	121156	1	Nancy Parkinson (18-481)	01/22/18	Brighton Professional Multifold Towels, White, 4,000 Towels/Ct	STAPLES INC	420258-1380004 (Jamison, Timothy F)-SG_CHEM46 (D_CHEM) [A]-N	1	27.47	1	27.47

FRC PROCESS

1. Utilizing the Receiver function will reduce the time spent on FRC by eliminating the time-consuming process of searching through paper files for B2P transactions.
2. The exception to this will be blanket and non-B2P orders.

Financial Review and Control

[Report Links](#)

[Help Links](#)

[Log Out](#)

[Save](#)

Bonds, Metallocyl

1/8/18	5104737310	benzene-d6 DLM-1-50	01130346	4502292085	CAMBRIDGE ISOTOPE LABORATORIES INC	\$232.50	<input type="radio"/> DR	<input type="radio"/> VR	<input type="radio"/> IS	<input type="radio"/> RES	Select a reason...		R
	5104737310	Methylene Chloride-D2 DLM-23-25	01130346	4502292085	CAMBRIDGE ISOTOPE LABORATORIES INC	\$250.50	<input type="radio"/> DR	<input type="radio"/> VR	<input type="radio"/> IS	<input type="radio"/> RES	Select a reason...		R
	5104737310	Chloroform-D DLM-7-100	01130346	4502292085	CAMBRIDGE ISOTOPE LABORATORIES INC	\$27.00	<input type="radio"/> DR	<input type="radio"/> VR	<input type="radio"/> IS	<input type="radio"/> RES	Select a reason...		
	5104737310	Toluene-D8 DLM-5-25	01130346	4502292085	CAMBRIDGE ISOTOPE LABORATORIES INC	\$79.00	<input type="radio"/> DR	<input type="radio"/> VR	<input type="radio"/> IS	<input type="radio"/> RES	Select a reason...		

Purchase Orders

Export to View Find PO (MIT) **Advanced** Search

SAP Purchase Order is 4502292085

Apply All of these conditions Cancel Search

PO Number	Req	Order Date	SAP Purchase Order	Uninvoiced Amount
100654	111648	12/19/17	4502292085	0.00

Per page 15 | 45 | 90



Notes to Buyer None
 Buyer Contact None
 • Requisition Type Standard
 SAP Requisition 111648:0012354705
 SAP Purchase Order **4502292085**
 SAP Error Msg None
 Attachments None

Phone (Work) +1 (800) 322-1174
 Email Opened last opened 12/27/17
 Order Number None

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Received	Invoiced
		 benzene-d6 DLM-1-50	3	Each	77.50	232.50	3	232.50

Need By	Part Number	Commodity	Savings (%)
12/22/17	None	Chemicals - General	#

Account	Period
MIT COA	
Chemicals -6932559 MULTIPLE METAL-CARBON BONDS, METALLACYCL-SCHROCK-SPON	
<u>420128-6932559 (Schrock, Richard Royce)-SG_CHEM33 (D_CHEM) [A]-SPON</u>	

View Receipts

View Received (MIT) Advanced Search

PO ID is 100654

Order Line Number is 1

Apply All of these conditions Cancel Search

Created Date	Status	Type	PO ID	Order Line Number	Item	Supplier	Receiver	Quantity	UOM	Price	Currency	Total	Actions
01/22/18	Created	Consumption	100654	1	benzene-d6 DLM-1-50	CAMBRIDGE ISOTOPE LABORATORIES INC	David D'Amore (6-333)	3	Each	77.50	USD	232.50	

QUESTIONS?

LINKS

<https://vpf.mit.edu>

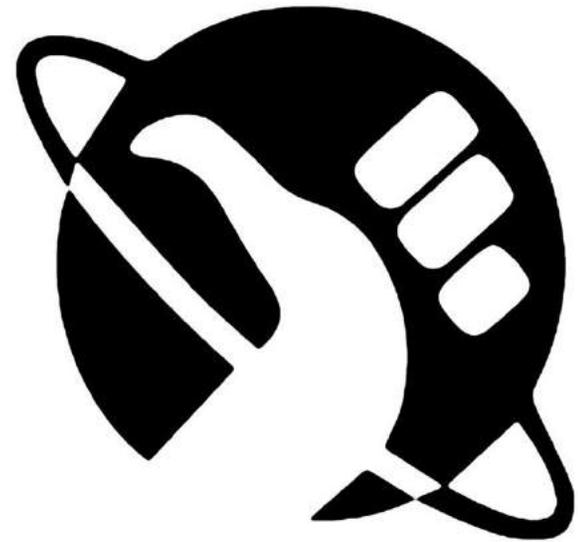
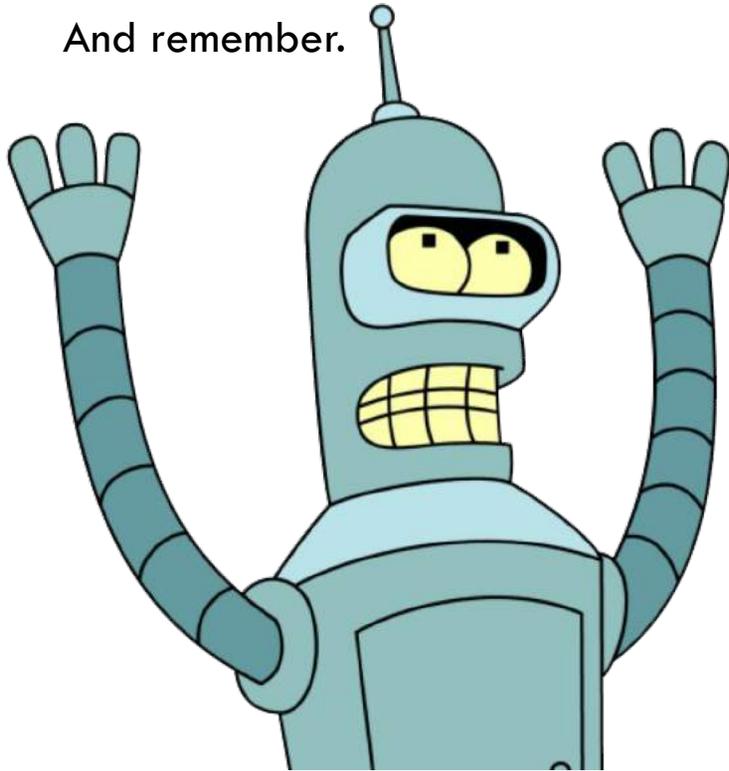
<https://vpf.mit.edu/get-to-know-b2p-system>

<https://vpf.mit.edu/buy-to-pay-b2p-quickcards>

<https://rise.articulate.com/share/48hmSPk9Fq83ldq6XBaTHszSWRsaLNYc#/? k=jo gy5a>

GO FORTH AND MARK LIKE A CHAMPION!

And remember.



**DON'T
PANIC**