

Quick Guidelines for Procurement Processes [iProcurement/B2P](#)

Requisitions

B2P Cart Naming Convention: *for orders that contain HCO Sponsored expenditures (org: 31460), please include the PI Last Name after the date (i.e. 2020-11-18 SMITH....) so that it is clear which Research Administrator should take on that cart assignment. This naming convention should also be used when carts are split coded between HCO sponsored and any non-sponsored account as the assignment of the cart will still need to take place by a 31460 approver at some point in the approval flow.*

Catalog Item or Punchout Item

- No additional paperwork/attachments needed

Non-Catalog Requisition

1. Attach valid quote to requisition (quote should not be expired)
2. If creating a [standing PO](#), please be sure to check off "Standing Amount Based PO"
3. If you'd like the PO [automatically sent to the vendor](#) upon PO creation, enter the Email and/or Fax information when adding the item to your cart. Else you'll need to send the PO to the vendor upon creation.

Payment Request

1. Attach invoice to the requisition in B2P and include the Invoice Number in the Invoice Information section
2. Appropriate Payment Request types as follows:
 - a. Copyright/Royalty/Licensing Fees (oc: 8570)
 - b. Donation (oc: 8450/8454)
 - c. Fellowship/Grant (oc: 6460-Students/6455-NonStudents)
 - d. Honoraria/Performer/Lecturer: Inside Mass (oc: 8690/8692)
 - e. Honoraria/Performer/Lecturer: Outside Mass
 - f. Prize/Award (6462-Students/8693-NonStudents)
 - g. Refund
 - h. Other (includes: Membership/Dues, Reader/Research Fees, Sponsored Subcontract, Stipends, Visa Fees (HIO), Utilities, FedEx Expenses)

Non-Employee Reimbursement

1. Attached scanned documentation (receipts) to the header section as one document
2. Expenses should be entered separately
3. NERF forms are now completed in the B2P system (rather than a form that is then uploaded)

Vendor Setup (individuals and companies):

1. Invited via Buy2Pay with Legal Name and Email Address
2. For Foreign Individuals: upon the submission of your vendor request in Buy2Pay, the individual will receive an email with Glacier login information. They will be instructed to print out the generated forms, sign them, and send them directly to Harvard NRA office.

Travel and Card Services

Purchasing Card (PCard)

1. Independent review of each transaction line needs to be completed by 5 PM on Tuesday
2. Original receipts should be provided to Jason Green (preferred). Scanned copies can be provided to Jason, however the audit responsibility then falls upon the cardholder for record retention (7 years).

Corporate Card (Citbank Card)

1. Citbank charges automatically pull into your CONCUR account to be reconciled
2. Receipts should be uploaded as backup for each charge being reconciled

How to set up email notifications in B2P:

[PowerPoint Presentation \(harvard.edu\)](#)

Updated 06/07/2023