Buying + Paying. Simplified.

Earlier this month, I was pleased to be able to talk at the AO/FO meeting about our initiative to transform the process of buying and paying for goods and services at MIT. Today’s experience is very fragmented, involving lots of different processes and systems, and generates a mountain of paper. We believe we can do better for the MIT community, and with the recent selection of a new buying and paying system, we are well on our way. For more details, please read the article “Transforming the Buying Experience at MIT” below.

We are engaging the MIT community as we make decisions about the implementation of the new system, through a User Advisory Group and many other types of outreach. With your help, we can deliver a better buying and paying experience for everyone involved, savings on needed goods and services, and much less paperwork.

If you were unable to attend the AO/FO meeting, I encourage you to review the slide presentation. Please also share your comments with the Buy-to-Pay project team by emailing B2P@mit.edu. We look forward to your comments and suggestions.

Best,
Glen Shor
Vice President for Finance

Concur Drop-down Menu: Benefits of Travel

Beginning in December 2015, Concur will add a new drop-down menu for expense reporting. To comply with federal requirements for travel expenses on sponsored projects, submitters will now be required to select the most applicable “Benefit to Project/MIT” in the report header. This information will be used to specifically capture the benefit of sponsored research travel expenses.

With this new requirement, submitters may need to ask the traveler for clarity regarding the benefit. In some cases, the travel itinerary will be sufficient to make an informed selection.

The new drop-down menu will provide the following options:

- Necessary for dissemination of sponsored project results
- Necessary for meeting the sponsor or collaborator
- Necessary to carry out sponsored project
- Non Sponsored Activity
- Other benefit to sponsored project (comment required in box)

When a travel expense is not tied to a sponsored account, the appropriate choice from the drop down is “Non Sponsored Activity.”

If the submitter has multiple benefits to include, or the trip is a mix of sponsored and non-sponsored activity, the best option is “Other benefit to sponsored project.” The associated comment box will accommodate an expanded explanation as described by the submitter.

Please contact VPF Travel Services with questions regarding this change.

Transforming the Buying Experience at MIT

Airgas Cylinder Audit

Airgas will be conducting an inventory of cylinders across campus in early 2016. The audit is necessary to ensure proper accounting of rental fees associated with Airgas cylinders on campus.

Environment, Health and Safety (EHS), VPF Sourcing and Procurement, and Airgas encourage labs to return all empty and unused cylinders and dewars before the audit.

As a reminder, MIT can reduce rental fees and cylinder disposal costs by managing our inventory accurately and efficiently. Based on past audits, Sourcing and Procurement has determined that returning unused and empty cylinders to Airgas in a timely manner can save the Institute up to 10% per year in rental fees.

To request pickup of empty and unused cylinders and dewars, please email John.Jordan@Airgas.com. We will send the audit schedule to designated lab representatives when the exact timing is determined.

VPF Training Opportunities

Register now for VPF training classes. These classes provide valuable information and guidance concerning VPF policies, procedures, and services.

All classes are held in NE49-3100 (600 Technology Square, 3rd floor) in the Grand Cayman Conference Room. The instructors are members of the VPF staff who support DLCs in these areas.

<table>
<thead>
<tr>
<th>Course</th>
<th>Date</th>
<th>Time</th>
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<tr>
<td>Introduction to Procurement</td>
<td>January 12, 2016</td>
<td>10:45 am-12:30 pm</td>
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<tr>
<td>Introduction to Travel &amp; Expensing</td>
<td>January 12, 2016</td>
<td>9-10:30 am</td>
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<tr>
<td>Fundamentals of Financial Mgmt.</td>
<td>February 3-4, 2016</td>
<td>9 am-12 pm (daily)</td>
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More Ways to Learn
It's complicated. From finding what you need at the best price and starting a requisition to closing out a vendor invoice, buying and paying at MIT can seem more like a maze full of twists and turns than a clear path from point A to point B. Given the volume of annual activity—765,000 transactions with 22,000 vendors by 7,500 authorized Institute personnel purchasing on behalf of 23,000 faculty, students, and staff—streamlining these processes for the MIT community would deliver a tremendous benefit.

The Institute has four very distinct and disconnected methods for making purchases: Procurement Card, external requisitions, eCat (MIT's electronic catalog), and personal funds. Until recently, the focus has been on upgrading components of the four existing purchasing methods currently in use at the Institute rather than reimagining the entire process.

That is, until now. In January 2015 VPF and Information Systems and Technology (IS&IT) began a discovery process to determine the best possible buy-to-pay solution for MIT. The team talked with members of the community who regularly perform tasks related to procurement, as well as VPF staff who process a high volume of transactions. They mapped the multi-step processes and documented the many pain points purchasers routinely experience along the way.

Over the coming months, community feedback will continue to be central to the process, with a User Advisory Group—made up of 35 members from across the Institute—at the core of a robust community engagement plan.

The Solution

The team thoroughly researched market leaders in the buy-to-pay space through a rigorous evaluation process that focused on the customer experience. The selected vendor, Coupa, clearly demonstrated how its solution will serve the vast majority of MIT's procurement needs.

The launch of the new Buying and Paying system will result in an end-to-end reinvention of procurement by providing:

- Real-time visibility throughout buying and paying processes
- Mobile approvals and expense capture
- Intuitive, integrated shopping experience
- Greater savings through preferred vendors and prompt payment discounts
- Reduction in data entry and paperwork
- Strong, cloud-based platform for continuous improvement

The timeline for the new buy-to-pay system is as follows:

- October–December: Design
- December–February: Configure and Prototype
- March–April: Delivery
- May: Rollout to pilot group

Please send questions and comments to B2P@mit.edu.

Payroll Reminders

Appointment Changes for 2015

As the calendar year comes to a close in December, please be mindful of changing appointments for graduate students from "Research Assistant/Teaching Assistant" to "Fellow," or vice versa. The same applies to changing "Post-Doc Associates" to "Post-Doc Fellows" or vice versa. Changes submitted or approved after December 18, 2015, cannot be processed with an effective date prior to January 1, 2016, so please plan accordingly.

Changing appointments will alter the tax and benefits eligibility. Learn more about the impacts by reviewing the post-doc summary or graduate student summary on the VPF website.

If you have questions, please contact HR/Payroll for assistance at payroll@mit.edu or 617-253-4255. HR/Payroll walk-in service hours in NE49-4097 are 8:30 am–4:30 pm, Monday through Friday, except Institute holidays.

W-2 Forms

Important Links
The new year generally triggers questions concerning the distribution of annual tax forms to employees. Tax forms will be online and mailed from Payroll (W2 and 1042S) and Accounts Payable (1099M) between late January and March 1, 2016. It’s important that home addresses are current in Atlas so forms are delivered in a timely matter. If you have any questions related to tax forms, you may contact HR/Payroll at payroll@mit.edu or 3-4255.

**Lenovo Computers: MIT's Preferred Supplier**

VPF's Sourcing and Procurement team welcomes Lenovo to MIT’s preferred supplier list. Find Lenovo on eCat and SmartBuy.

Community members can now purchase standard laptops and desktops as well as other items at discounted prices. Purchase directly from Lenovo using eCat or contact Katie Ballard, our inside sales representative (919-294-2855; kballard@lenovo.com), for a quote.

If you have questions, please email Bill Akerberg or Catelin Matos.

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**Financial and Administrative Service Areas Within VPF**

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**Office of the Vice President for Finance**

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