

The logo for buy2pay, featuring the word "buy" in black, a red shield with a white number "2" inside, and the word "pay" in black.

buy²pay

What's Changing?

23.1 Release – March 20, 2023

B2P March 2023 Release

Timing

- Buy-to-Pay will be down:
 - Start: Friday, March 17th 8PM
 - End: Sunday, March 19th Noon
- Changes will be in place for Monday, March 20, 2023

Communication

- B2P Blog
- B2P Org Message
- eNews

Release Highlights

On Monday, March 20, you will notice some changes in Buy-to-Pay due to the 23.1 Release.

B2P Previews / Updates:

- eProcurement
 - New - Ability to modify header level External/Internal Notes and Attachments on a Change Request
 - Update - Ability to copy individual account code elements to other lines
- Search Updates
 - Managed search updates
 - Invoice total
- Contracts
 - General updates to Contract search
 - Updates to Contract Attachments search
 - New - Contract Creator field

eProcurement- New

Change Request - Ability to modify header level External/Internal Notes and Attachments

- Header level External and Internal Notes and Attachments are now editable in a change request.
- Updates are merged to the purchase order and reflected in any revisions sent to the supplier.

Change Requests • 3729789

Summary PO Preview External Communication Comments 1 Attachments 2 History

Administration Finance and Administration

Internal Notes and Attachments .. **External Notes and Attachments** ...

ICQ Support Documentation *no value* Attached

Vendor Justification *no value* Form Provided

Debarment Form Provided (For

Note to all Suppliers *no value*

Attachments for all suppliers [Add](#)

[Test quote for your test PO.docx](#) ...

[80000003840.pdf](#) ...

Change Requests • 3742781

Summary Taxes/S&H PO Preview External Communication Comments Attachments 5 **History**

Start date End date Action User

mm/dd/yyyy mm/dd/yyyy

Filter Clear All Filters

Export CSV

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
1/4/2023 12:29:47 PM	Tonya Adams	Requisition modified	External Note	PR external note. PO external note.	Change PR external note. Change PO external note. Add note for CR.			

A new entry is made in the CR history when the external notes are edited and saved.

The documents remain available as Attachments and tracked in History.

This can aid when a supplier requests other language be present on the pdf PO document.

eProcurement - Update

Ability to copy *individual* account code elements to other lines

Previously, users could only copy the full line. Now, users can decide what elements of the coding to copy.

3 Items · 11.00 USD

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 #1			1.00	Qty: 1	1.00

ACCOUNTING CODES Values have been overridden for this line

Copy To Other Lines: Accounting Codes

Select code values to be copied and the line(s) they will be copied to.

Tub	Org	Object	Fund	Activity	Subactivity-Activity	Root	Suggested Income Tax Type - Only Applies to 1099	Income Tax Type Override
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
610 CADM*Central Administration	55623 CADM*Central Finance and Administration	6640 Office Supplies+Materials, GENERAL	000000 Unspecified	000000 Unspecified	0000-000000 000000*Unspecified	00000 Unspecified	NO VALUE	no value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
2 #2			1.00	1	1.00
3 #3			9.00	1	9.00

Copy Close

All *or* portions of account code string can be copied at the line level from one line to other or multiple lines.

1. When a user selects the **Copy** icon at the line level or selects the "Copy to other lines" link at the header, the "Copy To Other Lines: Accounting Codes overlay" displays all the elements including on the Accounting Code string to be copied.

2. Each element will have a **green checkbox** indicating it will be included in the copy. Users can uncheck any elements they do not want copied.

Note: The first-time account codes are copied, an overlay will ask if you want to set the selection as your default.

- Select Yes if you want the same account codes to be selected each time you copy account codes, otherwise select No.
- If you select Yes, the overlay is only displayed again if your default account code selection is changed.

Search - Updates

- New Search Added: New Standing Amount Based PO Invoice Total
- Existing Search Updated: Open Commitment Report

***New Standing Amount Based PO Invoice Total**

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

*Standing Amount Based PO: Yes/True | AP Status: Open | *Org: All

Page 1 of 6 | 1-200 of 1077 Results | 200 Per Page

PO Number	Supplier	Requisition Description or Business Purpose	Requisition Name	Created Date/Time	Total Amount	Invoice Total	Requisition Number	PO Owner	Matching Status
					1.00 USD	0.00 USD			

Open Commitment Report

Created Date: All | Quick search | Add Filter | Clear All Filters

Item Type: Non Catalog Ite... | AP Status: Open | Invoice Status: Partially Invoiced | *Org: All

Page 1 of 50 | 1-200 of 13193 Results | 200 Per Page

PO Number	Requisition Number	Supplier	Requisition Description or Business Purpose	Total Amount	Invoice Total	PO Owner	Invoice Status	Matching Status	Receipt Status	AP Status	Invoice Number	Receipt Number	Tub	Org	Fund	Object	Activity	Subactivity-Activity	Root
				243,000.00 USD	56,927.42 USD														

Includes "Invoice Total"

Contracts - Update

General updates to Contract Search – beta version

The screenshot shows the 'Search Contracts' page. At the top left, there is a 'beta' badge. The main header includes 'Search Contracts' and navigation links like 'Save As', 'Pin Filters', 'What's beta?', 'Got Feedback?', and 'Export All'. A search bar contains the text 'data processing'. Below the search bar, there are filters for 'Last Modified: All' and 'Contract Created By: All'. A table displays search results with columns for 'Contract Number', 'Contract Name', and 'Second Party'. A 'Filters' dropdown menu is open, showing a search filter input and a list of filter categories under 'General Information'. A settings gear icon is visible in the bottom right corner of the table area.

1. Ability to export

2. Increased filter options

3. Switch between Classic (current) and New (beta) search using the toggle at the bottom right-hand corner of the page.

Would you like to try out our new search experience?. You can switch as often as you like.

New search
 Classic search

SAVE CANCEL

This can aid in searching and creating reports.

Contracts - Update


Updates to Contract Attachment Search

The screenshot shows the 'Search Contract Attachments' page. At the top right, there are buttons for 'Save As', 'Pin Filters', and 'Export All'. A red arrow labeled '1' points to the 'Export All' button. Below the search bar, there is a filter dropdown menu. A red arrow labeled '2' points to the 'Find search filter...' input field within this menu. The menu also shows options for 'General Information' with checkboxes for 'Status', 'Attachment Content', and 'Classification'. The background shows a table of contract attachments with columns for document type, status, and date.

1. Ability to Export

2. Increased filter options

The screenshot shows the 'Search Contract Attachments' page with a search filter applied: '"Environmental Health"'. A 'Matched Search Terms' popup is visible, listing search results. A red arrow labeled '3' points to an information icon (i) in the bottom left corner of the table. The table shows contract attachments with columns for document type, status, and date.

3. Click  to see information about what terms matched

This can aid in searching and reporting on a word or specific phrase in contract attachments.

Contracts – New

New field: Created by

Users and Contacts

Contract Managers ★ Full control over this contract [Edit Users](#)
Jackson, Meghan
User 21, Contract

Invoice Approvers Approve associated invoices [Edit Users](#)
None

Stakeholders View this contract and receive notifications [Edit Users](#)
Lester, Amy

Created by Informative: Creator of this contract not related to permissions
Krengel, Kari

1. "Created by" will be added to all contract records.
(Users can not edit)

Contracts > Contracts > Search Contracts

beta [Save As](#) [Pin Filters](#) [What's beta?](#) [Got Feedback](#)

Last Modified: All Quick search [Add Filter](#) [Clear All Filters](#)

Contract Created By: Current User X

Find search filter...

1-8 of 8 Results

<input type="checkbox"/>	Contract Number ▲	Contract Name ▼	Second Party
<input type="checkbox"/>	AGRMT-001130	a	-

Contract Created By

General Information

- Contract Class
- Contract Document
- Contract Manager
- Contract Name

2. "Contract Created by" is available as a filter in the beta search.

Thank you!



- Next release (23.2) is July 2023.
- The next session of the Buy-to-Pay Contract Management Training course will be held on May 2nd at 1:00 pm. Please visit the Harvard Training Portal for more information about the course and/or to enroll.
- Reminder: B2P will be down this weekend – starting Friday night at 8PM.
- **Plan Ahead:** B2P will be completely unavailable from Tuesday, April 18, 2023 at 5PM until Monday, April 24, 2023 at 8AM due to the Oracle EBS 12.2 upgrade.