RUTGERS
New Jersey Institute for Food, Nutrition, and Health

IFNH POLICY

Category	Content
Policy Name:	Naming Convention for e-Business Documents
Section #:	400.3
Section Title:	Financial Management
Approval Authority:	Director of Administration & Finance
Responsible Executive:	Director of Administration & Finance
Responsible Office:	IFNH Business Office
Contact:	IFNH Business Specialist phone: (848) 932-3675
Adopted:	05/19/2017
Reviewed:	05/20/2020
Revised:	05/20/2020

1. **Policy Statement:** For bookkeeping, accounting and audit purposes Quotes, Purchase Orders and Invoices should be named with elements consistent with their purpose. Preparers need to save POs to the Purchase Order folder on OneDrive: Rutgers University\IFNH Administration - Documents\Business\Purchase Orders.
    a. If the member does not have access to the OneDrive, the e-document should be forwarded to the Business Specialist in the format delineated below to be saved to the Purchase Order database.

2. **Reason for Policy:** To assist the research process when providing e-business documents to the end user and provide an audit trail.

3. **Who Should Read this Policy:** All IFNH Members who have permission to Purchase on behalf of IFNH.

4. **Resources:** Purchase Order Folder provides a repository for all e-Business documents related to IFNH Purchases.

5. **Definitions**
    RFPO: Request for Purchase Order
    RU Marketplace: Rutgers University Procurement Portal
    Nomenclature: A system of names structured to provide all users information
    Lab: The Lab initiating the order, can also be the requestor or PI. For purpose of the Policy we reference 'Lab'

6. **The Policy:** IFNH Members are required to save Quotes, Invoices and Purchase Orders to the PO Folder on the shared drive and follow the department naming convention for audit purposes.

    I. **Elements of file name:**
        a. **Vendor Name**
        b. **Reference Number (Purchase Order, Invoice, Quote, etc.)**
        c. **Research Laboratory Group Identification (Quadro, Carmen, CB, LQ, etc.)**
        d. **Date (Format: Month, Day, & Year – MMDDYY)**

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II. **All e - documents including but not limited to the following examples:**

    a. **Quote:** *"Vendor Name"_Quote_"Number/Reference"_"Lab"_"Date"*
        i. Sigma Aldrich_Quote_#####_Quadro_061616

    b. **Purchase Order:** *"Vendor Name"_PO_#"XXXXXXX"_"Lab"_"Date"*
        i. Sigma Aldrich_PO#S123456_LQ_061616

    c. **IPO:** IPO_*"Internal Vendor Name"*_IPO Release#*"XXX-XXX"_"Lab"_"Date"*
        i. IPO_Licensed Software_IPO Release#1556762-39_CB_061616

    d. **Invoice**: should include the invoice number and applicable PO #;
      "VendorName"_Invoice_"Number"_PO#"XXXXXX"_"Lab"_"Date"
        i. AAA Limo_Invoice_#abcd_PO#12345_CB_061616
        ii. The body of the Invoice should have the PO # listed on the top left corner before it is forwarded to Invoice Processing: accountspayable@finance.rutgers.edu.

    e. **RFP from a Lab/PI:** RFP_*"Vendor Name"_"Lab"_"Date"*
        i. RFP_Sigma Aldrich_ LQ_061616

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