EUAT Newsletter

User Enhancements Come to Workday A variety of upgrades have been added to Workday in the past weeks. New requisition check-

out help text has been enabled — this orange-highlighted text pops up on the checkout screen in order to help requisitioners complete the transaction. A new notification system has been employed that informs SIR initiators when a new supplier request is fully approved and available for use. Workday has also been enhanced with change order functionality, allowing P2P specialists the ability to add freight to a purchase order when required. As always, the Purchasing Department would appreciate any feedback on these enhancements, in order to provide better service to all Workday users. **EUAT Status Report — Week 4**

Reqs Completed: 44 Reqs In Progress: 0

Reqs Cancelled: 5

Total Requisitions: 49

Total Supplier Invoice Requests: 75

SIRs Completed: 73

SIRs In Progress: 0

SIRs Cancelled: 2

Good work so far! Keep those SIRs and Requisitions coming! P2P leadership will be looking at EUAT participants who are using the old processes (PMM and 312 requisitions), and working

with those groups to help alleviate any roadblocks that might be causing them to avoid P2P.

A Quick Note About PCard!

The Corporate Purchasing Department has recently opened up the PCard program to new departments. Since there is a waitlist for the PCard program, Purchasing will continue to process PCard eligible transactions for departments that do not currently have a PCard. If you have any interest in acquiring a PCard, please contact Nathan Hodge at

Ynus

Nathan hodge@urmc.rochester.edu, or 275-8900. Work Begins on the Marketplace An online marketplace where requisitioners can build shopping carts of catalogued goods for purchase is coming to UR! P2P leadership sat down with Jaggaer representatives on July 12 to

define the roles, responsibilities, schedule, and decisions needed in order to deliver a positive shopping experience for our requisitioners. That meeting was followed by a two-day workshop where Jaggaer demonstrated their application. The Marketplace is scheduled to go live in a User Acceptance Test (UAT) in late November. The UAT will include all departments cur-

rently participating in the EUAT. P2P leadership is planning to provide a hands-on experience with the Marketplace before the UAT begins, so that everyone can learn how to use the module. Keep an eye out for more Marketplace news in the coming weeks!

Search Results 4 huma

View Trackable Spend Categories

Tasks and Reports

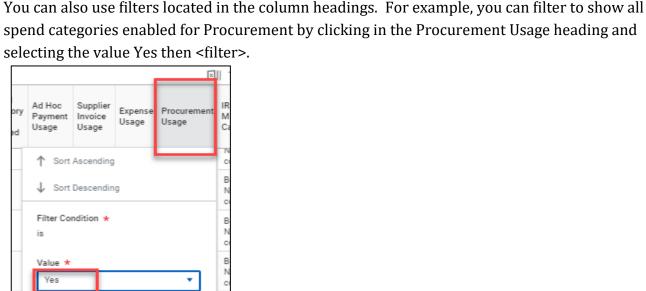
Common

Tips and Tricks — Viewing a List of Available Spend Categories Not sure which spend category to use for your SIR or requisition? If you'd like to review a list of spend categories and whether they are enabled for requisitions usage and also whether a category is trackable (capital) vs non-trackable (non-capital), you may wish to view a spend category report. Follow the steps below to run this report: Using the global search box, search for View Spend Categories URF0876 report.

Search Results

For use for requisitions, the column "Procurement Usage" must have a Yes. These columns are highlighted in the screenshot below — View Spend Categories URF0876 🔙

When you run this report, you are provided with a list of spend categories. If the spend category is for capital, the column called "Spend Category is Tracked" will have a Yes. For use with a Supplier Invoice Request (SIR), the column called "Supplier Invoice Usage" must have a Yes.



В

1 of 1

Select Action

Requisition for.

Deny

Send Back...

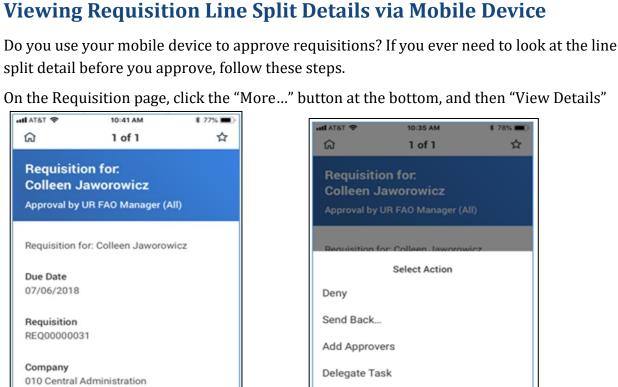
Add Approvers

Delegate Task

Reassign

View Details

Colleen Jaworowicz



Total Amount 864.783.60

Information

Goods

30 Items

Attachments

line splits! atl AT&T 🄝

Close

Line

Q

cess to

search will return no results.

Column Preferences

Requisition

Company

Requisition Line

order to its original settings.

coming your way next week.

44 Celebration Drive, Suite 2.200

Cameron Bojko

University of Rochester

Rochester, NY 14620

Phone: (585)275-0652

Keep in mind - preferences applied to a grid: Are not applied to Excel and PDF exports

Assistant Purchasing Manager, P2P Communications Manager

Are not shareable between users

Drag columns here to freeze

Image

More. Close

services) detail by selecting the arrows, highlighted below:

३ 78% **■**

Suppli

Item I

PPSUF

Once the Detail page loads, scroll down to the goods or services area. Expand the goods (or

Once the line detail is expanded, scroll all the way to the right. This is where you will find the

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Close

Amount

1,027.90

Amount

7,452.28

Amount 17,217.34

0.00

10:36 AM

Details

*Worktags

Company for FAO:

CC43317-000 Data

Center | Fund: Sel...

Company for FAO:

Security and Polic..

Company for FAO: 010 | Cost Center: CC40150-000

University Compu...

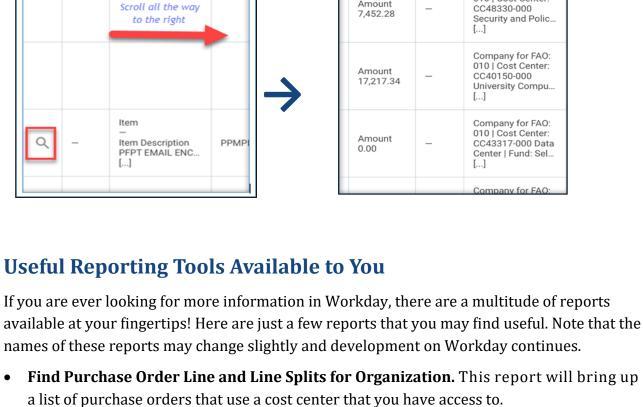
Company for FAO: 010 | Cost Center:

CC43317-000 Data

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CC48330-000

Memo



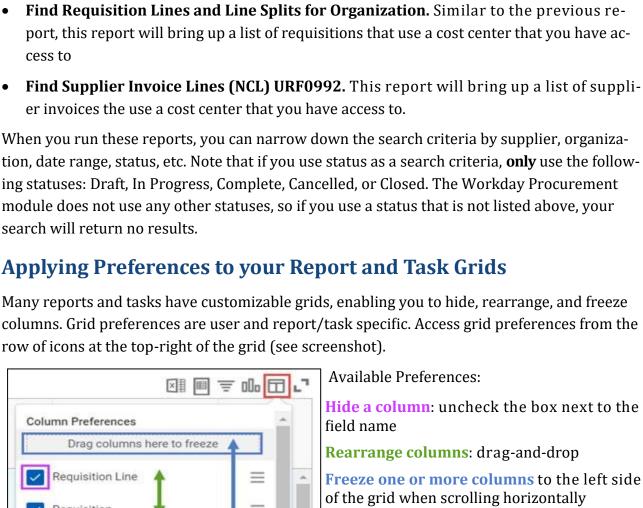
10:36 AM

Details

Item

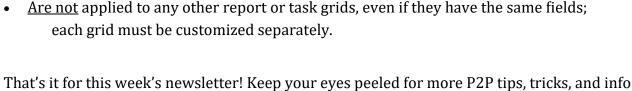
Item Description

3 YR PLATINUM L..



(similar to Excel's Freeze Panes feature): drag -and-drop the field to the shaded area at the

top of the grid preferences pop-up



After making these changes, you can click "Apply" to apply and save the settings. Your preferences are automatically applied each time you view the same report or task grid. You may also click "Reset" to unhide and unfreeze all columns and revert the order of the report or task

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