

Happy  
Independence  
Day!



Due to the holiday, we will not have new data on requisitions and SIRs this week. Keep an eye out for next week's newsletter, where we will share updated statistics on the status of the EUAT.

## New WalkMe Training Tool In Development

Corporate Purchasing is working on a training tool that will help new Workday users learn the ropes! WalkMe will provide an overlay of instructions, tips, and helpful reminders to Workday rookies while they use the application for the first time. WalkMe is not just for beginners though — optional pointers and useful information will be available to all users. Development is underway, with a pilot test currently planned for early 2019.

## P2P Team Set to Begin Work on Jaegger Module

Jaegger is the online marketplace where requisitioners will build their shopping cart — similar to Amazon.com, but just for UR employees! Members from Corporate Purchasing, Accounts Payable, and IT have a kickoff meeting with Jaegger representatives scheduled for July 12, followed by a workshop on July 16 and 17. These meetings will help define and focus the steps we need to take to ensure a successful rollout. A User Acceptance Test (UAT) will begin on November 12, and will involve all of the same departments as the EUAT. The UAT will have similar goals as the EUAT — finding bugs, fixing issues, and preparing staff for the university-wide launch of P2P.

## Questions and Answers

Take a look below at some of the questions that were brought up at last week's EUAT Training and Communications meeting:

**Q:** If Person A sets up a delegation to Person B, and then Person B sets up a delegation to Person C, will the responsibilities of Person A automatically be delegated to Person C?

**A:** No. A delegation only extends one step, to the person who has received that delegation. It does not carry over to further delegates. In the case described above, Person A would need to set up a new delegation directly to Person C.

**Q:** If someone creates a SIR, but goes home sick without completing it, can somebody else access that SIR and finish it?

**A:** Yes! Anybody else who is in the same department as the SIR initiator is able to access a SIR in draft status, and finish that SIR. See the Tips and Tricks section below for more details.

**Q:** When Accounts Payable receives an invoice, how soon will the requisitioner be notified to confirm the 3-way match?

**A:** An email will be sent to the requisitioner once Accounts Payable has entered the invoice into Workday. Per AP policy, invoices will be entered within one week of receipt. But please be advised, requisitioners don't need to wait for an invoice in order to complete this step! Once all products on the PO have been delivered, a requisitioner can mark those goods as received, which will allow the invoice to be paid (as long as the invoice matches the PO).

## Tips and Tricks

### 1. Editing and Submitting a Draft SIR Created by Another User

You can access, edit, and submit a draft SIR where you are a Supplier Invoice Requester for the same FAO or cost center by following the steps listed below:

1. Enter the SIR number in the global search box and press Enter
2. Select the Procurement search category
3. Click on the SIR
4. Access the Edit task via related action

Note: The Requester remains the user who created the draft SIR, but the questionnaire routes to the user who just edited and submitted the SIR.

### 2. Previewing a Supplier Record

Before initiating a supplier invoice request (SIR), it is recommended to search for and preview the supplier record. This will help you understand whether the supplier is approved for business by UR Procurement, or which supplier to use in the case that there is more than one similarly named supplier record.

In the global search box, use the prefix 'supplier:' along with at least three or more characters to begin your search. For example, to search on a supplier called Elsevier, enter the search as follows: **supplier:elsevier** and press enter. Take note that twelve results are returned, but your search is narrowed to suppliers containing that name.

### Rules to remember:

1. Parent supplier records cannot be used for SIRs (or requisitions). Do not select any supplier record with the word Parent in the title.
2. Do not select any supplier record with Inactive in the title. If the name and address are those of your supplier but it indicates Inactive, contact the P2P Service Center to have the Supplier re-Activated.
3. For a SIR, the supplier record you select must have a Remit-To address that matches the invoice or current payment address. If you find your Supplier with a name match but the address is different and you believe the company or individual has moved, initiate a change to update the Supplier record address by selecting the Related Action Change Supplier Contact Information and entering the new address. Contact the P2P Service Center for additional help if needed.
4. If you think you see a duplicate supplier record, the same supplier with the same address as 2 or more separate listings, contact the P2P Service Center to ask that they inactivate any duplicates. Keep in mind that some Suppliers have multiple valid remit to addresses and that students sometimes want to use a local address for some payments and their home address for others. That is, even if the name appears multiple times, the addresses may be different and valid.

When you hover your mouse over each supplier name, the orange 'related actions' button becomes available directly to the right of the name. Select the related actions button to preview the supplier information. For example, below is the preview of Elsevier 7247.

That's all for this week's newsletter! If you have any questions or concerns, be sure to attend the weekly EUAT Communications and Training Meeting scheduled for Wednesday at 10:00 in College Town Room 3007, or remotely via Zoom at <https://rochesterzoom.us/j/9478570834>, or by phone at +16699006833,,9478570834#.

Thanks,

Cameron Bojko

Assistant Purchasing Manager, P2P Communications Director

University of Rochester

44 Celebration Drive, Suite 2.200

Rochester, NY 14620

Phone: (585)275-0652

[cameron\\_bojko@umc.rochester.edu](mailto:cameron_bojko@umc.rochester.edu)