# P2P Newsletter

#### **UR** Procurement

### Introducing the Marketplace!

When the UAT begins on November 19, participating requestors will gain access to the newest piece of P2P — The Marketplace! The Marketplace is an eProcurement solution from Jaggaer that will give requestors an easy-to-use portal to a catalogue of available items. Qualified suppliers with catalogues in the Marketplace will include Medline, Staples, Hill & Markes, and more.

The Marketplace will provide requestors with a familiar, Amazon-like shopping experience, where users can search for items, see pricing, and build shopping carts. Some supplier catalogs will be hosted directly on the Marketplace, while other suppliers will utilize "Punch-Out Catalogs," where the requestor is directed to a supplier-hosted site. The ultimate goal of the Marketplace is to provide requestors with a simple and efficient way to order goods, while ensuring contract compliance and providing greater visibility of spend.

## **Marketplace Training Dates**

Requestors participating in the UAT will be required to attend a 90-minute training session prior to the UAT kickoff. This training session will focus on the Marketplace, teaching requestors to navigate and utilize the new online catalogue. Approvers and SIR initiators will not attend this training session. Training sessions have been scheduled for the following dates:

- October 22 from 10:00-11:30
- October 25 from 1:00-2:30

Both sessions will be located in Collegetown Room 3102. An invitation to these training sessions has been sent to all requestors, and they should have chosen one session to attend. If you have any questions about the Marketplace training, or need directions on how to find Collegetown Room 3102, please reach out to the P2P Service Center at 275-2012.

## **Experience the Marketplace Hands-On in UAT Testing Sessions**

Procurement will be hosting two UAT Testion Sessions, which will provide requisitioners with an opportunity to get hands-on experience with the Marketplace. Requisitioners will use these sessions to familiarize themselves with the application by exploring the Marketplace in a sandbox setting prior to the UAT kickoff. Subject matter experts will be on-site to assist with any questions that may come up. These Handson sessions are scheduled for the following dates:

- October 31 from 1:00-4:00
- November 1 from 9:00-12:00.

Both sessions will be located in Collegetown Room 3102, and it is **mandatory** for all requisitioners to come to at least one of these sessions. Attendance for the full 3-hour session is not necessary — attendees may come and go throughout the scheduled time. Requisitioners should bring real-life catalogue purchase examples with them to enter into the test environment

## P2P Status Report — Week 14

#### **Total Requisitions: 185**

Reqs Completed: 179 Reqs In Progress: 5 Reqs Cancelled: 15 **Requsition Total Turnaround Time:** 

4.2 Days

#### **Total Supplier Invoice Requests: 267**

SIRs Total Turnaround Time:

1.8 Days

SIRs Completed: 258 SIRs In Progress: 6

SIRs Cancelled: 9

# P2P Pilot Scheduled for Early 2019

In February of 2019, Procure to Pay will launch its first Pilot. This endeavor will involve 21 departments, giving them access to the Workday procurement module and the Marketplace. The greater diversity in real life scenarios from this new population of users will help to fine tune any business processes that might not have been present in the EUAT or UAT population. Additionally, the increased volume of transactions routed through the Procure to Pay business processes will help to shake out any other inefficiencies. Keep an eye out for additional details about the Pilot in the next newsletter!

Supplier Invoice	Exception Reasons	Invoice Created By	Waiting For	Supplier 6	Invoice Due Date	Total Invoice 9 Amount	Purchase Order
Supplier Invoice: SPI01861670	Needs Receipt	Steven Graves	5	Lantek Communications NY Inc	<b>8</b> 10/20/2018	46.07	PUR00000109
Supplier Invoice: SPI01860524	Freight Needs Receipt	Angela Milton- Hall		Eplus Technology Inc	• 10/07/2018	44.88	PUR00000048
Supplier Invoice: SPI01840055	Discrepant Price Freight Needs Receipt Supplier Invoice Line Does Not Have a PO Line	Angela Milton- Hall		Eplus Technology Inc	10/12/2018	81.00	PUR00000101
Supplier Invoice: SPI01860937	Needs Receipt	Angela Milton- Hall		Van Bortel Ford	10/17/2018	65.50	PUR00000148
Supplier Invoice: SPI01861341	Needs Receipt	Steven Graves		Eagle Productivity Solutions	10/27/2018	78.50	PUR0000052
Supplier Invoice: SPI01861350	Needs Receipt	Steven Graves		AAA Sound Service and Low Voltage LLC	010/31/2018	53.00	PUR0000075

## Workday Tips & Tricks: Supplier Invoices in Match Exception

A new worklet is available on the Procurement dashboard to quickly see outstanding supplier invoice match exceptions. The worklet will display 25 results based on the sort order shown below. Click View More at the bottom of the worklet to see additional results.

Sort order:

Awaiting your action

Due date

Invoice amount

Invoice number

All invoices to which you have reporting access are included in the results, even if you were not the requisitioner or requester. If you would like to only see those invoices awaiting your action, you can add a filter in the worklet settings.

Notes:

- 1. Supplier Invoice drill to view the invoice
- 2. Exception Reasons all header- and line-level match exception reaons
- 3. Invoice Created By the AP data entry specialist who entered the invoice
- 4. Waiting For the user in whose
- 5. Waiting For icon red flag if the invocie is awaiting your action
- 6. Supplier the supplier for the invoice
- 7. Invoice Due Date the due date for the invoice based on the invoice date and payment terms
- If any invoices have discount payment terms, a Discount Due Date column will be displayed after the Invoice Due Date
- 8. Invoice Due Date icon a status icon based on how soon the invoice is due
- Red diamond invoice is due within the next 5 days or is overdue
- Yellow triangle invoice is due within the next 14 days
- Green cirlce is due in more than 14 days
- 9. Total Invoice Amount invoice total including freight and miscellaneous charges
- 10. Purchase Order drill to view the PO or quickly access related actions such as Create Receipt
- 11. Configure the worklet filter on specific organizations (FAOs or cost centers) or Waiting For user

# New WalkMe Training Tool In Development

Procurement is working on a training too 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. The WalkMe job aid is currently being developed and will be tested in the Workday production environment in the upcoming weeks. Stay tuned for additional details!

That's it for today's newsletter — there will be more to come as P2P continues to grow and expand!

# 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@urmc.rochester.edu