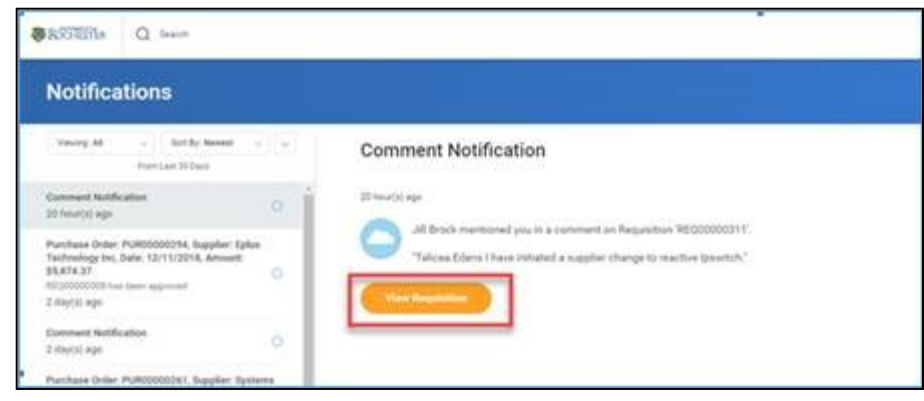


## Tricks and Tips — Workday's Activity Stream

Most transactions within Workday include a function called **Activity Stream**, which enables communication between everyone involved in that transaction. Workday users can type messages into the Activity Stream chat box, found at the bottom of a transaction. This message will be visible to everyone who has access to that transaction. When typing a message, users can type an "@" symbol to tag other users — those users who are tagged will receive a notification in their Daily Digest. We hope this function will help users communicate and collaborate!



To respond, after selecting the link in the emailed daily digest, you will be brought to the notification in Workday where you can view the transaction. The Activity box is located at the bottom of the transaction screen.



## Requisition Requestor Mass Change Request — The More You Know!

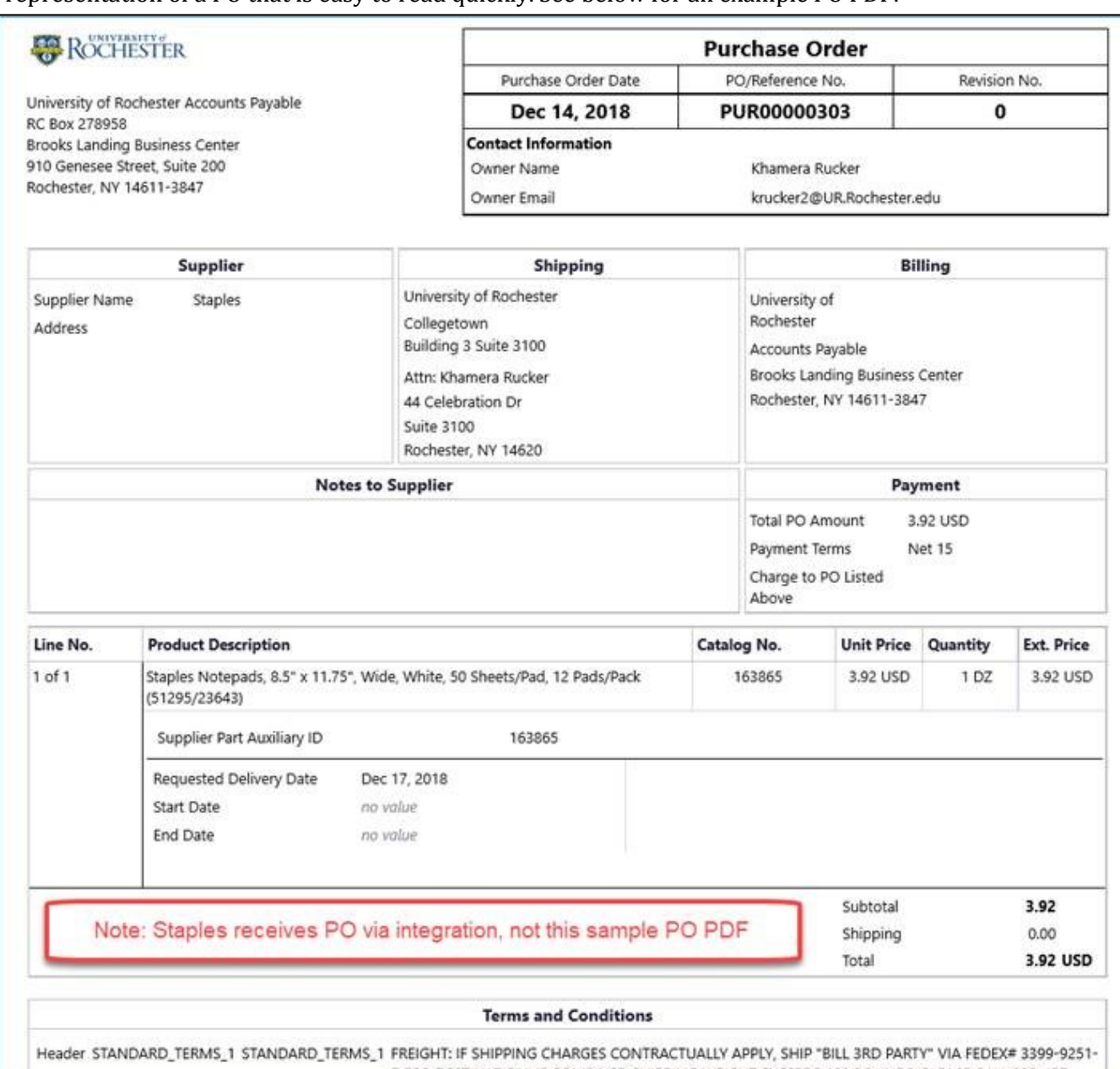
What happens if a requestor or approver within your department leaves the University, or is out on long-term disability? The best course of action is to initiate a request within Workday to **Change Requisition Requestor!** This is actually a fairly simple process to understand — all documents currently assigned to that employee will be reassigned to another employee who will then be responsible for completing the tasks associated with those documents.

While the concept may be simple, this is quite a lengthy process for Purchasing. For that reason, the Requisition Requestor Mass Change Request should not be used for vacations or other short-term leave.

## New Report coming to Workday—Print PDF of PO

Responding to requests from both Purchasing Department employees and UAT participants, University IT has developed a new report in Workday called **Print PDF of PO**. This report will give Workday users an easy-to-read image that encapsulates all vital information found on a purchase order. P2P Leadership received lots of feedback requesting this functionality.

It should be noted that the PO image created by this report *does not replicate what the supplier sees when they receive a PO*. When a PO is submitted to a vendor, each piece of PO information from each field on the PO is transmitted to the supplier electronically. This report is intended only to give Workday users a visual representation of a PO that is easy to read quickly. See below for an example PO PDF:



## P2P Status Report — Week 22

<b>Total Requisitions:</b> 325	<b>Requisition Total Turnaround Time:</b>
Reqs Completed: 312	<b>3.76 Days</b>
Reqs In Progress: 13	
Reqs Cancelled: 20	
<b>Total Supplier Invoice Requests:</b> 466	<b>SIRs Total Turnaround Time:</b>
SIRs Completed: 456	<b>2.07 Days</b>
SIRs In Progress: 10	
SIRs Cancelled: 13	

## P2P Pilot Scheduled for Early 2019

On February 18, 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 identify opportunities to streamline the system. Keep an eye out for additional details about the Pilot in the next newsletter!

## Limitations of Emailing Invoices to Accounts Payable

Employees in Accounts Payable frequently hear the question "Can I email the invoice to AP?" Unfortunately, in most cases, the answer is no. AP currently accepts invoices via electronic transfer using EDI810 for PMM transactions, XML for Workday transactions, and cXML for Jaggaer transactions. AP also accepts paper invoices mailed to their Genesee Street location. Paper invoices sent directly to the ordering department should be forwarded to Accounts Payable using interoffice mail, using RC Box 278958. Note that AP receives over 6000 invoices and forms weekly that need to be manually entered into their system. Please keep this in mind when submitting forms to Accounts Payable, and send them as soon as you are able, to give AP the time needed to perform this function effectively.

## A Discussion on When to Send Back...

Once a requisition or SIR is routed to the Purchasing Department, Purchasing employees have the capability to change some information on those forms, in cases where the information on the form is incorrect or insufficient. If a GL account number or FAO is changed, then that form **must** be sent back, as it could change the approval hierarchy. But what other situations call for a send-back? And when can Purchasing employees simply make a change and notify the requestor, without sending the form back through the entire approval process? P2P Leadership has recently opened up a dialog between the Purchasing Department and UAT Participants in order to discuss when it is appropriate to send back a requisition or SIR, with a meeting scheduled for next week. Any input or inquiries on this subject should be directed to the P2P Service Center. Your feedback is highly appreciated!

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