

## Pilot 1 Success!

Pilot 1 has successfully been rolled out! Three waves of FAOs became active since Pilot 1 launched on February 18. During the three week rollout period, a total of 75 SIRs, 106 catalog requisitions, and 23 non-catalog requisitions were created in Workday.

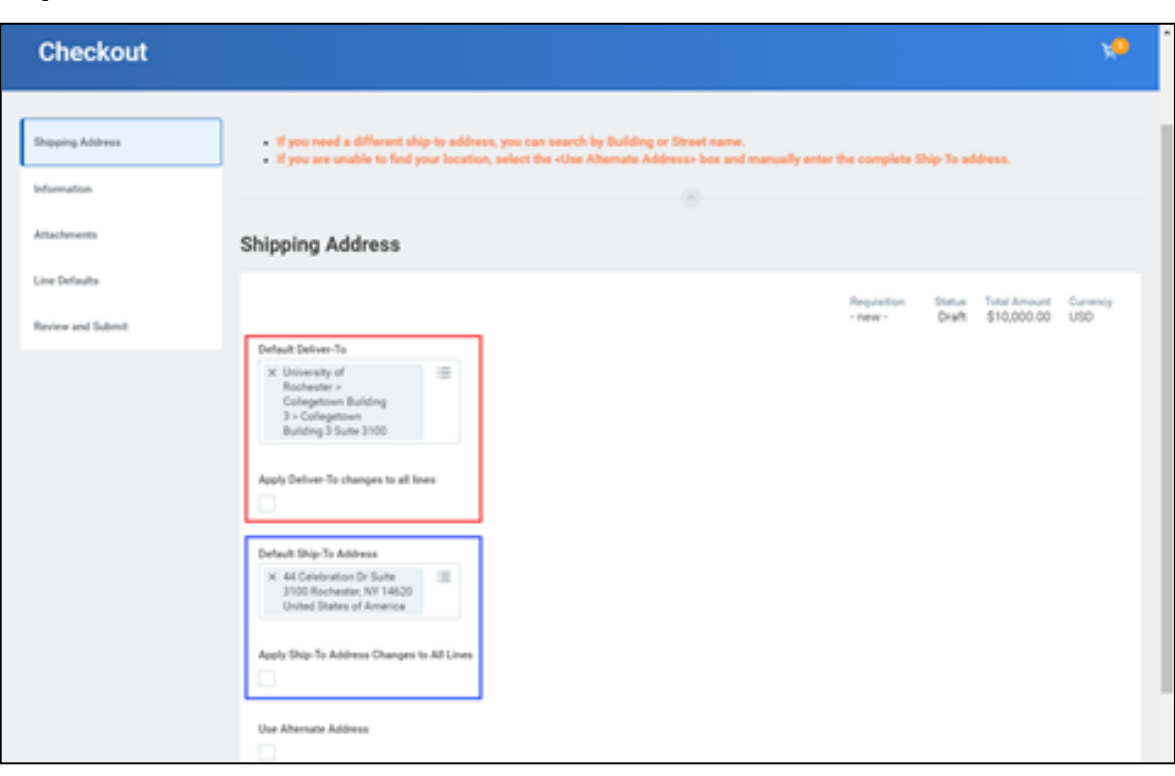
Pilot 2, scheduled for rollout in April of 2019, will bring the P2P project to a whole new group of departments. The next pilot is approaching quickly, so stay tuned for more details!

## UR Financials System Update

On March 9th, University IT flipped the switch on the newest update to our financials system — Workday 32! Go-live for the newest version of Workday went off without a hitch, thanks to everyone who came in on a Saturday to get it done.

The latest update introduces a new Default Deliver-To field on the requisition checkout Shipping Address tab. The Deliver-To location is not currently being sent to the supplier. The Ship-To Address, which includes a room or suite number, is the only location information that is sent to the supplier.

If you need to change the shipping address when completing a requisition, be sure the new address is selected for the Default Ship-To Address on the Shipping Address tab (blue in the screenshot below), or the Ship-To Address on the Review and Submit tab.



## P2P Status Report — Week 33

<b>Total Requisitions: 625</b>	<b>Requisition Total Turnaround Time:</b>
Reqs Completed: 601	<b>3.17 Days</b>
Reqs In Progress: 20	
Reqs Cancelled: 33	
<b>Total Supplier Invoice Requests: 729</b>	<b>SIRs Total Turnaround Time:</b>
SIRs Completed: 723	<b>1.71 Days</b>
SIRs In Progress: 5	
SIRs Cancelled: 33	

## Catalog Suppliers Enabled in Jaggaer Marketplace

Airgas USA LLC	Johnston Paper
Beckman Coulter	Krackeler Scientific
Bio-Rad Laboratories	Laboratory Products Sales
EMD Millipore Corp	Life Technologies
Dupli Graphics	McMaster-Carr Supply Company
Fisher Scientific	Sedgwick
Graybar Electronics	Sigma-Aldrich
Henry Schein	Staples
Hill and Markes, Inc.	VWR International
Illumina	Workplace Interiors
Integrated DNA Technologies Inc.	

## Upcoming Marketplace Supplier Updates

Some suppliers are currently in the testing phase, and should be up and running on the Marketplace soon! Keep an eye out for the addition of **Medline**, **Qiagen**, and **B&H Foto & Electronics** in the coming weeks.

## Airgas Update:

The cylinder return feature, which was previously available when ordering through SOLO, is now enabled in the Airgas catalog in Marketplace. So go ahead and return those empty tanks!

## Information on Roles in P2P

In Workday, there are several roles that can be assigned to a user, including Requisitioner, Supplier Invoice Requester, Principle Investigator, FAO Manager, Cost Center Manager, Grant Manager, and more... Note that if a user has the initiator role (such as Requisitioner or Supplier Invoice Requester) AND the user is ALSO an FAO Manager for the same FAO, they cannot approve transactions that they initiate. The transaction will be routed either to another FAO Manager (if assigned) or to the Cost Center Manager for approval.

Starting with the pilot deployments, all users that initiate P2P transactions will be assigned both the Requisitioner and Supplier Invoice Requester roles. The roles will be assigned at the Cost Center level. If there are changes to who has P2P roles, a [Userid Request Form](#) needs to be completed to reassign roles or assign roles to a new user.

## Ad Hoc Addresses No Longer Available for Marketplace Orders

Requisitioners will no longer be able to use an alternate address on Marketplace orders. The Marketplace suppliers required a list of all University of Rochester shipping locations to pre-load in their order fulfillment systems. Therefore, using an alternate address on your requisition will cause delays in fulfilling your orders. Please select a deliver-to and ship-to address from the drop down boxes on the Shipping tab and apply both to all lines. There will be a validation to prevent the use of an alternate address on Marketplace orders.

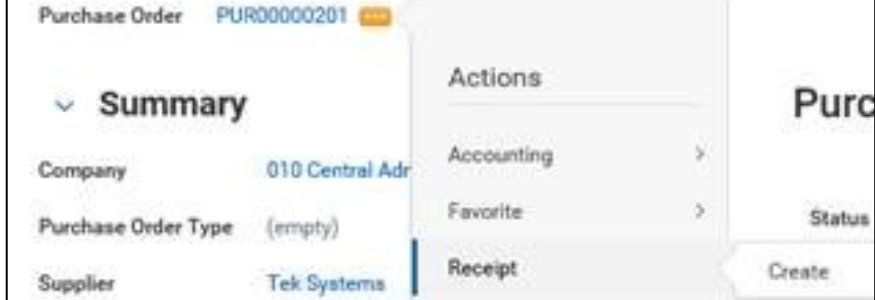
## Info on Match Exceptions and a Lesson on Creating Receipts

When a discrepancy between the purchase order, receipt(s), and invoice occurs, this results in a **Match Exception**. Requesters of requisitions should be prepared to resolve these match exceptions in Workday. The most common match exceptions that requesters need to resolve include: missing receipts, quantity discrepancies, freight amount variances, and missing purchase order lines. Invoices in “Match Exception” status that need attention are systematically routed to the requester, and appear as a task in your Workday Inbox (which will also generate an email notification if they are enabled). You can also review the **Supplier Invoices in Match Exception** worklet in your Procurement dashboard.

Missing receipts is one of the most common causes of match exception. Fortunately, this is an easy problem to solve! See the instructions below on how to create a receipt.

There are 3 ways to get to the Create Receipt task for your PO:

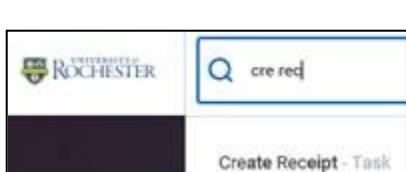
A.) The quickest way is to go to the related action for the PO and select **Receipt > Create**



B.) Select the task: **Create Receipt** from your Procurement Dashboard —



C.) Or, type “cre rec” into the Workday search bar



Instructions for the Create Receipt task:

- 1.) **Receipt Date** is required and defaults to today’s date. You can change this to the actual date that you received the goods or services.
- 2.) Goods Line: Enter the Quantity to Receive amount.\* This must be a whole number without decimals.
- 3.) Service Line: Enter the Amount to Receive.\* This should be a dollar amount.
- 4.) Click **Submit** when done.
- 5.) Upon submission, Workday re-evaluates open invoices for the PO and attempts to match them. A match exception may route back to you if your receipt creation did not resolve all of the discrepancies.

\*Within Workday you can drill into the Supplier Invoice (and where a paper invoice was provided, you can open the Document Link or Attachment to view the invoice) to review the invoice line details as desired.

Requesters should utilize the [Create Receipt Reference Guide](#) and [Change Order Reference Guide](#), or contact the P2P Service Center for assistance with resolving match exceptions waiting for your action.

## A Helpful Reminder About Cookies!

Users should not disable browser cookies for any punch out catalogs. Catalogs in the Marketplace require the use of browser cookies in order to shop. If you have disabled browser cookies, you will receive an error and will not be able to shop from the catalog. Please make sure that cookies are enabled in your browser!

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