UR Procurement July 10, 2019



Rollout 1 for P2P is just around the corner on July 15. The rollout will take place over three phases, scheduled for July 15, July 29, and August 12. When the rollout is complete, it will add over 1,600 FAO's and \$65M in spend to the P2P System. Instructor led training sessions are scheduled for those who will be going live over the next several weeks. For anyone who is currently utilizing the P2P system and would like the opportunity to attend an instructor led session as a refresher opportunity, please to go MyPath and search for "P2P Class" in the search bar to see upcoming sessions that you can register for.

Upcoming Jaggaer Marketplace Upgrade and System Design Changes

On July 21, Jaggaer (Marketplace) will be upgraded to version 19.2. There is one change that will be implemented after July 21st that effects the shopping experience user interface. In addition to the Jaggaer Upgrade, the P2P Design Team has been working on design changes that will impact the requisition checkout process. A zoom session will be offered on 7/12 to provide an overview of the shopping experience changes and the P2P design changes of the requisition checkout process. Sing up for a session here to learn about these upcoming changes.

P2P Trainer Coming Onboard

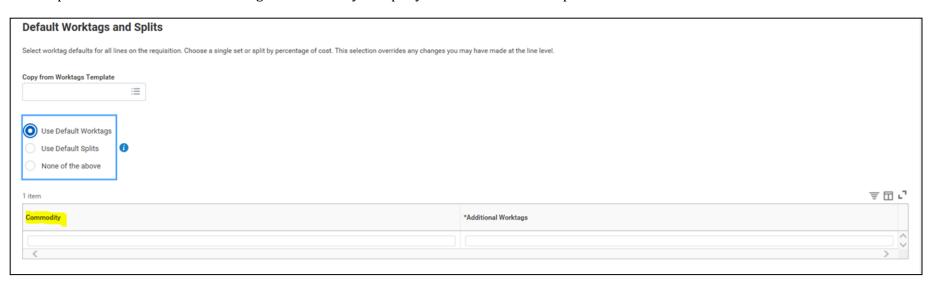
A dedicated P2P Trainer, Scott Torrens, has been hired to lead the instructor-led P2P training classes. Scott started on July 8, and he will also be assisting with training content and documentation. We look forward to having him as part of the P2P Team!

A Reminder About Medline Ordering

Please keep in mind that orders for Medline should not be done in the Procure to Pay System. All requisitioners should continue to use the method they have been using (SOLO, PMM or 312 Requisition) for their Medline orders.

New "Commodity" Field Added to Requisition Form

Starting July 15, there will be an additional required field on all Workday requisitions called "Commodity". The field will be on the Line Defaults screen and will precede the "Additional Worktags" field where you input your FAO. See the example below:



There are 3 values to choose from in the Commodity field: Capital and Equipment, Non-Clinical, and Services. Examples of each are listed on the Line Defaults screen to assist you in selecting the appropriate value. As noted, this is a REQUIRED field and will help route your requisitions faster to the appropriate purchasing team. Please direct any questions or issues regarding this change to the P2P Customer Service Center.

Changes Made to SIR Questionnaire

Periodically, updates are made to transaction and process design to improve functionality and user experience. With those goals in mind, changes have been made to the Supplier Invoice Request Questionnaire. The first change to note is a name change! Other SIR questionnaires are in development or are being planned, therefore the SIR Questionnaire has been renamed to **Supplier Invoice Request – Acceptable Use**. Additional open-ended responses such as "none of the above" and "other (please specify)" have been added in order to give initiators more flexibility when filling out the questionnaire. A question regarding payment terms has been modified, and a question about the supplier's payment type has been added. And finally, some questions have been redesigned to make them flow better.

A new questionnaire is being implemented: **Supplier Invoice Request - Foreign and EFT Payment**. This questionnaire allows Accounts Payable to more fully automate payments that involve foreign currency or require an EFT (electronic funds transfer). Please see the <u>Reference Guide</u> on the UR Procurement site for more information about this questionnaire. This questionnaire and related process updates do not cover expedited F4s that are sent directly to Treasury from the Initiator today. Initiators should continue with the existing process until advised to transition to the future automated process.

Cameron Bojko

Category Manager, Corportate Purchasing

University of Rochester

44 Celebration Drive, Suite 2.200 Room 2226

RC Box 278901

Rochester, NY 14620-2664

Phone: (585)275-2021

Email: <u>cameron_bojko@urmc.rochester.edu</u>