

MyPath P2P Advanced Class Training Now Available

Advanced P2P on-demand training classes are now available in MyPath. The Create Receipt and Match Exception Overview class is required for everyone who is in the “Initiator” role. This should be completed after you are live in UR Procurement. The Reporting and Analytics Class is optional. You can find these classes in MyPath by entering “P2P Advanced” in the search bar.

P2P Advanced: Create Receipt and Match Exception Overview – [Required for Initiators](#)

This module provides an overview of the match exception process in UR Procurement, the University of Rochester’s procurement and payment system. After completing this module, you will be able to review and resolve invoice match exceptions.

P2P Advanced: Reporting and Analytics Overview - [Optional](#)

The University of Rochester has several methods for making purchases (buying) and payments (paying). This module provides an overview of the reporting tools available in UR Procurement, the University of Rochester’s procurement and payment system. After completing this module, you will be able to run, view and export reports.

Tips for Requisitions and Attachments

To avoid requisition processing delays, below are some tips to review prior to submitting a requisition:

- Be sure the requisition line information is complete and aligns with a quote (if attached)
- Be sure the commodity selected aligns with your line items
- Be sure the spend category selected for each line item aligns with your line item
- Be sure that any attachments (i.e. Supplier Price Justification Conflict Information Form, Consultant/Independent Contractor Forms, etc) are complete
- Include attachments as individual documents rather than 1 attachment with multiple documents (this allows the ability to send select documents (i.e. contract, quote) to the supplier with the Purchase Order)

P2P Workshop Wednesdays Coming Soon!

These workshops are intended for hands on experience (for users that are live in P2P) with the Procure to Pay Team to address any questions (i.e. Resolving Invoice Match Exceptions, How to Transition your Blanket Order to P2P, How to Run Reports, etc.) or issues you may be experiencing. Registration for these sessions will be in MyPath and will be limited to 10 per session. They will be conducted in the College Town Training Classroom 3-3102, 44 Celebration Drive.

Wednesday August, 21st 1:30pm-3:30pm College Town (CTOWN 3102)

Wednesday August, 28th 8:30am-10:30am College Town (CTOWN 3102)

Wednesday September, 4th 1:30pm-3:30pm College Town (CTOWN 3102)

Wednesday September, 11th 8:30am-10:30am College Town (CTOWN 3102)

Wednesday September, 18th 1:30pm-3:30pm College Town (CTOWN 3102)

Wednesday September, 25th 8:30am-10:30am College Town (CTOWN 3102)

Study Participant Payments

In response to feedback received from existing and future P2P initiators, the P2P team has decided to allow departments to decide if they want to transition their paper F4 study participant payments to Supplier Invoice Requests or continue to utilize the paper F4 form for study payments after their P2P go-live date.

While the P2P team feels there are multiple benefits to utilizing SIRs (faster overall turnaround time to payment, increased visibility into process status, more control over entry) we understand that some departments, particularly those that are heavy users of paper F4s for study payments, may find it too time-consuming to Create Supplier Requests for participants that have never gotten a payment from UR before. All other paper F4s must transition to Workday Supplier Invoice Requests if the department decides that study participant payments will remain on paper F4s.

Similarly, patient refunds, insurance refunds and student refunds that cannot be integrated into Workday can remain on paper F4s sent to Accounts Payable.

P2P Status Report — Week 55

Total Requisitions: 3,778

Reqs Completed: 3,453

Reqs In Progress: 174

Reqs Cancelled: 136

Total Supplier Invoice Requests: 3,041

SIRs Total Turnaround Time:

SIRs Completed: 2,878

1.85 Days

SIRs In Progress: 137

SIRs Cancelled: 163

Supplier Invoice Request (SIR) Tip

SIR initiators can edit and submit a draft or In Progress SIR created by another user in their department, as long as they both have access to the same FAO or cost center. See how below!

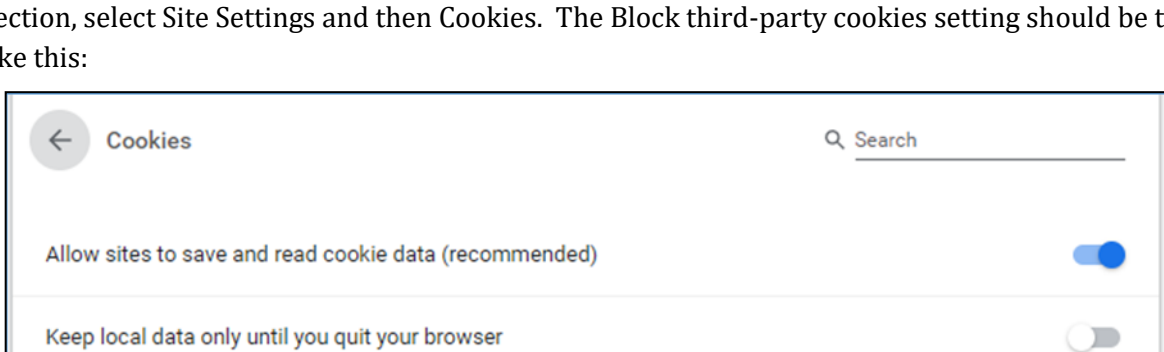
- 1) Enter the SIR number in the global search box and press Enter
- 2) Select the Procurement search category to see the search results
- 3) Click on the SIR
- 4) Access the Edit task via related action
- 5) The person editing the SIR becomes the Requester, however the questionnaire completion step is still routed to the original initiator. Contact the P2P Service Center to have the questionnaire completion step reassigned to the new requester so the SIR submission can be completed; otherwise, the request will not be submitted.

The full SIR tips and tricks, along with many other helpful tips, can be found on the Procurement website at www.rochester.edu/adminfinance/urprocurement/tips-and-tricks/

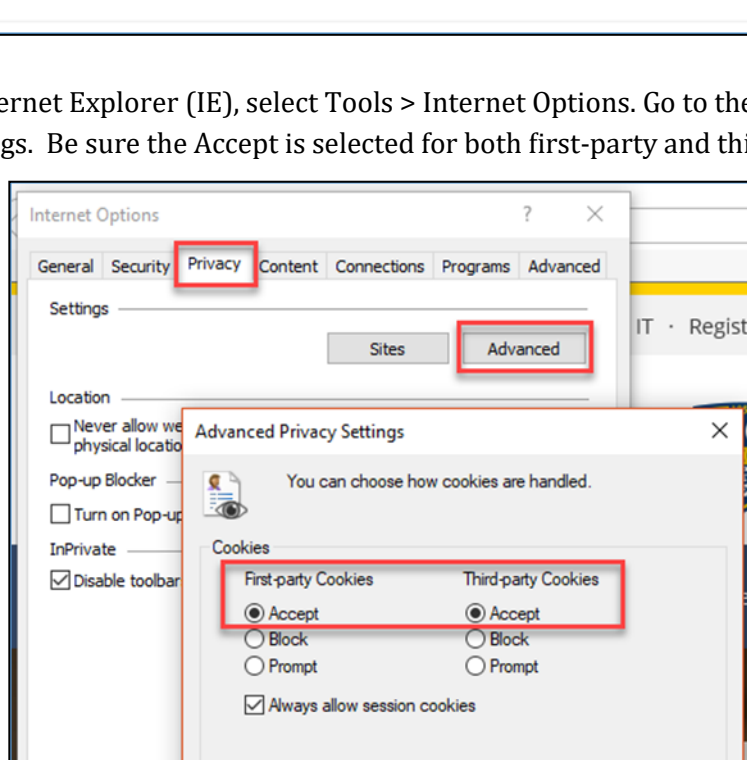
Troubleshooting the P2P Marketplace (Jaggaer)

Have you checked out the P2P Marketplace recently? There are 24 catalogs available. Our Marketplace suppliers do require Third Party Cookies, therefore if you have any troubles connecting, be sure to check your Cookies setting and ensure you do not have Third Party Cookies blocked.

In Chrome, select Settings. Then scroll to the bottom and select Advanced. Under the Privacy and security section, select Site Settings and then Cookies. The Block third-party cookies setting should be turned off, like this:



In Internet Explorer (IE), select Tools > Internet Options. Go to the Privacy tab and select Advanced under Settings. Be sure the Accept is selected for both first-party and third-party Cookies, as shown below:



3-Marketing Supplier Group

The following suppliers are assigned to the 3-Marketing Supplier Group and cannot be processed on a Supplier Invoice Request. F4’s may have been submitted for these suppliers in the past; however, based on the products/services they provide, any purchase for these suppliers must be submitted on a requisition.

- Alphagraphics 478
- Antithesis Advertising
- City Blue Imaging Services
- Cohber Press Inc
- Cooley Group Inc
- Eagle Graphics Inc
- Epi Printing and Finishing Inc
- Forward Branding and Identify Inc
- Geiger
- Gravity Pool
- Icon Creative Inc
- ID Signsystems Inc
- John Schlia Photography
- KB Graphics Inc
- KOKO Productions Inc
- Matt Wittmeyer Photography Inc
- NXT Media Group Inc
- Pierrepont Visual Graphics Inc
- Pixos Print
- Premier Sign Systems LLC
- Truth Collective LLC
- Tucker Printers
- Uniform Village Inc Summary
- Upper Case Design Inc

Keep an eye out for future P2P news and updates!

[Cameron Bojko](#)

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