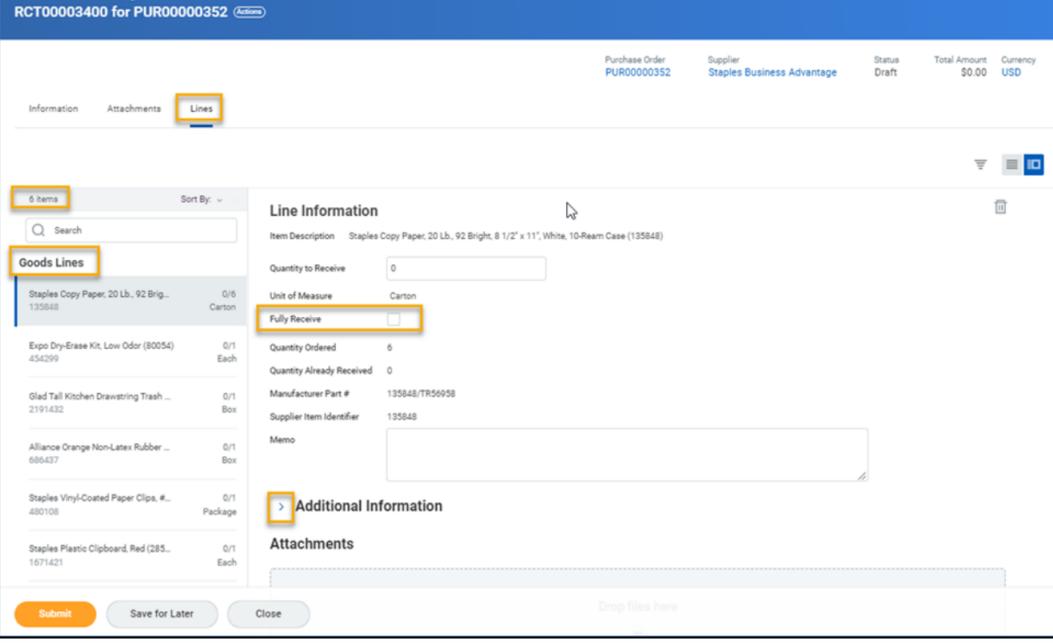


Workday 33 Upgrade

On September 7th, the UR Financials & UR Procurement (P2P) system successfully underwent a scheduled upgrade. A change to the “Create Receipt” screen is the only impact to end users. Check out the details below. If you have questions, please email UnivITHelp@rochester.edu.

The new “Create Receipts” screen is easy to navigate. Users creating receipts will have the ability to fully receive directly on each line (in additional to fully receive as usual). There is also a new search feature where users can search for a specific line item when there are many lines. Below is a sample screen to help illustrate the functionality.



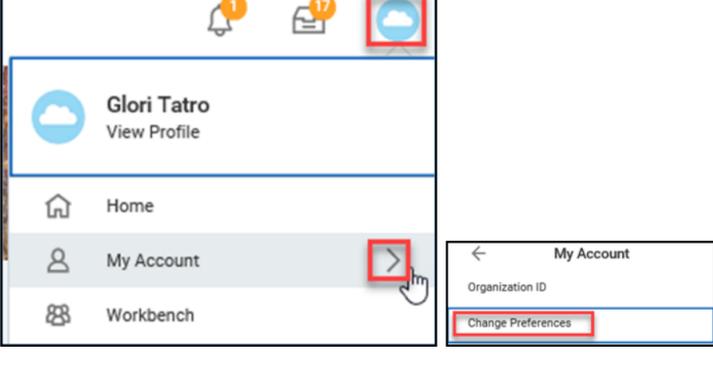
Notice the new Fully Receive box, which when selected will update the Quantity to Receive for the line selected. When more than one line, all lines are listed on the left side of the screen and are easy to select. When you expand the Additional Information, you will be able to view line details from the purchase order, including the Worktags (Cost Center, FAO)

Ad Hoc Addresses

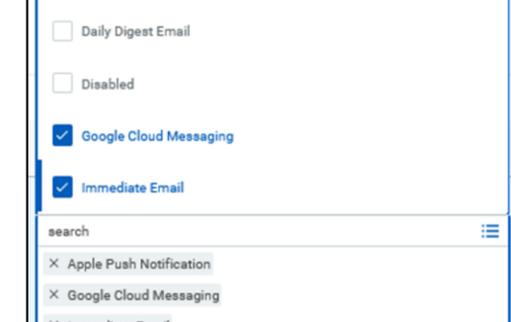
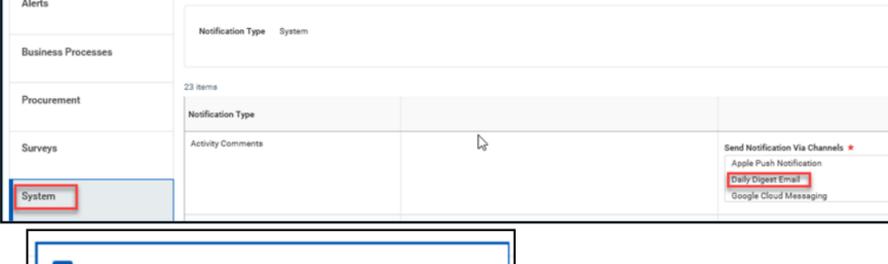
Marketplace orders cannot transmit if a user has entered an Ad Hoc Address. The Marketplace suppliers have all of the U of R addresses pre-mapped, since these transactions are machine to machine. If you need a Marketplace order shipped to an offsite location, you must reach out to the P2P Service Center well in advance so that a request to add the address can be sent to the I.T. team. Please allow at least one week for the address to be added.

Activity Stream Email Notifications Can be Sent Immediately!

We’ve mentioned the Activity stream in the past, which is enabled for collaborating on procurement transactions. If you are @mentioned in a transaction that you have access to, you will receive a notification in Workday. By default, the notification will be included in your daily digest email. If you would like to receive immediate email notifications for activity stream messages, you will need to update your notification preferences by clicking on the cloud icon, then **My Account > Change Preferences > System** (bottom of page) > **Activity Comments**.



Change the Daily Digest Email to Immediate by clicking in the box as shown. Select **<OK>** when done to save your changes.



Requisition Attachments — Internal vs. External

If any attachments need to be sent to the supplier with the purchase order, you can select the External Attachment button when adding attachments to the requisition. Attachments being sent to suppliers must be less than 30MB. As a best practice, be sure to name all your requisition attachments with meaningful names, which is helpful for your approvers and the purchasing team.

After uploading your attachments, select the External checkbox for attachments that should be sent to the supplier with the purchase order. Do not select the external checkbox for attachments that should not be sent to suppliers. And if you are unsure, please reach out to the P2P Service Center for guidance.

P2P Status Report — Week 58

Total Requisitions: 4,617	Requisition Total Turnaround Time:
Reqs Completed: 4,392	4.49 Days
Reqs In Progress: 226	
Reqs Cancelled: 190	

Total Supplier Invoice Requests: 3,807	SIRs Total Turnaround Time:
SIRs Completed: 3,657	2.11 Days
SIRs In Progress: 150	
SIRs Cancelled: 195	

Supplier Invoice Request Initiators Must Complete Questionnaire

Once a SIR is submitted, the Initiator almost always will be prompted to complete the Questionnaire. The SIR Questionnaire is not required for study participant payments. Therefore, nearly all SIRs require completion of the Questionnaire. The SIR will not route for any approvals until the Questionnaire is completed.

If you navigated away from the SIR completion screen where you could have just clicked on Complete Questionnaire, then go to your Workday Inbox where you will find all tasks awaiting your action. Click Submit when you are done with the Questionnaire so that your SIR will route for approval. If you get any red error messages you must correct them for your submission to be accepted. If you have any questions, please consult the Procurement website at <https://www.rochester.edu/adminfinance/urprocurement/>, or you can reach out to the P2P Service Center at 275-2012.

Thanks for reading! Keep an eye out for future P2P news and updates!

Cameron Bojko

Category Manager, Communications for P2P

University of Rochester

44 Celebration Drive, Suite 2.200 Room 2226

RC Box 278901

Rochester, NY 14620-2664

Phone: (585)275-2021

Email: cameron_bojko@urmc.rochester.edu