P2P Newsletter

UR Procurement

Vol. 13— September 9, 2019

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 <u>UnivITHelp@rochester.edu</u>.

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.

Create Receipt RCT00003400 for PUR00000352 @	6						⊻ €
Information Attachments			Purchase Order PUR00000352	Supplier Staples Business Advantage	Status Draft	Total Amount \$0.00	Currency USD
						Ŧ	
6 items Sort By: ~ Q Search Goods Lines Staples Copy Paper, 20 Lb, 92 Brig 0/6 135848 Carton Expo Dry-Erase Kit, Low Odor (80054) 0/1 454299 Each Glad Tall Kitchen Drawstring Trash 0/1 2191432 Box Alliance Orange Non-Latex Rubber 0/1 66457 Box Staples Vinyl-Coated Paper Clips, # 0/1 481018 Package	Line Information Item Description Staples Copy Quantity to Receive Unit of Measure Car Fully Receive Quantity Ordered 6 Quantity Already Received 0 Manufacturer Part # 135 Supplier Item Identifier 135 Memo Additional Inform	Paper, 20 Lb., 92 Bright, 8 1/2" x 11", V ton 848/TR56958 848	khite, 10-Ream Case (135848)		Æ		
Staples Plastic Clipboard, Red (285 0/1 1671421 Each	Attachments						
Submit Save for Later	Close		<i>a</i>				

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 transaction 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 steam 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**

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.

Click here to sort	Parent Notification Type Notification Type System						
Alerts							
Business Processes							
Procurament	23 items						
Procurement	Notification Type						
Surveys	Activity Comments	ß		Send Notification Via Channels *			
System				Daily Digest Email Google Cloud Messaging			
Apple Push Notification							
Daily Digest Email							
Disabled							
Google Cloud M	Google Cloud Messaging						
- Immediate Ema	il						
search		:=					
× Apple Push Notific	× Apple Push Notification						
× Google Cloud Mes							
× Immediate Email							

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!

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