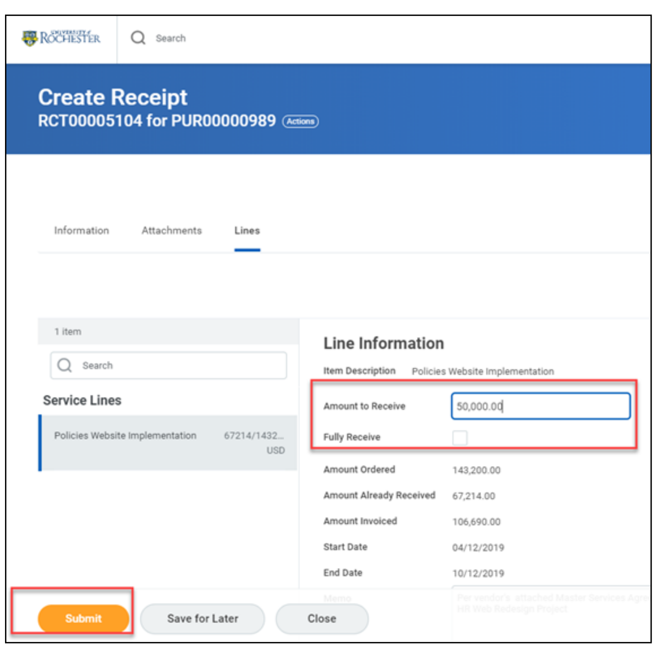
P2P Newsletter

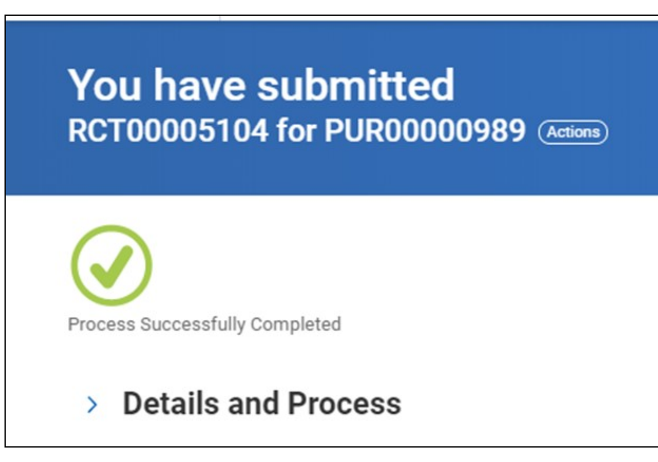
UR Procurement — Vol. 14— October 24, 2019

Draft Receipts — Don't Forget to Hit Submit!

During the rollout of P2P, the Service Center has come across a common error. Some users have been creating receipts, but not fully submitting them. This results in a Draft Receipt that will not resolve a match exception. When this happens, the receipt will need to be edited and submitted.

When creating a receipt, please remember to hit submit after filling in the amount or quantity you wish to receive. Even if you check the Fully Receive box, you still need to click on submit. Your receipt is not complete unless you see a message stating you have successfully submitted a receipt. Please keep this in mind when receiving!





Upcoming P2P Workshops

In addition to the P2P Service Center for support after go-live, the P2P Team is offering P2P Workshops. These have been mistaken to be instructor led sessions; however, they are hands on sessions to assist with answering 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 are 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. Upcoming P2P Workshops are listed below:

- Friday, October 25, 2019 — 1:00 – 3:00pm College Town Rm 3102
- Friday, November 1, 2019 — 8:30 – 10:30am College Town Rm 3102
- Friday, November 8, 2019 — 1:00 – 3:00pm College Town Rm 3102
- Wednesday, November 20, 2019 — 1:00 – 3:00pm College Town Rm 3102

Expedited SIR Pilot Program has Begun

New functionality is being piloted with Payroll SIR Initiators whereby they will select a Spend Category that has been configured for Expedited processing. Expedited processing allows for a single Special Category Approval prior to payment. This process has been designed similar to the paper/email process today, and is limited to a very few central activities (primarily Payroll and Human Resources).

It is important to note that Expedited processing is very different from Rush processing. Most P2P users should never use the Expedited process. If you accidentally use one of these expedited spend categories, you'll need to Cancel your SIR and start a new SIR with the correct Spend Category. Editing the SIR for the correct SC will not work, because there will be no Special Category Approver designated and the SIR cannot be re-assigned to follow the proper approval path. The SIR must be Canceled.

Please reach out to the P2P Service Center with any questions.

Reminder: Requisitioners Do NOT Need to Submit 312 Reqs through Workday

Purchasing has received a few Workday requisitions which have a 312 requisition included as an attachment. In this case, the 312 requisition is duplicative, and is not necessary to place an order. If you are submitting requisitions via Workday, you do not need to fill out a 312 requisition as well.

Correction to 9/9/19 SIR Questionnaire Newsletter Article

In the previous edition of the P2P Newsletter, an article about the SIR questionnaire included some incorrect information — that the SIR questionnaire is not required for study participant payments.

This is not the case. Currently all Supplier Invoice Requests, including those for study participants, require the completion of a questionnaire. New functionality is being developed that will bypass the SIR questionnaire for certain Payroll and Human Resources payments, but all study payments require the questionnaire.

Apologies for any confusion this may have created.

VWR Quote Feature Now Available!

There is a quoting feature now available in P2P for VWR. Requisitioners who ordered from VWR in the past may be familiar with "My Quotes" that was available prior to P2P. After logging in, select the My Quotes link located on the left-hand side of the screen.

Any quotes that were requested and prepared are listed. Click on the quote number and it opens up in the shopping basket at the prices quoted. Customers are able to order any item off the quote and/or change quantity.

P2P Status Report — Week 63

Total Requisitions: 6,963	**Requisition Total Turnaround Time:**
Reqs Completed: 6,676	**5.12 Days**
Reqs In Progress: 276	
Reqs Cancelled: 283	
Total Supplier Invoice Requests: 6,250	**SIRs Total Turnaround Time:**
SIRs Completed: 5,964	**2.30 Days**
SIRs In Progress: 291	
SIRs Cancelled: 293	

New Questionnaire for Non-Catalogue Requisitions Coming Soon

Effective Monday, October 28th, for non-catalogue purchase requisitions only, a preliminary questionnaire will be presented to the requisitioner after the "Submit" button is pressed. These questions are essential to mitigate risk to the university and medical center. A similar questionnaire is currently in use for Supplier Invoice Requests (SIRs).

This questionnaire should help expedite requisitions in Purchasing rather than having them contact you via email or phone for answers to the questions. Answers to some of the questions will also be used to route the requisition to the appropriate individual to determine if additional analysis is required. Note that depending on the answer selected, additional attachments may be necessary.

In the event that you are uncertain how to answer any of these questions, please consult with the requestor for answers, or reach out to the P2P Customer Service Center for assistance.

Here is a draft of the questionnaire:

Preliminary Questionnaire v 20190923

If you are uncertain as to how to answer these questions, please reach out to the requester of this purchase requisition for answers.

For details for the Consultant/Independent Contractor question, please click here.

For details for the Conflict of Interest question, please click here.

For details for the Lease question, please click here.

This is NOT a purchase with a Consultant/Independent Contractor supplier. (Required)

- Agree.
- Disagree – Please complete and attach the 4 attachments per the policy: 1) Initial Assessment Questionnaire, 2) Independent Contractor Certification Form, 3) Professional Services Agreement, 4) W-9 Request for Taxpayer Identification Number and Certification (only if Consultant/Independent Contractor is an individual)).

There is NO conflict of interest per the University's policies with respect to this expenditure. (Required)

- Agreed. There is NO conflict of interest.
- Disagree. There is a conflict of interest. You will be asked to explain how the conflict of interest is being managed in a separate questionnaire.

The purchase does NOT contain a lease agreement or arrangement? (Required)

- Agreed.
- Disagree - The purchase contains a lease agreement or arrangement, or the purchase contains an identified asset (property, plant, or equipment) explicitly or implicitly specified in the contract (the asset is free with the purchase of the goods).

Freight Charges—if known, add it to the PO header

When requisitioners place an order for goods, and there is a freight charge associated with that order, the freight amount should be entered in the **Freight Amount Field** in the Information Tab of the checkout process. By entering freight charges when they are known, it will alleviate Invoice Match Exception discrepancies and delayed payment to suppliers due to freight. Please keep this in mind when creating and submitting requisitions.

Thanks for reading, and keep your eyes peeled for more P2P news to come!

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