

## What to do if an approver or initiator leaves the department

It is best to initiate changes in Workday prior to the employee leaving permanently. Anyone with initiator or approver roles in Workday will have to submit a security form to remove those roles from their Workday profile. In addition the person who is assuming those roles will also need to submit a security form to add them. To see the roles to remove the user should type [View My Role Assignments](#) in the global search bar in Workday. They will see a list of all their roles and they should transfer all of them to their security form. It is recommended a copy of the form be retained so those same roles can be assigned to the replacement.

Here is a link to the security form: [www.rochester.edu/adminfinance/urfinancials\\_permission\\_form/?app=procurement](http://www.rochester.edu/adminfinance/urfinancials_permission_form/?app=procurement)

After roles have been taken care of there are additional steps that need to be taken if the employee leaving has been an initiator. The department will need to transfer all of their tasks in Workday to the new user so match exceptions and other notifications can go to the correct individual to resolve them.

The P2P Service Center can initiate the transfer, but they need information in order to do this. Below are the instructions on how to obtain the necessary information.

**Before proceeding with this Create Requisition Requester change request, you will need to produce a list of ALL requisitions that need to be reassigned by running the "Find Requisition Lines and Line Splits for Organization" report, and then to include the list as an attachment in this request.**

**Steps:**

1. Open a new Workday tab and use the Global Search to find the "Find Requisition Lines and Line Splits for Organization" report.
2. On the report fill in Requester Name, uncheck "Exclude Closed", and leave all other fields blank.
3. Export the results from the report as an excel file using the *Export to Excel* icon.
4. Complete this Create Requisition Requester change request.
5. Use the exported excel file as the attachment requested in question 6 of this form.

Once you have the spreadsheet you will need to type [Create Request](#) in the global search bar in Workday to initiate the request to transfer the items to your new initiator. Be sure to attach the Excel file to your request. The completed request will route to the P2P Service Center and they will initiate the transfer of the tasks.

## Design Changes Implemented on 2/3/2020

On February 3rd, several design changes were implemented in UR Procurement:

- Multi-Company Requisition Functionality
- SMH/MFG Capital Requisition Automation
- Requisition Questionnaire enhanced to include (Personally Identifiable and Protected Health Information and Clinical Lab Equipment Acquisition Review questions.

If you were not aware of this, you can learn more about it by reviewing the following [video](#)

## Invoices for Requisitions in P2P

If you have an invoice for a requisition for goods received or services provided, do not attach the invoice to the requisition when creating the requisition in P2P. Requisitions do not route to Accounts Payable and therefore, will not know the invoice is attached. Best practice is to follow the current process and send the invoice to Accounts Payable (Box 278958) for processing.

## Approver Delegations

In advance of planned absences, be sure to setup a delegation in UR Procurement to delegate the approval of transactions while you are out so there are no delays with getting transactions approved. If you need instructions on how to set a delegation, visit the UR Procurement Website, [P2P Self Help](#) and Approver P2P Support Tools Section.

## 312 Requisitions submitted after P2P go-live

After you are live on the P2P system, you should no longer submit 312 requisitions to Purchasing. You should begin to transition your requisitions to the P2P system. 312 requisitions submitted after your go-live date may be returned with a request to process the requisition in the Procure to Pay System.

## P2P Status Report

**Total Requisitions: 15,963**

**Requisition Average Turnaround Time: 6.04 Days**

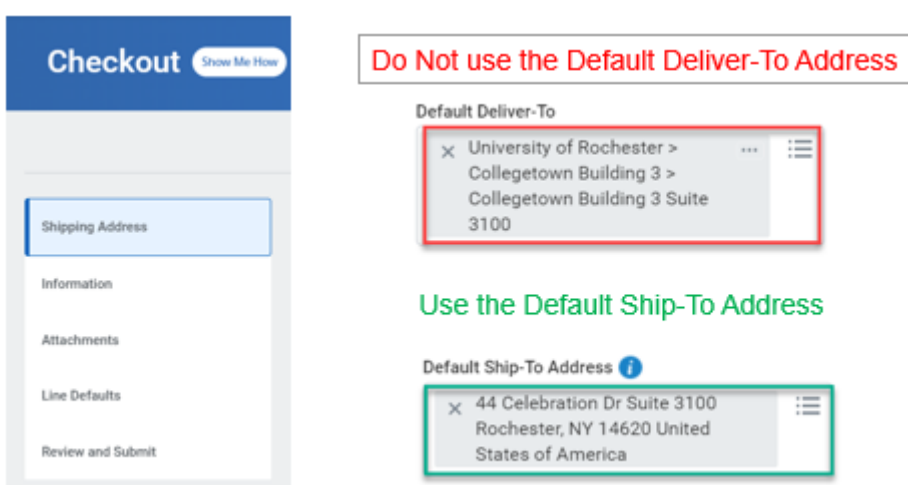
Requisition Qualified Supplier Turnaround Time:	7.88 Days
New Supplier – Non Catalog Turnaround Time:	11.97 Days
Marketplace Order Turnaround Time:	1.65 Days

**Total Supplier Invoice Requests: 13,129**

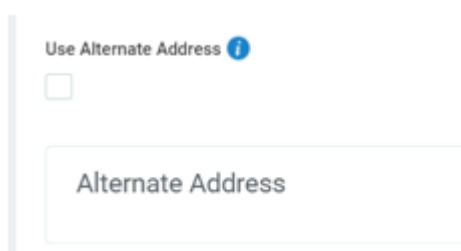
**SIRs Total Turnaround Time: 2.77 Days**

## Ship To Addresses

During the Checkout process on Non-Catalog and Marketplace orders you will need to fill out shipping address information.



- The Default Ship-To Address Can be changed to a different UR address on file.
- Search by building or street name
- If you are having difficulty finding your address, please reach out to the P2P Service Center for assistance
- You can also have your address set as the default by submitting a request to: [URFinancialsSupportTeam@UR.Rochester.edu](mailto:URFinancialsSupportTeam@UR.Rochester.edu)



- The "Use Alternate Address" option can **only** be used for Non-Catalog Requisitions that are being shipped to a Non UR Address
  - i.e. Research materials that are being shipped out of state