

# P2P Newsletter

UR Procurement

Vol. 25 July 20, 2020

## Marketplace Upgrade

On July 19<sup>th</sup> the UR Financials Procurement Marketplace (Jaggaer) successfully underwent a scheduled upgrade. Changes made did not impact end users. If you have questions please email Procurement\_service\_center@ur.rochester.edu or call x52012

## Zero Dollar Lines in Workday

On occasion having a \$0.00 line on a Requisition is necessary. However, there are a couple of things that have to be kept in mind. Even though there is no money on the line, the system still requires the zero dollar line to have an FAO number. In addition, if you set up default splits you will have to remove the splits from the zero dollar line. Mathematically it is not possible to split zero into smaller pieces. A single FAO number (Worktag) is required for a zero dollar line on a requisition.

## Partial Quantities Not Allowed on Requisition Lines

When creating a requisition in P2P, you should not enter partial quantities. Purchase orders cannot be transmitted with partial quantities. We will be implementing a custom validation in the future that will prevent the ability to enter a partial quantity on a requisition line.

## Submission of Invoices for Purchase Orders

When creating a requisition in P2P, please do not attach an invoice to the requisition. Accounts Payable will not see the invoice for processing. If you have an invoice that should be processed against a PO, you should assign the PO number to the invoice and send it to Accounts Payable (Mail: Box 278958 or email accountspayable@finance.rochester.edu) for processing. When sending emails to the AP email box, it is helpful if you make the subject of the email reflective of the nature of the email. For example, "Payment Status for X", "Question about Y", or in this case something regarding "Invoice to be processed".

## Check the status on Supplier Contact Information Changes

If you want to see if your Supplier Contact Information Change request has been approved, you can look at your Inbox Archive. Scroll to find your change request and click on it. The Overall Status will show as In Progress, Approved, or Denied. You can also click on and see the Process history to see who the change is sitting with if it does show as In Progress.

The screenshot shows the P2P system interface. At the top, it says 'Sandbox - rochester' and 'On behalf of: Deborah Harradine'. Below this is a search bar with 'supplier:amer assn'. The main area is titled 'Inbox' and shows a list of events. The selected event is 'Contact Information Change for Amer Assn Critical Care Nurses - created by Deborah Harradine on 06/19/2020'. The event details show 'Overall Status: In Progress' and 'Overall Process: Contact Information Change for Amer Assn Critical Care Nurses - created by Deborah Harradine on 06/19/2020'. The 'Process' tab is highlighted, showing the event details and contact information.

## Managing Service Line Expiration Dates

In P2P you will not receive emails letting you know that Service Orders are expiring. You can monitor that information easily within your UR Procurement Dashboard. When logging into P2P, click on the UR Procurement icon and then click on the Orders tab. For more information see the "Managing Purchase Order Expiration" Tip and Trick located in the [P2P Self Help General Support Tools Section](#) on the UR Procurement Website.

The screenshot shows the UR Procurement dashboard. The 'UR Procurement' icon is highlighted in the top right corner. The 'Orders' tab is selected in the bottom navigation bar. The dashboard also shows a 'Customize your Procurement dashboard' banner and a 'Filter Name' input field.

You can also utilize the "Find Expiring and Expended Orders" report to manage your service line expirations and available purchase order dollars.

The screenshot shows the 'Find Expiring and Expended Orders' report form. The form includes fields for Company, Organization, Status (Exclude), Supplier, Cost Center, Percent Used, Days Until Expiration, Expiration, % Funds Available, Service Lines Only, and Goods Lines Only. The 'Cost Center' field is highlighted with a red box. The 'OK' button is highlighted with an orange box.

## Requisition Review Process Reminder

As communicated in the May 2020 newsletter, due to COVID-19 and prior communications by University and URM senior leadership, the University of Rochester is taking precautionary measures to control non-essential spending and maintain the financial welfare of the organization.

A weekly review of requisitions is in place to support this directive based on the criteria below:

- River Campus (Company 010, 020, 021, 022, 023, 024, 030, 070, 080) requisitions \$25,000 and greater
- Medical Center (Company 040, 060, 090, 091, 092, Highland Hospital) non-clinical requisitions \$50,000 and greater
- Strong Memorial Hospital (Company 050) non-clinical requisitions \$100,000 and greater