

P2P Newsletter

UR Procurement

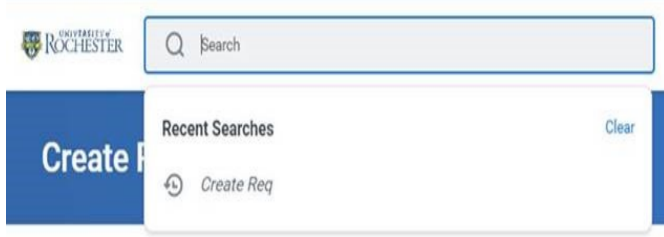
Vol. 28 September 24, 2020

UR Procurement Upgrade Complete

On September 12th the UR Financials & UR Procurement (P2P) system successfully underwent a scheduled upgrade. Changes made did not impact P2P end users. There were a few enhancements to the user interface which are noted below.

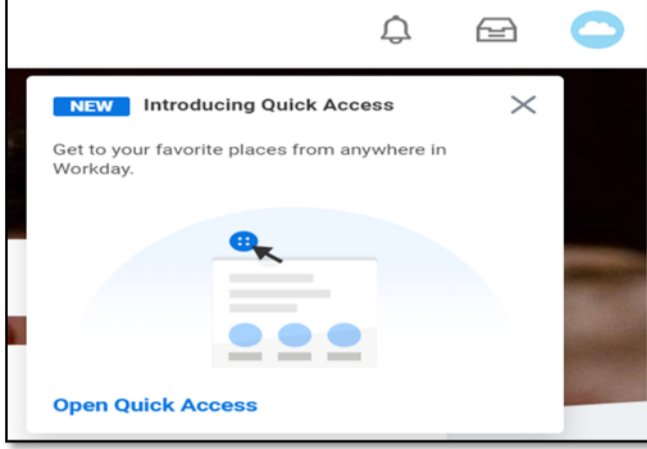
Search Bar

UR Procurement now makes it easier to recall recent searches performed on tasks or reports in the system. The UR Procurement **Search** bar now includes a feature that captures the 5 most recent searches entered into the bar. This list automatically displays as you click within the field. Here you may notice new icons to distinguish between reports and tasks. To use a recent search select the search term from the drop down list. To clear the history, select **Clear**.



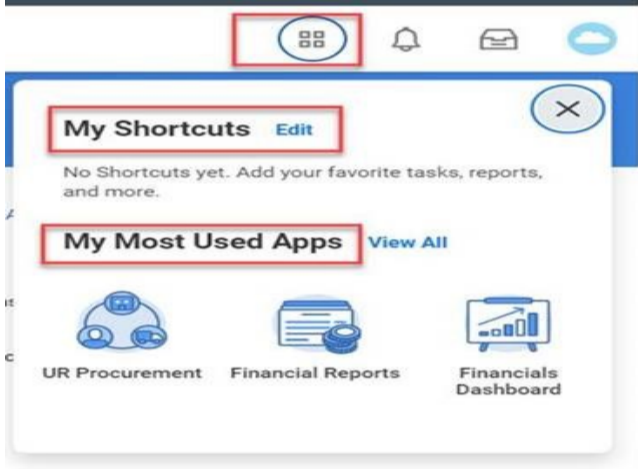
Quick Access

Users may see a popup on the right of their screen announcing a new Quick Access feature when they first login after the system upgrade. Select **Open Quick Access** to go to the new *My Shortcuts* and *My Most Used Apps* features, or click the X to close.



My Shortcuts

The **My Shortcuts** feature allow quick access to a customized list of saved tasks, reports and links. This listing is created by users for their account in the system and can be edited at any time. Select **Edit** to build your shortcut list



If you have questions please contact the P2P Service Center procurement_service_center@ur.rochester.edu

SIR and Requisition Questionnaire Changes

The Supplier Invoice Request Acceptable Use Questionnaire is being updated on Friday, September 25th to include a question about Personally Identifiable Information. This is the same question/prompt that has been on the Requisition Preliminary Questionnaire and further improves our ability to identify potential information security risks and compliance. For more information about the Social Security Number/Personally Identifiable Information Policy, please visit the [IT policy website](#).

The Requisition Preliminary Questionnaire is being updated on Friday, September 25th to include a question about Clinical and Lab Equipment Acquisition Review (see below). This question has been required for requisitions created for Company 050 and 091 since February 2020 and will be expanded on the questionnaire for all companies. Requisitions that contain one of the categories listed will route to the CLEAR Committee for review after FAO and Cost Center Procurement Manager financial approvals.

Does the requisition contain any products that fall into the categories identified below? (Required)

- IT or AV Equipment (includes all tablets and mobile devices)
- Connectivity to the Enterprise Network either hardwired or wireless (i.e. Bluetooth or Radio Frequency)
- Uses/ transmits/ or stores data
- Connect with EPIC, the health systems Electronic Medical Record (EMR)
- Software
- Medical/Clinical equipment for patient use or diagnosis
- Operated by power source (electric or battery)
- Clinical Laboratory Equipment (including Reagent Rental Equipment Agreements)
- Medical Imaging Equipment (i.e. X-ray, CT's MRI's or Photography equipment)
- A Radiation Emitting Source
- Trial/Eval/Rental/Loaner or Leased Equipment
- Hospital Bed/Stretcher/OR Table (Required)

- Yes, one of the above applies
 None of the above apply

Supplier Price Justification Questionnaire

A Supplier Price Justification Questionnaire will be enabled on Friday, October 2nd for requisitions that total \$25,000 or greater. This questionnaire will replace the requirement to complete the Supplier Price Justification Conflict Information Form (SPJCI) off-line and attach it to the requisition. Requisitions with Grant FAO's \$25,000 or greater will have additional questions regarding minority supplier solicitation and selection. A Zoom Overview Session has been scheduled for 09/30/2020 at 2:00—3:00pm to preview the questionnaire and provide an opportunity to ask questions. To attend the overview session, please utilize the Zoom meeting information below. A recorded session of the [Supplier Price Justification Overview](#) and [Supplier Price Justification Questionnaire Demo](#) are also posted on the UR Procurement Website.

Supplier Price Justification Questionnaire Zoom Overview Session Information:

9/30/2020 2:00—3:00pm

Meeting URL: <https://rochester.zoom.us/j/95155660807>
Meeting ID: 951 5566 0807
Passcode: 104514

Marketplace Catalog Enhancement Coming Soon

Workplace Interiors is updating their catalog from a hosted to a punchout catalog and will introduce a quoting feature that will allow you to search for a quote and add the items from the quote to your cart. Stay tuned for updates when this updated catalog will be available.

Inactive Suppliers

An [Inactive Supplier Tips and Trick document](#) has been posted to the UR Procurement Website to assist with questions regarding inactive suppliers and use on SIR's and Requisitions.