

P2P Newsletter

UR Procurement

Vol. 30 November 23, 2020

UR Procurement (P2P) Marketplace Upgrade

UR Procurement Marketplace (Jaggaer) upgrade was successfully completed on November 8th. There were no impacts to end users. If you experience any issues, please contact the P2P Service Center for assistance.

Checking On Order Status

What should you do if you did not receive your order? You can first check the order transmission status by following the instructions in the Tip and Trick ([How to Tell if Your PO Was Sent](#)) on the UR Procurement Website. After checking the order status, and have confirmed your PO was sent, you should contact the supplier directly to get an update on your order.

Delegations

When delegating tasks to someone else, please keep in mind the person you are delegating to must be a peer, superior or subordinate and have the same security. Delegating does not delegate all responsibilities. As an example, the person that is delegated to may not have the security to create receipts or process invoice match exceptions.

Timely Receipts

P2P requires a 3-Way Match for most transactions prior to an invoice being paid. It is best practice to enter receipts upon delivery of goods or services. Entering timely receipts will prevent delayed invoice payments and avoid receipt match exceptions in your Match Exception Worklet.

See the table below for P2P receipt requirements.

Receipt Type	Dollar Value	Receiving Required
Goods (Catalog)	< \$2,500	No
Goods (Non-Catalog)	>\$0	Yes
Grant Purchase (GR5XXXX)	>\$0	Yes
Spend Category = Trackable	>\$0	Yes
Service	>\$0	Yes

Reminder: SOLO Order Decommission Date

To complete the transition of remaining transactions occurring outside of Workday, we will be turning off SOLO access for the remaining suppliers below as of November 30, 2020. Please plan accordingly to assure there is no disruption in your departmental ordering process.

Airgas USA LLC

Krackeler Scientific Inc.

MilliporeSigma

VWR Scientific

Fisher Scientific

Laboratory Product Sales Inc.

Preparation for SOLO Decommission

To avoid interruption of ordering after November 30 for your department or lab, if you have a SOLO login for any of the suppliers above but do not have P2P Initiator access in Workday, you will need to submit a [P2P Security Form](#) to the [P2P Service Center](#) to request initiator access. New users will also need to complete the MyPath P2P Initiator Training *P2P: Introduction to UR Procurement for Initiators (P2P Marketplace Overview)*. There are instructional videos on how to [Create a Marketplace Requisition](#) available on the UR Procurement Website for staff who are not familiar with how to do this. Please plan accordingly to avoid disruption in ordering.

What to Do When Someone Leaves Your Department

Prior to someone leaving your department that has initiator rights, there are some things that you should do to avoid disruption to your operations:

- ⇒ **Employee Leaving Should Submit a Request to Remove Roles prior to Leaving Position**
- ⇒ **Transfer Tasks to another staff member (replacement) on initiated transactions of exiting staff member**
- ⇒ **Change the contact person on Purchase Orders Initiated by Departing Employee**
- ⇒ **Manager Change Invoice Exception Worklet to View Departed Employee Invoice Match Exceptions**

For details on these tasks above, please review the [What to Do When Someone Leaves Your Department](#) document on the UR Procurement Website

Blanket Purchase Order Guidelines for PO Expirations 2021 and Beyond

If you have UK blanket purchase orders that expire in 2021 and beyond, please refer to the guidelines below regarding transitioning these to P2P.

- (1) All PO's should be transitioned to P2P Prior to the expiration if there is no multi-year contract or agreement connected to the purchase order (i.e. linen services as needed)
- (2) If a multi-year agreement (i.e. software or hardware maintenance) is connected to a current PO expiring after 2021, the PO will remain active and no action is required. Upon the PO expiration, the renewal should be processed in P2P.