## Delegation Expirations—12/31/2020

A reminder that delegations can only be setup for 1 year to a peer, superior or subordinate.  Reminders will be sent out for procurement delegations that are set to expire on 12/31/2020.

## Closing of Purchase Orders

Do not close your purchase orders unless they have been fully received and invoiced/paid.  If a purchase order has been closed, it will cause invoices to reject. A validation will be implemented to prevent this in the future; however, in the meantime, please be mindful of this issue if you are looking to close your purchase order.

## P2P January Workshop

The January Workshop will be held on January 13th from 2—3pm.  To access the workshop  utilize the following link:  https://rochester.zoom.us/j/91726401106

## Capital Design Project Update

Requisitions for capital project unrestricted fund FAO's will be transitioned from 312 requisitions to P2P as of January 18, 2021.  Instructor led zoom training sessions have been scheduled for the week of January 11, 2021, for anyone who is responsible for initiating or approving these capital requisitions and are new to Workday or need refresher training.

## Workday Pcard Project Update

Pcard transaction verification and approval will transition from US Bank's Access On-Line system to Workday as of 2/1/2021.  The Pcard Policy was recently updated and will be effective January 1, 2021.  Updates regarding the policy have been provided through the Pcard Newsletter and other meeting venues.  A new My-Path module regarding the Pcard process in Workday will be available in early January.  Live Instructor zoom sessions are scheduled for the week of January 18, 2021 and January 25, 2021..  Training information and resources will be available in early January on the UR Procurement Website.  Stay tuned for further updates.

## Avoiding Fraudulent Supplier Payments

When requesting a supplier be paid via ACH (electronic payment), please be aware there is a two step verification process that takes place to validate the banking information before the ACH payment status can be activated.  This could add additional time to the process during the supplier setup; however, it is important to protect the University and avoid fraudulent payments to suppliers.

## Commodity Required for Catalog Requisitions =>$50,000

A recent validation was implemented to require a commodity when submitting a marketplace (catalog) requisition that is => $50,000.  Any catalog requisitions <$50,000 does not require a commodity.

## Laboratory Product Sales—Pipette Repair Process

With the recent decommissioning of SOLO suppliers including Laboratory Product Sales, we have received inquiries regarding the ordering and billing process for pipette repairs.  LPS will be providing a quote for the pipette repair in their Marketplace catalog and will notify you via email.  You can obtain the quote by selecting "My LPS" and then selecting "My Quotes".  Select the quote provided for the pipette repair. The details of the quote will appear. You can click on **"Add Quote Items to Cart".** Click on **"Check Out"** and you will return the cart to the Marketplace and then to Workday where you can finalize the order.  An alternative to using the quoting feature in the Marketplace catalog, would be to setup a non-catalog service requisition with a start date/end date and dollar amount if you anticipate utilizing LPS for ongoing pipette repair services.  If you have questions regarding these processes, please contact the P2P Service Center.

## Approver Role and Ability to Print PO Copy

Anyone with an approver role in Workday will be unable to view/print the PDF of the purchase order. If you need a copy of the PO information, below are some alternative options to obtain this information:

* Run the Find Purchase Order Line Distributions report (URF01040)

* Select the related actions on a purchase order and select Accounting > View Purchase Order Accounting Distribution for PO details in a report format (which can also be exported and opened in Excel
* Ask the requisitioner or P2P Service Center for a copy of the PO PDF.

## Selecting Ship to Locations

A number of recent marketplace requisitions have been created and assigned generic ship to addresses by company.  These addresses do not include room or suite numbers and as a result this is causing delays and shipping problems. To avoid these shipping delays, please **do not** select any of the *Addresses by Company* (see below) as the ship-to.   It is best practice to search for your ship to by typing a room or suite number (no hyphens, dashes or periods).  Additionally,  assigning a default ship to location to your profile will save time and reduce errors on your marketplace orders.  Having a default address will not prevent you from selecting a different ship to address on a requisition.  Please reach out to the P2P Service Center for assistance with selecting ship to location or to request a default location assignment.