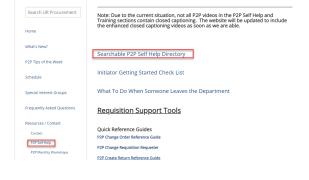
# P2P Newsletter

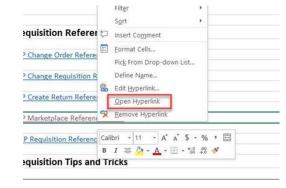
UR Procurement

Vol. 32 January 25, 2021

#### Searchable Directory on UR Procurement Website

To assist with quickly locating support documentation on the UR Procurement Website, a searchable directory has been added to the website in the P2P Self Help Section. You can search for key words (i.e. receipt, delegation) to locate any support documents (quick reference guide, video, tip and trick) available within the P2P Self Help Section. Once you locate the resource you want to view, right click on the name and select "Open Hyperlink"





#### New Support Documents on UR Procurement Website

The following new documents have been added to the UR Procurement Website:

<u>View Role Assignments</u>—To view your security in Workday

<u>Completing the P2P Security Form</u> —How to Video on completing the P2P Security Form

<u>Creating a PO that Will be Delivered to Someone Else</u> - Changing the Requester on the Requisition

#### P2P February Workshop

The February Workshop will be held on February 10th from 2—3pm. If you have topics that you would like to have addressed at this workshop, please submit a request to the P2P Service Center. To access the workshop utilize the following link: <a href="https://rochester.zoom.us/j/91726401106">https://rochester.zoom.us/j/91726401106</a> Passcode: 609916

#### Capital Design Project Update

As of January 18, 2021, capital project unrestricted fund FAO transactions should now be processed in P2P. 312 requisitions should no longer be used for these transactions. The UR Financials New FAO Request Form has been updated to include security roles for assignment for any new capital project unrestricted fund FAO's created.

#### Workday Pcard Project Update

Pcard transaction verification and approvals will transition from US Bank's Access On-Line system to Workday as of 2/1/2021. A new <u>Pcard section</u> has been added to the UR Procurement Website including the Pcard Policy, FAQ's, Forms, Resources and Training.



In preparation for the go-live, there are optional live Instructor zoom sessions scheduled for the week of January 18, 2021, and January 25, 2021. Check-in sessions after go-live have been scheduled 3 days a week from 2/1/2021—2/19/2021. Details regarding these check in sessions is available in the <u>Pcard Training</u> section on the website.

## Creating a Requisition that Will Be Delivered to Someone Else If you work in an area that orders for people in different locations, you can set up a PO so that the deliver-

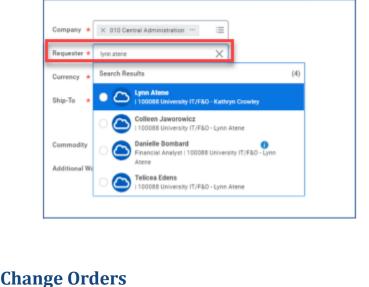
ies will be delivered to the correct individual. This will also ensure the person who actually receives the product or service will be able to do the receipts required on the Purchase Order.

Initiate a requisition in the normal manner, either by typing Create Requisition in the global search bar or

by clicking on the Create Requisition Task in the UR Procurement Dashboard.

In the next screen, take your name out of the Requestor field and type the other person's name in.

Hit enter to search. Click to choose their name. If you have questions or need assistance with this, please contact the P2P Service Center.

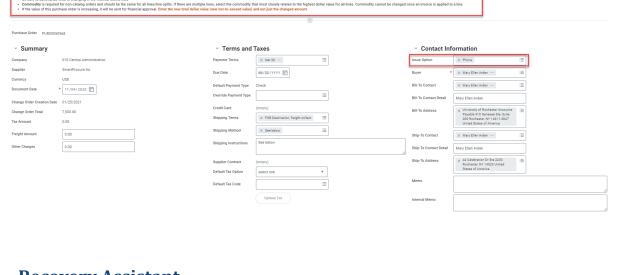


## If you are initiating a change order to a purchase order and it is an internal change that does not need to go to the supplier (i.e. FAO change), please be sure to change the Issue Option to Phone or Print.

Create Requisition

Failing to do this may result in duplicate orders. Any questions should be directed to the P2P Service Center.

Create Change Order

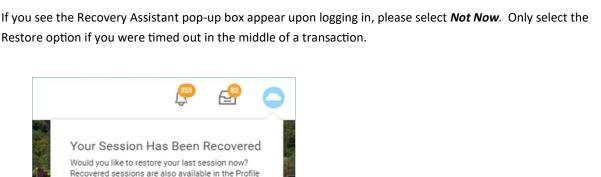


### Recovery Assistant

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