

P2P Newsletter

UR Procurement

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Paper and Toner Purchases

Reminder: All copy paper, toner & printer ink cartridge related products are no longer available from the Staples catalog and should be purchased from WB Mason. For significant cost savings regarding high use copy paper, W.B. Mason SKU **RBB61200** replaces Staples SKU **135848**

My Requisition Worklet Enhanced

The My Requisition Worklet has been updated to include Hold Reason (i.e. Spending Restriction, Supplier Qualification and Claimed By (Person in Purchasing who is working on the requisition)).

Requisition	Status	Date	Suppliers	Total Amount	Requester	Purchase Orders	Receipts	Hold Reason	Claimed by	Awaiting Person
REQ00027222	In Progress	05/06/2020	Experian Health Inc	609,612.48	Chassity Speer					MaryAnn Capuano
REQ00027220	In Progress	05/06/2020	Experian Health Inc	86,400.00	Chassity Speer					MaryAnn Capuano
REQ00027077	In Progress	05/07/2020	Kronos Incorporated	\$17,500.00	Chassity Speer				Charlene Harris	Carol Dorfner Charlene Harris Katharina Mariczyk Melissa Bour Paris McLean
REQ00026894	In Progress	05/05/2020	VVC Holding Corp	187,527.06	Chassity Speer				Charlene Harris	Carol Dorfner Charlene Harris Katharina Mariczyk Melissa Bour Paris McLean
REQ00026881	Closed	05/05/2020	Solu Technology Partners	26,800.00	Chassity Speer	PUR00026351	RCT00019376 for PUR00026351		Charlene Harris	
REQ00023926	In Progress	04/22/2020	AMERICAN TELEMEDICINE ASSOC	1,500.00	Chassity Speer			Supplier Qualification	Charlene Harris	Carol Dorfner Charlene Harris Katharina Mariczyk

Requesting a Default Ship to Location

Having a default ship to location set can save time when creating a requisition. If you do not currently have a default ship to location set in Workday and would like to have one, please copy the desired default ship to address from a prior requisition and send the request to set it as a default to the Procurement_Service_Center@ur.rochester.edu. Once a default ship to address is setup, if you are creating a requisition that needs to be shipped to a different address, you can remove the default and change it. Any questions regarding default ship to addresses can be directed to the P2P Service Center.

Create Requisition

Company: X 010 Central Administration
Requester: X Debra Flotteron
Currency: X USD
Ship-To: X Select a Shipping Address
Rochester, NY 14627 United States of America
Commodity:
Additional Worktags:

Unassigning Carts in the Marketplace

Assigning Carts in the Marketplace should only be done if you do not have time to complete the process of submitting your order. You cannot assign carts to approvers for approval. Approvers do not have access to the Marketplace to retrieve carts. Carts can only be assigned to other Initiators. If you have previously assigned a cart to someone in the Marketplace you can retrieve the cart and un-assign it. It will come back to you to process. For instructions on how to do this, please review the [Unassigning Carts in the Marketplace](#) Tip and Trick on the UR Procurement Website.

Finding Payment Status for Supplier Invoice Request (SIR) and P2P Purchase Orders

If you need assistance to identify the payment status for a Supplier Invoice Request (SIR) or a P2P purchase order (PURXXXXXXXX), please review the guides that have been posted to the UR Procurement Website Self Help Section.

[Finding Payment Status for Supplier Invoice Requests](#)

[Finding Payment Status for P2P \(PURXXXXXXXX\) Purchase Order](#)

P2P March Workshop— Steps Required Prior to Someone Leaving the Department

The March Workshop will be held on March 10th from 2—3pm. We will be reviewing what steps you need to take when you know that a staff member will be leaving your department that has P2P responsibilities to avoid any access issues for creating and viewing transactions and resolution of invoice match exceptions.

If you have other 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: <https://rochester.zoom.us/j/91726401106> Passcode: 609916

Changing Email Preference Notifications

Workday is set to send a number of notifications to your Outlook email. If you would like to change how many email notifications you receive, it is very easy to do from your UR Procurement Dashboard by changing your preferences. Instructions on [Changing Email Preference Notifications](#) can be found on the UR Procurement Website P2P Self Help section.

Workday Pcard Project Update

Pcard transaction verification and approvals are now live in Workday as of 2/1/2021. A new [Pcard section](#) has been added to the UR Procurement Website including the Pcard Policy, FAQ's, Forms, Resources and Training information. Below are some statistics regarding Pcard Verifications in Workday to date.

- Total Pcard transactions last two weeks: **3,642**
- Completed verifications (fully approved): **2,017** (55%)
- Verifications in progress (awaiting Pcard manager approval): **374** (10%)
- Verifications in draft: **155** (5%)
- No action taken yet: **1,096** (30%)

Note: All Pcard transactions must be fully verified (by cardholder and manager) within 30 days of the transaction date to avoid a temporary suspension of the Pcard.

Finding and Editing Draft Pcard Verifications

One of the most common questions received since the Pcard Project go-live on 2/1, is finding pcard transactions that were started but the verification process was not completed. To find a transaction in draft status, please review the [Editing a Draft Pcard Verification](#) video or the [Draft Verification](#) Quick Reference Guide.

Pcard Transaction Support

For those who are now approving Pcard transactions in Workday, below are several support opportunities for you:

PCard Special Interest Group meetings: Wednesdays – February 24th, March 21st, April 21st

- Review of issues identified and resolutions, identify new issues for resolution
- Review of overall transaction statuses and those nearing 30 day approval deadline
- Review of reports, best practices and other tips
- Time will be available to ask questions

Please click this URL to join. <https://rochester.zoom.us/j/99186965399?pwd=cGxQWjVoTHFzNDc1bUdzMmFwV0V1dz09>

Passcode: 14963

Or join by phone:

Dial(for higher quality, dial a number based on your current location):

US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782

Webinar ID: 991 8696 5399

P2P Monthly Workshops are available to provide tips, answer questions and provide support for all P2P transactions, including PCard transactions.

If you don't want to wait for one of the meetings, feel free to contact the P2P Service Center for one-on-one help.

Best Practice for Multi-Line Requisition with Multiple Ship To Locations

It is best practice to create requisitions for items that are being delivered to the same ship to location. Users have experienced issues when creating a multi-line requisition with different ship to locations.