

## UR Procurement Marketplace (Jaggaer) Upgrade

The P2P Marketplace (Jaggaer) system is upgraded three times a year. The first upgrade for 2021 was completed successfully on 4/11. There were a few minor user interface changes as a result of the upgrade. For an overview of the changes, please review the changed posted on the [UR Procurement Website](#). If you have any questions or need assistance, please contact the P2P Service Center.

## P2P 2021 Monthly User Meetings

Are you interested in hearing about upcoming P2P enhancements, sharing best practices and sharing what is not working well with P2P? If so, you may want to consider joining the monthly P2P User Meeting. These meetings are scheduled for the first Tuesday of each month from 10—11am. To view a schedule, information on how to join the meeting and prior meeting slides, please view the [Monthly User Meeting section](#) on the UR Procurement website.

## P2P May Workshop - P2P Reporting Overview (Setting Favorites, Filters & Scheduling Reports)

The May Workshop will be held on May 12th from 2—3pm. We will be reviewing P2P Reports including setting favorites, filters, and scheduling reports). A [schedule of workshops](#) for 2021 and upcoming topics are posted on the UR Procurement Website.

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

## New P2P Resources

New P2P Resources have been added to the UR Procurement Website

- [Creating a Change Order on a PO](#)
- [Finding the Process History on a PO Change Order](#)
- [Multi-Company Pcard Verification](#)
- [Multi-Company Spend Category Splits Verification](#)
- [P2P Reporting Matrix](#)
- [Saving My Procurement Card Transactions as a Worklet](#)
- [View Process History on a Change order Video](#)

## Airgas Freight Charges

If you process orders to Airgas, there are cylinder processing fees that were submitted as freight on the invoice header. This resulted in invoice match exceptions that routed to Purchasing. Airgas has corrected this and these processing fees are now included as a header value on the marketplace cart for input in the *Freight* field during Requisition Checkout. A validation message will identify the freight amount that you will need to enter in the freight field on the requisition header during checkout. This allows the usage fees to match between purchase order and invoice and should no longer create invoice match exceptions and delay payment. Upon completion of the requisition to a PO, the processing fee will appear in the freight field. If you have any questions or need assistance, please contact the P2P Service Center.

## SOLO Order Placement and Invoice Impacts

Due to an increase in the number of SOLO supplier invoices with inaccurate or missing information, this a reminder when placing orders with current active SOLO suppliers (i.e. Medline, RR Donnelly, FedEx) to provide accurate accounting codes to avoid past due invoices and delayed payments. The proper format to use is **SCxxxxxOPxxxxxx** or **SCxxxxxGRxxxxxx** or **SCxxxxxPRxxxxxx**. Ensuring full and accurate accounting codes are provided at order placement will help our accounts to be in good standing and avoid potential credit holds and/or late fees.

## Setting Workday Notifications

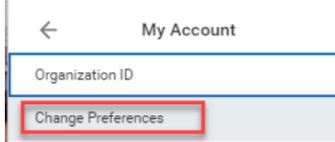
To assure you are receiving key notifications in Workday in a timely manner, below are instructions on how to check and set the email notification to immediate.

### Check Your Workday Preferences to ensure Key Notifications are set to Immediate

In Workday, select the *cloud icon* in the upper right corner, then select *My Account*

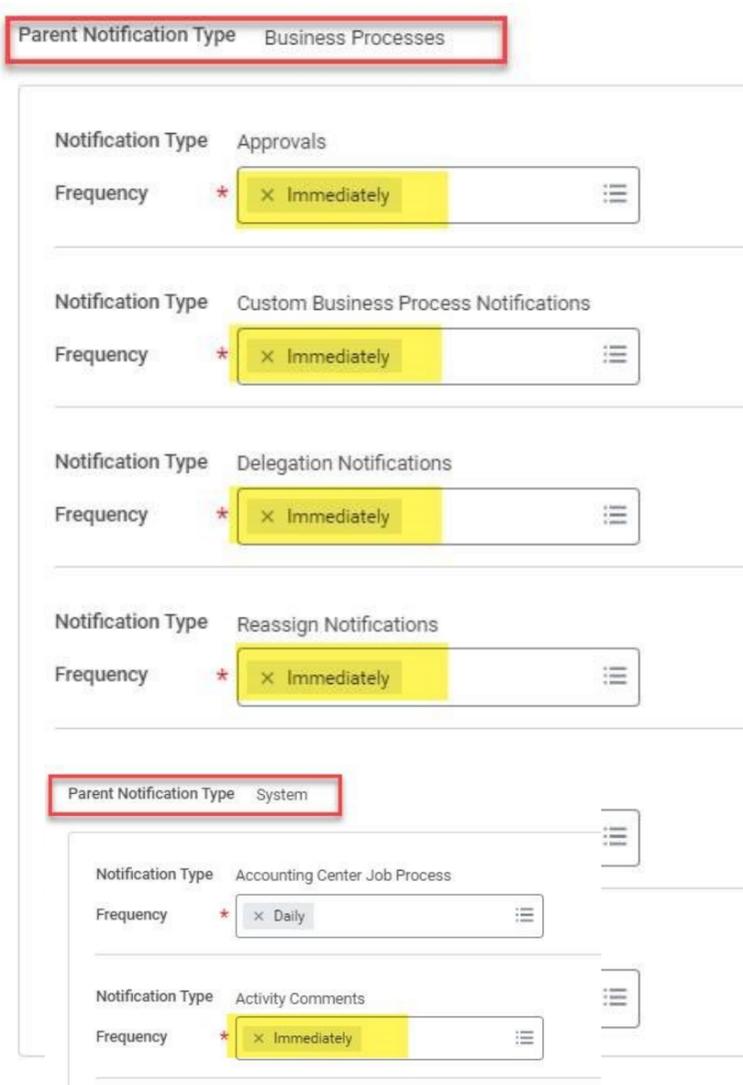
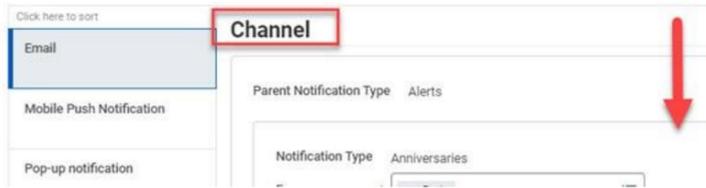


Then select *Change Preferences*



On the *Change Preferences* page, scroll down to the *Email channel* area. Ensure the Frequency is set to “Immediately” for the following notification types:

*Approvals, Custom Business Process Notifications, Delegation Notifications, Reassign Notifications and Activity Comments.*



## Requisition Status—Closed

If, when viewing your My Requisitions Worklet you see a Requisition is Closed, that only means that a Purchase Order has been generated. Every night Workday automatically closes Requisitions that have sourced in to a Purchase Order. If you see the status is Closed, you should also see a Purchase Order number. Once a Purchase Order is generated any changes must be made to the Purchase Order, not the Requisition. If you reopen a Requisition the system will re-source it into another Purchase Order and you will receive a duplicate order. Please **do not** hit the action button on Closed Requisitions and select the Reopen option.