

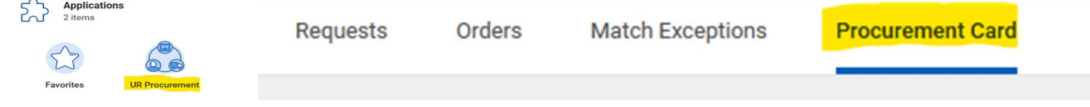
Workday Upgrade

On September 11, 2021, UR Procurement (Workday) will be upgraded. There are no significant changes with this upgrade. Additional communications regarding the upgrade including when the system will not be available will be distributed the week of September 6.

If you have questions, please email Procurement_service_center@ur.rochester.edu or call x52012.

New Procurement Card Dashboard

A new Procurement Card dashboard has been added for Pcard holders to the UR Procurement Dashboard



When viewing the dashboard, you will see different views to assist you with managing your Pcard transactions including **Compliance by Timeframe** to see what transactions may be approaching the 30-day compliance timeframe for approvals. In addition there is a **Transaction Summary** that will display a list of total transactions by date. The last view is **My Procurement Card Transactions** which is a basic summary of all of your recent transactions and their verification date. In addition to this information there have been Pcard Tasks and Reports added to this screen for easy access. If you have questions or feedback regarding this dashboard, please contact the P2P Service Center.

P2P September Monthly User Meeting

If you want to hear the latest news regarding P2P, including sharing of tips and best practices, join us for the September Monthly User meeting that is scheduled for September 7th from 10—11. To view the schedule and information on how to join the meeting, please view the [Monthly User Meeting section](#) on the UR Procurement website.

P2P September Workshop - Managing Service Order Expirations and Available Funds

If you have non-catalog service line purchase orders, did you know that you can monitor what PO’s will be expiring in the next 30 days or up to 120 or greater in advance? You can also monitor if these orders have funds available or are close to maximizing the dollars and may need to be amended to add additional dollars. To view this information, on the UR Procurement Dashboard, go to the Orders Tab to view a list of your non-catalog orders. To avoid delays in getting products or services and invoice payment delays to suppliers, please utilize this dashboard to manage and re-new your service line purchase orders.

The September P2P Monthly Workshop will be held on September 8 from 2—3pm. We will be reviewing this dashboard and managing service order expirations.

A [schedule of workshops](#) for 2021 and upcoming topics and zoom access information is 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 information:

Password:861120

iPhone one-tap:(US Toll): +16468769923,,96804988927# or +13126266799,,96804988927#

Meeting URL:<https://urmc.zoom.us/j/96804988927?pwd=SUI3YzltQ0JEelFnNEg0V09RY2VaQT09>

Blank Marketplace Screen

The P2P Service Center has received an increased volume of inquiries from users who are receiving a blank screen in the Marketplace. This can be resolved by clearing your cache and cookies in your browser. If you do experience this issue and clearing your cache and cookies does not resolve the issue, please contact the P2P Service Center.

Marketplace Supplier Updates

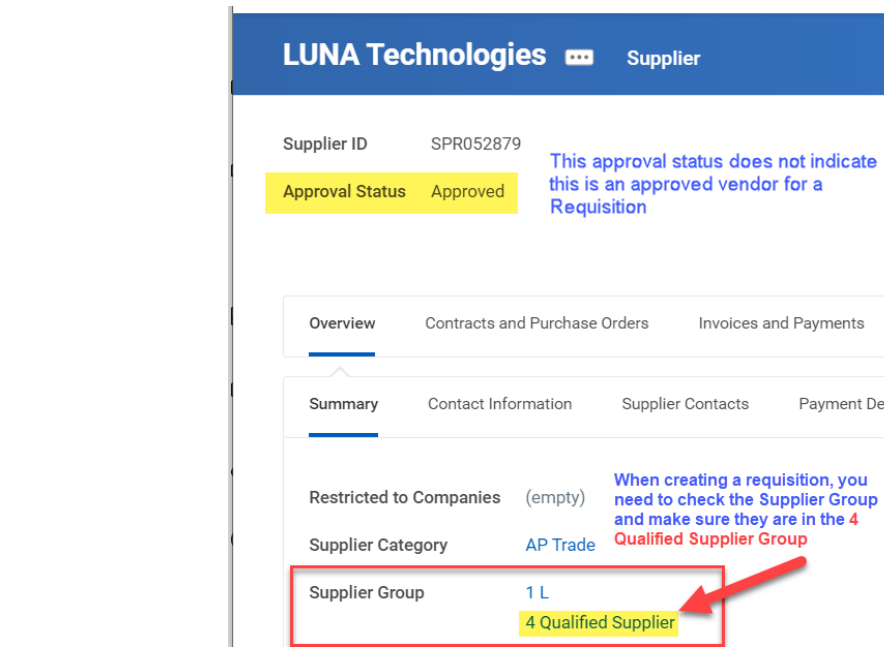
Thorlabs Catalog was implemented on 8/12 in the Marketplace. It is located in the Scientific Research Supplies Catalog section.

Dupli Catalog functionality was recently updated to include the ability to request a quote and search for a quote and add the items from the quote into your cart/requisition. Details regarding this functionality and instructions to request a quote, are located on the [UR Procurement Website](#).

Catalogs Coming Soon—Stay tuned for Updates: Audio Video Corp

Supplier Status for Requisitions

We have received inquiries regarding the Approved Status in a supplier record in Workday indicating the supplier is an approved Purchasing vendor. This approved status does not indicate the supplier is approved by Purchasing and can be used on a requisition. To utilize a supplier on a requisition, please check the supplier group information. Any qualified Purchasing supplier will be assigned to the 4- Qualified Supplier Group. See an example below. If you have a supplier that you would like to use and it is not assigned the 4-Qualified Supplier Group, please contact the Procurement Service Center.



Determining which Purchase Order Invoices Need Receipts

On Purchase Orders with many invoices attached, it may be difficult to determine which invoices still need receipts. There is a report that makes it very easy to tell which invoices still need receipts. It is called Purchase Order Invoice Matching Balances. This report has been made available off of the Actions button on any Purchase Order. Hover over the blue number and click the button that appears. Under Actions, look for the word Reports and hover over that word. Select the report. Instructions on using this report can be found on the UR Procurement Website under P2P Self Help (Invoice Match Exception Support Tools). [How to Determine Which Invoices Still Need Receipts on a PO.](#)

