WyoCloud Upgrade: Procurement Deep Dive

Wednesday, March 28th
AGENDA

1. Process Updates
2. New Features and Functionality
3. System Demonstration
4. Tips & Tricks
5. Training and Support
6. Questions
Process Updates: Search for Employee Invoices

The navigation to search for employee invoices was altered by Oracle with the system upgrade. We have escalated a request to reinstate the functionality. For now, we have developed a workaround using the advanced searching features.

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New Features and Functionality

- Simplified requisition screens with intuitive navigation
- Enhanced non-catalog requisition process
- New Shopping List feature for non-catalog requisitions
- New functionality to change the requestor on a requisition
New Features and Functionality: Simplified Pages

- New requisition page
- Simplified cart preview and navigation
- New navigation to set requisition preferences
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New Features and Functionality: Non-Catalog Requisition

- New navigation and language
- Updated screens and layout
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New Features and Functionality: Non-Catalog Shopping List

A Shopping List is a collection of items you can create to group your frequently ordered items so you can quickly create non-catalog requisitions.
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This feature allows the Requester to reassign **ALL** requisitions to another user to manage through the procure to pay process. Use this feature if an individual leaves UW or changes departments to continue the procure to pay process.
New Features and Functionality: Change Requester on Requisitions

This feature allows the Requester to reassign ALL requisitions to another user to manage through the procure to pay process. Use this feature if an individual leaves UW or changes departments to continue the procure to pay process.

Do NOT change! If changed, all requisitions are sent back through approval workflow.
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System Demo
Tips & Tricks: Requisition Best Practices

Do This

- One attachment per requisition
- Add attachment at line level
- Urgent status only for critical requisitions
- Single supplier for each requisition
- Detailed and accurate descriptions
- Set attachment category as either “Internal to Requisition” or “To Supplier”

Not That

- Multiple attachments with the same name
- Add attachment at header level
- Urgent status for every requisition
- Multiple suppliers on one requisition
- Generic descriptions that suppliers cannot understand
- Set attachment category as “Miscellaneous”, “To Approver”, “To Buyer”, “To Receiver”
**Tips & Tricks: Requisition Best Practices**

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**Did you know?**
The Account Analysis Report includes the requisition description
Tips & Tricks: Requisition Reminders

Supplier Applications
Do not need to be attached to requisitions

Purchase Order Attachments
PO attachments are not sent to Accounts Payable

Quick Reference Guides
Was this deep dive helpful? It was created directly from the new QRG’s on the Knowledge Base. Check them out!

Save Money
Huge discounts provided to UW through Procurement Catalogs
## Tips & Tricks: Procurement Catalogs

### Office Depot Procurement Catalog

- **Boise® X-9® Multi-Use Copy Paper, Letter Paper Size, 20 Lb, Bright White, 500 Sheets Per Ream, Case Of 10 Reams**
  - **Office Depot Main Website**: $57.99
  - **Walmart (lesser quality brand)**: $36.10
  - **Procurement Catalog: Office Depot**: $30.17

### CDW-G Procurement Catalog

- **HP ProDesk 600 G3 - SFF - Core i5 7500 3.4 GHz - 8 GB - 256 GB - US**
  - **CDW-G Main Website**: $799.00 on sale today for $757.09
  - **Procurement Catalog: CDW-G**: $535.54

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**Save money and reconcile fewer p-card transactions using Procurement Catalogs**

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<th>Case of 10 Paper Reams</th>
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## Tips & Tricks: Procurement Catalog Price Comparison

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<tr>
<th>#</th>
<th>SKU</th>
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Training and Support

Open Labs

- Strategize with the Procurement team to determine how your unit can utilize new requisition features
- Open lab tomorrow!
  - Thursday 3/29 from 1-3 PM in ITC 173
- Open Lab schedule available in WyoLearn

Quick Reference Guides

- New Create Non-Catalog Requisition Shopping List
- New Change Requestor on Requisitions
- Updated Create Non-Catalog Requisition
- Updated Create Procurement Catalog Requisition
- Quick Reference Guides available on Knowledge Base

Online Training

- Updated to reflect new navigation and screens
- Updated Create Non-Catalog Requisition
- Updated Create Procurement Catalog Requisition
- Online Training available in WyoCourses
Questions?