

Department Site Visits with P2P Posse

Site Visit Details

Content: Site visits differ from classroom training. Classroom training provides hands-on P2P practice on individual computers. Site visits are led from a single computer with participants viewing P2P demonstrations on a projection screen. The goal of the site visit is to help Requesters be successful in **P2P Perfect Commerce** catalog shopping and completing the Requisition. **Departments have greatly benefitted from site visits, particularly when the P2P Go-Live Coordinator attends and applies department business processes within the context of the presentation.**

I. PowerPoint Presentation with Sample Scenarios (first hour)

Catalog searching tips, requisition completion, common vendor issues, and best practices for working with the Receiver and Department Buyer. Scenarios using top searching techniques in Perfect Commerce, including searching for past purchases, searching by product ID number, vendor, key words, etc.

II. Live Demonstration of P2P Searching in Perfect Commerce (second hour)

Audience interaction where participants provide current purchasing examples (i.e., goods they buy today from Perfect Commerce vendors) for translation by the P2P Posse into P2P purchasing exercises.

Participants: Site visits are targeted for lab staff assigned the Requester role. These non-administrative Requesters are usually first-time PeopleSoft users. Department attendance is not limited. **P2P Go-Live Coordinator attendance is required.**

Timing: Site visits are scheduled for two hours at a location reserved by the Department. Departments can schedule site visits only during their assigned wave period.

Department Set-Up

The P2P Posse facilitates 3 site visits per day at different locations so Departments are required to provide support and set up. The P2P Posse will bring a laptop computer that needs to connect to the Department's LCD projector and to the room's network port. Advance testing of the room's internet connection is required in order to ensure successful access to the P2P training environment. Due to UCSF firewall restrictions, all site visit locations **MUST** be tested prior to the Site Visit. The Department is responsible for:

1. Reserving the room
2. Testing and ensuring room has a network port with active internet connection; **NOTE:** wireless connection is not sufficient so a network port is required
3. Inviting department participants (particularly Requesters in labs) and encouraging them to bring examples of purchases they make today outside of P2P from vendors like Fisher Scientific, Invitrogen, etc.
4. Providing and setting up AV equipment prior to site visit
5. Sending P2P Coordinator to meet with P2P Posse at the room at least 15 minutes prior to the start time to ensure set-up success

Schedule a Site Visit

Site visits are scheduled on a first-come, first-served basis. Priority is given to Departments within the time period's current Go-Live wave. Departments in previous waves can also schedule site visits if there is availability.

1. Determine how many site visits are needed for your department. Departments with multiple labs and/or locations may require multiple site visits.
2. Complete one (1) **P2P Site Visit Request Form** for EACH requested site visit.
3. Email completed form to MaryEllen.Walsh@ucsf.edu.
4. Site visit requests will be confirmed promptly with an email or phone call to the P2P Go-Live Coordinator in the department.
5. Department IT specialist ensures Site Visit success (live demo in P2P can be a challenge if everything is not set up in advance).
6. Several days prior to the site visit, the P2P Go-Live Coordinator will be contacted for final confirmation of date, time, location and number of participants.

Questions about Site Visits

Contact Mary Ellen Walsh at MaryEllen.Walsh@ucsf.edu or 476-4503 with any questions.

P2P Site Visit Request Form

Complete one (1) form for EACH site visit request.

Instructions:

1. Preferred Date/Time: _____
2. Name of P2P Coordinator: _____
3. Name/Phone of Site Coordinator: _____
4. Department/Lab(s) Attending: _____
5. Building/Room for Site Visit: _____
6. Confirm (X) LCD projector and internet access will be provided, tested and set up by the Department for site visit:
_____ Room has Network Port with active Internet Connection (not wireless) _____ LCD Projector will be provided and tested
7. Name/Phone of person who will test and confirm Internet access in room prior to site visit: _____
8. Expected # of participants: _____
9. Comments:
10. Email completed form to MaryEllen.Walsh@ucsf.edu.