Attendees: Lara Anderson, Vaughn Boyle, Michelle FitzGerald, Daniel Hart, Mary McGuan, Yasemin Norris, Jeri O’Mahoney, Robin Portune, Daniel Stack, Kathleen Yabsley, Bobby Zavala

Not in Attendance: Patricia Esparza, Rogelio Gonzalez, Terri Hille, Calli Price, Alyssa Warren

Guests: Jacob Godfrey, Fadi Sakr

Any corrections to the notes from the last meeting? None.

Start Round Robin:

Jeri: How do other departments handle Amazon returns, when the end user starts the requisition and then has to enter the return? Have you experienced any push back from exacerbated PIs?

Daniel Stack: We have PIs come down to the office and help them process their returns.

Yasemin: Will the actual SQ invoice due date show up in Gateway? Fadi: The SQ invoice due date is not synchronized from PeopleSoft to Gateway. Payments go out 1-2 days before the due date. If your invoice is in payable status contact Steve Kriz. Kathleen: The Gateway terms are set at Net 30 in the PO clause, unless the vendor specified other terms before they were added to Gateway.

Dan Stack: Do any other departments have student work study employees entering receipts for low value POs? We have so many receipts, that they have been set aside for a day when I can devote 5 hours to enter them. Michelle: We do. Fadi: We wouldn’t want students entering high value receipts, as Daniel said, but low value receipts with common vendors seems fine.

Fadi: I ask the group, regarding small price discrepancies from Amazon, what amount is worth a phone call? Would you all agree that you want to be contacted if your department is invoiced over .50? The group nods in agreement, and agrees to be contacted if the department if they are invoiced at .50 or more over the PO. Higher amounts stop in Match Exceptions.

Bobby: How can I get a contract number for a contract with NIPA? Daniel Hart: Call Cal Coast.

Mary: We are planning an equipment purchase, over $100,000 and it has a unique payment situation. The payment terms will be 10% on acceptance, 50% on delivery, and 40% in August 2019.

The 10% and 50% will be from several sources and we can set a % split on the requisition. However the final 40% will be from an entirely different funding source. I know once the PO is created the funding can’t be changed. Do you have any suggestions? Daniel Stack: Could you
do line item #1 acceptance 10% (and split by %) line item #2 delivery split and so on? Can you assign different strings and split by line item? Kathleen: This situation is highly dependent on the payment schedule and the vendor providing an invoice for each payment.

**End Round Robin**

**Gateway Updates:**

- **New UC Santa Barbara Branding rolled out to Gateway:** Navy and mist are the new colors. We welcome your feedback. Michelle liked the large font that previously went across the dashboard. Calli wanted the Gateway branding on our dashboard. Should Procurement be in the logo heading? Robin liked the old screen, and previous colors, they were happier, and wonders why they have to be changed. Jacob summarized that we have been asked by the campus to make these changes. We have been asked to standardize all the apps. Vaughn wanted to know if we remove Procurement, could UC Santa Barbara font be larger?

- **Office Depot Business cards with new branding:** Office Depot offers 2 paper stocks 14 and 16. Kathleen is passing around her new business card in the Mist, and this is paper stock 16. You can click on the Office Depot punch-out and under Welcome UCSB – to begin ordering Business Cards/Envelopes Click here to get started. The turnaround for ordering business cards was about 1 week.

- **Thorlabs:** Punch-out or hosted catalog viable? Thorlabs is ironing out consortium or local? Currently polling other campuses.

- **Praxair:** ECOE wants a hosted catalog. Do we want a hosted catalog? Daniel Stack and Michelle FitzGerald would like a punch-out. Michelle worked with Jason and Calli to negotiate with the major billing issues for liquid helium. Jeri had terrible issues resulting in multiple phone calls. Praxair would not apply the credits, and would not send credit memos, and sent no documentation. Ken sent 2 quotes, both with #1 as the quote number and yet they did not show up in Praxair’s system. Their on-line system is horrible. Daniel Hart says Ken gets the account information wrong, but he does show up for every meeting. Praxair is still charging 8.75% tax. Fadi asks if the group would like to request another account representative. Daniel Stack and Jeri are not sure yet. Fadi suggests to start Cc’ing Tristan on emails if the problem persists.
Release of New Gateway Shop Dashboard:

- November or January? Yasemin: November is too soon. Mary: This is an easy transition. Vaughn: This is not a traumatic transition. Bobby: If this role out is in December can we have the directions 2 weeks before? Kathleen: Yes, we will have the directions for the new dashboard posted early next week.

Supplier Keyword (Category) Search: Update by Kathleen for Calli

- After viewing the category list, the group wants to add: events / rentals, office supplies, lab equipment/lab supplies, promotional items (Learfield licensees).
- Jaggaer is working on a new search engine, the system and search engine are configurable so there is more opportunity in the future to customize search results priority

Supplier Management Strategy Workgroup / Jake

With Jake’s absence due to extended jury duty service, the workgroup, consisting of Michelle, Mary, and Dan Stack, voted and decided to postpone their next meeting until December. An overview for those that are not in the group: The discussion will focus on how vendors are added, when it is appropriate to remove vendors, managing the vast population of vendors and how vendors are aligned with campus values.

Gateway User Group Nominations for 2019

Please send an email to Kathleen before November 20th if you plan to continue your membership or if you have a nominee for next year.