Attendees: Lara Anderson, Vaughn Boyle, Patricia Esparza, Michelle FitzGerald, Terri Hille, Mary McGuan, Yasemin Norris, Jeri O’Mahoney, Robin Portune, Calli Price, Daniel Stack, Alyssa Warren, Kathleen Yabsley

Not in Attendance: Rogelio Gonzalez, Daniel Hart, Bobby Zavala

Any corrections to our notes from the last meeting? None

Kathleen – Responding to Actions Items from last meeting

- The discount indicated in Amazon doesn’t come over to the cart Gateway, you can add a comment under the invoice or comments tab, that the invoice amount will come less than the PO. Modifying the punch-out causes electronic problems.
- The dashboard requisition widget (window) can only show the 5 most recent requisitions.
- A link for older Gateway and Procurement news as well as current news will be added to the Gateway Banner
- There will be an ability to put a hyperlink to the searchable database in the Help text.

Start Round Robin:

Daniel Stack – When our POs are distributed, the vendor is not seeing the terms “Net 30”. Can we add a link for the terms?

Kathleen – Whatever suppliers need to see is fine, you can cross it out and write it in if they accept it. The payment terms are hard coded in the PO under clauses, then supplier invoicing, Terms & Settlement Matrix.

Action item** change PO clause invoice & billing - Calli

Michelle FitzGerald – Vendors have not been receiving POs, should we contact you?

Kathleen – Yes, please contact the help desk.

Daniel Stack – Can we use sales as an email address for vendors?

Kathleen – The email address can be overridden, but the PO should go to the contact address we were given when the vendor was set up. Please send email or any address updates to the Help Desk.

Alyssa –The commodity code in Amazon.com. doesn’t make sense.

Kathleen – If the seller is a 3rd party it could be blank, or irrelevant. We asked Jaggaer to have it default to an office supplies commodity code (44000000).

Mary McGuan – Do we need to send hard copies of wire draft forms to HR?
Robin Portune – No. You can attach the wire form with a comment or to the invoice. A scan of the signature is OK.

Jeri – I keep getting a dashboard error message, how can I get rid of it?

Kathleen – There was a name change. Select Gateway Shop under your profile.

End Round Robin.

Gateway Updates:

1. New UC Santa Barbara branding – New colors navy and mist
2. Fastenal punch-out catalog not ready to go live / fixing tax issue
3. Do we want a Praxair hosted Catalog?

Daniel Stack – For actual gas, yes we want a punch-out. Hosted catalog prices are often wrong, and the search feature doesn’t work well. Cylinder Rental – Daniel is still paying demurrage-and Praxair cylinders are less expensive, no rental. had to buy out their inventory. He is using Airgas for bulk tanks.

Kathleen – Hosted catalogs get updated 1x per quarter, if you have an invoice prices are supposed to be honored.

Helium is a “special item” send a ticket to help desk and Kathleen will gather questions for the Kick-Off call.

   - Document search widget has been added
   - Forms have been changed to the title of the form instead of sticker – to recover space

Supplier Categories: Workgroup Update

Do we want to search supplier records in Gateway?
Can you have multiple key words to search a supplier?
They have identified 7 categories for the keyword search.
Is there value in adding a search short cut to the dashboard?
Supplier Management Plan Workgroup - postponed

Object Codes Update – Vaughn/Kathleen

The word repair is not in the description any longer – commodity codes up to 60 Mil are items 70mil and up are services, like warranty & maintenance. 81mil – engineering, tech based services

254 characters is the max for commodity code description in Gateway – the time frame to release this to the campus will be late fall when we have incorporated the 2 level commodity codes.

We will offer webinars and announcements to the campus as to why we are doing this.

Additional discussions

Terri - How do we buy gift cards if object code 7751 has been used for non-cash gift?

Vaughn - Best Buy Gift cards can use the electronics code

Terri Hill – We used gift cards or our UCSB Grad Program –

Vaughn - Starbucks is OK, buy things that are not services, and things that are not able to be traded in for cash.