Attendees: Lara Anderson, Michelle FitzGerald, Rogelio Gonzalez, Daniel Hart, Terri Hille, Mary McGuan, Mathew Norton, Jeri O’Mahoney, Robin Portune, Calli Price, Daniel Stack, Alyssa Warren, Kathleen Yabsley, Bobby Zavala

Not in attendance: Vaughn Boyle, Patricia Esparza, Yasemin Norris

Guest: Jacob Godfrey

Welcome Mathew Norton, from Associated Students. Brief introductions around the room.

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

Start round robin:

Alyssa: Q. Is it possible to change multiple line item object codes like we can change the commodity codes? A. No it is not.

Michelle: Q. Amazon’s discount doesn’t come over if you click on the discount, it doesn’t show the discount in the cart.

Daniel Stack: Q. Can you add the discount to the line time, once it is in Gateway?

**Action item: Kathleen will check**

Mary McGuan: Q. Regarding the fund end date, can we change that date manually? A. No, but you can talk to accounting about changes. The date is synced over from the GL.

End Round Robin.

Continued discussion on appropriate use of walk-in forms:

Calli: I understand from the group that there is still value using walk-in PO forms, but it is possible to narrow down the areas of when their use is appropriate. For example, we can limit the use of the form to certain vendors.

Michelle: Q. Will there be a list of vendors? A. Yes, there will be a list and we can modify the list as needed. We will vet future vendors for appropriateness.

Jeri: Q. For the group, how does your department handle purchases from Home Depot?
Daniel H: A. We use FlexCard. Fastenal has most of the same items, and they will take a one-time purchase order or walk in form. Terri: A. We use FlexCard, then do an allocation. Daniel S: A. We use Home Depot on-line.

**Gateway Updates:**

- Amazon Business FAQs are located on the homepage of Gateway, under Help and Resources.
- Grainger and Fastenal will be on campus August 1, 2018 / cXML invoices coming soon
- Sunbelt eParts punch-out live in production
- Jaggaer release 18.2
- UCSB Gateway Shopping Dashboard will be turned on campus wide September 1, 2018. The Gateway Announcement banner will be used for promotions and news

New punch outs are located across the top of the punch out section for 1 month; then they get moved to their respective category.

Request by Terri on the Gateway homepage. Is it possible to view more than the last 5 requisitions,

***Action item: check for ability to view more than 5 recent requisitions

Mary: Q. If the news is on the banner, how long will it stay there? Will there be links to view older news? A. The news will stay in the banner based on relevance, but we can add some links to older news.

***Action item: add link on Banner to older news on website

**Supplier Management Plan**

Workgroup Update; by Jacob

The work group has met once, since our last Gateway meeting. We are looking at the history of the vendor over the last 4-5 years. What is special classification, and what considerations will be carved out? For sustainability there will be a score on a matrix and underlying core statement.
Object and Commodity Code Update – Currently working on removing services from supply codes. There will be cheat sheet with shorter descriptions and keyword search capability. New searchable database will be on the accounting website.

- Kathleen will email what they have now and what the work group has proposed.

Daniel Stack: In the help box, can we add a link to the searchable database?

***Action Item: check on option to add a hyperlink link to help screen

To update a commodity/object code combination. Select new commodity code and hit save. In the box below, select value, then search and you will have a list of valid object codes for that commodity code.

Services commodity codes start with 7000000 and up. The team has done a clean-up and proposed changes. You will get a template with key words.

Terri: Q. For printer, service, goods – with sales tax, can I find the service code easily? Daniel S: A. It will be easier, but there will be more codes.

9000 - will no longer be used
9120 - lab
9135 - inventoriable equipment sub 4
8100 - non – inventoriable equipment

7213-Jacob is stating that 8000 is primarily the default for goods if nothing else is more specific. Are defaults appropriate? Explicitly ask Olga Mery.

Jacob: Consider commodity code change from 8 to 4 digits? Daniel S. – Changing the commodity code format may confuse people because they would look too similar to the object codes.

Jake recommended to move to level II, pull out roll up codes. Eliminate the number of choices.
Jake exports spend analytics commodity code / object code and reviews every month, this data is used to negotiate contract vendors.

Terri: Q. I had one order placed through Amazon, in Gateway, that appeared the sales tax was not recording as 7.75%. A. If the product is coming through a 3rd party and does not include the proper sales tax then the use tax will appear on the ledger.

Gateway Invoice Workflow – It will stop in the sales tax review bucket if tax does not match the PO. Some invoices are reviewed in PeopleSoft.

When departments do a Ledger Review – If no sales tax look at use tax

Terri Hille – Our shadow system like to have those match. Under the Invoice history tab, you can see who made the adjustment and for how much.

Michelle – Under my mobile app, I should be able to approve, shop and put in receipts? Kathleen will take a look at your configuration.