Attendees: Lara Anderson, Julie Ballesteros, Victoria Bebko, Vaughn Boyle, Patricia Esparza, Daniel Hart, Terri Hille, Mary McGuan, Irina Nikolaeva, Yasemin Norris, Jeri O’Mahoney, Robin Portune, Daniel Stack, Alyssa Warren, Kathleen Yabsley

All in Attendance

Corrections to last meeting notes: None

Start Round Robin:

Daniel Stack: When will the mapping to the 2nd level commodity codes be completed? KY: The project is 50% completed.

Victoria: Can we get notifications when invoices have been entered into the workflow? KY: Yes, in preferences, under accounts payable, you can click on notifications. You can also do queries on invoices that are in process by using the date range filter and AP status. The invoice owner inherits the information from the PO owner, when the invoice has completed the workflow. Victoria: If I enter a cost type and then enter the accounting codes, is it possible to go back and change the cost type to blank, in the drop down?

Daniel Hart: I always have to delete the whole string.

KY: Other departments can use the same code; it is not unique to departments.

Irina: I had requisitions returned for invalid object & commodity codes. KY: That is happening because the codes are now being validated.

Terri: Is B&FS going to communicate the expanded commodity codes with the campus as a whole? Does B&FS want us to use expanded codes? KY: We offered mini-tune-ups, drop in sessions, and we posted a notice on the Gateway Dashboard. Always use your best judgement when selecting your codes, but yes we want you to use the expanded codes.

Terri: I did a contract for catering, the contracts processors had to change the object code to 7215, because there wasn’t a code for that. KY: I have been updating the codes every two weeks. Let us know if you see something you need, that isn’t there – or if you see something wrong.

Patricia: We have students that create carts, and then I do the rest, why do they become the PO owner? KY: The person who fills out the cart is the PO owner. The supplier needs to know who to contact for any information regarding the order. Once the purchase order is created then you
can send a request to the help desk to change to PO ownership and set those preferences for notification purposes.

Terri: Amazon does not work that way. KY: Correct, Amazon uses the email address to send out the order confirmation, before the order is even sent.

Patricia: When we get a CR revision we can’t see the name of the supplier. KY: You can use the field for the cart name and put the name of the supplier in that field. When you makings your requisition, in the upper left hand field, you will see “Cart Description,” and that will be transferred to the PO description field.

Mary: The Vendor Blanket Revision form doesn’t show the suppliers name. KY: Jaggaer controls that. We are having trouble placing Airgas orders. KY: A new price file was turned on Friday. It takes the file about 24 hours to upload. KY: Did your PO go to a different supplier record? When this meeting is over call me at x 3542 and we can manually enter the order into a non – catalog order.

Daniel Hart: I was getting strange error messages from Dell. Dell’s punch-out seems like it has old prices and older models. KY: Action Item-Kathleen will check to make sure our punch-out is up to date. If you get errors or notice any other abnormalities, please send a ticket to the help desk with the error messages or screen shots so we can research it.

Julie: I noticed a PO in Gateway that had one total and 3 invoices for separate amounts. VB: Amazon makes multiple shipments for 1 PO. You can look at the invoice tab in Gateway. Also use tax will be added on the ledger, but it is the suppliers’ responsibility to collect it. KY: Gateway estimates 7.75% but the tax on the invoice may vary.

Vaughn: The charge shows up on the ledger if a discount is taken when it is paid. 2% credits come a day or two later.

Kathleen: McMaster-Carr Punch-out is staying. The UC was asking us to turn off the punch-out but Calli negotiated a contract. Graybar will start sending electronic invoices again.

Daniel Stack: Any updates with Praxair? KY: I have emailed them today and they need another 2 weeks and then they can start testing.

End Round Robin
Gateway Enablement Updates:

- Medline Punch-out, cXML POs and invoices – testing
- ePlus Punch-out, cXML POs and invoices – testing
- Illumina cXML POs and invoices – testing

Review Charter Workgroup Update: Kathleen

The group met and suggested to increase the membership from 12 to 15 people, they also requested that the membership run for 2 years. Calli will share the finalized document when it is completed.

New “How to Shop and Create an Order” training guide: Lara

This document is for the new user, who needs to get started shopping and creating orders. It may help those who have not had the opportunity to take Gateway 101 yet. It is an easy to follow guide with new and updated pictures that cover the four different types of orders. We welcome any feedback. We have more documentation coming soon.

Yasemin: Would like an index added to this document.

Victoria would like a “Best Practice for Receipts” and Mary would like “Where is my cart when it fails validation or is returned by an approver?”

Kathleen – Do you think there is value in offering additional training on how to search for documents? Please let me know.

Gateway Roles/Workflow Workgroup Update – Kathleen

Lara will send out the notes from the last meeting.

Kathleen: The request for scheduled payment date testing is going into production using the AP Information section of the Invoice. The invoice date/ account date if in payable status – it means it is in process and in payable status is the scheduled date. The paid date will also go into the history tab.

Meeting adjourned.