Attendees: Lara Anderson, Julie Ballesteros, Vaughn Boyle, Patricia Esparza, Terri Hille, Mary McGuan, Daniel Hart, Irina Nikolaeva, Calli Price, Alyssa Warren, Kathleen Yabsley

Guest: Jacob Godfrey

Not in Attendance: Victoria Bebko, Yasemin Norris, Jeri O’Mahoney, Robin Portune, Daniel Stack

Corrections to last meeting notes: None

Start Round Robin:

Daniel Hart: We have been experiencing search problems.

Terri: I am having problem using the back button; I get a message that the link has expired.

Kathleen: Gateway 19.3 was put into production please let the help desk know if you keep having these problems. We were also experiencing problems with commodity code updates, the update would not change code on the invoice.

Julie: We had an issue where the PO owner did not get notified of a cancelled invoice, and the invoice was late getting paid. If there is one PO owner can another person be added?

Kathleen: No, only one person can be the PO owner. Under user profiles you can sign up to receive notifications for invoices. Look under the AP section, then invoices, and look for cancelled invoices.

Patricia: Who is the PO owner? Is it the shopper, or the “cart prepared for”?

Terri: You can select a new PO owner in the requisition stage, after you finalize the requisition, there is a description of the cart and you can rename the PO owner.

Mary: Can a “Out of Office” notification be sent from Gateway? When I am gone for a week, anyone who sends a comment to me inside Gateway doesn’t realize that I am away.

Kathleen: That is a good suggestion for a possible enhancement. We might be able to have that added to the user profile. Some questions to think about would be “Who do you want to be notified, and when?” Please send a ticket to the help desk for the enhancement request.

Vaughn: Invoices processors enter comments all the time, to managers in the department. It would be great to receive a message a message back stating this person is no longer in this position.

Patricia: Does the shopper who assigns the cart get the emails? Why can’t two people get an email?
Kathleen: This is a software service, and Jaggaer only has place for the PO owner, but we can ask.

Calli: I will send a help desk ticket for an enhancement request for a user “out of office” message.

Jake: If someone had 15 requisitions assigned to them, could they be unassigned in the workflow and put back in the shared folder so another approver could work on them? We can check to see if it is a possibility. This would be proactive and based on the department in question.

Patricia: I have a question about invoices. If I send 4 invoices in on 4 separate PDFs, why does one invoice fail or get lost? I always put the full PO number, the receipt number, and the invoices looked identical.

Jake: Everything that is an actual invoice, in a PDF, not a quote, or statements gets sent to Docufree which then uses OCR – optical character recognition. Once the invoice is read then the PDF then gets sent to Jaggaer. Occasionally the invoice can end up in match exceptions or not make it through the entire process. Some reasons can include the remittance address is missing, or the OCR could not read the PO number. Also Docufree can have service outages.

Vaughn: Maybe one invoice, the PO number could not be read by OCR due to 1 digit not being clear. Robin might have had to force match the receipt.

Kathleen: Some are read perfectly by the OCR and others are not read correctly.

Alyssa: Gateway’s update of “My Recent Approvals,” has now been changed to “Recent Requisitions Approved by Me.”

Kathleen: These are requisitions you approved, not that you submitted.

Calli: The new document search feature coming in 2020 is really hard to use. The search is not alphabetical or chronological. The search results are not logically presented.

Kathleen: Jaggaer is changing the search interface in March 2020. Now it is in test, but they say it will be a mandatory change in version 20.1. The new quick search kept defaulting to “All,” even if the previous search you chose POs. It was very annoying.

Jake: The former president of Jaggaer invested to improve the platform, the new president wants to expand into the private sector putting money into the R&D for Commercial/For Profit as opposed to the Higher Ed market.

**Gateway Enablement Updates**

- Medline Punch-out, cXML POs/Invoices/Credit Memos – testing
• Illumina cXML POs, Invoices - testing
• Praxair has a new Punch-out in testing. It is possible to up the punch-out catalog without full integration.

**New Charter 2019 – Vote**

Calli: I added a little information to the new charter mostly the difference between voting members and ex-officio members in the new release of the Charter.

Kathleen: Does the group want to vote on the new charter? A motion to approve the new changes, all voting members approve.

For new members we were thinking about reaching out to Michelle Fitzgerald if she has a recommendation from Chemical Engineering. MSI and the UCEN are some of the bigger departments that would be good to have representatives from.

Kathleen: If you have a recommendation you can send them to me. I review the charter, go over expectations and make sure their managers approve the decision to serve as member and understand the requirements.

**New follow-up date custom field on requisition/PO?**

If you know every year that you expect an invoice for a PO, such as a software renewal, there is going to be a place on the requisition that you can fill out a date so it serves as a reminder that you need to create a new PO. This will help your department to avoid Confirming POs,

We could add an optional field to the requisition and custom field search filters.

Jake: This is similar to a query for contact requests and how departments handle this. It was brought up by Elise, that we have other orders that can use this anticipated renewal date. It would prompt work by the department.

The requisition date is sent to the GMC – maybe the GMC date could prompt a notification to the PO owner? Asking ETS may be a more practical approach (as part of the audit table) than asking Jaggaer. It would have to be built first. Is everyone in favor of this possibility? All members say they see value in this.

This would likely be accomplished in two phases:
Phase 1: Adding the field to the requisition and purchase order documents so filtered searches can be done
Phase 2: Automated Notification that date is approaching (to PO Owner).

**Jaggaer 19.3 and 20.1**
Jaggaer will be revamping the document search screens so we will update screen shots in our reporting guides. We will likely develop additional documentation on how the search works.

**Schedule for 2020 Meetings**

The new schedule will be emailed to the members with the new charter. Our next meeting is Dec. 17th and we will have the end of year celebration of appreciation. We will hand out certificates and review accomplishments. This will be our last meeting as the formal service year comes to a close.

**Packing Slips Workgroup Update/Jake**

The work group found that packing slips are not required. The next step is to discuss the purpose of receiving, review the language and discuss discretion that could be pushed down to the department level. For example, departments could elect to receive only over a certain dollar threshold. Not as a campus policy but at a department level.

**Discussion of Vendor Blankets**

Julie: I heard Vendor Blankets are going away?

Jake: A VB is like a blank check to draw down – there is no oversight to it.

Patricia: Why isn’t a VB a good idea for utilities?

Terri: VB is the mechanism for lease agreements and shredding services.

Jake: We are considering having the payment of the invoice used as the draw down mechanism rather than the receipt. We will ask this group to look at Vendor Blankets, Receiving and Forms. Perhaps POs with several invoice is cleaner.

**Final Comments**

Patricia: I was having trouble trying to update the object and commodity code.

Kathleen contacted Jaggaer Technical Support. We are expecting a maintenance release on Thursday night.

**Meeting Adjourned**