Gateway User Group Notes
October 24, 2017

Corrections to Notes from September 26, 2017 – None

2018 User Group Membership – Continue Service Nominations

**Gateway Update:**

Tangram Interiors has replaced BKM as our Steelcase Dealer. A new punch-out is coming soon.

**Start round robin**

Michelle: Question about searching restricted items in the drop down list – will send ticket to the help desk

**End round robin**

**Unified Instance: Normalization Collaboration HUB – Summary**

Provides an overview of proposed recommendations from the Office of the President to re-organize the way the UC handles procurement system-wide. This includes identifying best practice for requisition workflow, buyer delegations, forms, blanket PO’s, clauses, and supplier on-boarding

- Normalization Project – SC 500
- As members of the User group, how do we work through these changes or make an argument for better solutions?
- UCSB is in a good position improving workflow and changing definitions
- Unified Instance is being piloted at UC Davis

**Workflow** (future state) – Proposed by Office of the President

- Department workflow may be limited to Requisitioner and Approver – all others Ad Hoc
- Buyer Review – standardize routing criteria
- Purchase Order steps – asset management, inventory, year-end hold – will bring a different kind of risk; for example releasing a PO too soon
- High Risk / High Dollar – proposed that Chancellor would sign off

**Delegations**

- Buyer Delegation – to standardize department level buyers delegation of authority across campus to 10-25K

**Forms**
• Standardizing Forms system wide Vendor Forms, Blanket PO, Contract Labor, Request to Pay, Sole Source Waiver, PO Change Order and Quick Quotes

Blanket POs

• For goods and services, for 1 year at a time, for a known amount
• We lose some control with 2 way match on a vendor blanket

Vendor Management

• Common system portal/governance-eventually the information will be uploaded to several ERP systems if the vendor is selected
• A focus on Supplier Management Lifecycle and Supplier class
• Supplier Taxonomy – ability to describe vendor types

Spend Classification

• Commodity Code Analysis – currently over 214 standard codes
• UNPSC – Project plan to develop descriptions of codes; using segments 1 & 2
• Encouraging small business spend
• Train and Develop people in which their classifications are representations of what they do

Clauses

• PO clause categorization
• Remove redundant clauses
• Use same language for each department

Record Retention

• How to support the migration strategy of our active orders – Run existing instance or use a data base for legacy artifacts
• What to retain and what to purge – Federal Funds require a 6-7 year retention past the last award date