Attendees: Lara Anderson, Julie Ballesteros, Victoria Bebko, Vaughn Boyle, Daniel Hart, Mary McGuan, Yasemin Norris, Robin Fortune, Daniel Stack, Alyssa Warren, Kathleen Yabsley

Guests: Fadi Sakr, Jacob Godfrey

Not in Attendance: Patricia Esparza, Terri Hille, Jeri O’Mahoney, Calli Price

Corrections to last meeting notes? None

Round Robin Discussion: No discussion topics from the user group today

Gateway Enablement Updates:
- Jaggaer 19.2 in Gateway production as of 7/22
- New England BioLabs Punch-out with cXML POs and Invoices live on 7/25

Commodity/Object Codes Training:
- Starting July 29th offering mini tune-ups and drop in sessions
  The first level codes will still be available but we are adding second level codes which will be more specific.

GMC Clean Up:
A list was sent out to departments that had account strings without account approvers or who had not assigned all 6 financial limits. We found that if an account string was used in the past, and it was disabled then you cannot filter using the document search. The information is not lost, but only active account strings can be found using the document search.

Action Item: We can ask Jaggaer to include disabled account strings in the filter.

Jake: Is this true for any custom value there?
Kathleen: Yes, the information is there, it is just the filter is not there on the document search.

Vaughn: Olga created a new inventorial object code for inventorial live stock which is 9150

Jake: Regarding the clean-up, is UC Path populating accounts strings in the GMC?
Kathleen: I asked Avi, who requested that, and if they going to be removed.

Mary: How long have the UC Path LAFS been showing up in the GMC?
Kathleen: I am not exactly sure, I can see their description in the GMC showing up as UC PATH, perhaps they were repurposed from PPS.

Julie: Should we deactivate those LAFS?
Kathleen: Hold off on any deactivation, until we get a solid answer.
PR Workflow and Roles Meeting

The Gateway User Work Group will meet on Wed. 7/31/2019, at 10:00AM in the HR Learning Center.

Goals for FY 2020

What would the group like to accomplish?

Julie: Will we have the ability to recharge journals in Gateway this year? Kathleen: We will start rolling this out as a pilot project to see if it works. Jake: We are working with ETS and they found problems with the methodology for the allocation module.

Jake works with the managers to identify projects and he will share a portion of his list as a starting point for the discussion of goals for FY 2020.

- Workflow Roles – updating definitions: Preparer and Approver
- Revenue and Plant Accounts
- Recharges
- Supplier Portal
- Payee / Registration Portal for billing and account history
- WebTMA Integration with Gateway
- MBS –(Bookstore ordering system) Invoices via Gateway
- Gateway Role Certification Project
- Vendor Purge Project – Purging vendors that have not had activity for 2 or more years
- Invoice Workflow
- Payment Look-ups
- Check Reduction Project: Currently Docufree uses the email based invoicing system. Kathleen is working on a pilot project with Jaggaer’s new ability to use portal invoicing via email which gets into Gateway immediately, instead of the 2-3 day wait period.

Daniel Stack: With the payment look-up system, will we have the ability to see if a check was cashed, or if a check was lost?

Vaughn: In PeopleSoft there is a date when the check cleared and we know what date the payment when out.

Daniel Stack: Vendors ask for check information. We would like a way to see when and if the check was cashed.

Kathleen: We have the payment date, and the anticipated payment date. Once an invoice has gone to PeopleSoft-we are asking for the anticipated pay date.
Action Item: Jake: What I am understanding is that if we had a “look up tool”, it would be helpful. We can look into this.

Action Item: Kathleen: Regarding the Gateway User Group Fiscal Year Goals for 2020, we can remove the items from the spread sheet that don’t apply to this group and then the group can review the list and we can find out what is important to this group.

Kathleen:  Please send enhancement requests to the help desk and Kathleen will look into it.

Victoria:  Is there a detailed transaction report, that is similar to the one in the Data Warehouse?

Kathleen: On our Procurement Website, under Gateway->Gateway Classroom Resources->Gateway Reporting Guide, and Gateway Vendor Blanket Search/Export Guide

3 Export types – screen view, transaction level, and full export; If you use the Vendor Blanket Template it will give you the information in one file instead of multiple files.

Action Item: UPDATE REPORT GUIDE TO INLCUDE SEARCHING FOR RECEIPTS.

You can export the receipts which is good for vendor blankets that have been in place for many years.

Vaughn:  Has anyone been expecting a credit memo from Office Depot, that has not arrived?

Fadi will be working on Amazon’s credit memos, and we have found that the transaction goes on the credit cart, but does not show up in Gateway.

Kathleen:  The Supplier Terms have been synched over to Gateway in the Supplier Record and soon the payment terms can be seen on the PO and Invoice.

Meeting adjourned.