Gateway User Group

Meeting Notes for 6/27/17

No Corrections to notes from May 23, 2017 meeting.

Round Robin

- **Jeri O’ Mahoney** – Q: When there is a mismatch between subject and object code, can there be an error message or warning in Gateway, before it goes through the approval process?
  A: The job of the Department buyer is to check commodity and object code compatibility. If the PR validation fails, the requisition goes back to the requestor. We can see if the PR validation compatibility can happen earlier in the process. Please send in a ticket to the help desk for enhancement request.

- **Tahna Hekhuis** – Q: Use tax was added in the GL properly, yet not recorded properly in Gateway. A: Gateway invoices go into PeopleSoft where the use tax may be adjusted. Sometimes tax can be rounded off creating discrepancies. Q: In Service Now, I am getting messages addressed to Melisa Wyatt and she no longer works here. A: The email most likely was shared administration account. We can check to see if the LDAP was updated. Q: Should a receipt be entered without tax, on a taxable vendor blanket? A: The receipt uses the subtotal – yes.

- **Terri Hille** – Q: Is there a way to receive PO notifications even if I am not the PO owner.
  A: No, but you can submit a request to transfer PO’s over to your name through the Help Desk. Q: Why are invoices put in payable status before a receipt has been entered?
  A: Please send in a help desk ticket. Q: I submitted a change order on a vendor blanket and sales tax was added once the change was made. A: Forms are by default non-taxable so if a buyer makes a change, they need to double check the remove sales tax box. We can remind our buyers.

- **Yasemin** – Q: How are credit memos being handled? A: You will see the full amount of the credit memo on your departments GL.

- **Melia Cutcher** – Q: Can multiple attachments be added in the comments as opposed to one at time? A: We will put in a ticket to Jaggaer, as a possible enhancement.

- **Max McCumber** – Comment: Receiving a lot of emails from Service Now, involving the same ticket. Reply: Those messages are representing different stages of the ticket, such as the ticket was successfully submitted, received, being looked at and resolved.

End of Round Robin
Comments from:

**Fadi Sakr** –

1. Reasons not to enter blanket receipts: Some departments process a “blanket receipt” ahead of the invoice to (presumably) make invoice approval go swiftly without us asking for receipts. When the departments do that, invoices get processed without us even knowing sometimes. That being said, invoices will be paid regardless of whether the department did in fact receive the goods/services or not, and even worse if the invoice is wrong as to amounts, quantities, overcharges it WILL be paid, and the department may have to go the vendor for a credit memo.

2. Bay Alarm – Departments are responsible to pay late charges if vendor will not waive them. It is recommended to change over to FlexCard payments if possible.

**Vaughn Boyle** –

1. Invoices that had 3 decimal places for units, were being chopped off in PeopleSoft and vendors were being short paid. It is possible new releases of PeopleSoft caused this, Avi is testing.

Review Gateway updates – Office Max is transitioning to Office Depot on August 7\(^{th}\), and will be on campus August 30\(^{th}\) for meet and greet and to demo their new platform – Please sign for the up for sessions in the LMC (Learning Management Center) under Gateway.

- New object code coming soon to replace 7200
- Review of new dashboard: Move New Supplier Request Form – having its own widget under supplier search
- Login to your home page – go to name, then dashboards – we will encourage a test group

Invoice Workflow –

- We will be reaching out to the volunteers who offered to test invoice workflow earlier in the year.
- Reviewed draft announcement memo

Group updates from Jacob Godfrey –

- Daniel Stack brought up free database named Quartzy to the group, Jacob reviewed and found it is an interesting product consortium with potential.
• Insurance Tracker, an outside vendor, is being used to obtain and manage insurance. Although Procurement releases the contract it may stop at Risk Management if it is a high risk.

Action items for Kathleen:

1. Can multiple attachments be added in the comments section, instead of one attachment at a time? (For Melia – Jaggaer Enhancement)
2. Can PR validations be available/compatible earlier in the approval process?

Action item for Calli:

1. Remind buyers that the tax status changes when modifications are made to forms (VB and Contract)
   - Manually update the PO line to original tax status after the modification is saved.