Gateway User Group Notes

March 28, 2017

• **User Group Membership for 2017**: Introductions

• **Round Robin**:
  Melia Cutcher – Question: Can we request Airgas to discontinue electronic invoicing and return to scanning? Answer: She will send in help desk ticket.
  Question: Are goods shipped outside of California tax-free? Yes, no sales or use tax.

  Michelle Fitzgerald – Question: How will the default account string be chosen? Answer: The DPA will select a general account string, not one using federal funds. Comment: Bio Rads invoices are coming in as duplicates, and no credit memos are being issued.

  Rogelio Gonzalez – Question: Who can be contacted to make sure electronic credit memos for GlaxoSmithKline and Sanofi Pasteur are applied? Work with and Vaughn and Fadi’s team.

  Tahna Hekhuis – Comment: It would be helpful to see the supplier’s names on the first page of the printed requisition. She will send in a help desk ticket for possible Sci-Quest enablement.

  Terri Hille – Question: Is there any way to mark the purchase order as “don’t pay?” Yes, it will be possible to make a comment in the new approval workflow bucket. Contracts and Vendor Blankets will require a receipt before being paid.

  Max McCumber – Comment/Question: Integrated DNA Technology – Credit Memos are not being received and are we getting a punch out for configurables? Catalog is still an enhancement request, but it has been a slow process.
  3 hands were raised in favor in vote for IDT. Max, Melia and Daniel Stack.

  Daniel Stack – Comment: Newark Electronics has not been getting their orders from Gateway. Perhaps change to faxing the PO (from email).

  Bobby Zavala – Question: Can we look at new end user history, in regards to permissions that they had been given or removed? Yes, user history in Gateway.

• **User Group Charter Workgroup Meeting Update** – Calli Price
Calli reported on the Charter review and update process at the workgroup meeting.

Members were shown the revision and a vote was taken (10) yes, (0) no votes resulting in a unanimous decision to adopt the 2017 charter.

- **Updates** – Jaggaer v17.1
  Shopping dashboard / widgets for shopping, credit memos, trade ins, invoice sorting options

- **Invoice Workflow Updates**
  Jake presented a Visio diagram of new invoice workflow –

  All members in favor of adopting the an approval bucket– unanimous decision (10) yes,(0) no. All members voted yes to tolerance of +20% or -20% - this yes vote included approve or reject with 5,000 threshold

  Ad hoc – option to add another approver?

  notifications sent to approver

  Vendor Blanket Receipts – send notice to department buyer and receiver?

  Notification preferences – invoked by workflow

  Can an individual have a role level / individual role – Kathleen (will look into this)

  7 calendar days to approve or comment to hold payment – finalize vote

  New members: we want to reduce cost to the campus

  Group wants to keep existing tolerance rules

- **Credit Memos** – Do not hold invoices for payment. What if a credit memo comes in after a grant is closed? Follow up with SCIQUEST and Controller’s Office –

  Jacob: What if there was an alert within 90 days of the end of award?

  For next meeting please add mismatched PO lines on agenda / Robin Portune