Wednesday, February 19th, 2014 – Gateway User Group Meeting Minutes

Attendees: Sara Bard, Ann Boochangkool (taking note for Kara Kaneda), Karen Cisneros, Ron Hirst, Lisa Klock, Mike Moore, Hannah Morand, Terri Jo Ortega, Adriana Perez, Calli Price, Kathy Scheidemen, Daniel Stack, Tedi Tehrani, Robin Testa, Luisa Velez

Not Present: Kara Kaneda

Introduction:

Hannah reminded the group to continue to send in Enhancement Log Priorities and Pain Points for AP/PURC.

Issue: eCOE

Discussion: Currently UCSB is involved with the eCOE and is closely partnering with UC San Diego. As part of this partnership, we will be getting several Hosted Catalogs and Punchouts within the next few weeks including HD Supply and LifeTech. Cardinal Health is currently being tested with San Diego and will hopefully be available to our campus as well in the coming months, assuming testing goes well. Since Cardinal Health sells sensitive products, the punch-out will have a selective workflow in the system. The point of the eCOE is to standardize workflow and use the “power” of all of the campuses to get better pricing and move towards efficiency. San Diego has such a large team that can manage such a large workload; we are all working to “share the wealth”.

Summary/Action Items:

Issue: Removal Discussion (cont.)

Discussion: The group followed up on previous discussion on taking removals and relocations out of Gateway. The thought is that involving Procurement in the process is just adding another step that does not need to be involved. It should just be Travel Advance only. Last time the main issues from the group were making sure that there was still a purchase order number to reference and the risky nature of the relocations. To address the issue of the purchase order number, Annette offered to either come up with a purchase order number wheel or to offer the Travel Advance number for that purpose. The group felt that that was appropriate. Beyond that many felt that not having a “true” purchase order/contract left the University open for liability. Calli Price explained that even now if issues occur with a moving company, the individual being relocated takes out a claim against the moving vendor and the University is not involved. The group members still felt that relocations can be such a risky endeavor that the campus needs to more involved with the terms and conditions aspect to make sure that relocation companies are taking care of the faculty/employee to ensure that the initial perception of the University
is good and intact. This way the faculty are not feeling “wooed” and then “forgotten” by the University. The group suggested that Procurement take this to a Faculty group for their review as well.

Summary/Action Items: Take back the Terms Issues to Annette. Calli will talk to Faculty groups to get their sense of plan to take removals out of Gateway.

**Issue: Cost vs. Quantity Receiving**

Discussion: in previous meetings, the group had discussed removing receiving completely from the system. After review, we were told by campus governance that receiving needed to stay in place. Today, the idea was floated to the group of removing quantity receiving in an effort to streamline the process, relieve confusion for departments and help eliminate some errors on receiving that accounting is running into. The group was against the idea and moved to keep both quantity and cost receiving in the system. They felt that both were necessary for departments. Users were interested in the audit requirements of receipt documentation. Receiving is a big pain point for the campus. We are trying to find the happy medium that reminds people to receive, makes it easy to receive and also keeps the burden off of AP.

Summary/Action Items: Hannah will follow-up to get audit findings, find out more about receiving audit documentation practices (Jim Corkill?) and also how other campuses are handling receiving.

**Issue: Dept. Buyer Checklist**

Discussion: Calli prepared a Department Buyer role checklist at the request of some departments that wanted to make sure that their Department Buyers were correctly checking and filling out requisitions in Gateway. This is not a requirement, just an enhancement or guide for departments. It will also be added to the appendix to the Gateway Desk Manual.

Summary/Action Items: Users should provide feedback/suggestions.

**Issue: Gateway Brochure**

Discussion: Hannah brought up the idea of Purchasing preparing a “brochure” of sorts to match what other campuses with versions of SciQuest currently prepare. Other campuses give a high level view and usually use it for meetings, presentations, etc. We want to float the idea of bringing in someone to write a report code so that we can run reports at the department level and give each department spend reports as well (an end of year report card of sorts). The question of “would it be helpful to the group” was floated. After a lot of discussion, the main points being that most could query the system already for most of that data (or between Gateway and Data Warehouse), the group felt that department level data was a waste of time and money, but that a campus high level view would be good. Most felt that the money could be better spent elsewhere. Some did argue that it might be helpful to show cost savings and thus be a good selling point to users or departments that are taking issue with the system. But generally, most felt that time/resources should be spent elsewhere.

Summary/Action Items:
**Issue: Phoenix Interface**

Discussion: Several emails have gone out to the campus regarding the Phoenix Interface conversion with instructions, resources, browser requirements. Additional drop-in hours will start next week. All profiles will be switched at the end of February. Terry Jo volunteered to help with Letters and Science.

**Summary/Action Items:** Another email will go out before the end of the week.

**Issue: Ron’s AP Presentation – Invoice Graph**

Discussion: Per Ron’s analysis, 1005 of the invoices that should be paid via Gateway are in Gateway. Approx. 7,000 invoices are paid a month. Ron represented the following when asked by the group:

- They have 3 full time employees, 2 part time employees dedicated to Gateway
- Average pending invoices, down from 4-5 week turnaround to 2-3 weeks.
- InvoicesOnly email sends emails to suppliers with requirements on invoices (like color paper, full PO number, legibility, etc)
- He also represented the time each processor spends on Gateway invoice processing:
  - Lakshmie is mostly working on Contracts invoices and not Gateway invoices
  - Robin is down to 80% due to troubleshooting for the Gateway Helpdesk on Gateway Invoice questions.
  - Lydia is around 100%
  - Nichole is around 95%
  - Sam is around 80%
  - Ron is around 30%

When asked what the departments can do, his main point was legibility and the reference of the full PO number. That is taking a lot of processing time to figure out/track down.

**Summary/Action Items:** Create vendor relations group that can work with just the vendors on how to submit proper invoices. Campus not comfortable with rejecting invoices. Robin will be handling problem invoices, Sam & Nichole doing the screening and scanning.

**Issue: Furniture Services, Recharge, Number Wheel**

Discussion: The group asked for a reminder about where the Recharge Test with Furniture Services was left off. There was also discussion about the number wheel. Hannah confirmed that they will have an “R” instead of a GW. From Hannah’s memory, the form had errors to work out and we were in a holding pattern between Jeff and fixing the form for beta testing. The group did disagree about the movement of recharge into Gateway. A few members felt that the current process is best for their units, while others really liked the idea of accountability before purchase.

**Summary/Action Items:** Follow-up to see where we are with the beta testing.
Issue: Flexcard /Vendor Blankets and Daniel Stack's Department

Discussion: Daniel asked for a discussion about Flexcard, Vendor Blankets and invoicing troubleshooting. He currently is paying for Verizon via his Flexcard, but is finding that it is more time consuming with his shadow system. He wants to move to Vendor Blankets, but is worried that AP backlog, might affect service. Many still suggested Flexcard, but using the Flexcard Authorization Form to get the faculty members approvals up front, rather than one at a time, to save some of the issues with the backend shadow system. Vendor Blankets are useful as long as you are on top of receiving. AP also pays utilities first. Currently Arrowhead water is paid without a receipt due to the fact that they were already on consolidated billing with the campus. Some users asked about the possibility of moving utilities to that as well to combat late payments.

Summary/Action Items: Daniel will set up a Flexcard approval for a year and just pay through a VB in GW for that time frame.