Wednesday, June 18th, 2014 – Gateway User Group Meeting Minutes

Attendees: Ron Hirst, Hannah Morand, Adriana Perez, Calli Price, Daniel Stack, Tedi Tehrani, Robin Testa, Luisa Velez

Not in Attendance: Sara Bard, Karen Cisneros, Kara Kaneda (Ann Boochangkool), Lisa Klock, Mike Moore, Terri Jo Ortega

Guest: Jacob Godfrey, Kayla Jackson, Megan Moore

Introduction:

Chair updates included a plan for revising Gateway Training. Gateway is now in Phase III and is in year two of implementation to the campus, which we feel means that most users will benefit from more specialized courses. Courses offered now will be: A streamlined 2-hour beginner’s course, a course on Receiving, a course on Forms, and a course for DPAs on the GMC. User Group members agreed on this approach and suggested including Invoice Review with the Receiving course. Ron suggested implementing mandatory Gateway Training to help cut down time on complaints and questions. The group felt that this was not needed, especially this far into implementation, and it was preferable to communicate to the user or expedite issues to the MSO if needed. Chair update also included an eCOE Review. Upcoming punch-outs and Hosted Catalogs will include: Sigma Aldrich, Life Technology, CleanSource, VWR, New England Biolabs, and HD Supply. Cardinal Health testing is underway as well. The group was given an update.

Issue: Reverse Auction Information

Discussion: As part of discussions with the eCOE, they have reached out to the campus CPRs to let us know that there will be an upcoming Reverse Auction that we can take part in as viewers. San Francisco recently completed a RA that saved them 34% in 1hr on a Window Cleaning bid. If any of the group members (or their colleagues) would like to view a RA, let Hannah know and she can help facilitate with the eCOE.

Summary/Action Items: Group members can f/u with Hannah via email and she will coordinate when the eCOE f/u with her regarding the next scheduled RA.

Issue: New Ship-To Address

Discussion: Hannah asked the group their thoughts on building a new specialty ship-to address. It would be a “Customer Pick-Up” address and could be found/customized much like the “One-Time” Ship-To
Feature is right now. The group agreed on the feature and liked the idea, especially for many of their needs within their department.

Summary/Action Items: Hannah will explore with SciQuest and Test.

**Issue: Inventory Systems**

Discussion: Hannah described some of her research that has been complied thus far regarding Inventory Systems for Chemical Storage and Housing/Facilities. The eCOE has been slowly exploring options, as well as departments on this campus. Hannah has been working with members from Chemistry/EH&S to explore their needs and campus needs for a Chemical System that would bridge with SciQuest. Housing has asked for a solution for their inventory needs as well. Many SciQuest campuses are using “Maximo” which bridges with the current software. The group asked about payment for systems and although this process is very early and this is not decided, it would seem that since it is an eCOE endeavor, there is a chance that this might be absorbed by eCOE costs.

Summary/Action Items: Hannah will continue research and provide demo opportunities for both groups.

**Issue: Customer Satisfaction Survey**

Discussion: Throughout the implementation of Gateway, there have been two benchmarked surveys thus far. We are currently into Phase III – the enhancement phase, and would like to track campus progress and satisfaction. Draft survey questions were handed out to the group for their review and suggestions. The goal is to benchmark process with the campus. We will be sending the survey to all users of the system, hopefully by the end of July. Group members are asked to return suggestions to Hannah, who will finalize and send to the campus.

Summary/Action Items: Electronic copies will be sent for review and suggestions to be returned to Hannah.

**Issue: Federal Funds Discussion**

Discussion: Jake lead a quick summary of the new Uniform Guidelines and the changes being made by OMB. Generally speaking, the goods news is that our campus is already in line with many of the guidelines so there will not be much policy to introduce. Bad news is that any new policy needs to be implemented by December 26th. He gave a large overview of the policy, what has happened with the decision, the new circulars and the campus groups involved.

Summary/Action Items: Hannah will send out links regarding OMB for the group to see the information and impacts for their units.
Issue: User Group Update / Charter Revision

Discussion: As the group has been meeting for almost a year, the group has been tasked to help revise the Charter and refresh the mission. Goals for the upcoming year of User Group meeting will be to run a more active group that focuses more on solving enhancements as a group, rather than giving a laundry wish list to the Chair. Chair feedback will also be a larger part of the coming year’s meetings to push user members to be more proactive members within the Gateway community spreading messages from the meetings. Subgroups will be more active over the coming year as well. Group members also wanted to be sure that AP had adequate representation at the meetings and participation in the subgroups to focus on their specific needs and enhancements.

Summary/Action Items: Group members will receive an electronic copy of the Charter in order to send suggestions to the Chair.

Issue: Open Discussion – Daniel Stack

Discussion: Dan brought up the need to evolve the Walk-In Form to more of a “manual distribution” form as many orders do not fit completely into either the non-catalog mold or the physically walk-in mold. This is a sentiment that we have heard before, so this discussion was easily moved into our first subgroup. Kayla Jackson, Dan Stack, Calli Price and Hannah Morand will meet to discuss possible changes to the form.

Summary/Action Items: The subgroup will meet. Findings will be presented at the next meeting and governance will decide on next steps.

Issue: Open – Daniel – Vendor Issues

Discussion: Daniel brought up a few invoice issues where vendors had not received payment despite Gateway showing check and Direct Deposit payment information. The information was passed to Ron Hirst for follow-up.

Summary/Action Items: Ron and Daniel will f/u offline.

Issue: Open Discussion – Daniel Stack - Shipping options – Requisition Drop-Down
Discussion: Daniel asked if there is a way to change the shipping option dropdowns on the Requisition from their current options to carrier vs. speed. This question had been asked in the past and the response had been no, Hannah will investigate further.

Summary/Action Items: Dan will send Hannah a wishlist. Hannah will work with SciQuest to find out if it is possible to amend the dropdown.