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

Attendees: Karen Cisneros, Ron Hirst, Lisa Klock, Mike Moore, Hannah Morand, Terri Jo Ortega, Calli Price, Daniel Stack, Tedi Tehrani, Robin Testa, Luisa Velez

Not Present: Sara Bard, Kara Kaneda, Adriana Perez, Kathy Scheidemen,

Guests: TJ Bloominger, Ann Boochangkool, Jacob Godfrey, Megan Moore, Monica Yamasaki

Introduction:

The group went around and introduced themselves as there were a few visitors this week. Both Facilities and Electrical Engineering brought their “Gateway Gurus” for some perspective, our two Campus Buyers came to meet the group that they interface with on such a frequent basis behind the scenes, and Jacob Godfrey came to follow-up from the recent Townhall and to spend time with the group.

Issue: Audit Findings Summary / Packing Slips

Discussion: Between the last two meetings, the group was sent the Audit Findings from the Post Implementation Audit conducted. The main question from the group was where is the audit information/requirements regarding packing slips, specifically for Federal Funds. This audit did not deal with that specifically and that decision will need to come from Jim Corkill. The group decided that they would like to make this a priority. Jacob provided some background that Jim has been working between UCOP and audit to formalize a best practice, but as there are many different “audit” vehicles, a decision has been hard to formalize. The group felt that timing was important – specifically by July 1st.

Summary/Action Items: After discussion with the group, Hannah will draft a proposal to put in front of Jim, with User Group input regarding Unrestricted vs. Restricted Funding best practices regarding receiving. Jacob recommends including what needs to be accomplished, talk about the process for the campus, and the message out to campus. Also included what will be required vs. not required. This will help with framing for Jim. Include Post-Audit (pattern after Flexcard) and QA.

Issue: Recharge Update

Discussion: After some questions in the last group, Hannah confirmed to the group that the Recharge pilot is on hold. Jacob also confirmed that being respectful of the hard timeline of PeopleSoft is part of the hold.

Summary/Action Items: n/a

Issue: Department Buyer Checklist

Discussion: There were no more edits from the group. The checklist is already included as an appendix in the Gateway Desk Manual. It will be announced in our next email to the Campus Community.

Summary/Action Items:
Issue: Enhancement Updates

Discussion: Hannah let the group know that two of the longest standing Enhancement Requests to the campus were taken care of: ensuring that est. shipping was shown on the PO copy that distributes to the supplier. Many recent examples of International Vendors charging hundreds more because the shipping was not spelled out on the PO copy prompted the reexamination. A change in the PO order acceptance instructions as well after overwhelming requests to include more information about the Helpdesk and Invoice Processing so that the user was not always poked by the supplier. Both were checked off the list. With the 14.1 release, it looks like Hannah is able to customize emails sent from the system, which should also address some of the other requests from the campus about “unhelpful” or confusing system communications. The group would like to help with the customization. This also led to another discussion about comment transfer. [Hannah took this back to SciQuest and offered an example to the group about functionality that currently exists. Users have the ability to change the comments views from any document that they are on. ]

Summary/Action Items: Enhancement Log resent to User Group and linked on Info Site for Campus View.

Issue: UCOP Catalog Stand Down

Discussion: Three catalogs will need to be stood-down per UCOP: BioExpress, Fastenal, MSC. Jacob explained to the group that the commodity has been envisioned. Now that the contract is no longer valid with UCOP, the suppliers are under no obligation to observe or offer the rates.

Summary/Action Items: This will also be included in our next announcement to the campus.

Issue: Communication about Gateway

Discussion: We asked the group for their thoughts about our ways of communication about Gateway, specifically are we communicating too much? Not enough? Are office hours working? Hannah explained that she is re-working the training into something more manageable and topic based. Office Hours also do not get a lot/if any turn out. The group felt that once a month was fine and that the new plan for training felt like a good step. Daniel brought up the Townhall presentation and wanted to be sure that the tone that we are presenting to the campus is consistent. There are negative feelings still towards Gateway within some units and presenting the face of “everything is fine” and not bringing up the points that we are still working on will hurt our image of trying to work with departments.

Summary/Action Items: Keep all of the above in mind when reaching out.

Issue: eCOE Update

Discussion: Hannah updated the group that she had her first call with the eCOE to talk to them about the eCOE. The next call will be about terms standardization, which is where she plans to talk about receiving per User Group request.

Summary/Action Items: