Attendees: Lara Anderson, Julie Ballesteros, Victoria Bebko, Patricia Esparza, Michelle FitzGerald, Terri Hille, Mary McGuan, Irina Nikolaeva, Yasemin Norris, Jeri O’Mahoney, Robin Portune, Calli Price, Daniel Stack, Kathleen Yabsley

Guests: Jacob Godfrey

Not in Attendance: Vaughn Boyle, Daniel Hart, Alyssa Warren

Any Corrections to last meeting notes? Yes, from Daniel Stack. Jeri asked me if all students were made receivers. The correction is “No, only certain students are made receivers.”

Start Round Robin:

Terri: Object Code Question: There seems to be an inconsistency in Gateway, with non-inventorial equipment 8100 equipment 0 to $5,000. On the website it says $200 up to $5,000. This also is true for 8130 and 8135.

Kathleen (A) Accounting still has to update their website.

Daniel Stack: I had and order where a discount was involved. The formatting was very confusing to the vendor as it was listed subtotal, tax, then the discount.

Action Item /Kathleen: Can the PO document show the discounted amount above the tax?

Calli would like to be involved in this process

Daniel Stack: I have had a lot of requisitions stuck in PR validation. Kathleen (A) This is a known problem and Jaggaer is aware of requisitions being stuck from PR validation through PR validation 2 and right before the PO# is issued. This is a bit of a tricky problem to track since it is happening on an intermittent basis and the requisitions are being stuck between the workflow steps. If you have a requisition get stuck please let Jacob, Calli or myself know and we can resume the workflow.

Daniel Stack: I had an order get cancelled in a request to close ticket. I always include the vendor, and PO number. Maybe we should draft up best practices for requesting cancel /close POs? (A) Kathleen: We can add best practice to our tips and tricks.

Action Item / Lara: Draft best practices for cancel /close POs

Yasemin: Do we need to do a confirming PO if the order is under $10,000?

Jacob (A) The confirming PO does not get distributed to the supplier, it just stops, so yes there is justification for doing the confirming purchase order.
Mary: I have a question regarding restricted item flags. I don’t get feedback, so I am never sure if I am adding them appropriately. Also the Ad Hoc Approver could put a comment in if they thought the flag was not necessary.

Calli (A) It is always better to flag than not to flag. The Ad Hoc Approver could put a comment in if it wasn’t necessary and they were repeatedly seeing the flags. Other departments are not using the flags diligently; it might be helpful to have a mini tune-up.

End Round Robin

Gateway Updates:

- **Praxair Punch-out:** Catalog kick-off has been postponed until Friday, January 25, 2019. Robin will work on testing invoices.
- **ControlCo:** Ongoing testing problems; orders not going through
- **Steelcase/Tangram:** New punch-out platform coming soon
- **Illumina:** cXML invoices coming next month
- **New England Bio Labs:** cXML POs and invoices coming soon

Michelle: Will Praxair get rid of the rental fees for all gas cylinders? You can ask Ken about and the timing of that. Invoices will be cXML and invoices will match electronic invoices.

Terri: I was not able to access a Tangram quote; due to the fact it was uploaded to another person’s email. Will the new platform be easier to use? Kathleen: (A) Yes, Lara and I specifically brought this up and now quotes will be number specific, in the new Punch-out.

Illumina: San Francisco was the first campus to move to electronic invoicing and now they have worked through the process, we are ready to follow.

Kathleen: McMaster Carr can upload PDF copy of their invoices when using the portal for non-catalog items and credit memos. They also send electronic invoices for catalog items.

UCen – Also uses the portal, they have their hosted catalog, non-catalog and walk in POs.

cXML invoices will not have a PDF image.

**Replace Receipts matching requirement for forms invoices with Department Invoice Approval / Jacob**

Jacob: Fed Ex/UPS – Do you want invoices to stop for invoice review?

Daniel Stack: If the rule applies. FedEx never submits invoices to Gateway, then to have to create a receipt would be annoying. Jake: If the receipt rule was not present then you would have everything you needed? Daniel: Yes. Jake: So an invoice review instead of receipt?
Jake (Contracts) – When the scope of work has been signed off on a contract form, it can automatically trigger the invoice approver workflow step.

Terri Hille: One vendor was fully paid without doing any of the work. Jake is the control appropriate with the receiver? For Terri Hille it should be a contracts and grants analyst. Vendor blankets require receipts, but it would it be ideal to have it in the invoice approval role?

Terri: Someone with seniority in the department. Jake: We have nothing formal that dictates this, currently it is a mixed bag.

**Payment Terms & Payment Methods / Update by Kathleen**

Sync from PeopleSoft to Gateway and the ETS Project has been estimated and is to be prioritized based on resource availability.

**Object & Commodity Code / Update by Kathleen**

Phase I project – showed mappings currently in Gateway and searchable data base on the General Accounting website and other resource locations for object code references.

**New Shopping Experience**

Tabled until March 26, 2019 meeting.