
Guests: Jacob Godfrey, Heather Perry

Not in Attendance: Daniel Hart

Corrections to last meeting notes: none

Summary of Round Robin:

The round robin discussion was focused on PR Validation 1 being moved to the beginning of the requisition workflow and how various departments were affected.

Some departments have not trained the Requesters to complete the sub codes (they are left blank) or Commodity and Object Codes but leave that for the Department Buyers. This caused requisitions to be returned. The preparer and approver have been entering information and signing off. This is a controls issue. There needs to be a separation of duties.

This discussion will continue in a work group meeting to be scheduled.

Restricted Items EH&S / Jake

EH&S has found some disturbing trends, as in a whole population of transactions having restricted items which are not being identified or flagged as restricted and not being routed to EH&S. EH&S is proposing training for requisitions.

Kathleen: In the requisitions document we can make an entry in the restricted field required step to catch orders that are not being flagged.

Mary: As a Department Approver, they need to have accountability.

Michelle: We will return carts if items are not flagged.

Supplier Management Group Update / Jake

It has been proposed that if we have not used a supplier in over 2 years, they can be deactivated. If you want to have a supplier reactivated you can send a ticket to the Gateway Help Desk, and we can reach out to the supplier for updated information, on a case-by-case basis.

Unanimous yes vote from all voting members.

Update from Receipt / Packing List Requirements Group Update / Jake

Policies are being reviewed by Mike Moore’s group. Packing lists are not required by audit, but may be internally for each department.
Replace receipts matching requirement on forms invoices with Department Invoice Approval:
Proposing to convert receipt requirement to Department Invoice Review bucket, then no receipt is required to release payment. Continued discussion in May meeting.

Commodity / Object Code Update Descriptions / Kathleen
You will be able to use the search tool to search the commodity code by a word. The second level commodity codes we hope to rollout to the campus by July 1st. We will offer training to the campus by written document, a drop in session, or Zoom. Please let Kathleen know if you have any other ideas. We are working on a plan to have real codes replacing all the spot buy codes.

Ecomedes and Waxie/ Heather
The UC Demo Site contains 3rd party certifications. This site is a shopping/research tool you would use first then go into Gateway. We welcome your feedback on this site. Please send to feedback to Heather.perry@ucsb.edu

We have added a green leaf for Waxie (more suppliers to come) green seal/safer choices for the hosted catalog. Users can use Custom attributes to see UC Green Preferred 🌿 and MLC ⛅️

Question:
Daniel Stack: Can departments close their own POs? This would save the help desk a lot of work.

Kathleen: Do you want to have the rights to close? Soft close – no invoice can come in against the PO, and hard close, no receipt. You need to be careful who has the permissions to do this. Please send a request to the help desk if you want your department to have this ability.

The Meeting was adjourned.

Additional Questions from Members
What can be done if the award end date shows the incorrect date?

The award end dates come over from the General Ledger. It could be a timing issue between the time the cart was assigned and when the end date was extended. You can contact Kevin Woo, who now works with Antonio in accounting.

Victoria - How do we change the LAF on a Vendor Blanket?

You can fill out the Vendor Blanket Revision form on Gateway’s home page.

Regarding FlexCard, how can we add more than 10 lines into the allocation module?
Vaughn and Victoria will review.

Terri – Department Invoices approvers are getting request to approve invoices, even though it is a Vendor Blanket.

The steps of department invoice reviewer are different from entering the receipt. If you check the box on the requisition, you can review all invoices for the order.

Michelle: Is it difficult to share carts?

If you are in the carts, you can select which carts you want to share.

Kathleen will send out an explanation of how to share carts.