Title:	Purchasing Discovery Session #1
Date:	August 8, 2016
Participants:	Chad Cox, Holley Schramski, Christie Haynes, Lauren Holcomb, Michael Oldham, Cliff Merkell, Mary Eubanks, Bill Weyrich, Jeniece Vinson, Chad Cleveland, LaTosha Pittard, Susan McCullough, Sarah Fraker, Jennifer Dobbs, Russell Hatfield, Kenneth Little, Annette Evans, Claire Boyd, Kathy McCarty, Brandi Shealy, Christy Bailey, Jessica Beri, Deanna Wang, Angela Varnes, Hall Gibson, Jennifer Dunlap, Ocie Anderson, Susan Cowart, Matthew Whitley, Teresa Page

Topics discussed:

Item	Notes
Introductions & Overview	- Welcome and Introductions were made. - Primary focus of these sessions is to understand what's currently happening in UGA's purchasing system today. - Chad Cox reviewed the goal of the purchasing discovery sessions and presented two options to the group. See attachment. - Holley Schramski reviewed the meetings rules to the group. - Sierra-Cedar consultants, Cliff Merkell and Bill Weyrich, kicked off the discussion of the purchasing functionality questionnaire.
Purchasing Questionnaire: General Assessment Review	- TBD: Will supplier maintenance happen in PS or SQ? - Supplier data will need to be ready to go (conversion complete) on Day 1. - If both spend and supplier attributes are housed in PS, then state reporting may be done completely in PS - Students have a single vendor ID for all refunds – check into one-time supplier as a solution for this business process; Cliff to provide clarity on exactly how this works. - TBD: Whether we will use PS travel & expense module - Library likely to stop using their own supplier database – LL & 000 vendors to be combined with PS vendor database - UGA supplier ID is 9 digits with 2 digit identifier (VN1234567-XX); PS supplier ID is 10 digits. - PS has a duplicate supplier check upon entry – can be warning or hard stop & can be toggled on/off. Test this. - PS can also periodically test for duplicates

	• Supplier database cleanup will occur in legacy system prior to conversion to PS – complete conversion conversation to be tabled for a later date • There is a place in PS to store the old supplier ID if needed, but initial plan is to keep old supplier ID (VN#). • TBD: What types of supplier updates should be pushed over to SQ • Look into PS vendor portal solution • NRA documentation (1042's ?) will need to be configured and tested • PS can implement supplier checks that would automatically place a supplier on PO Hold – will need to be developed and tested • PS has the potential to allow Property Control to keep up with suppliers • Capital assets & equipment database slated to retire and move to PS • NIGP/Commodity codes will be retained in conversion • PS will need 1099 records prior to go-live • TBD: Consider using PS to process refunds between AR & AP • All supplier/vendor data is likely to be converted from the UVDB to the PS supplier module
Purchasing Questionnaire: Requisitions Review	• Workflow integration points discussed: chart string, budget checks, HR for dept., PO & supplier revisions & changes, PO FY rollover • VetView retrofit will be needed for new chart of accounts

Action Items:

Item	Due Date	Person(s) Responsible
<Item 1>	<date>	<name>
<Item 2>	<date>	<name>
<Item 3>	<date>	<name>

Decisions:

Description	Person(s) Responsible
<Item 1>	<name>
<Item 2>	<name>
<Item 3>	<name>

Change Management Items:

Description
<Item 1>
<Item 2>
<Item 3>

Parking Lot Items:

Description
<Item 1>
<Item 2>
<Item 3>

OneSource Purchasing Team

Goal: The OneSource Purchasing Team has been formed and the first task is to determine the scope of SciQuest within the PeopleSoft implementation. A proposal is due to the PLT (Project Leadership Team) on September 13.

Option1: Stay with current setup

Current SciQuest Module Usage at UGA: ← Function / Activity (across the top)

SciQuest Module Name (across the bottom) →

Option2: Move to the Sandwich Model