

SmartStream Coordination Meeting Minutes
May 3, 2005

Attendance: Sophia Bedard; Pete Bostian; Ed Green, Randy Keller, Mel Lambert, Dave Mayo, Cathy McClintock, Jim Racheff

1. Web Reports: Pete reported that new SmartStream WEB reports are still being developed, particularly for the Accounts Payable area. He has examined the reports that AP produces from their manually-maintained travel database and believes they can be replicated directly from SmartStream. Pete also noted they are looking into Mel's request regarding several errors in some SmartStream Access reports.
2. Bar-Coded Delivery Ticket/Scanner: Pete sent Ron Brown cost estimates for barcode readers and software so that Ron could submit a budget request for equipment to implement a signature-capture system for deliveries. He noted that there were still outstanding issues to be resolved; e.g. bulk deliveries. He cautioned that C&SS needs to be involved before actual equipment is ordered.
3. PCard Modifications: Purchasing has approved the specifications for Pcard modifications that will require users to select centers and accounts from their validation lists rather than use their defaults when entering orders. Template-based orders will not require the re-entry of the centers and accounts.
4. New Computer: The new HP computer is in the Receiving warehouse. Dave indicated a work order has been placed for delivery and that it should be delivered to Bldg. 362 soon. Receiving will contact C&SS prior to delivery. Pete noted that the SmartStream production system will be copied to the new computer and tested. When the test is complete, the production system will be copied again and the new computer will be placed into production.
5. Warehouse Item Descriptions: Pete noted that no request has been received to resolve the differences between descriptions of warehouse items. Mel stated she contacted Cindy Farling and hasn't heard from her regarding the descriptions – changes will be made when we receive a request from Purchasing.
6. Requisition Load for Service Contracts: Sophia Bedard has been working on batch loading requisition data. It was more difficult than anticipated, particularly in formatting the line comments. Purchasing wants to batch load service contract requisitions (generated from the CMS (work order) system to avoid re-keying them. She noted that she has recently been able to load a test requisition so that the purchase order is formatted correctly even though the requisition appears unformatted. We will do an actual requisition and see how it works and then we will set up the buyers and purchase entity so that real data can be loaded. Sophia noted that the unit price doesn't come over to the PO from the PR.
7. Miscellaneous Items:
 - a. Mel noted she will be going to the Alliance meeting in Florida next week. She will check into the new version which should have been released this week. Pete noted that they have not planned on upgrading the application prior to migrating to the new computer.

- b. Pete reported that Purchasing stated that all buyers will be using credit cards to place orders – this will affect AP entering invoices for these orders since the Purchasing buyers do not use the PCard system. It was also noted that the ERS process will be discontinued because the lab supply purchase order will become a blanket order and end users cannot be depended on to enter the unit prices and quantities correctly – a requirement for ERS processing. This will impose an additional burden on Accounts Payable since these invoices will have to be manually entered.
- c. There was discussion regarding a new on-line purchase request form being created by Purchasing. Requisition forms will no longer be distributed although users apparently will be assigned requisition number ranges prior to their using the forms. These forms may also require additional approvals. No one attending the meeting had specific knowledge of this new form.
- d. Randy Keller inquired about the possibility of changing the scheduled meeting date (first Tuesday of each month) due to a conflict with an SAIC manager's meeting which currently involves Purchasing and Accounts Payable. A date change would allow someone from these departments to attend the meeting. Discussion followed regarding communication from Purchasing and Accounts Payable. Randy will contact AP and Purchasing to determine a more convenient date for these meetings and get back to us. For the time being, the meeting date will stay as is.

The next meeting will be held June 7, 2005, at 9:00AM in the Building 362 conference room.