



Query Repository View Enhancements (Project IUUN0020)

Purchasing in Oracle

June 13, 2003 - 301 Service Bldg. - 1:30 – 2:30

ATTENDEES:

Dale Austin, Jayna Cheesman, Debra Claunch, Chuck Combes, Phyllis Cooper, Chris Donahoe, Hugo Hempel, Keith LaVey, Marc Mathews, Jody Reed, Kevin Stevens

PRESIDING:

Jayna Cheesman

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>▪ Marc explained OCT is interested in recording new equipment items in eBARS at the time of requisition. He wants to know what Purchasing elements are in the Data Warehouse Environment (DWE). Jayna said all the elements are in the DWE and IT is in the process of adding the metadata (data definitions). Keith said they are done extracting the information from IDMS, but need to load this to Oracle. He said Lee Song would be working on this beginning June 16, 2003. Keith said the metadata currently available on the Reporting web site (<a href="https://reporting.uky.edu">https://reporting.uky.edu</a>) includes the synonym, short description and COBOL name. The short description is currently displayed due to space concerns, and eventually the full descriptions will be available. Currently this is a dump of each individual record.</li> <li>▪ Jayna said IT would like to use Purchasing as the pilot for the element standard naming conventions since there are fewer views to work with and no one is currently using these views.</li> <li>▪ Hugo asked if they would be able to suggest alternate keys to retrieve information, for instance, the Purchase Order number would be an alternate key. Jayna and Keith said yes. Keith said if they want to index on the PO number or any other elements to let him know.</li> <li>▪ Keith said a suggestion has been made to include the map or screen number in the cross-reference as part of the metadata.</li> <li>▪ Jayna asked if capital equipment is identified by object code, and if the account information is at the line item or at the header record level on the Purchase Order. Chris said it is becoming more important to be able to get this line item information because of GASB35. The account information should be at the line item level.</li> <li>▪ Jayna said IT would work with Chuck on which object codes need to be used to extract equipment data.</li> <li>▪ There was discussion about when the data needs to be extracted for eBARS, once it becomes an order, prior to invoicing, after its paid, etc.</li> <li>▪ Initial recommendation was the data should come from the FRS paid transactions.</li> <li>▪ Hugo said he is also interested in being able to run reports on the amount of time an order has been in the system.</li> <li>▪ The print date on the Purchase Order will be used to select new POs. The Date Received on the line item may also be needed. Will also need the voucher date associated with received items that are ready to be paid.</li> <li>▪ A 3-way match (PO, receiving and invoice) is required on equipment orders. When a 3-way match is obtained, the order will be vouchered. The date vouchered will be used to extract the data. <ul style="list-style-type: none"> <li>▪ <b>DATA ISSUE: How to handle partial payments on line items with quantities greater than one.</b></li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>▪ Currently inventory worksheets are sent when the item has been vouchered. This triggers the property tagging process.</li> <li>▪ Leased equipment is capitalized up front.</li> <li>▪ Chuck said he is interested in having a pending equipment file available to departments, so they are aware at the time the order is placed (the PO print date) what has been ordered. The person placing the orders and the people involved in the receipt of the order are not always the same and communication levels vary.</li> <li>▪ Discussion about sending the tag and worksheet when the Purchase Order is mailed out. The worksheet requires the department to list the Model Number, Serial Number and Room Number. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Worksheets and property tags will be sent to the departments at the time the PO is printed.</b></li> </ul> </li> <li>▪ There are about 10,000 to 13,000 purchase orders per year.</li> <li>▪ A batch job to download all capital equipment data to the eBARS database will be required on a daily basis. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Hugo will write a job to extract capital equipment data for eBARS.</b></li> <li>▪ <b>ACTION: Hugo will work with Keith to get the batch job triggered in the IT batch schedule.</b></li> <li>▪ <b>ACTION: Deb, Jody, Dale and Kevin will work together on the naming standards for the Purchasing data.</b></li> </ul> </li> <li>▪ <b>Target deadlines:</b> <ul style="list-style-type: none"> <li>▪ 1) Complete element names standardization July 7, 2003.</li> <li>▪ 2) Create revised views for Purchasing prior to September 2003.</li> <li>▪ 3) Purchasing start using views for reporting prior to September 2003.</li> <li>▪ 4) Batch job to eBARS completed by Fall 2003.</li> </ul> </li> </ul>