## HOW TO PLACE AN ORDER IN GATEWAY

- 1) Log in to Gateway at <u>https://gateway.procurement.ucsb.edu</u>
- 2) On the right hand side of the screen, login with your UCSBNetID and password.
- 3) From the homepage, there are several ways to shop:

home/shop favorites	Forms	carts	approvals	document search	settlement	profile	contracts
shop settlement							
						)	
	Shop Even	/thing \$		Go	advanced search		
						ļ	
	Go to: favorite:	s   forms   non-catalog it	em   quick order Brow	se: suppliers   categories   c	ontracts   chemicals		

- a. You can use the **Search Box** function to shop across all catalog suppliers/vendors (each order can only contain items from one vendor at a time).
  - You will be able review individual options and price check across multiple vendors.

Shop Everything	Go	advanced search
Go to: favorites   forms   non-catalog item   quick order	Browse: suppliers   categories   co	ontracts   chemicals

• After clicking "**Go**," you can further narrow your search by using the left side toolbar:

Add Keywords	2	Results per page 20 +
Go		no image available Part Number Info Manufacturer Info
Filter Results	?	\$ <b>3 *</b>
Where are my counts?		
By Product Flag		no image Part Number NC9007920
Green 🗼		Available Manufacturer Info 520010 - (Cov
By Supplier	74	Ş 😧 🌒 🔶
BIOEXPRESS \$ DISCOUNT LAB SUPPLIES \$ FISHER SCIENTIFIC \$ NETA SCIENTIFIC INC \$ PERKIN ELMER ☆ \$ more.		Glass Test Tube 200/pk from FISHER SCIENTIFIC           no image available         Part Number         NC9047598           Manufacturer Info         TTB150010-20         \$ 😧 🐲

b. If you know the SKU numbers for catalog vendors, you can use the **Quick Order** function located below the search bar. All items need to be from the same vendor.

Quick Order		back to shop
Category	Everything \$	
Part Number (SKU)		
	Add to Active Cart	

c. **Showcase Suppliers** are vendors that have their catalogs hosted on the Gateway site or have granted access to their catalogs through the Gateway portal. Purchasing expects to add more vendors in the future.

Showcased Suppliers					?
CDWG	DØLL	Fisher Scientific	<b>©</b> OfficeMax	spectrum	UNIVERSITY CENTER

• You can search directly from their icon on the homepage:



• Or, by clicking on the vendor's icon from the homepage, the system will transfer you to the UCSB version of the vendor's website through the Gateway portal if they are a **Punch-out Supplier**.

(F) Fisher Scientific		Welcome Naomi Recania My Account V Fisher PunchOut Partner	Order Status   Rapid Order   🖷	Shopping Cart 0
		Search by keyword or catalog number	All Products	<ul> <li>Search</li> </ul>
SCIENTIFIC SAFETY HEALTHCARE SCIENCE EDUCATION		Custom Searches:	Antibodies   MSDS   Product Certifi	cates   Substructure
Customer Service: +1 800-766-7000 Web Support: +1 877-885-2081	All Other Contact Info		Help	
RNAL Pargents, Origo Symhesis	Ordering Online ordering Place R View the Hotilists Add you Tempila Add you Place R When you Review U Review U Check th	from Fisher Scientific through the Fisher Web Site is easy and quick. The navigation above will help you navigate through the for <u>paid Order</u> items by typing catalog number, quantity, and unit of measure. <u>apping Carti</u> contents of your current order. impost frequently requested items to your customized hotlists. <u>as</u> invost/seaved orders to your shopping cart. u request a quote, it's available online for review as soon as it has been prepared saving you time and effic <b>Requisitions</b> : equisitions you've submitted through our web site, plus those waiting for your approval. <u>ders</u> : e status of all orders on your account, regardless of order entry source.	llowing order functions:	

- When you "punch-out" to a linked vendor, their site will show UCSB pricing.
- You will know you are still working within Gateway if the large navy banner is across the top.

## **Gateway Punchout**

• After you have added the products you need to the Punch-Out shopping cart, click on the cart in the upper right-hand corner to view your items.



• After reviewing your order, click on the green button that says "**Return Cart to Purchasing Application**," then "**Submit**" (on the following page) to send the items to Gateway to complete and finalize your order.

Account Number: 114940-001			Continue Shopping
		Did you make changes	to the items in your cart? Update
Catalog No.: <u>14-961-25</u> TUBE CULT DSP 10X75MM 1000/CS	Case of 1000 for \$23.35	1 Qty	Estimated Delivery: 4/10/2013 From: CHINO, CA (SCD)
Add to Hotlist Remove Item			Item Subtotal: \$23.35
Save these items as a Template		Did you make changes	to the items in your cart? Update
			Group Total: \$23.35
			Shopping Cart Total: \$23.35
Returning	your cart to your purchasir	g application will log yo	u out of the Fisher Scientific website.
	Delete	Shopping Cart Retu	rn Cart to Purchasing Application
OTE: Shipping and handling charges will b onditions.	e calculated at time of sh	ipment based upon yo	our account's terms and
			Continue Shopping

• You can get back to Gateway without adding anything to your cart by clicking on the orange "Cancel Punchout" button in the top right corner of the screen.

					Cancel Punch-out
Welcome Naomi Recania Fisher PunchOut Partner	My Account	V	Order Status	<sub>Rapid</sub> Order	Shopping Cart 1

- e. **Non-Catalog Items** are for vendors that do not currently have their catalogs linked to Gateway.
  - You can find the link to start an order for a **non-catalog item** under the **Shop/Search** box:

Sho	Everything \$	
Go to:	favorites   forms   non-cata	alog item

• You can select a vendor from the vendor database and manually enter the order details in the non-catalog window (e.g., copy and pasting the product information from the vendor's website).

Non-Catalog Item					? X
Enter Supplier or supplier search					
Product Description	Catalog No.	Quantity	Price Estimate	Packaging	
				EA - Each	\$
254 characters remaining expand	Save and Close S	ave and Add	Another Close		

f. **Walk-In PO forms** are available for local vendors (such as Home Depot, K-Mart, Tri-Valley Trophies, etc.) that will accept POs for items that you cannot order online or need immediately. From the main homepage, the form can be found in the **Gateway Forms** section on the homepage.

Gateway Forms					?
GATEWAY VB Draw Down	GATEWAY VB Recurring Services	GATEWAY VB Revision Form	GATEWAY Walk-In PO	GATEWAY Quick Order Form - Non Catalog	GATEWAY Confirming PO
CATEWAY Flexcard Authorization					

• Fill in the appropriate fields in the pop-up window and click the **Go** button at the top of the form to add the items to your cart.

Walk In PO Available Actions: Add and go to Cart						e 🔒
General I	nformation	?	Supplie	r Information		?
UCSB P	ROCUREM	ENT	Enter Supplier	or supplier search		
GAT			Distribution The system will distribute purchase orde Custom Supplier Distribution sele Manual	ected - manual	d below:	
End User's Full Name:			Order	Information		?
End User's Phone #			Description of Items			
How are these items used in your research (N/A)?						
				250 characters remaining	expand	clear
	250 characters remaining	expand   clear	<b>Quantity</b> Unit Price			
					Total	0.00

## **CHECKING OUT**

1) Once you have all of your items from <u>one</u> vendor in your cart and are ready to checkout, click on the **Cart** icon in the upper right corner.

	ेन्न 201	3-04-09 naomi_reca	nia	01   1 item	(s), 25.22 USD
s	earch for	Catalog No. (SKU)	ŧ		Go

2) Once you have the **Cart** open, we ask that you add your project code after your name to help us distinguish which Department Buyer is responsible for approving the order.

Shopping Cart	for Naomi Recania		Save
Cart Name	19 naomi_recania 01 DC02HC	Req Delivery	
Description			mm/dd/yyyy

• You can also upload quotes from vendors directly into the system on the right side of the screen, above the line items.

	For selected line items Add To Favorites	\$ Go
Contract	702/OP/002 more info	
PO Number	To Be Assigned	
Quote number		

- If you have paperwork to attach to the order, after you "finalize the cart," you can upload it to the "Notes and Attachments" section on the **Requisition** tab.
  - You may also leave a note for the vendor (**External Note**) in this section (e.g., the name of the representative who gave you the quote, a reference number, etc).

1	Notes and Attachments	?
Internal Notes and Attac	edit	
Internal Note		
Internal Attachments		
add attachment		
Supplier Notes & Attache External Note External Attachments	ments no note	edit
add attachment Supplier Account Number		

3) At this point, you can either select "**Finalize Cart**" to input the accounting and shipping information or "**Assign Cart**" to send the cart to another person to add items or for them to assist with any questions or problems.

	1 Item(s) for a total of 25.22 USD				
Shopping Cart	Finalize Cart or Assign Cart				
Add Non-Catalog Item			Save		
Cart Name	2013-04-09 naomi_recania 0	Req Delivery		Internal Note	add note
Description			mm/dd/yyyy	External Note	add note

a. Assuming you have already set up a **Favorite Address** and marked it as the default, the only **Alert** you should see is to select the appropriate **Accounting Codes**.

📀 Addresse	s 🛕 Accounting	Codes 🛕 Final Review	• • • • • • • • • • • •		
	Almost I • Require • Require	ready to go! The list below ed field: Account String of ed field: Department of	w needs to be address	ed before the request can	be submitted.
lequisition	PR Approvals Co	mments Attachments Hist	ory		
Summary	Accounting Code	es Equipment Managemer	t   Purchase Details	Supplier Info   Taxes/S&H	
			A	accounting Codes	
			These values app	bly to all lines unless specified by I	line item
Dep	artment	Account String	Sub Account	Cost Type	Fund Type
C Require	ed field 🧷	<ul> <li>Required field Ø</li> </ul>			

- b. Clicking "Required Field" in either of the yellow boxes will open the Account Code pop-up window.
- c. To enter the department name, click on "**Select from all values...**" and type **MTRL** in the value field of the Custom Field Search window and click "**Search**".
  - i. Once the "Materials Research Laboratory" description populates, click "Select".
  - ii. You will then be prompted to enter the Account String information.
- d. If **Code Favorites** are already set up, you can use the dropdown menu to select the appropriate project code.

Account Code								? X
Select from your code favorites Department	✓ DC02HC DCGTUN	it String	Sub Account	Cost Type	Fund Type	Award Type	add split	
Select from all values	8 Required	field	Select from all values		]			
						recalculate / validate values		
			Sa	ve Cancel				

e. If you have not set up **Code Favorites**, once the department (**MTRL**) has been selected, click on "**Select from all values...**" to view the list of accounts.

Account Code						?	x
Select from your code favo	rites 🗧 🗧						
Department	Account String	Sub Account	Cost Type	Fund Type	Award Type	add split	
MTRL Select from all values	✓ Hide all values MTRL-ADCA41-8-402480-19941 – ADCA41 Pak/CAMP Funds MTRL-ADCAMP-8-402480-19900 – ADCAMP Pak/CAMP Funds MTRL-ADCM1-8-442480-19941 – ADCM41 Computing MATERIALS RES MTRL-ADFOG1-8-442480-19941 – ADFOG1 Pak/Seshadri CF from 10 MTRL-ADFOA1-8-442489-19941 – ADHC41 HAWKER START-UP FUNDS /	3 Select from all values		7 Select from all values recalculate /	2 Select from all values validate values		

- e. Once you select the appropriate account, select the **Sub Account**. If you are unsure of what sub to select, the Department Buyer can select it when they review the order.
- f. Select "**Save**" when you are finished.



- g. Click on the "Final Review" link in the yellow box.
- h. Double-check all of the information entered and select the "Submit Requisition" button if there are no changes.

C Addresses	Accounting Codes C Final Review	t Requisition or sign Cart
	④ Return to shopping cart 🕚 Co	ntinue Shopping
	$\bigcirc$ All done! The required information has been completed and this request is ready to be submitted.	
	Once you have reviewed the details, you may continue by clicking the button at the top of the page.	

- i. This will route your order through the appropriate channels for approval.
- 4) Below is an example of the approval process workflow for a low value PO.
  - a. The person placing the order is the **Requester** (far left).
    - b. If you have purchase authorization, the **Account Approval** step will automatically approve if the order is within your authorized limit.
    - c. If you do not have purchase authorization, your PI will provide the **Account Approval**.
    - d. Next, it will go to your MRL **Department Buyer** (Sylvia, Naomi, and Janet) for final review and approval (**Department Post-Approval**).
      - i. If the order includes equipment or restricted items, it will then be routed to Purchasing and EH&S, respectively, for approval.
    - e. Once the order has cleared all necessary approvals, Gateway will issue a PO number and the order will be automatically submitted to the vendor through Gateway. You will receive order updates by e-mail through Gateway.

