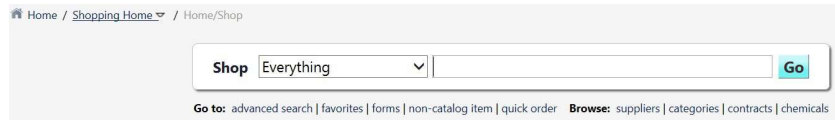
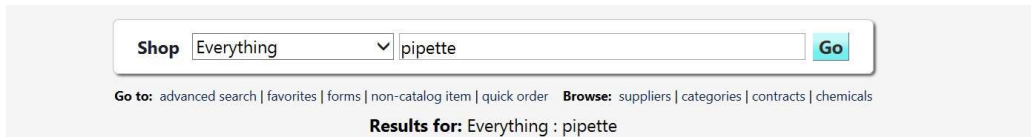


## HOW TO PLACE AN ORDER IN GATEWAY

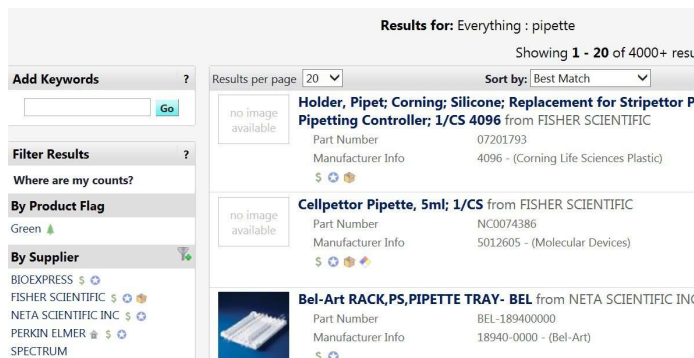
- 1) Log in to Gateway at --- <https://gateway.procurement.ucsb.edu>
- 2) On the right-hand side of the screen, login with your UCSBNetID and password.
- 3) From the homepage, there are several ways to shop:



- 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). Note that there are currently only a small number of catalogs loaded in the system, so you may not always be able to find your items this way. If this is the case, jump to section e (non---catalog suppliers) to order from your normal vendor.
  - You will be able review individual options and price check across multiple vendors whose catalogs are in Gateway.



- After clicking “Go,” you could narrow your search by using the left side toolbar:



- 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.**



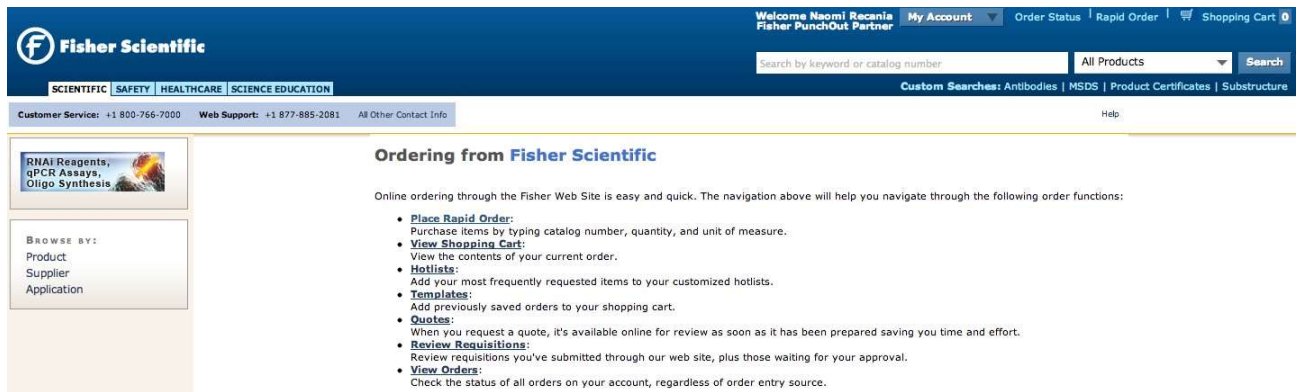
- c. **Punch-out Suppliers** are vendors that have their catalogs hosted on the Gateway site or have granted access to their catalogs through the Gateway portal.



- You can search directly from the vendor’s icon on the homepage:



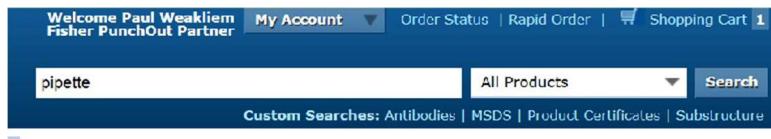
- Or, by clicking on the vendor’s icon from the homepage, the system will transfer you to the UCSB version of the vendor’s website through the Gateway portal if they are a **Punch-out Supplier**.



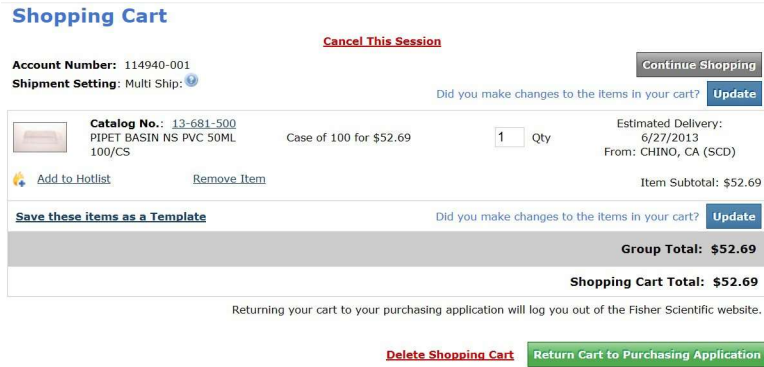
- When you “punch-out” to a linked vendor, their site will show UCSB pricing.
- You will know you are still working within Gateway if the large navy banner is across the top.

## Gateway Punchout

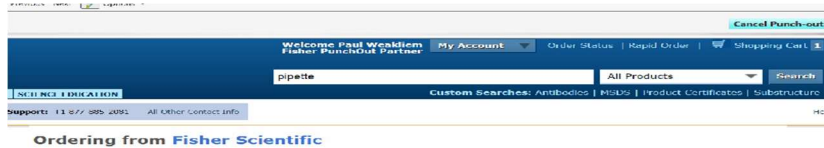
- After you have added the products you need to the Punch-Out shopping cart, click on the cart in the upper right-hand corner to view your items.



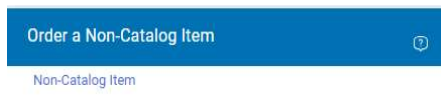
- After reviewing your order, click on the green button that says “**Return Cart to Purchasing Application,**” then “**Submit**” (on the following page) to send the items to Gateway to complete and finalize your order.



- You can get back to Gateway without adding anything to your cart by clicking on the light blue **“Cancel Punch---out”** button in the top right corner of the screen.



- 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:



- You may 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). If you can not find the vendor in ‘supplier search’, please contact the CNSI purchasing office for your options.

**Non-Catalog Item** ? X

**Enter Supplier**

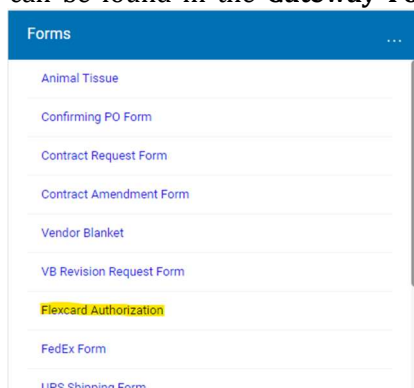
or  
supplier search

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

254 characters remaining expand | clear

**Save and Close** **Save and Add Another** **Close**

- f. **Flexcard Order** are also processed in Gateway. They are completed on a Gateway Form. From the main homepage, the form can be found in the **Gateway Forms** section on the homepage.




- Fill in the appropriate fields in the pop-up window, attach a quote or screenshot of your cart at the bottom, and click the **Add and Go to Cart** button at the top of the form to add the items to your cart.

\*Flexcard Holder’s Name: Jewels Bolden

Form • Flexcard Authorization Close **Add And Go To Cart**

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**General Information**



- Use this form to request Flexcard authorization in **Gateway**. Note: This Form cannot be used for federal orders over \$9,999.99. Please use a standard purchase order for federal orders exceeding this amount.
- Field names in **bold text** are required.
- In order to ensure proper handling of your request, you must do the following:
  - Enter the **Supplier** you wish purchase your goods from.
  - Specify the **Order Placement**
- List out the items, price, and quantities of the goods you are buying on your flexcard.
- This form will be routed to the departmental buyer approver to place the order on Flexcard. Once the request has been processed through the departmental workflow to PO will auto-close preventing receiving/invoicing. On orders over \$5,000 the order will automatically be

**Supplier Information**

Supplier Name \*

Supplier Contact Name

Supplier Contact Email/Phone

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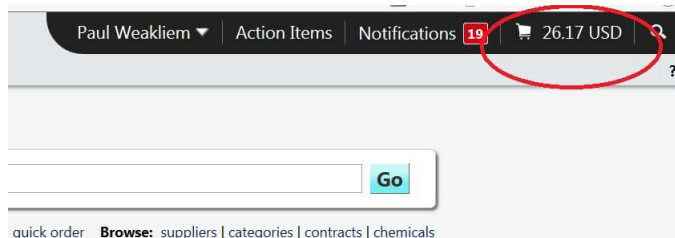
**Order Information**

Order Placement \*

Flexcard Holder's Name

### **CHECKING OUT**

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



- 2) Once you have the **Cart** open, we ask that you add your project code after your name in the Cart Name field.

**Shopping Cart** for Paul Weakliem

**Add Non-Catalog Item**

Cart Name   Req Delivery

Description

Share cart No user groups available

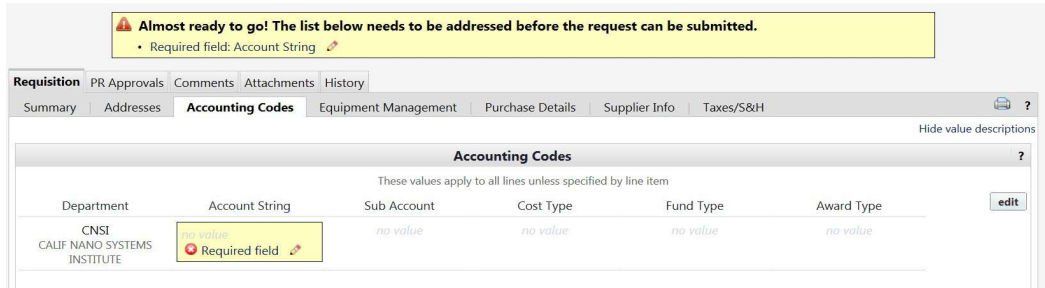
**Supplier / Line Item Details**

- If you have paperwork to attach to the order (e.g. quotes), you must “finalize the cart” before you may upload it to the “Notes and Attachments” section on the **Requisition/Summary** tab.
- If you would like to leave notes or comments for UCSB staff (internal use), click ‘Edit’ button in the Internal Notes and Attachments section. Please note that any comments entered in this section cannot be deleted from Gateway and become part of the auditable records. Please be mindful of the information you are entering and contact the CNSI Purchasing Office if you have questions prior to submitting orders.

- 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).

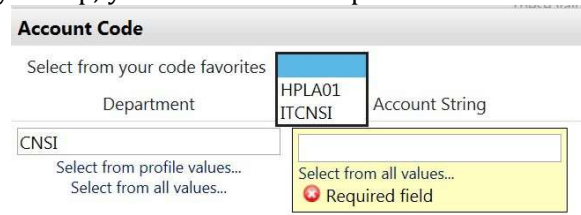
3) At this point, you should select **“Finalize Cart”** to input the accounting and shipping information.

- 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**.



- Clicking **“Required Field”** in either of the yellow boxes will open the **Account Code** pop---up window.
- To enter the department name,
  - Click on **“Select from all values...”**
  - Type **CNSI** in the value field of the Custom Field Search window
  - Click **“Search”**
  - When you see **“Calif Nano Systems Institute”**, click **“Select”**.  
You will then be prompted to enter the **Account String** information.

- If **Code Favorites** are already set up, you can use the dropdown menu to select the appropriate project code.



- If you have not set up **Code Favorites**, once the department (**CNSI**) has been selected, click on **“Select from all values...”** to view the list of accounts. In the second field of the popup window (labeled **“Description”**) type the project code, or nickname of the project you want to charge to. Then click the blue select button from the search results.



- 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. Select **“Save”** when finished.
- At this point your **last step is to make sure a commodity code and object code are selected for your order**. These codes tell accounting what type of items are being ordered. Toward the bottom of your cart, you will see your items listed. Next to your items will be the fields for Commodity code and Object code.
  - In the Commodity code box click on the Spyglass icon to search for the desired Commodity Code.

Size/Packaging	Unit Price	Quantity	Ext. Price
EA	2.79	4 EA	11.16

Taxable

Commodity Code - Click? for help:

Object Code:

- This search can be performed in two ways, either by entering up to the first four digits of the commodity code, in the "Code starts with..." field or by entering a key word in "Description contains..." field and clicking "Search."

**Commodity Code Search** ✕

**Commodity Code Search** ✕

- The search result window opens with a selection of Commodity Codes to choose from. Once you have found the proper Commodity Code click the plus sign and save.

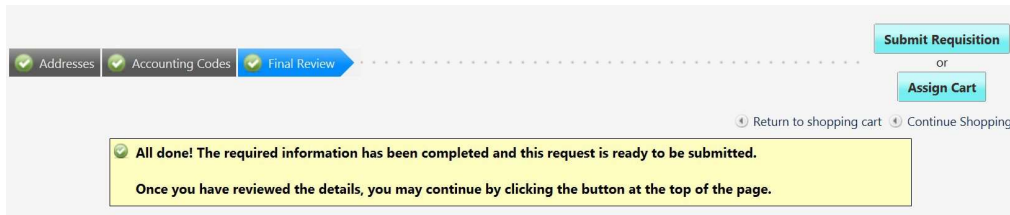
Code ↑	Description	
41000000	Laboratory & Measuring & Observing & Testing Equipment (Object Code 8020 8040 8120 9120 9610)	+
41100000	Laboratory and scientific equipment. Including baths, tissue processing, refrigerators, freezers, glove boxes, fume hoods, centrifuges, incubators, furnaces, pumps, electrophoresis systems, tissue processors, DNA processors, growth chambers, and washers.	+
41120000	Emulsifiers, components and accessories. Including laboratory glassware, slides, tools, crucibles, storage containers, and pipettes.	+

- After the Commodity Code is selected. Repeat the process in the Object Codes field. Click the plus sign to select the code.

**You have completed the required information in this step. At this point, you can do the following:**

**Proceed to the next step: Final Review.**

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



j. Selecting “Submit Requisition” will route your order through the appropriate channels for approval.

4) Below is an example of the approval process workflow for a low value purchase order.

- a. The person placing the order is the **Requester** (far left).
- b. The order then goes to the CNSI **Department Pre---Approval/Buyer** (Daniel) for review.
- c. If you have purchase authorization, the **Account Approval** step will automatically approve orders within your authorized limit.
- d. If you do not have purchase authorization, your Advisor/PI will provide the **Account Approval**.
- e. Next, the order will go to **Department Post---Approval** for final review and approval  
If the order includes equipment or restricted items, it will be routed to Purchasing and EH&S, respectively, for approval.
- f. Once the order has cleared all necessary approvals, Gateway will issue a purchase order number and the order will be automatically submitted to the vendor through Gateway. You will receive order updates by e---mail through Gateway. You can also see where it is in the process by clicking on the “PR Approvals” tab.

