Contacts and Help

- **Gateway Help:**
  - Call Us! 805-893-8025
  - Log a Ticket! Help@Gateway.Procurement.ucsb.edu

- **Gateway Website:**
  - [http://www.bfs.ucsb.edu/procurement/gateway](http://www.bfs.ucsb.edu/procurement/gateway)
  - News/urgent system admin communications
  - FAQs
  - Training guides and desk manuals
  - Archived campus announcements
  - Contact information and more!

- **Who can I talk to?**
  - Hannah Morand – Gateway Systems Coordinator (Acting) x8025
  - Any questions? Troubleshooting: Basic, moderate and advanced users welcomed!
  - Donna Baumann – Supplier Enablement Specialist x4266
  - Any “Add Supplier” Form Request follow-up

The 30,000ft View

- **Gateway replaced** low value (LVPA) and high value (SBs) legacy system purchases.
- **Gateway did NOT replace:**
  - Flexcard (Campus Visa Card)
  - Travel and Entertainment
  - Form 5
- **Why eProcurement?**
  - Automated approval routing and tracking
  - Streamlined and strategic buying
  - “Best value” pricing for contracted prices
  - Speed with access to “Shopping Carts”
  - Real-time requisition status and reports
  - Sustainability – Reduce paperwork, access green vendors and products!
Login Information

- Gateway Access:
  - [http://gateway.procurement.ucsb.edu](http://gateway.procurement.ucsb.edu)
  - UCSB Net ID and Password

- Login Tips:
  - Need Gateway to reference a new email/phone?
    - Update your UCSB Directory entry at Identity online!
  - Change your UCSB Net ID?
    - Contact the Gateway Helpdesk! We will merge your roles/profile for you!
Type of Suppliers

• **PunchOut:**
  - Supplier websites that host UCSB Pricing
  - Examples: Officemax, Fisher, Dell
  - Clicking the supplier tile "Punches" you out of Gateway to a session on their website to shop

• **Hosted Catalog:**
  - Supplier provides product and pricing information that is searchable within Gateway
  - Examples: UCSB Bookstore, Sigma Aldrich, Perkin Elmer
  - Clicking the supplier tile or searching the search bar on the homepage allows you search for a product

• **Test:**
  - Very few suppliers are kept in a "Test" category to highlight specific login instructions.
  - Example: McMaster Carr

• **Non-Catalog:**
  - Supplier product and pricing information is NOT stored within Gateway. User will need to get their pricing outside of the system, either through a quote, a price list, or some other communication with their supplier representative. This will then be used to manually build a shopping cart for the vendor.

All About Suppliers

• Gateway currently has upwards of 4,000 suppliers for your use.
  - If your supplier is not in the system, please use the "Add Supplier Form" located in the Resources Section, on the homepage.

• Supplier Class Icons are used to mark suppliers that have special ordering instructions, discounts available or unique workflow in place.
  - Examples are:
    - Free Shipping: 📦
    - UCSB Strategic Sourced Supplier: 💰
    - Small Business Supplier: 🌐
    - Routes to Campus Procurement for Review: 📦
Helpful Cart Hints!

• You can have as many draft carts as necessary.
• Carts do not expire.
• One Supplier = One Requisition
• Always Check Your Commodity Code/Object Code!
  – “Spot Buy Products” must be changed
  – Use the Spyglass icon to narrow a search by desired commodity code or even object codes!
  – Always save after selecting a new Commodity Code to refresh available Object Code Choices

Forms

• Forms are to be used for unique purchasing situations:
  – Animal Tissue
  – Confirming
  – Contract Request Form
  – FedEx
  – Flexcard Authorization
  – Vendor Blanket
  – VB & Contract Revision Request
  – Walk-In

Animal Tissue

• To be used with ALL purchases of animal tissues that take place in the system.
• Routes to the IACUC/Campus Vet for proper approval and review.
Confirming PO Form

• “Cart before the Horse” PO
• This form is to be used in situations where goods or services were procured without an authorized Purchase Order in place first.
• A Confirming Form can be completed to pay the invoice against, but the Purchase Order will not be sent to the vendor* (to avoid a duplicate situation).

*Manual Purchase Order

Contract Request Form

• This form should be used to route Professional or Personal Services, Hotel, Revenue and license agreements through Gateway.
• This results in a Purchase Order, and, if applicable, signed agreement which will be distributed directly to your supplier.
• The Contract Request Form will trigger review by the Procurement Services Team, including a step for insurance review.

FedEx Form

• FedEx does not accept Purchase Orders, so we are unable to enable them in a way that users are able to directly send orders and shipments through Gateway.
• This means that you will still need to contact FedEx to ship, print, etc outside of Gateway via your usual process.
• Gateway Purchase Order creation will simply serve as a means for you to pay your FedEx invoices.
• The FedEx Form is a highly detailed “one-time” use Purchase Order Form that can be a way for your to pay your FedEx invoices.
Flexcard Authorization

- Flexcard and Gateway are two separate procurement vehicles.
- The only time the two cross paths are with this form.
- The Flexcard Team will require that if you need a one-time limit raise, that you have a Purchase Order as back-up.
- This form will route through your department for approval and end with the Flexcard Team for their approval.
- Once approved you have a PO on file and the Flexcard Team will raise your card limit for the purchase.

Vendor Blanket

- Purchase Order to be used over a longer period of time (vs. a single use PO)
- Generally good for recurring services
  - Ex. Copier Maintenance Invoices, Gas Cylinder Rentals
- Things to Remember:
  - Cannot set up for more than one year
  - Can renew! But if Vendor Blanket has been expired for more than two months, you must start a new PO.

VB & Contract Revision Request

- Change orders are not allowed in the system.
- The exception being with Vendor Blankets and Contract Request Forms as they are generally longstanding Purchase Orders.
- Use of the Revision Request Form will allow departments to request date changes, additions of funds, LAF revisions or all of the above.
- The form will route to the Procurement Team and a Professional Buyer will make updates to your existing Vendor Blanket or Contract Request Form.
  - You will keep your same Purchase Order number
  - The system will assign you a “CR” or “Change Request” number for you to know that the process and revisions are complete.
Walk-In Form

• This form is to be used when a department will be going to a supplier’s location to place their order and/or pick up their goods (you are “walking into” the supplier’s location).

• Since the Purchase Order is being taken directly to the supplier’s location, the system will not distribute the purchase order*.

*Manual Purchase Order

Receiving

• Why should we receive?
  – It is your department’s way of indicating the status of all of your goods and/or services for that particular order.
  – In many cases your receipt is the key for releasing payment on your purchase orders’ invoices.

• When should we receive?
  – Best practice is to receive on every single purchase order for which you have direct knowledge of receipt, in order to indicate that your goods and/or services have been received.
  – However, on orders $2,500 and below, a receipt is not needed for the invoice to pay if the invoice and purchase order match.
  – Please note: Bypassing the Receiving step may, however, raise audit issues.
  – Receipts are always required to release the invoice to pay on any order over $2,500.

• What kind of receipt should we create?
  – Quantity Receipts are typically used for simple receiving on purchase orders.
  – They are used to reflect the quantity of items ordered on the purchase order and received.
  – Quantity receipts are most often seen with supply orders, like OfficeMax or Fisher Scientific.
  – Cost Receipts are typically used for receiving the actual amount reflected on the invoice against your purchase order.
  – They are also used with Vendor Blankets, Walk In Forms and Confirming Forms as they need to match the exact amount of the invoice for payment against your purchase order.

Invoicing

• Invoices need to be sent direct to Accounting for payment to be processed.
  – Please ensure that the invoice copy sent over is not on carbon paper, colored paper or is illegible as the scan into Gateway will fail.
  – You can email invoices to Accounting via: InvoicesONLY@bfs.ucsb.edu
    • Be sure it includes the full “GW” number for reference.
Features of the Gateway Invoice

• Where can I check the status of my invoice?
  – Check the Invoice Tab on your Purchase Order
  – Here you can see a copy of your invoice (denoted by “SQ”).
  – Clicking the “SQ” number will give you your invoice detail including a .pdf scan copy of the original invoice (not present for suppliers that e-invoice), remittance information and payment detail.
  – In Process = An AP Processor is working on your invoice
  – Payable = Your invoice has completed AP workflow and payment is in process to your vendor
  – Paid = Your invoice will have check, direct deposit or payment plus details

Invoice Tolerances

• Gateway has several tolerances built in place to allow your invoice to process even with moderate changes from the PO price.
  – Shipping: $105
  – Tax: $10+ or $400
  – Unit Price: $200 or 20%

• Anything above the set tolerances will need your Account Approver to comment on the invoice and give approval for the invoice to pay.

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