UCSB Business & Financial Services
Procurement

Gateway System Forms Overview

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Forms

- Forms are used for unique procurement situations.
- You are still obtaining a Purchase Order with a Form
  - Form is filled out and added to your cart
  - Form is the item being "purchased" in your order
- Some forms have different number wheels to stand out
  - F = Flexcard Authorization Form / “Flexcard”
  - CR = VB & Contract Revision Request Form / “Change Request”
  - “R” = Coming soon for Furniture Services / “Recharge”

Animal Tissue

- To be used with **ALL** purchases of animal tissues that take place in the system.
  - Examples include:
    - Generation of custom antibodies
    - Generation of genetically engineered animals (e.g. knockout mice)
    - Any custom (i.e. not “off-the-shelf” or from a catalog) animal or animal product that is produced specifically in response to an investigator’s request
- Routes to the IACUC and our Campus Vet for proper approval and review.
Animal Tissue Example

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

Confirming PO Example
Contract Request Form

• This form should be used to route Professional or Personal Services, Hotel 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.
• For Revenue Agreements – please email contracts@bfs.ucsb.edu

Contract Request Form Example

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.
  — FedEx Corporation = Shipping
  — FedEx Office = Calle Real Center for Printing
• 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.

*Manual Purchase Order
FedEx Form Example

Flexcard Authorization Form

• 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.
  – Reminder: Since you are paying with FC, your supplier does not have to be linked to use this form!
• Once approved you have a PO on file and the Flexcard Team will raise your card limit for the purchase.

Optional Dept. Use for FlexCard Form

• Capture approval authorizations before card is used
  – LIBR, PHYS are examples
• Routes the purchase on the appropriate LAF through your department to capture all approvals electronically.
  – Allows department to control access to card and card allocations up front.
• Not mandatory.
FlexCard Authorization Form Example

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.

Vendor Blanket Form Example
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.

VB & Contract Revision Request Example

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 suppliers 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
Walk-In PO Form Example

Tips and Tricks!
• Always Cost Receive with Forms!
• Multiple Line Items with Forms
  – Create and Save multiple versions of the same form to your active cart.
  – Great for taxable vs. non-taxable on same order
  – Great for splits on Vendor Blankets
• Remember: Do not add a Form to a cart with other non-catalog, PunchOut or Hosted Catalog items – you will get an error!