What is the GMC?

• The Gateway Management Console (GMC) is an online application that gives department administrators the ability to create, edit and review their Gateway workflow, including user roles and spend authority.

• Generally, access is given to a department’s manager, business officer, and/or director. It should be someone familiar with the departmental fund and personnel structure as decisions made in the GMC will effect roles and funds available in Gateway.
GMC Roles

• There are two campus level administrator roles for the GMC.
  – **DSA** (Department Security Administrator) – This role is given outside of the GMC; Campus Level administrative permission.
  – **DPA** (Department Purchasing Administrator) – This role is granted in the GMC, by the DSA. As the DSA may not handle the day-to-day management of roles and spend authority, the DPA should be considered the primary role for handling GMC responsibilities. Please note – it is acceptable for a departments’ DSA and DPA to be the same person.
Gateway Roles

**Shopper:** The “default” role in Gateway automatically assigned to all users with a UCSB Net ID. Can view PunchOuts, Hosted Catalogs, create a cart, but must assign it to a Requester to place an order as they cannot submit purchases, only assign. Cannot enter fund information or search system for data.

**Requester:** This role should be assigned to someone with some training and knowledge about accounts. Can shop and create orders as the Shopper can, but Requesters have the further permission to submit orders and have full system transparency.

**Account Approver:** The account “owner” or someone delegated authority to approve spending on an account string. Reviews requisition and account string and either approves the document to the next step or returns/rejects to the Requester for edits, as this role cannot edit any requisition document. **Please note:** If Account Approver and Requester are the same person on an order – the system will auto-approve this step.

**Department Buyer:** This role reviews for availability of funds, allowability and appropriateness on the selected account string. Considered to be the “Purchasing Expert” for a department’s unit; reviews sub accounts, commodity/object codes, restricted commodities, etc. Can, but should not edit cart or account string. Assigns Ad Hoc Approver if necessary. Approves the document to the next step or returns/rejects to the Requester for edits.

**Ad Hoc Approver:** This role can be assigned to workflow when additional review/approval is needed on certain orders, but review is not needed for in “everyday” workflow. As such it is an optional assignment. Examples of users who might have this role are a C&G Analyst, Financial Manager, IT Specialist, MSO or Chair. Like the Account Approver, this role approves the document to the next step or returns/rejects to the Requester for edits.

**PR Validation:** This is an automatic step performed by the system during workflow to verify that the selected account string is open and valid on the GL and that the sub and object code combinations used are appropriate. If there are any validation errors, the requisition will be returned to the Requester.

**Post-Dept. Approvals:** These are automatically invoked in workflow (if applicable) and include EH&S review, Risk Management, Equipment Management, Campus Buyer Review and/or Procurement Manager review. All of the above are determined by dollar thresholds, federal fund usage, commodity/object code selections and restricted item selections. Approves the document to the next step or returns/rejects to the Requester for edits.

After all approvals are complete, the system will generate a Purchase Order from the requisition document. A “GW” Purchase Order number will be assigned it will distribute to the supplier by whatever transmission method has been set up with the vendor during the enablement process (fax, email, manual/walk-in, or CXML).

**Receiver:** The role completes their responsibilities after the goods have been delivered and/or the services have been fulfilled by the supplier. The Receiver will use the quantity and cost receipt functions on the Purchase Order “available actions” menu to indicate that the goods/services for the specific order have been received. In many cases, this step is important for releasing payment in invoice workflow.
Where Do I Start in the GMC?

• Accounts Tab (Creating and Managing LAFs)
  – Create a New Account
    • (Cost Center / Project Code / Cost Type)
    • (Account Strings > Build New Account)
  – Edit/Review Accounts (Account Strings)

• Assignments Tab (Creating and Managing Roles)
  – Get an Account String into Gateway (Assignments by User/Role)
  – Create a New Role (Assignments by User / Role)
  – Edit Existing Roles (Manage Assignments)
  – Remove Someone Leaving My Department
    • (Manage Assignments or Bulk Assignment Management)

• Reports Tab
  – Get some quick Data on spend authority assignments
Accounts Tab – *Creating and Managing LAFS*

- The Account tab is where departments will manage their accounts for use in Gateway.
- Accounts active with the Chart of Accounts will ‘sync’ into the GMC; you will never have to manually enter a LAF (Location-Account-Fund).
  - Please note that only expenditure accounts are available at this time, income accounts are not.
- Accounts sync from the Chart of Accounts using a general format that does not include department specific cost centers or project codes.
  - EX. PURC-000000-8-661556-19941
  - (Cost Center-Project Code-L-A-F)
Accounts Tab – *Creating and Managing LAFS*

- **Subtabs:**
  - Cost Center –
    - Create Cost Centers (if used by your dept.)
  - Project Code –
    - Create Project Codes (if used by your dept.)
  - Cost Type –
    - Create Cost Types (if used by your dept.)
  - Account Strings –
    - Manage/Review LAFS
  - Bulk –
    - Bulk Update of LAFS
Assignments Tab – *Creating and Managing Roles*

• The Assignments Tab is where departments will manage their roles for the GMC and Gateway.

• Roles are *important* as they determine your workflow in Gateway!
  – The system will know automatically where to send an order based on Department Code, LAF, and dollar amount based on what you set up in the GMC!
Assignments Tab – *Creating and Managing Roles*

- **Subtabs:**
  - Manage Assignments
    - Review and Manually Edit Assignments
  - Assignments by User
    - Add New Role (User – Down Approach)
  - Assignments by Role
    - Add New Role (Role – Up Approach)
  - Bulk Assignment Management
    - Editing Roles in Bulk
  - Assignments Log
    - Audit Log for reviewing who made updates to roles
Task: Creating a New Account

• Where: Account Tab > Account Strings

• If you use Project Code and/or Cost Center, that is the only time you need to “Build a New Account” to add your unique Project Code and/or Cost Center.

  – “Template” LAF will sync from Chart of Account, so if you do not use Project Code and/or Cost Center, you do not need to Build a New Account ever
Task: Creating a New Account

• How To:
  – Cost Center and/or Project Code needs to be created first before new LAF can be built!
  – Access Accounts > Cost Center
  – Enter in the Cost Center and a description. The system will auto-enable your Cost Center for use in Gateway. If you need the Cost Center to be PPS enabled – please also be sure to check the PPS box as well
  – Click “Add”
  – Follow the same steps for Project Code
Task: Creating a New Account

• How To:
  – Now that Cost Center (CC) and Project Code (PC) have been created, the new LAF can be built
  – Access Accounts > Account Strings
  – Click “Build New Account String”
  – You will notice your recently built CC and PC choices are dropdown options in the “Build New” popup. Select your desired CC and PC options, with your LAF selection.
  – When ready, click either:
    • “Save” – which will complete the creation of the new LAF combo
    • “Save & Add Another” – which will save and let you continue
Task: Edit/Review Accounts

- Where: Account Tab > Account Strings
  - Next to each Account you will see the options:
    - Edit
      - This lets you edit the description and indicate the default account for your department
    - Disable
      - This will remove the LAF from the view leaving you with only the strings that you are currently managing
      - The string will not be removed from the GMC so if you change your mind, you can enable it again at a later time. Click on “show disabled” to see disabled account strings
Task: Get An Account String Into Gateway

• Where: Assignments > Assignments by User/Role
• The key piece to remember, is that until you link an Account Approver to an Account String, it will NOT sync to Gateway.
  – Remember: Strings sync twice a day: 10:30am and pm
• You can do this under either:
  – Assignments by User
    • User-Down Approach
  – Assignments by Role
    • Role-Up Approach/Good for Assigning Large Groups at Once
Task: Get An Account String Into Gateway

Assignments By User:

• Lookup User
• Select Account Approver Role
• Select Department from Drop-down
• Find the Account String this person will be the approver for
  – You can look via the Cost Center, Project Code or LAF drop-down
• Select the limits they will approve (or select all)
  – Each box needs to be checked; the box above will not supersede the boxes below
• You have the option to “Display Account String(s)” to view what strings you are about to add this person to before hitting save.
• Hit Save!
  – You will see “X new assignments created” above your selection when complete.
  – If you need to add another person to this same set-up, leave everything in place, just change the name. It will keep all of your data in place and you can hit save again to continually add additional approvers.
Task: Get An Account String Into Gateway

Assignments By User:

- Application: Gateway
- User: Hannah Morand
- Role: Account Approver - approvers
- Workflow Step: Account Approval
- Department: PURC - PURCHASING OFFICE
- Cost Center: PURC
- LAF: 8-661555-07427
- Project Code: 000000

Display Account Strings: 

<table>
<thead>
<tr>
<th>Department</th>
<th>Cost Center</th>
<th>LAF</th>
<th>Project Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURC - PURCHASING OFFICE</td>
<td>PURC</td>
<td>8-661555-07427</td>
<td>000000</td>
</tr>
</tbody>
</table>

Items Per Page: 10
Task: Get An Account String Into Gateway

Assignments By Role:

• Select Account Approver Role
• Select Department from Drop-down
• Find the Account String these users will be the approver for
  – You can look via the Cost Center, Project Code or LAF drop-down
• Select the limits they will approve (or select all)
  – Each box needs to be checked; the box above will not supersede the boxes below
• You have the option to “Display Account String(s)” to view what strings you are about to add this person to before hitting save.
• Search for each users name
  – Selecting their name and clicking “assign”, will add them to a list below. You can continue to build your list below. Once you have a large list of all of the people you would like added:
• Hit Save!
  – You will see “X new assignments created” above your selection when complete.
Task: Get An Account String Into Gateway

Assignments By Role:

<table>
<thead>
<tr>
<th>Application:</th>
<th>Gateway</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role:</td>
<td>Account Approver</td>
</tr>
<tr>
<td>Workflow Step:</td>
<td>Account Approval</td>
</tr>
<tr>
<td>Department:</td>
<td>PURC - PURCHASING OFFICE</td>
</tr>
<tr>
<td>Cost Center:</td>
<td>PURC</td>
</tr>
<tr>
<td>LAF:</td>
<td>8-661555-19900</td>
</tr>
<tr>
<td>Project Code:</td>
<td>000000</td>
</tr>
</tbody>
</table>

Limit: Select All
- 1. Under 500
- 2. 500 to 2500
- 3. 2500 to 5000
- 4. 5K to 10K
- 5. 10K to 25K
- 6. Over 25K

Display Account Strings: [on]

<table>
<thead>
<tr>
<th>Department</th>
<th>Cost Center</th>
<th>LAF</th>
<th>Project Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURC - PURCHASING OFFICE</td>
<td>R-661555-10000</td>
<td>000000</td>
<td>000000</td>
</tr>
</tbody>
</table>

Find User and Assign Role(s)

First Name: Karen
Last Name: Jeffers

Find assigned users:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>UCSBnetID</th>
<th>Email Address</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen</td>
<td>Jeffers</td>
<td>kjeffers</td>
<td><a href="mailto:karen.jeffers@bfs.ucsb.edu">karen.jeffers@bfs.ucsb.edu</a></td>
<td>Assign</td>
</tr>
</tbody>
</table>

Assigned Users:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>UCSBnetID</th>
<th>Email Address</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hannah</td>
<td>Merand</td>
<td>h_merand</td>
<td><a href="mailto:hannah.merand@bfs.ucsb.edu">hannah.merand@bfs.ucsb.edu</a></td>
<td>Unassign</td>
</tr>
<tr>
<td>Calli</td>
<td>Price</td>
<td>capric</td>
<td><a href="mailto:call.price@bfs.ucsb.edu">call.price@bfs.ucsb.edu</a></td>
<td>Unassign</td>
</tr>
</tbody>
</table>
Task: Create a New Role

• Where: Assignments > Assignments by User/Role
  – GMC Roles: DPA
  – Gateway Roles: Account Approver, Department Buyer, Requester, Receiver

• Tips for Success!
  – GMC Roles – Update Instantly
  – Requester and Receiver roles – Update Instantly
  – Account Approver and Department Buyer roles, need to catch a sync to be active – either the 10:30am or pm
  – All Gateway Roles are Mandatory
    • In fact your Department cannot be active without the Dept. Buyer!
Task: Edit Existing Roles

• Where: Assignments > Manage Assignments
• This is a great place to see who is currently set up in your roles, make quick changes or see who was set up in the past.
• The “header” portion, lets you filter the information that you want to see.
  – If in the “assigned” view – this is all your current assignments
  – If you choose the “unassigned” view – this is past assignments
Task: Edit Existing Roles

• Where: Assignments > Manage Assignments
• If in the “assigned” view – this is all your current assignments
  – Clicking “unassign” next to a role will remove it
• If you choose the “unassigned” view – this is past assignments
  – Clicking “reassign” next to a role will add it back
  – *This is where you want to go if you are getting the message “assignment already exists”*
Task: Remove Someone Leaving Dept.

• Where: Assignments > Bulk Assignment Management

• This gives you the option to remove roles/assignments all at once, rather than individually through the Manage Assignments Tab

• Quick Note:
  – You cannot use this to remove someone who has separated from PPS – their UCSB Net ID needs to be active
Task: Remove Someone Leaving Dept.

- Where: Assignments > Bulk Assignment Management
- Select your Department from the drop-down
- Choose a File to Download
  - User Roles (Requester, Receiver)
  - Department Roles (Department Buyer)
  - Account String Assignments (Account Approvers)
- This will give you a CSV File
- Leave all the header information in tact
- Put an “X” in Column A, next to all of the information that you want to delete
- Save to your computer
- Go back to the GMC
- Upload back to the respective location
- This will mass delete roles/assignments for you
- Please note: Mac Computers love to change “000000” project codes to “0”, a great way to get around it is to save to your computer and leave the file open to preserve formatting when you upload.
Task: Remove Someone Leaving Dept.
### User Roles Report

<table>
<thead>
<tr>
<th>Department</th>
<th>Role Name</th>
<th>Role Desc</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURC</td>
<td>Department Buyer</td>
<td>Department Purchasing Agent</td>
<td>Donna</td>
<td>Baumann</td>
<td><a href="mailto:donna.baumann@bfu.ucsb.edu">donna.baumann@bfu.ucsb.edu</a></td>
</tr>
<tr>
<td>PURC</td>
<td>Department Buyer</td>
<td>Department Purchasing Agent</td>
<td>Lynn</td>
<td>Corrigan</td>
<td><a href="mailto:Lynn.Corrigan@bfu.ucsb.edu">Lynn.Corrigan@bfu.ucsb.edu</a></td>
</tr>
</tbody>
</table>
Tips for Success!

• Two daily syncs:
  – 10:30am and 10:30pm

• Account Strings need Account Approvers

• “Assignment Already Exists” Message
  – Check Manage Assignments > Flip to Unassigned View!
Contacts and Help

• Gateway Help Desk:
  – Log a Ticket! Help@Gateway.Procurement.ucsb.edu

• Gateway Website:
  – http://www.bfs.ucsb.edu/procurement/gateway
  – You Will Find:
    • News/Urgent System Admin Communications, Contact Information
    • Training Guides, Desk Manuals, FAQs

• Who Can I Talk To?
  – Kathleen Yabsley– Gateway Systems Manager x3542, kathleen.yabsley@ucsb.edu
    • Questions, Training & Content Enablement
  – Lara Anderson – Procurement Coordinator x8025, lara.anderson@ucsb.edu
    • Questions on
  – Donna Baumann – Supplier Enablement Specialist x4266, donna.baumann@ucsb.edu
    • Any “Add Supplier Form” Request Follow-up or supplier info updates
  – Vaughn Boyle - Vendor Settlement Manager x7377, vaughn.boyle@ucsb.edu
    • FlexCard and Gateway Invoices