GATEWAY UPDATES

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OVERVIEW

• Introductions
• Shopping Dashboard
• Invoice Approver
• Receipts
• Default Account Strings
• Organization Updates
• Coming Soon
• Open Q&A
Shopping Dashboard

The new shopping dashboard combines commonly used functions like supplier searches, entering non-catalog orders, and much more into one convenient dashboard.

Key Points:
• Available August 1, 2017*
• User Enhancement - Optional
• Training: Gateway 101
• FAQS: Gateway Updates July 2017
  http://www.bfs.ucsb.edu/procurement/gateway/faqs/updates

* Active now
Invoice Approver

The "Invoice Approver" is a new role. The role certifies receipt of goods and services invoiced and approves invoice charges; including overages and fees not included in the Purchase Order.

The Gateway Support Team will contact your Department Purchasing Administrator (DPA) to set up this workflow step for your department.

Key Points:
• Go Live September 1
• All Invoices $5,000 or Over
• All Invoices that exceed tolerances:
  – Shipping and Handling: $105 over
  – Line Items: $200 or 20% difference on the original price
  – Tax: $10 over or $400 under
• Time to Process 7 Days

7 days to Receive or Approve
10 days for both WF Steps
Receipts

Effective August 1, the “receipt” threshold for standard orders is being raised to $5,000.

Invoices processed on vendor blankets, walk-in orders, contracts, FedEx, and UPS orders will continue to require a receipt regardless of dollar amount.

Key Points:
• Threshold Raised from $2,500 to $5,000.
• Receiving period is seven calendar days
• No receipt “reminders”
• Training: Gateway Receiving
• Resource: Receiving Guide
Default Account Strings

Starting September 1, invoice charges will post to a default account string when the assigned account string is invalid.

The Gateway Support Team will be reaching out to your DPA to set up your department’s default account string.

Key Points
• Training: GMC 101
• Resource: Default Account String Guide

Organizational Updates

Procurement Services

Purchasing
- Purchase Orders
- Contracts
- Sourcing and Bids
- Small Business
- Sustainability
- Subcontracts

Settlement Services
- Invoice Processing
- Virtual Card
- Payment Card

Gateway P2P Systems & Vendor Management
- Gateway
- GMC
- Gateway Service Desk
- Invoice Imaging
- Supplier/Vendor DB Management

Capital Asset Management
- Asset Capitalization
- Asset Inventory Management
- Agency Reporting

If you have questions or suggestions email: gatewayhelp@bfs.ucsb.edu
Gateway User Group - 2017

- Melia Cutcher – Marine Science Institute
- Michelle Fitzgerald – Chemical Engineering
- Rogelio Gonzalez – Student Affairs
- Daniel Hart – Facilities Management (including D&C and EH&S)
- Tahna Hekhuis – Electrical & Computer Engineering
- Terri Hille – Gevirtz Graduate School of Education
- Max McCumber – Neuroscience Research Institute
- Yasemin Norris - Library
- Jeri O'Mahoney – Earth Research Institute
- Daniel Stack – Physics, Lab Expert
- Bobby Zavala – Housing & Residential Services
- Vaughn Boyle – Ex Officio Member – Settlement Services
- Robin Portune - Ex Officio Member – Settlement Services
- Calli Price – Ex Officio Member – Procurement Manager
- Lara Anderson – Ex Officio Member – Procurement
- Kathleen Yabsley – Chair – Gateway Systems Manager
Coming Soon

• Award End Date and WF
• Object Code 7200 – Misc. Services
• FORM 5 Project
Question & Answers

Resource Reminder

Next Q&A Session
Monday, July 31 from 2pm to 3pm
HR Training Room, SAASB 3rd floor, Room 3101DD

Procurement Gateway FAQS
http://www.bfs.ucsb.edu/procurement/gateway/qa/qa

Email Your Questions
gatewayhelp@bfs.ucsb.edu