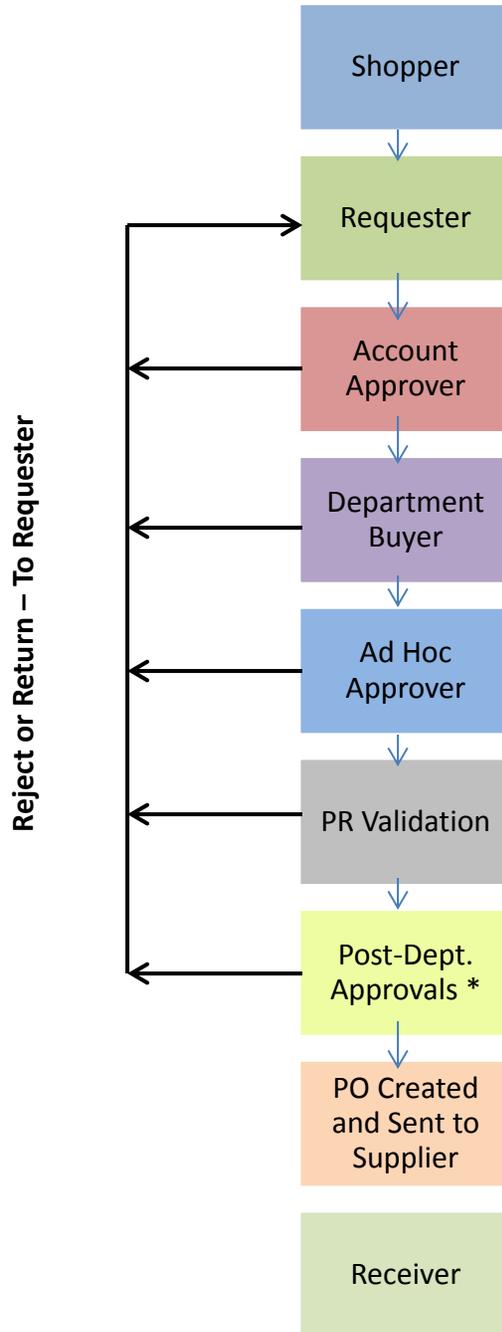# Gateway Requisition Workflow

Reject or Return – To Requester

Shopper

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

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

Account Approvers: 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

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

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

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 *

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.

PO Created and Sent to Supplier

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

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.