



# **Gateway Tips & Tricks**

Presented By: Kathleen Yabsley



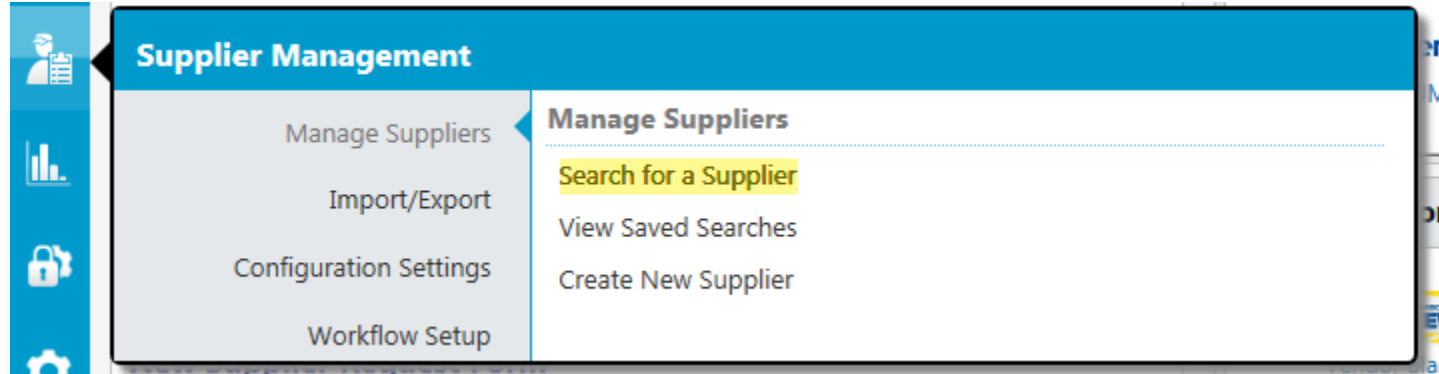
# Tips for Requisitions

- Use cart name field to identify, flows to Requisition Name. This shows on the document search screen for requisitions. Great for Flexcard, VB revision and Contract Amendment POs as the supplier name is not otherwise searchable.
- Use PO Description in cart, flows to requisition and PO and is searchable. This field is visible in GUS.
- Discounts must be reflected in the unit price of line item(s) as we cannot include a negative line item.
- Use external attachment on the requisition for special shipping instructions when supplier is integrated (electronic POs). Some of these suppliers will not see the external notes.
- If an international vendor needs wire payment, indicate in Additional Order Details, Special Handling Section.
- Lasers purchases need to be marked in the restricted items section



# Searching for a Supplier

To see if a supplier is in Gateway, select Supplier Management, Manage, Search for Supplier



Supplier names in all Capital letters have been set up for UCSB, green check = active

Search Details

Filtered By  
Search Terms: abc  
Save New Search

Refine Supplier Search ?

Registration Status  
None (25)

Registration Date  
[Dropdown]

Shopping/AP Status  
Active (2)  
Inactive (24)

Results Per Page: 200 | Sort by: Best Match

✓ <b>ABCAM INC</b> (Abcam)	Type: [Icon] Preferences: \$ [Star]
Supplier Number: 0000443528	DUNS Number: 139406602
Registration Status: None	Diversity Classifications: None
✗ <b>ABC Audit &amp; Business Consulting</b>	Type: [Icon]
Registration Status: None	Diversity Classifications: None
✗ <b>ABC Building Care Inc.</b>	Type: [Icon]
Registration Status: None	Diversity Classifications: None
✗ <b>ABC Carpet Cleaning</b> (Abc Carpet Cleaning)	Type: [Icon]
Registration Status: None	Diversity Classifications: None
✗ <b>ABC Companies</b> (Muncie Transit Supply)	Type: [Icon]
Registration Status: None	DUNS Number: 605837970



# Searching for a Supplier

Supplier Details & Notes can show information on ordering from the Supplier including minimum order amount

### ABCAM INC

Supplier Number 0000443528  
Registration Status None

[View Supplier Registration](#)

About ▾

- Supplier 360**
- Summary
- General
- Supplier Classes
- System Settings
- Contacts and Locations >
- Workflow and Review >
- Legal and Compliance >
- eProcurement >

[View History](#)

#### Supplier Details

**Abcam**  
[www.abcam.com](http://www.abcam.com)

In Network	
Active	
Hosted Catalog	
Legal Name	ABCAM INC
DBA	Abcam
Aliases	-
Supplier No.	0000443528
3rd Party Ref No.	-
Date of Last Order	9/30/2016
Diversity	-
Registration Status	None

Business Description  
*There is no business description available for this supplier.*

#### Internal Notes

University of California Procurement is pleased to announce that it has signed a new discount agreement with Abcam, effective through November 30, 2018. All catalog products, excluding custom formulations or services, are discounted at 3% off list prices if purchased through UC Procurement's e-commerce ordering website. Additionally, a 2% patronage incentive applies to all products sold through this contract. An agreement summary & freight costs are outlined below:

Product Discount:  
3% - applies to all catalog products, discount from list price.

Patronage:  
2% - applies to all orders placed



# Supplier Add Requests

Do not add vendors for a one-time payment. Check to see if a Form 5 or FlexCard can be used. We have over 5,500 suppliers in Gateway!

To facilitate the add new vendor process, always include an email address for the vendor and submit a quote or invoice, NOT screenshots from their web site.

If you have a relationship with the vendor, you can send the required forms (UCSB Business Information Form and W9 form, W8BEN for international) and when they are returned, upload them with the new vendor request. Requests with the forms are processed within one business day.

We do not use vendors where there is a conflict of interest, that is, the vendor is a UC employee or related to a UC employee.



# Exporting Document Searches

- The **Document Search** Export:
- Enter File Name & Description The description displays with the file on the screen where exports are downloaded.
- Request Export Template - Select the export template for the data.
  - Screen Export – Exports only the information available in the **search** results screen for each **document**.
  - Transaction Export – Exports an expanded set of information on the documents. For invoices, only those invoices with line items will be included in this format.
  - Full Export – Exports transaction with history and forms. For invoices, only those invoices with line items will be included in this format.
  - Custom Export Templates - You may have created custom export templates or have access to shared custom export templates. If one or more custom templates is available to you, they will display below a dotted line after the standard extract types. When a custom template is selected, the Further customize this export template? option displays. If you would like to further customize the export, select Next. If not, proceed to the next step.
- Click the Submit button. The export will execute. If you remain on the screen a pop-up notification will display when the export is complete. You can click on this notification to be taken to the Download Export Files page to retrieve the file. Alternatively, you can access that page by navigating to Orders & Documents > **Document Search** > Download Export Files.



# Managing Vendor Blanket POs

Many department have requested a way to see when their VBs will expire so they may extend the date or start a new VB before the expiration. This export routine & template will give you the details of the VB form including expiration date.

Select advanced search, “purchase orders.” In the Item/Product Information section, enter “Vendor Blanket” in the Form Name field.

Scroll down the page to the Custom Fields section, department and click on “select from all values”. In the value field type your 4 character department code and click Search. Click “select”, click “Go”.

On the search results screen, click on “Export Search.”

Enter a file name and description, select “Vendor Blanket List” from the Request Export Template dropdown. Click Submit.

The “Request Submitted” screen will appear. Click on “Go to Page: Download Export Files”.

After the export is complete, click on the blue file name to download the zip file. Select “Save as” from the dropdown and choose your file destination.



# Managing POs

You can now request us to change the PO owner when someone leaves your department. Send a request to the Help Desk with the names of the current PO owner and the new PO owner. Also indicate which POs you want changed.

We can close and cancel POs for you. When reviewing your open PO lists, you may see partially received and partially invoiced status for POs that are really complete but where not all items or cost on the PO was filled. This may be due to an item not available from the supplier or an invoice reflecting a discount that was not on the PO.





# Checking Document Workflow Status

- There may be times when you have questions about a **document's** behavior as it moves through workflow. A **document** may stop in a particular step and you need to know why. Or, conversely, a **document** may move through that same step without stopping. The workflow inspector tool allows you to view the data that caused the behavior of **document** in a workflow step.
- For example, a step in the PO workflow may include a rule that requires approval on totals greater than \$1,500. A PO **document** with a \$1,600 total would stop in this step pending approval. With the workflow inspector tool, organizations can see both the data that stopped the **document** (total = \$1,600.00) and the rule (totals > \$1,500 require approval).
- Access and open the **document** (purchase order, requisition, invoice, etc.)
- Click on the Approvals tab.
- Locate the step in workflow and click on the workflow step name. The Workflow Inspector popup screen displays. The screen displays the rules associated with the workflow step, the values evaluated from the **document** and the result.
- If you need to communicate with someone regarding a requisition or invoice in a workflow step, add a comment and optionally email an approver the comment.



# Gateway Invoices

- Invoices need to be sent direct to BFS 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. Payment cannot be made from a Statement.
  - Attaching an invoice to a PO will not get it paid.
  - You can email invoices/credit memos to Procurement via:  
[InvoicesONLY@bfs.ucsb.edu](mailto:InvoicesONLY@bfs.ucsb.edu)
    - Be sure it includes the **full** “GW” number. For example: GW0000123456 is correct, GW#0000123456 will fail.
    - Be sure the invoice has not already been sent by the supplier.
    - Do not use this email address for correspondence
  - Please respond promptly to requests from invoice processors!



# User Profile Information

- 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 ASAP! We will merge your roles/profile for you to minimize the impact on workflow approvals
- Need notifications?
  - You can set your notification preferences in “View My Profile”, Notification Preferences. Select GW notice and/or email option



# Procurement Training

- Procurement Fundamentals
- Gateway 101
- Gateway Forms
- Gateway Receiving
- Gateway Management Console (GMC) 101
- Flexcard Department Administrator
- Flexcard Department Reviewer
- Flexcard Cardholder
- Fundamentals of Equipment Management
  
- For details visit our website at:
- <http://www.bfs.ucsb.edu/procurement/gateway/training>



# Contacts and Help

- Gateway Help Desk:
  - Log a Ticket! [Help@Gateway.Procurement.ucsb.edu](mailto:Help@Gateway.Procurement.ucsb.edu)
- Gateway Website:
  - <http://www.bfs.ucsb.edu/procurement/gateway>
- Who Can I Talk To?
  - Kathleen Yabsley– Gateway Systems Manager x3542, [kathleen.yabsley@ucsb.edu](mailto:kathleen.yabsley@ucsb.edu)
    - Any Questions, Training & Content Enablement
  - Lara Anderson – Procurement Coordinator x8025, [lara.anderson@ucsb.edu](mailto:lara.anderson@ucsb.edu)
    - Any Questions
  - Donna Baumann – Supplier Enablement Specialist x4266, [donna.baumann@ucsb.edu](mailto:donna.baumann@ucsb.edu)
    - Any “Add Supplier Form” Request Follow-up
  - Vaughn Boyle - Vendor Settlement Manager x7377, [vaughn.boyle@ucsb.edu](mailto:vaughn.boyle@ucsb.edu)
    - FlexCard and Gateway Invoices