



# 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

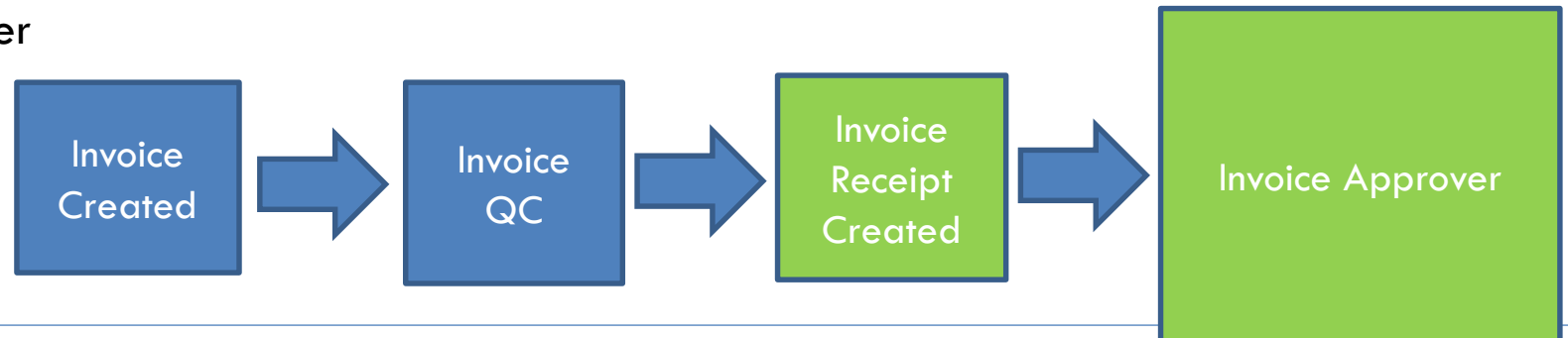
The "Invoice Approver" is a new role. The role certifies receipt of goods and services invoiced and approves invoice charges; including overages and fees not included in the Purchase Order.

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  
<http://www.bfs.ucsb.edu/files/docs/procurement/GuideREPSept2013.pdf>

# Default Account Strings

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

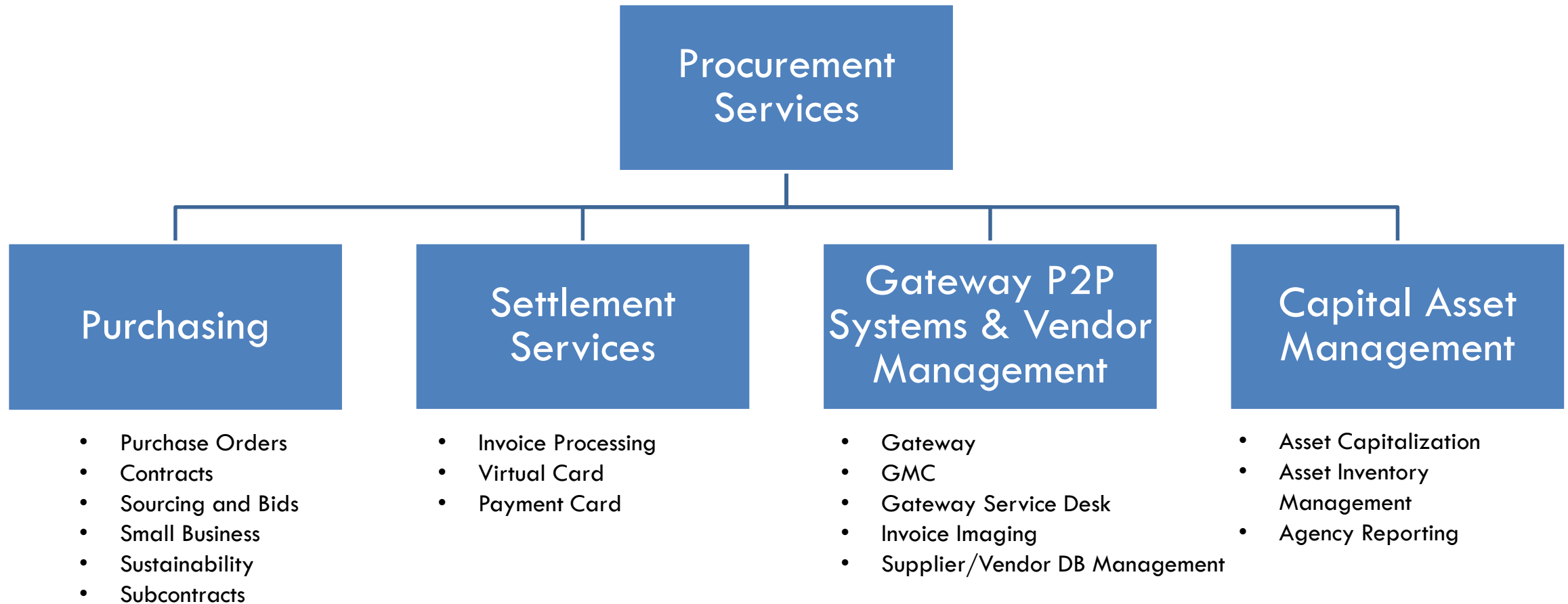
The Gateway Support Team will be reaching out to your DPA to set up your department's default account string.

## Key Points

- Training: GMC 101
- Resource: Default Account String Guide

[http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/docs/procurement/Setting%20Default%20Account%20String%20in%20GMC Jan%202017.pdf](http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/docs/procurement/Setting%20Default%20Account%20String%20in%20GMC%20Jan%202017.pdf)

# Organizational Updates



[If you have questions or suggestions email: gatewayhelp@bfs.ucsb.edu](mailto: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/faqs/updates>

### Email Your Questions

[gatewayhelp@bfs.ucsb.edu](mailto:gatewayhelp@bfs.ucsb.edu)