Gateway Glossary

Account Approver: This role can be assigned to the person in the department who has authority to approve purchases on accounts.

Account String: An account string is a collection of information that Accounting and departments use to identify and categorize expenditures. The most basic account string structure is the combination of location-account-fund-sub (for example, 8-40xxxx-19900-3). This account string can then be enhanced by the use of object codes, project codes, cost centers, and cost types. Gateway is designed to provide maximum flexibility for departments to incorporate their existing practices for classifying and tracking expenditures.

Ad Hoc Approver: An ad hoc approver is an additional work flow step that can be activated when additional approvals are needed.

AP: Accounts Payable.

Approval Chain: An approval chain is the series of steps necessary for an order to be authorized and placed. An example would be requisitioner ⇒ supervisor ⇒ department approver. Approval chains can be simple or complex depending on a department's existing standards, and in Gateway they are customizable. For example, you can add EH&S, a departmental chair, or a PI to an approval chain.

Basic Campus Approver: This is the pre or post approver depending on how the workflow is set up. The person is responsible for ensuring available funds in the assigned account strings and that items are appropriate for that string.

Bulk Load: Ability upload large amounts of information in one load into the Gateway Management Console.

Campus Buyer: Professional Buyers in the purchasing department who have different levels of approval authority. For example; items over $10,000, $50,000, high risk items, or restricted items are processed by campus buyers.

Confirming Order: An order that is in violation of Bus 43 Part 3 section VIII: Unauthorized Purchases. These purchases will require a form to be completed in Gateway, and a statement to explain the circumstances for the individual purchase, and steps to be taken to avoid repetition. The form will require Campus Buyer review.

Consortium Pricing: These are suppliers that have been negotiated with centrally by the Office of the President for the entire UC System.

Credit Memo: If an item is returned to a supplier and the supplier issues a credit to the account, a credit memo is prepared to accept the credit against the original purchase order.

Department Buyer: The person in the department who will review the requisition after a cart has been submitted including addition of object codes, subs, and ship-to address information. The Department Buyer will also have the ability to add in Ad Hoc approvers. They can also be responsible for reviewing account strings, verifying funds, reviewing FAB or Equipment purchases, and restricted item purchases.

Department Purchasing Admin: This is a role in the GMC. The DSA may not handle the day to day tasks of creating account strings or assigning SciQuest users. The DPA is the primary role for to handle these functions. It is possible for the DSA to assign them self the role of DPA if they perform those functions for their department.

DSA: Department Security Administrators will establish the roles and approvals for their department.

Electronic Invoice / CXML: Some vendors will have the ability to send and receive electronic files (PO's and invoices) which will result in a faster payment process.

Enabled Vendor: Suppliers in the Gateway system that will accept electronic purchase orders and provide the campus with electronic invoices.

EProcurement: E-procurement is short for "electronic procurement" and can also be called "procure-to-pay". It is a software solution that integrates and streamlines the requisition, purchase order, order transmission, invoicing, receiving, and payment process with built in work-flow design, approvals, and reporting functions. UCSB's system is called **Gateway** and it will do all of this and much more.

Favorites: Gateway has the ability to set personal favorites which could be: items, shopping carts, accounts, addresses, searches, and reports. The Gateway System Administrator will also have the ability to set campus wide favorites.

Forms: Forms are a way of purchasing goods through the system. The requester will be able to fill out the form and add it to a cart to create a requisition. Currently there are 5 forms active in the system: Vendor Blanket: Draw Down, Vendor Blanket: Recurring Services, Confirming Order, Animal Tissue, and Non-Catalog item.

GMC: Gateway Management Console the integration point for how departments will augment the UCSB financial systems and databases, and assign spend authority and approval for the purchasing process.

Hosted Catalog: is an electronic catalog where Supplier Data is hosted within the SciQuest Application.

LAFS: The most basic account string structure is the combination of location-account-fund-sub (for example, 8-40xxxx-19900-3).

Match Exception: When a PO, Invoice, and Receipt are not matched in the three-way matching process, the purchase will go into match exception for review by Accounts Payable.

Non-Catalog Item Form: This form is used to make purchases for items that are not available in Gateway. For example, if a shopper has a quote from a supplier that isn't in the system, they could use the form and attach the quote to complete the purchase.

Non-Catalog Item Bar: This is a feature enabled within Gateway to purchase items not available in Gateway. However, the standard will be to use this feature only when adding estimated shipping costs to your shopping cart. It will be recommended that the Non-Catalog Item Form be used to make purchases.

Non-PO invoice: is the ability for suppliers to send invoices in an electronic format without having a purchase order in the system

Operations Manager: This is a role within the GMC that authorizes the user to look at the Data Warehouse feeds, and the SciQuest Sync status, and manually start the sync.

P2P: Electronic Procurement-to-Pay system.

Product Flags: Icons that give you additional information about the product. For example, the three arrows recycled flag ♻ lets the shopper know the item is a recycled item. The shopper will have the ability to limit search results based on product flags.

Punch Out Catalog: is a Supplier's electronic catalog, where content remains hosted by the Supplier on its website, and is accessed via a link in the SciQuest Application.

Receiver: This role will receive items from the supplier and enter information from the packing slip into the system. Receiving is an important role because it is used as part of the three-way matching process.

Requester: The person who submits the requisition and requests the goods and services.

Roles: Both Gateway and the Gateway Management Console have defined roles that departments will be able to assign to individuals within the department. Roles available for assignment include: Account Approver, Ad Hoc Approver, Basic Campus Approver, Department Buyer, Receiver, Requester, Shopper, Department Purchasing Admin, Department Security Admin, and Operations Manager.

Science Catalog: is a select group of scientific suppliers with hosted Supplier Data participating in the SciQuest Supplier network, which Suppliers are typically enabled with the Supplier's general list price.

Settlement: Is the receiving and invoicing part of the payment process.

Shopper: This is the default role in Gateway. Any person can log in with their UCSBNetID and Password and prepare a shopping cart. This role is followed immediately by the Requestor role.

Substitution: If an individual is going on vacation they can assign a substitute to their workflow; this will allow work to continue in their absence. When the individual returns to the office they will need to remove the substitute.

Supplier: is a company that provides its product information and pricing to SciQuest for use via its electronic catalog.

Supplier Classes: Different suppliers can be grouped together by a supplier class. These classes will have associated icons. For example a California Based supplier could be placed into the California Supplier class with an icon of the state.

Three Way Matching: This term refers to standards that are used to determine when a payment can be made to a vendor. Three-way matching requires that the purchase order, invoice, and receipt of goods are all in agreement before payment will be made. UCSB uses three-way matching as its standard.

VB Draw Down: This form is used to request goods which are needed on an ongoing basis, over a specified period. If the total purchase exceeds $100,000, contact a Professional Buyer to discuss sourcing options prior to completing this form.

VB Recurring Services: This form is used to request services which are needed on an ongoing basis, over a specified period. If services will be needed irregularly, please order on an as needed basis. If the total purchase exceeds $100,000, contact a Professional Buyer to discuss sourcing options prior to completing this form.

Walk In PO: Is a form that can be printed and used to make purchases at local businesses.