Log into Gateway at https://gateway.procurement.ucsb.edu using your UCSB NetID and password.
You will land on the homepage of Gateway.
If you have shopped previously, and have draft carts, it is best practice to view your carts before shopping. To view all of your carts, hover over the shopping cart icon and click “My Carts and Orders.”

Click “View Carts.”
The Cart Management window will open, allowing you to create a new cart and view all draft carts. Your active cart is shown in blue. When you click “Create Cart,” that cart becomes your active cart.

Below are the four different ways to shop and create purchase orders in Gateway:

**Punch-Out Catalog: (page 5)**
Supplier hosted websites that link the user directly to their website showcasing UC contracted pricing. Users can click on the sticker, also known as the tile, then search and shop online for goods and services. Best practice is to create a new cart prior to shopping in a punch-out catalog.

**Hosted Catalog: (page 8)**
Specific suppliers upload their price files directly into the system. Users can search under the hosted catalog search by supplier name.

**Non-Catalog: (page 13)**
Suppliers that do not have a hosted website or price file in the system are referred to as non-catalog suppliers. Users need to verify pricing for their desired goods/services outside of the system such as through a quote, the supplier’s website or an email. Using that information, users can “build” their own cart in the system.

**Forms: (page 21)**
For unique ordering, there are different forms that capture specific purchasing needs. These forms help to alleviate and expedite the purchasing workflow. The forms are located on Gateway’s homepage under the Forms section. They include Animal Tissue, Confirming PO, Contract Amendment, Contract Request, FedEx, FlexCard Authorization, UPS Shipping, Vendor Blanket, Vendor Blanket (VB) Revision Request, and Walk in PO.
**PUNCH-OUT ORDERING**

Access to the punch-out catalogs can be found on the homepage of Gateway. Punch-out and Hosted Catalogs are mixed on the homepage, organized by their applicable purchasing categories. **Punch-outs can be distinguished by the small black box in the upper right hand corner of the supplier’s tile.**

To access the supplier’s punch-out, click the desired supplier’s tile or sticker. (Please note that some suppliers will ask for a small amount of user information when punching out for the first time.)

Clicking on the tile or sticker will transfer you to the supplier’s hosted website.
It is important to make sure that you see the “Gateway Punch-Out” bar across the top left hand side of your screen, as well as the “Cancel Punch-Out” button on the right. You can always use the “Cancel Punch-Out” button to get back into Gateway.

Once you are connected to the supplier’s website, you are able to search and shop for items. When you find the desired good(s), select the quantity needed and click “Add to Cart.”
After adding the items to your cart, you will see the number of items in the cart, and the dollar amount.

After the desired items have been added to the cart, you will need to check out. Suppliers often use different terminology for this process. For example, Amazon uses the terms “Proceed to check out,” B&H uses “Transfer Cart,” and Office Depot uses “Check Out.”
The cart and the items will be returned to your **ACTIVE** cart in Gateway.

**HOSTED CATALOG ORDERING**

On Gateway’s homepage you will find the Hosted Catalog Search, click “Advanced Search.”
The Advanced Search window opens, with a drop down that defaults to "Everything." For this example, it was changed to Lab Supplies. Under **Find Results That Have:** you need to enter at least one field to filter by. Beakers is entered in the field, and the system will search through all of the Hosted Catalogs for items that contain the word beakers in the description.

This window also allows for other searchable options to be entered, including UC Green Preferred Products, or Million Lamp Challenge (MLC), under Custom Attributes.
The search results for beakers displays. This window provides a comparison of prices, which can be viewed by clicking on “compare.”
Another option for searching by hosted catalog, is by accessing a specific supplier’s tile from the homepage and utilizing the supplier specific search bar. This will only search inside the single Hosted Catalog.

Users can also search the hosted catalogs by using “Quick Order,” located as a link under “Go To.”
If the user has access to a supplier’s Part / SKU numbers, the Quick Order function can be used to quickly put a cart together.

Once a search has been entered, users can filter their results using the left hand menu. This menu will appear when searching using either method for Hosted Catalogs.

Enter the quantity and “Add to Cart”. This will update your Gateway shopping cart with your items.
NON-CATALOG ORDERING

Most of the suppliers in the system are non-catalog, which requires users to verify pricing outside of the system in the form of a quote, or to search on the supplier’s website or catalog. Once pricing is confirmed with the supplier, users can go to the home page of Gateway and find the section titled Order a Non-Catalog Item and click “Non-Catalog Item.”

Enter the supplier’s name or click on the Supplier Search. The supplier needs to be enabled in the system before the user will be able to successfully use this form.

The Catalog No. is a required field and if there is not one available enter “N/A”.
- “Save and Close” will give the user a single line in the purchase order.
- “Save and Add Another” will save the current information and give the user additional lines for their order.

When finished adding the pricing information, select “close.” This will add all of the entered information into the active shopping cart.
Once you are finished adding items to the cart, click on the shopping cart icon at the upper right hand side of the screen.

It is required that both the Commodity Code and Object Code are entered.

Click on the Spyglass icon to search for the desired Commodity Code. If you need help, click “Commodity Code - Click? for help,” link.
This search can be performed in two ways, either by entering up to the first four digits of the commodity code, in the “Code starts with…” field or by entering a key word in “Description contains…” field.
Click “Search.”
The search result window opens with a selection of Commodity Codes to choose from. Once you have found the proper Commodity Code click “Select.”

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>41100000</td>
<td>Laboratory and scientific equipment. Including baths, tissue processing, refrigerators, freezers, glove boxes, fume hoods, centrifuges, incubators, furnaces, pumps, electrophoresis systems, tissue processors, DNA processors, growth chambers, and washers.</td>
</tr>
<tr>
<td>41110000</td>
<td>Measuring, observing and testing instruments. Including analyzers, monitors, balances, scales, meters, microscopes, detectors, sensors, testers, gauges, counters, photometers, spectrometers, oscilloscopes, accelerometers, and chromatographs.</td>
</tr>
<tr>
<td>41120000</td>
<td>Emulsifiers, components and accessories. Including laboratory glassware, slides, tools, crucibles, storage containers, and pipettes.</td>
</tr>
</tbody>
</table>
After the Commodity Code is selected, it will be transferred to the Commodity Code field in the cart. “Click “Save.””
Next, click “Select from all values…” to search for the list of compatible Object Codes.

<table>
<thead>
<tr>
<th>Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>EA</td>
<td>500.00</td>
<td>2</td>
<td>1,000.00 USD</td>
</tr>
</tbody>
</table>

Add discount...

- Taxable: checked
- Commodity Code - Click for help: 41120000
- Object Code: Enter 39120000 for Emulsifiers, components and accessories. Including laboratory glassware, slides, tools, crucibles, storage containers, and pipettes.
The Custom Field Search window opens, click “Search.”

The search results window opens allowing you to select the appropriate object code. Click “select.”
The selected code will appear inside the cart, then click “Save.”
FORMS

Forms are used for special purchasing situations. Instructions are located inside each form to help the user. Users can access Forms on the homepage of Gateway and by clicking on the name of the Form.
This is an example of the Vendor Blanket Form. After filling out the information in the Form, select “Add to new cart,” from the Available Actions drop down menu. This will add the Form to a new cart, make it the active cart and open the new cart in one step.

Forms cannot be mixed with punch-out, hosted catalog or non-catalog items. They need to be in their own cart. Users can add more than one of the same Form to the cart and create additional line items. Many times this is done when users need to add a line item as taxable, and another line item as non-taxable, all on the same order.

To continue with your order, you can assign the cart or finalize the cart, depending on your department’s procedures.