Gateway Instructions

Gateway is UCSB's purchasing and requisition system. Workshop Wizards and other lab users can use Gateway to submit carts or invoices to PI's or professors for approval. Gateway has three systems of ordering: integrated suppliers, non-catalog items, and flexcard purchases.

Integrated Supplier

Integrated suppliers contain the most common lab and university suppliers, including Fisher Scientific, McMaster Carr, and Amazon Business. Integrated Suppliers typically will redirect to their specific catalog, allowing normal browsing and checkout. Upon reaching checkout the supplier will import the invoice to Gateway where it can be assigned, reviewed, and approved.

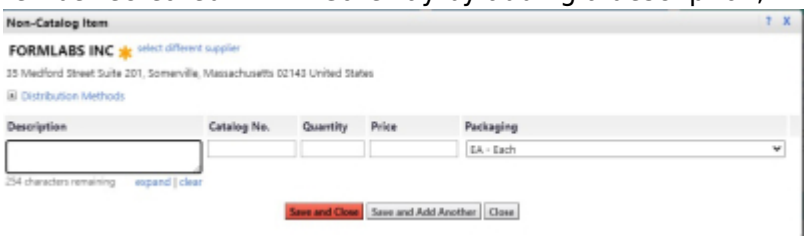


1. Select the desired supplier from the list of integrated suppliers
2. Once redirected to the suppliers website, add items to cart and proceed to checkout
3. Once redirected back to Gateway insure all invoicing information is correct before clicking “assign Cart”
4. Search for desired lab PI or sponsor and assign the cart for approval

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Non-Catalog Item

Non-catalog items are suppliers recognized by Gateway, but not integrated into its checkout system. You must first search for a supplier and ensure they are supported within the non-catalog item checkout. If supported, the invoice must then be recreated within Gateway by adding a description, catalog No., quantity, and price.



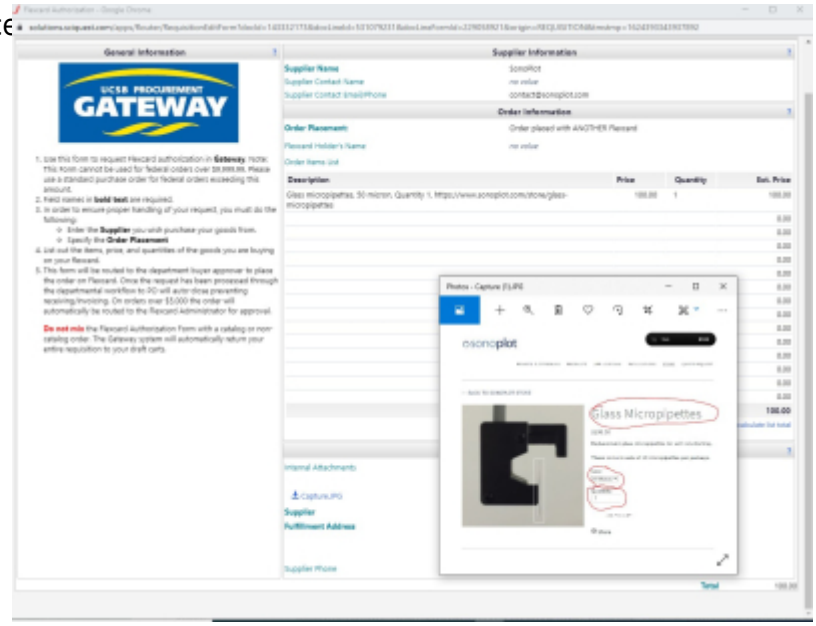
1. Attempt to find desired product from one of Gateways integrated suppliers
2. Find the desired product within non-catalog suppliers website including catalog No. and description
3. Within Gateway select the “Non-Catalog Item” tab
4. Search for supplier within popup, if supplier is not found use a Flexcard authorization
5. Add product description, catalog No., Quantity, and price. It is better to err on the side of excess information
6. Select “Save and Close” or “Save and Add” to continue checkout process
7. Once saved, select the cart icon in Gateway in the upper right hand corner
8. In Gateway insure all invoicing information is correct before clicking “assign Cart”
9. Search for desired lab PI or sponsor and assign the cart for approval

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Flexcard purchase

If a supplier is not supported in both the integrated suppliers and non-catalog item it must be purchased through a Flexcard authorization. As Flexcard authorizations are processed internally by hand it is preferable to use non-catalog or integrated suppliers when possible. When filling out a flecard authorization ensure to provide enough information and detail for someone unfamiliar with lab equipment to order. It is better to err on the side of providing more information than necessary,

including screenshots if the ordering proce



1. Attempt to find desired product from one of Gateways integrated suppliers or non-catalog item
2. Find the desired product within non-catalog suppliers website including catalog No. and description
3. Within Gateway select “Flexcard Authorization” from under the “Forms” tab within Gateway
4. Include full supplier name and contact information
5. Under “Order Information” select “place order with ANOTHER Flexcard” from the “Order Placement” dropdown
6. Under “Flexcard Holder's Name” fill in the name “Lynne Leininger”
7. Fill in product information including description, price, and quantity.
    1. Include links to purchasing or product page if possible
    2. Include pictures under “Internal Attachments” if useful during ordering process
    3. These orders are processed by hand, typically by people unfamiliar with technical products. Provide enough information to make their job easy and straightforward.
8. Select “Go” in the top right corner of the pop up to continue checkout process
9. Once saved, select the cart icon in Gateway in the upper right hand corner
10. In Gateway insure all invoicing information is correct before clicking “assign Cart”
11. Search for desired lab PI or sponsor and assign the cart for approval

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