

# 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

## 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 insure 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.

## 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 flexcard 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 process requires filling out technical specifications.

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