

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.

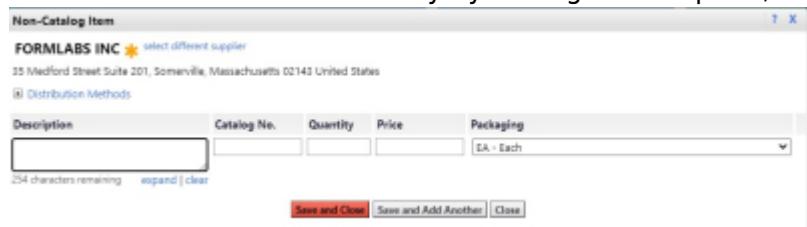
The screenshot displays the UCSB Gateway Integrated Suppliers interface, organized into four main sections:

- Office Supplies, Print Solutions and Furniture:** Includes links to Amazon, Office Depot, UCSB Bookstore, Ergonomic Favorites, RICOH, and tangram.
- Computer Hardware / Software:** Includes links to Apple, B&H Photo & Electronics, CDW, DELL, Digi-Key, and e+.
- Medical / Clinical / Lab:** Includes links to various medical and clinical suppliers such as ABCAM INC, Airgas, Beckman Coulter, Bio-RAD, Cell Signaling Technology, eppendorf, Fisher Scientific, GETINGE, Illumina, IDT, ThermoFisher Scientific, and many others.
- Facilities / MRO:** Includes links to American Education Supplies, CED, CONTROLCO, SUNBELT eParts, Fastenal, Grainger, HD Supply Maintenance Solutions, HomePro, McMaster-Carr, and WAXIE.

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.



The screenshot shows a 'Non-Catalog Item' dialog box. At the top, it says 'Non-Catalog Item' and 'FORMLABS INC' with a 'select different supplier' link. Below that is the supplier's address: '15 Medford Street Suite 201, Somerville, Massachusetts 02142 United States'. Underneath is a section for 'Distribution Methods'. At the bottom, there are fields for 'Description' (a text input box), 'Catalog No.', 'Quantity', 'Price', and 'Packaging' (a dropdown menu set to 'EA - Each'). Below these fields is a note: '254 characters remaining' with 'expand' and 'clear' links. At the very bottom are three buttons: 'Save and Close' (red), 'Save and Add Another', and 'Close'.

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

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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