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INTRODUCTION

- Log into Gateway using your UCSB Net ID - [https://gateway.procurement.ucsb.edu](https://gateway.procurement.ucsb.edu)

- There are four ways to shop and create purchase orders in Gateway. They are:
  - **Punch-out** – (pages 2-3)
    - Supplier hosted websites that link the user directly to their website showcasing UC contract pricing. Users can then search and shop online for goods/services much like an Amazon.com interface.
  - **Hosted Catalogs** – (page 4)
    - Specific suppliers upload their price files directly into the system. Users will find their items and pricing directly by querying Gateway.
  - **Non-Catalog** – (page 5)
    - Suppliers that do not have a hosted website or price file in the system are non-catalog. Users will need to verify pricing for their desired goods/services outside of the system either through a quote, the supplier’s website or some other vehicle. Using that price information, users “build” their own cart in the system.
  - **Forms** – (page 6)
    - For unique ordering there are specialty forms to alleviate and expedite purchasing workflow. Users can use the specialty forms to capture specific purchasing needs in the system.
      - Forms can be found on the homepage in Gateway. There are currently nine (9) forms that are available for use. They are:
        - Vendor Blanket Form
        - VB Revision Form
        - Walk-In PO
        - Confirming PO
        - Flexcard Authorization
        - Animal Tissue
        - GW Transition
        - FedEx Form
        - Business Card Form
How To Place An Order In Gateway

PUNCH-OUT ORDERING

- There are currently thirteen (13) punch-out suppliers in the system, with more being added throughout the year.
- Access to the punch-outs can be found on the homepage in Gateway. Punch-outs and Hosted Catalogs are mixed on homepage, categorized by their applicable purchasing area. **Punch-outs can be distinguished by the small black box in the right hand corner of the supplier’s tile.**

- The most popular and newest punch-outs are placed in the “Showcased Suppliers” section.

- To access the supplier’s punch-out, click the desired supplier’s tile.
  - Please note that some supplier’s will ask for a small amount of user information when punching out for the first time.
- Clicking the tile will transfer you to the supplier’s hosted website.
  - It is important to make sure that you see the “Gateway Punchout” bar across the top 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 desired goods.

Search for the desired good(s), select the quantity needed and “Add to Cart”.

When the items are successfully added to the cart and the user is done shopping, click “Checkout”. This will transfer the items and cart information back into Gateway to complete the ordering process.
HOSTED CATALOG ORDERING

- There are currently twelve (12) Hosted Catalog suppliers in the system.
- **Hosted Catalogs can be shopped three ways:**
  1. By using the **“Shop Everything” bar** on the homepage. This will search through all of the Hosted Catalogs in the system at once which is a great option if a user would like to compare prices across suppliers.
  2. By accessing a specific supplier’s tile from the homepage and utilizing the **supplier specific search bar**. This will only search the single Hosted Catalog.
  3. By using the **Quick Order function**, located as a link under the “Shop Everything” bar. If a user has access to a supplier’s item 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.
- Much like the punch-outs, **simply enter your quantity and “Add to Cart”. This will update your Gateway shopping cart with your items.**
NON-CATALOG ORDERING

- Most of the supplier’s in the system are non-catalog, which will require users to verify their pricing outside of the system in the form of a quote or searching of the supplier’s website or catalog.
- Once pricing is confirmed with the supplier, users can select the non-catalog link under the “Shop Everything” bar to build their cart in the system.

  ![Gateway Training Guide Image]

- This link will bring up a dialogue box that will let users build a cart based on their verified pricing information.
  - The supplier needs to be enabled in the system before the user will be able to successfully use this form.
  - A Catalog No. needs to be entered. If there is not one, we suggest using “N/A”.

  ![Gateway Training Guide Image 2]

  - “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 pricing information, select “close”. This will add all of the entered information into the active shopping cart.

  ![Gateway Training Guide Image 3]
FORM ORDERING

- Forms are to be used for specialty purchasing situations in the system. Each form is set up according to different needs for system users for the purchase of specific goods or services. There are specific screenshot instructions for each form located on our Gateway Info Site. Please visit http://info.gateway.procurement.ucsb.edu/ for guidance on any particular form.
- Users can access forms on the homepage, by clicking the desired tile.

- After filling out the information on the Form, select “Add and go to Cart” from the available actions drop down menu. This will add the Form to the user’s active cart.
  - Forms cannot be mixed with punch-out, hosted catalog or non-catalog items. They will need to be in their own cart.
  - Users can add more than one of the same Form to their cart in order to create more than one line item if needed in their cart. Many times this is seen when users need to line as taxable, the other as non-taxable, all on the same order.
**FINALIZING YOUR ORDER – CHECKOUT**

- Once you have all of your desired goods in your cart, you can quickly access your cart by clicking the shopping cart icon on the upper right-hand side of the screen.

- To finalize your order and submit it through workflow for approval, all of your items in the active cart need to be from **one supplier**.
  - The purchase order number is a contract between the University and the supplier; we cannot send the same purchase order number to more than one supplier.
  - Users can have as many draft carts as needed to accomplish this.
  - If items from different suppliers need to be moved to a separate cart, check the box next to the line item and select “Move to Another Cart” from the available actions dropdown menu.

- Select the “Finalize Cart” button to review and input ordering information and to submit the requisition into workflow.
  - The finalize cart button is not available for users with the “Shopper” role. Shoppers cannot commit funds on behalf of the University. They will need to select “Assign Cart” to have another user finalize the cart on their behalf.

- Once the cart is finalized, users will be brought to the Requisition Summary screen to enter in Account Code information, Ship-To Information and any other specific information that is important for the specific order.
The Review Steps at the top of the screen, link to specific areas on the requisition that need to be completed before the requisition can be submitted.

- **Addresses:**
  - The Ship-to address needs to be updated before the order is complete. Click the “Select from org addresses” link.
  - Search for either a 4-digit department code or “ONE” to get a one-time ship to address feature. Select the corresponding address and enter in user detail information for the order.
  - Users also have the option to “Save this Address for future use” and also “Make this the default address”.

- **Account Codes:**
  - The accounting code that will be used for the purchase needs to be inputted before the order can be submitted.
  - Always start with the Department section first. Select the “Required field” link to get the “select from all values” link to search using a 4-digit departmental code.
  - **Do not** just type into the box; this will cause an error when trying to submit the order as the system needs to validate the selections to ensure that they are appropriate and active.
How To Place An Order In Gateway

- Once that code is entered, a “select from all values” link will appear in the Account String section.
  - Smaller departments that have less than 50 active strings, will have a drop down menu to select their strings from. Larger departments that have more than 50 strings will have a search bar instead. Those departments should use asterisks around their search term to find their strings. Ex. *8-123456-78900*

- Depending on a user’s departmental process, enter in the sub account or leave that for the Department Buyer role.
  - **Other Requisition Details:**
    - There are other areas of the requisition summary that users can input addition information into for their order.
    - The **Notes and Attachments** section can be used to attach documents to send to the supplier via the External Notes and Attachments section. This is a great section to attach quotes. Internal Notes and Attachments are used for departments that would like to keep a record of any document that pertains to the purchase order.
    - The **Equipment Management** section is required for any equipment purchase.
    - The **Purchase Details** section is where departments can mark their order as restricted, include Work Order Information and include Special Handling Information.

- “Submit requisition” if there are no other changes that need to be made. This will route your order through departmental workflow for approval and eventual distribution to the supplier.
ORDER TRACKING

- Gateway will not provide package tracking information for orders. Some punch-out suppliers are able to provide tracking information which will be emailed upon order confirmation if they provide that service.
- What can be tracked in Gateway is the requisition approval process.
  - Checking on the approval progress of an order is very simple. Access the requisition either by searching through Document Search or by using the quick links provided by clicking the user’s name at the top of the screen. This provides a listing of the orders pending and complete in the last 90 days.
    - Document Search can be accessed by clicking the icon of the stack of papers on the left hand side of the screen.
  - The quick search can be found by clicking the users name on the top right hand side of the screen.
- Once on the requisition, access the PR approvals tab. This will show exactly where and who the requisition is currently with. This can help expedite the order and with communication.
Removing Items from Cart

- Click on the shopping cart icon at the top right of your screen.
  - You will see a drop down view of the items in your cart.

- To remove an item, click the small “trash can” icon next to the line that you would like to remove.

- Your cart will be immediately updated with the changes.
Changing the Commodity Code for Several Lines

- Check the box on the right to “select all”
- Select “Change Commodity Code” in the drop down box and select “go”.

- Enter in the commodity code for all lines into the dialogue box and select “save”.
- All lines will be updated.
INTRODUCTION

- Some suppliers’ pricing includes shipping. These suppliers are notated by a cardboard box icon next to their name.
  - For these suppliers, you **do not** need to enter a Freight/Shipping estimate on your requisition.
- For all other suppliers, you should enter a Freight/Shipping estimate on the requisition.

ADDING FREIGHT/SHIPPING TO THE REQUISITION

- From the requisition summary tab (after the cart has been finalized), click on the **“Taxes/S&H” tab**.
  - Once on the **“Taxes/S&H” tab**, just after the line item details, you’ll see the “Supplier subtotal” section and a link that says **“Edit taxes, shipping, and handling for all line items in this group...”**
  - In the shipping section of the **“Edit taxes, shipping, and handling...”** box, choose “override” from the dropdown.
    - **Important**: Be sure to only override shipping and not tax.
  - On the per PO line, enter in an estimate for the shipping for the order, or the actual amount you have been quoted.

**NOTE**: The campus tolerance for shipping is currently set at $105, so if the shipping estimate you put in this section is within $105 of the amount billed, the invoice will pay without additional action needed. If you think shipping will be less than $105 for your order, you can leave the shipping estimate at $0, and as long as the invoiced shipping is between $0 and $105 the invoice will be able to pay without additional action needed due to shipping cost.
On the Requisition Summary page, click the “Edit” button in the Ship-To section of the document. This will allow you to select the “To choose a different address, click here” link.

After clicking that first link, a new link will appear. Click “select from org addresses”.
How To Update the Ship-To Address

- You will then see a search box. Use this to type in your four digit department code (example LSCG = Life Science Computing Group).
  - **TIP:** You can also type in “ONE” to get a “One-Time Ship-To feature” that will let you completely edit the address fields. This is a great resource for off campus shipping.

- When your address appears in the search results, click “select”.

![Image of search box and results](image-url)
How To Update the Ship-To Address

- Add in the ATTN line and click “Save this address for future use”.

- You can also choose the option of making this your default address.
After the cart is finalized, visit the Requisition Summary page to make changes to the Account String.

Under the accounting codes tab click the blue link “View/edit by line item.”
The edit button will let you add a split between departments or two funding sources within the same dept. at the header level.

When you click the “Add Split” button it will let you enter in information from either two funds on your department or two different departments.

Then just hit save!
• You will notice, that if you select two departments, the requisition will route to both departmental approvers.
After the cart is finalized, visit the Requisition Summary page to make changes to the Account String.

Under the accounting codes tab click the blue link “View/edit by line item.”
GATEWAY TRAINING GUIDE

Split Preparation Instructions – By Dollar Amount (Line)

- An edit button will appear by the line items at the bottom of the page.
- Click the edit button.
Split Preparation Instructions – By Dollar Amount (Line)

- A pop up will open up. Enter your accounting code information.

- Click Add split. This will duplicate the line item.

- In the drop down select if you would like to do the split on % of Price, % of Quantity, Amount of Price or amount of quantity.

- If you need to change the funding source by line item you can click edit next to each line and change the funding source.
INTRODUCTION

- Account Approvers are designated by each department’s Department Purchasing Administrator in the Gateway Management Console. They have been given this role as they have signature authority over a particular account(s) or have been delegated authority over a particular account(s).
- Account Approvers can be assigned one or all of the following approval limits:
  - Under $500
  - $500 - $2,500
  - $2,500 - $5,000
  - $5,000 - $10,000
  - $10,000 - $25,000
  - Over $25,000

HOW TO APPROVE – LOGGING INTO THE SYSTEM

- When there is a new requisition needing review and approval, Account Approvers will receive an email notifying them of the new submission. The email will be automated from the system (help@gateway.procurement.ucsb.edu) and will be titled “New Pending Approval for Requisition…”
  - The body of the email will include all the details about the order (vendor, account/fund, items, total) for you to review.
- Scroll to the bottom of the email and find a link that says “Click here to view the document in your organization’s site”.
  - Clicking this link will bring you directly into Gateway if you are already logged in. Otherwise, it will bring you to a log-in page. Simply enter in your UCSB Net ID if you need to log in.
- If logging in does not automatically redirect you to your approvals page, simply select the “stack of paper” icon on the left hand side of the screen. Then select “Approvals” > “My Approvals”.
- The Phoenix Interface will also leave notifications for pending approvals in your Notification bar at the top of the screen. Users can click the Notification bar and follow the links directly to the pending requisitions there as well.
This will bring access to your approvals folder(s), which will list all pending requisitions needing your approval.

- Click the requisition number on the left hand side to access the order to review.

  Since there can be more than one Account Approver on a funding source, it is important to “Assign” the requisition to yourself before it can approved. This should be done in the “Available Actions” drop down menu on the right hand side of the order.
THEN from this same “Available Actions” drop down menu, you have the option to approve.

- “Approve/complete step” – This just approves the current requisition
- “Approve/complete & show next” – This approves the current requisition and brings up the next requisition that needs approval.

When you have completed your approvals, it will bring you to a page that says “No Documents Found”. This simply means that all of your approvals are complete and there are no more requisitions that require your attention.

HOW TO APPROVE – SETTING UP AN APPROVE VIA EMAIL PIN

- In order to be able to approve directly from an email you will first need to modify your profile in Gateway.
- Log into Gateway using your UCSB Net ID - https://gateway.procurement.ucsb.edu
- Select your name from the top right hand side of the screen. This will allow you to “View My Profile”.

Under “User Information and Settings”, access the “User’s Name, Phone Number, Email, etc.” link.
In the “Email Approval Code” section, enter a 4-digit numerical code.

Hit Save.

The next time that you receive an email from the system notifying you of a pending requisition for approval, you will now see in the Accounting Codes section:

Click the “Take Action” button, which will open a small browser window allowing you to take action on the requisition without logging into the system. It will look like this:

Select an action (approve, assign to myself, reject or return) and enter in your approval code. Once you have done that, press “submit” to complete your work.
GATEWAY TRAINING GUIDE

Gateway Animal Tissue Form Instructions

Suggested Form Uses:
- This form should be used for ALL animal tissue purchases that take place in the system.

Other notes for use of this form:
- This form routes to the Campus Veterinarian for review and approval.
- For more detailed information about animal tissue purchases and policy, please refer to our FAQ: http://info.gateway.procurement.ucsb.edu/faq-ordering

Where is the form located?
- From the homepage in Gateway, you can select the Animal Tissue Form from the Form Section.
Steps to process an order:

- The top portion of the form is to be filled in according to the contact information of the end user making the purchase.
- The bottom portion of the form is to be filled out according to the species and order information.
Suggested Form Uses:

- This form is used to create a purchase order to be used for invoicing and receiving for Business Card purchases that take place on the OfficeMax Impress website. The purchase order number should be used to complete checkout on the OfficeMax Impress website.

Other notes for use of this form:

- This form does NOT distribute to the supplier as it simply is used for invoicing and receiving.
  - The actual Business Card order is placed separately on the OfficeMax Impress website.
- Business Card ordering is a two-step process that involves:
  - Designing the cards and placing the order directly on their site and
  - Creating a purchase order in Gateway that can be used to invoice and receive against.
- Before finalizing your order on the OfficeMax Print site, send your Business Card Form through your Department's workflow for approval so that you can get a purchase order number assigned.
- The OfficeMax site will need a purchase order number before finalizing the order. Once you have that, you can send your order through.

Where is the form located?

- From the homepage in Gateway, you can select the Business Card Form from the Form Section.
Steps to process an order:

- The form is set up to match the different cart quantities, pricing and stock options available in the print website.
- You should look over the form and find your desired card quantity (either 500 or 1000), design style and pricing option.
- Once found, simply indicate how many you will be purchasing in that style by entering your quantity.

- When complete, scroll back to the top and select “add to cart and go” and click blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.

For questions regarding use of this form please contact:

help@gateway.procurement.ucsb.edu
Suggested Form Uses:

- This form is to be used to obtain a purchase order for orders that have violated BUS 43 Part 3 Section VIII. If goods and services are procured first without securing a purchase order, it is appropriate to utilize the Confirming PO Form.
- Your supplier needs to be enabled in the system before you will be able to use the form.

Where is the form located?

- From the homepage in Gateway, you can select the Confirming PO Form from the Form Section.
Steps to process an order:

- Enter the name and the extension of the end user that placed the original “unauthorized” order.
- Enter the name of the supplier.
- Enter a description of the goods and/or services procured.
- Enter in the Grand Total for the order (usually on an invoice as the order has already been finalized).
- Provide a detailed explanation of the circumstances and how this situation will be avoided in the future.

- When complete, scroll back to the top and select “add to cart and go” and click blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.
GATEWAY TRAINING GUIDE

Gateway FedEx Form Instructions

Suggested Form Uses:

- This form is used to create a single use purchase order for the supplier FedEx.
- FedEx does not accept purchase orders, so you will still need to place your order with the supplier either by phone or on their website. This form is to obtain a purchase order number that can be used for invoice processing and receiving.

Other notes for use of this form:

- This form should NOT be used for FedEx Office orders.
  - FedEx Office is located on Calle Real in Goleta. Please use a Walk-In Form for purchases with them.
- While non-catalog and Walk-In Forms can also be used for FedEx orders, this form can be used when more specialized information is needed from departmental users to place the order as it contains detailed information about the shipment or package.

Where is the form located?

- From the homepage in Gateway, you can select the FedEx Form from the Form Section.
Steps to process an order:

- Fill in the name and extension of the user that will be placing the order on the left hand side.
- Fill in the shipping and package details on the right hand side of the form.
  - The estimated shipping cost is a true estimate. You should not worry about overages as invoices match and pay with cost receipts created, not the order totals.
Suggested Form Uses:

- When you need a PO to raise your limit for a one time purchase via the flexcard.
- When you want to take advantage of the Gateway workflow authorizations in your flexcard process.

Where is the form located?

- On the Gateway home page; under Gateway forms.
Steps to process an order:

- Click the “Flexcard Authorization” sticker on the Gateway home page.
- The form will pop up as a new window in your browser.
- The items marked in bold are required prior to submitting.
Gateway Flexcard Authorization Form Instructions

- Enter the Supplier Name, Your contact within the Company, their email/phone number.

- Select from the drop down if the order will be placed on YOUR flexcard or another Departmental Flexcard holder.
- Designate the name of the Card holder (this field is not required to be filled in by shopper/requester, but the department buyer SHOULD fill this section out and identify the card holder for the charges).
Gateway Flexcard Authorization Form Instructions

- Enter the description, price and quantity of the items you are purchasing with your Flexcard. (The form is limited to 10 line items you may need to adjust quotes to fit into 10 line items).

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- Attach your quote, as needed.

- When complete, scroll back to the top and select “add to cart and go” and click blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.
GATEWAY TRAINING GUIDE

Gateway Flexcard Authorization Form Instructions

Additional information:

- Any order over $2,500 will automatically route to the Flexcard administrator for approval.
- Note Gateway will not send any order to your supplier noted on the form. It is up to the end user to contact the vendor directly and supply the vendor with your credit card information.
- The official Supplier in Gateway is listed as “Flexcard Supplier” with the Business and Financial Services Contact Information.
- This form is only to be used for authorizations, which is why the supplier is defaulted to “Flexcard Supplier.”
- The form is on its own PO number wheel. The PO’s generated from this form will be a 12 digit number beginning with an “F” for Flexcard.
- The form will automatically close preventing duplicate invoicing, and will also not require a receipt.

For questions regarding use of this form please contact:

help@gateway.procurement.ucsb.edu
Suggested Form Uses:

- A Vendor Blanket is used for procurement of goods or services which are needed on an ongoing basis, over a specified period. The use of this type of purchase order is especially valuable for recurring payments or for orders where there will be multiple invoice occurrences as it allows the department to organize payments through one purchase order number.
- Vendor Blankets should be set up utilizing a one-year period of coverage unless referencing a quote that has a greater period of coverage.

Where is the form located?

- From the homepage in Gateway, you can select the Vendor Blanket Form from the Form Section. It is the first tile in that section.
Steps to process an order:

- When you click the link it will bring up the following form for you to fill in according to your pricing or quote.
- As you begin to enter in supplier, the system will start to pre-populate for you. Select your supplier.
- Enter the appropriate period of coverage.
  - The period of coverage should be a one-year period or less, unless specifically stated in a quote by a supplier.
- Select “Yes” or “No” to indicate if the supplier will travel to campus at all for the scope of the service.
- Use the description example on the right to fill in the “Description to Supplier” section.
  - Please note: Most copier companies will require Serial Numbers and Rate Information. If you have an account with a company, it is a good idea to include that information as well for their reference.
- If applicable, enter in either a quote number or prior purchase order number in the appropriate fields.
- The unit price should be the total price that you will spend over the period of coverage.
Gateway Vendor Blanket Form Instructions

- When complete, scroll back to the top and select “add to cart and go” and click blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.

For questions regarding use of this form please contact:

help@gateway.procurement.ucsb.edu
GATEWAY TRAINING GUIDE

Gateway Vendor Blanket Revision Instructions

Suggested Form Uses:

- When you need to revise a current Vendor Blanket purchase order in the Gateway System.
- Departments can change a funding source, increase or decrease the period of coverage, increase or decrease the amount of funds on the Vendor Blanket or any combination of the above.

Where is the form located?

- On the Gateway home page; under Gateway forms.
Steps to process an order:

- Manually enter the existing information from the original Vendor Blanket purchase order that you would like to request a campus buyer revise. Information includes: Original Purchase Order, Supplier Name, Current VB Dollar Amount and Current End Date.

- State if your revision need to be sent to the supplier, and if your revision includes changes to the funding source.

- Select the type of revision you are requesting from the drop down list:
Gateway Vendor Blanket Revision Instructions

- Provide the details on the type of change you selected include: new dates, the dollar amounts that you are adding or subtracting, etc.

  - **Type of Change**
    - New VB End Date
    - Dollar Amount to be added

- Provide a detailed description and attach a new quote from the supplier (if applicable).

- The VB Revision Form will always default to the supplier UCSB Blanket Change. The values in this section cannot be modified.

Supplier

- UCSB Blanket Change
- Fulfillment Address 1:
  - UCSB Purchasing
  - 3203 SAASB
  - Santa Barbara, CA 93106
- Supplier Phone:
  - +1 (805) 893-8025

Your request will route to the appropriate campus group for processing.
The completed form should look like this:

1. Use this form to request a revision to a Gateway Vendor Blanket Purchase Order that has already been created.
2. Field names in **bold text** are required.
3. In order to ensure proper handling of your request, you must do the following:
   - Enter the original **PO Number**.
   - Specify the **Type of Change**.
   - In the VB Revision Request Details box, describe the required PO change(s) as well as the reason for the change. For example, changes to End Date, Drawdown Amount, rates, Ship To, delivery instructions, etc. should all be precisely explained when entering the change request. If there are changes to one or more lines on the PO, please include the PO line number and associated change(s) for each. If you need to **decrease the dollar amount** of your Vendor Blanket, please select that option from the "Type of Change" drop-down menu and give a detailed explanation in the VB Revision Details section.
4. If the PO total has changed, input the new PO total excluding tax and shipping.
5. This form will be routed to the department requisition approver regardless of dollar amount and then to Campus Purchasing. Once the revision request has been processed, the VB Revision Request "requestion" will be marked as approved.

**Do not mix** the Change Order Request Form with a catalog or non-catalog order. The Gateway system will automatically return your entire requisition to your draft carts.
Gateway Vendor Blanket Revision Instructions

- When you are ready to submit your form, click “add to cart and go” and click the blue “go” button.
- Your shopping cart will populate with information from the form. Click “finalize” and submit into workflow.

- When the form reaches the Campus Buyer step a professional buyer will work with you on the modifications to your original Vendor Blanket Purchase Order.
- Important Note: The revision form is on its own PO wheel. The number assigned these completed forms will be CRXXXXXX.

For questions regarding use of this form please contact:
help@gateway.procurement.ucsb.edu
Gateway Training Guide

Gateway Walk-In PO Form Instructions

Suggested Form Uses:

- This form is used to create purchase orders that can be directly taken to the supplier’s location to purchase goods/services.

Other notes for use of this form:

- This form does NOT distribute to the supplier. It is a manual form as you will be taking the form to the supplier to place the order.
- Some suppliers in the system are only able to take Walk-In purchase orders (like Costco Goleta).
- Once the purchase requisition completes workflow and becomes a purchase order, you will want to print the Walk-In PO Form and the actual official purchase order (with the UC Terms and Conditions) to bring with you to the supplier’s location.
  - To print the official purchase order, select “print fax version” from the available actions drop down menu on the purchase order.

Where is the form located?

- From the homepage in Gateway, you can select the Walk-In PO Form from the Form Section.
Steps to process an order:

- Enter the name and extension of the user that will be placing the order.
- Enter the supplier.
- Complete a description of the goods/services that will be purchased.
- Enter your quantity and price
  a. We suggest entering a quantity of 1, so that your Unit Price can reflect a “Lot” purchase.

- When complete, scroll back to the top and select “add to cart and go” and click blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.

For questions regarding use of this form please contact:
help@gateway.procurement.ucsb.edu
WHY do we need to receive?

- It is your department’s way of indicating the status of all of your goods and/or services for that particular order.
  - Remember indication of appropriate receipt of materials may be part of audit documentation, especially on contracts and grants.
  - In many cases, your receipt is the key for releasing payment on your purchase orders’ invoices.

WHO should receive?

- Your Department Purchasing Administrator (DPA) has selected specific employees to have the role in Gateway of “Receiver”.
- In some departments there are many Receivers that have the ability to receive for their individual orders, while other departments have set up a few Receivers for centralized receiving. Please check in with your department for clarification regarding receiving practices in your department.
- The role of Receiver is the only role with the option to create receipts in the system.

WHEN do we need to receive?

- Best practice is to receive on every single purchase order, for which you have direct knowledge of receipt, in order to indicate that your goods and/or services have been received.
- However, on orders $2,500 and below, a receipt is not needed for the invoice to pay if the invoice and purchase order match.
  - Please note: Bypassing the Receiving step may, however, raise audit issues.
- Receipts are always required to release the invoice to pay on any order over $2,500.
- Receipts are always required to release the invoice to pay Vendor Blankets and Walk-In Forms.
  - Please note that receipts are not necessary to release payment on Arrowhead Water Vendor Blankets. However, it is still best practice to continue creating receipts to maintain audit standards.
- For further details on Gateway’s receiving tolerance’s please visit: http://info.gateway.procurement.ucsb.edu/files/tolerances.pdf

WHAT kind of receipt should I create?

- **Quantity** Receipts are typically used for simple receiving on purchase orders.
  - They are used to reflect the quantity of items ordered on the purchase order and received.
  - Quantity receipts are most often seen with supply orders, like OfficeMax or Fisher Scientific.
- **Cost** Receipts are typically used for receiving the actual amount reflected on an invoice against your purchase order.
  - They are always to be used with Vendor Blankets, Walk-In Forms and Confirming Forms as they need to match the exact amount of the invoice for payment against your purchase order.
WHERE do I create receipts in Gateway?

- You will always create receipts from the Purchase Order, not the Requisition.
- If you have the Receiver role in Gateway, options to create receipts will be in your “Available Actions” drop down menu on the right hand side of the purchase order.

**Quantity Receipts**

- From your “Available Actions” drop down menu, select “Create Quantity Receipt” and hit “Go”.
- When you select this option, the receipt will populate as if you have received all line items for your order. If you received everything perfectly for your order, then leave it as is!
  - Partial Shipment - If you did not receive all of your shipment, change the quantity to reflect what you did receive. That will leave the line open for you to receive at a later time on a new receipt. If you are waiting to receive a full line of your order, you can delete the entire line off of your receipt, leaving it open to receive at a later time when your goods arrive.
  - Returns – If you received an item and need to return it, select the “Receive & Return” button. It will duplicate your line, showing that you’ve received that quantity of goods and also returning the same. This leaves the line open for receiving again at a later date.
  - Cancellation – If you are not going to receive the goods (the supplier does not carry the item anymore, etc), change the “received” drop down to “cancelled”. This ensures that that line item closes as you do not expect a future shipment.
- For more guidance on partial receiving and cancellations please visit: [http://info.gateway.procurement.ucsb.edu/files/receiving.pdf](http://info.gateway.procurement.ucsb.edu/files/receiving.pdf)
Cost Receipts

- From your “Available Actions” drop down menu, select “Create Cost Receipt” and hit “Go”.
- When you select this option, the receipt will populate filling in the entire amount of your purchase order.
  - This is good to remember especially for Vendor Blankets, so you do not cost receive the entire amount of your order if your intent is to just receive for a specific invoice!
- When cost receiving for Vendor Blankets, Walk-In and Confirming Forms where you would like to alter the amount of the cost receipt first, all you need to do is edit the amount in the “Cost” field by deleting the pre-populated amount and typing in your desired amount.

Finishing Your Receipt:

- The last part of the receipt requiring attention is the top portion. Filling out these fields is up to your department’s best practice.
  - Fields to consider are:
    - Packing Slip No.
    - Carrier
    - Notes
    - Attachments/Link (Some departments utilize this field to actually scan and attach the actual packing slip(s))
- When you are finished, click “complete” at the bottom, right corner of the receipt and your receipt is created!
**RECEIVING FAQ**

- **Q**: What do I do if I make a mistake on a receipt and I cannot re-open the receipt to delete it or make edits?
  - **A**: If your receipt has already closed because an invoice hit workflow on your purchase order, you should create another receipt for the same amount, using a negative amount. This will essentially cancel out the incorrect receipt, bringing your PO back into balance.
    - For example: If you accidently created a cost receipt for $40, just create another cost receipt for -$40.

- **Q**: If I have several cost receipts to create for one Vendor Blanket, can I just create one cost receipt reflecting the total balance of all of the cost receipts needed instead of having to create several individual receipts?
  - **A**: Yes! The system will accept that as well as several individual cost receipts.

- **Q**: I received a notification from the system that my order needs a receipt, but I do not see the options to “Create Quantity Receipt” or to “Create Cost Receipt”, what should I do?
  - **A**: If you do not see either of the two options to create receipts from your “Available Actions” drop down menu while you are on your purchase order, then you do not have the role of Receiver.
    - When the system notices that an order needs receiving, it will send a notification to the purchase order’s owner to let them know that receiving needs to take place. If you are not the Receiver, please forward the notification on to the correct person in your department. If you feel you should have this role, contact your Department Purchasing Administrator (DPA).

- **Q**: How do I become a Receiver?
  - **A**: Your Department’s Purchasing Administrator has assigned roles in Gateway using the Gateway Management Console. If you feel that you need further roles in the system, please contact your DPA and ask about the addition of roles to your profile.
    - You can check your current roles by going to:
      - Your Name > View My Profile > Assigned Roles (Under User Access and Security)

- **Q**: What should I do if I have further questions about receiving?
  - **A**: Come to our weekly drop in hours currently being held every Monday at 8:30am in the Purchasing Conference Room (3203G SAASB).
    - Reach out to our Helpdesk! We are here to help! Please email us at Help@gateway.procurement.ucsb.edu or call x8025.
The Typical Invoice Process:

1. AP receives & time stamps an invoice.
2. AP scans and within 24 hours an image appears in GW the next business day.
3. 50% of all scanned invoices fall in the “Invoice Import Errors” folder.
4. AP reviews and adjusts the invoices. Common adjustments: Remit To / Supplier Information / Taxability and/or Tax Calculation / Line Item Quantity / Price / S&H / Duplicate Invoices.
5. If there is a price / tax discrepancy outside of matching tolerances, AP is required to contact the Dept. for clarification or approval. The same is true for invalid account strings.
6. If the necessary receipt has not been created AP creates a comment to Dept. Receiver(s) to create the receipt.
7. When an invoice matches the PO, that status changes to “payable” and moves into APEX for payment.
8. If a HOLD or credit memo is required, the invoice is held until resolved.
9. Payment Is issued two days before invoice due date based on payment terms (usually net 30).
10. Checks Will Arrive at Supplier Approximately 4-5 Days After Issuance.
**Invoice Import Workflow Step**

- Scanned invoices submitted to Accounts Payable first show up in Gateway in either the “Invoice Import Errors” or “Invoice Import Matches” workflow step.

- Invoices in the Invoice Import Errors step often have multiple discrepancies, such as:
  - Missing a valid 12-character purchase order number
  - A missing or duplicate invoice number
  - Price and/or quantity discrepancy versus the Department’s original purchase order
  - Invoice supplier name discrepancy versus the Department’s original purchase order
  - Scan legibility

- Invoices in the Invoice Import Matches step will go ready for matching and enter the standard invoice workflow.

- Partial shipment and Vendor Blanket Invoices also fall into the “Invoice Import Errors” folder since the single invoice price and/or quantity will vary from the original Departmental purchase order.

**Note:** Please do **not** contact Accounts Payable for discrepancies you see on invoices in the Invoice Import Errors workflow step.

- Invoices in this step, have not been reviewed and corrected by AP, so there will always be a significant variance from the PO.
• **Invoice Import Errors:** The scanned image of the paper invoice requires review and correction before by an AP processor before it can enter the AP workflow and match to the PO or the receipt.

• **Invoice Import Matches:** The scanned image of the paper invoice matches the PO and requires review to verify remittance address prior to matching to the PO or receipt.

• **Ready for Matching:** The invoice leaves the import process and is associated to the PO. Matching (either two way or three way) is performed on the invoice.

• **Invoice Review:** This is a step for specialty or custom review rules either based on specific suppliers or by a supplier class (group of suppliers).

• **Non-PO Invoice:** The invoice had non-PO lines and has been flagged for review.

• **Credit Memo:** The invoice is a credit memo and is reviewed and approved by accounts payable.

• **Tax/Withholding Review:** If the PO line items are marked as taxable and the invoice does not contain sales tax it will stop in this review step for approval. If the PO line items are marked as not taxable and the invoice does contain sales tax it will stop in this review step for approval.

• **Mixed Invoice Review:** If the invoice contains PO and non-PO line items it is considered a mixed invoice and will stop for approval.

• **Hold for Receiving:** Departments have 10 days from invoice creation date to create the corresponding receipts for their PO’s. If the receipt is not created within the 10 day waiting period it will fall into match exception.

• **Match Exceptions:** Invoices fall into match exception for the following reasons: the PO does not have the required receipt, the invoice line items are 10 % or $100 more than the PO line items, the shipping on the invoice is $75 more than the shipping on the PO, or the sales tax on the invoice is either $10 more than the PO or $400 less than the PO.

• **Purchasing Review:** If an invoice requires a professional buyer to review it will stop for Purchasing to review.

• **AP Supervisor:** Accounts payable processors can choose to route invoices to the AP Manager on an as needed basis.

• **OK to Pay:** The invoice has completed workflow and will be exported to APEX. The status on the invoice will change to "payable". Once the invoice has "paid" the system will change the status to paid, send the APEX Reference Number, and the check number and check date back onto the invoice in Gateway.
INVOICING FAQ

• **Q:** Do I need to scan my invoice into Gateway to get it paid?
  
  o **A:** No! Accounts Payable will need to scan your invoice into Gateway for you. If a vendor happens to send an invoice to you, please send it either through Campus Mail or to invoicesOnly@bfs.ucsb.edu referencing the full purchase order number.

• **Q:** What are the invoice tolerances that will trigger my invoice to halt with a processor for extra review and department consultation?
  
  o **A:** The number 1 reasons invoices stop in the match exception folder for review is because the purchase order is missing a receipt. Other reasons include:
    - Shipping and Handling: $105 over the PO
    - Line Items/Total: $200 or 20% over the PO
    - Tax: $10 over the PO or $400 under the PO

• **Q:** Where can I write with questions, comments or concerns regarding an invoice so that a processor will be able to see it?
  
  o **A:** Leave a comment for a processor directly on the invoice. By clicking on the “SQ” number if you are using Document Search, or if you’re looking at your purchase order, it will display the actual invoice. From there, you will see a few different tabs; click the “Comments Tab”.

  o You can leave a comment detailing your wishes for the invoice and/or email a processor directly.
Q: Can I turn on any notifications that might help with the invoicing process?

- A: Yes! We suggest turning on the following notifications if you are interested in receiving notices from the system when invoices hit workflow for your purchase orders, and also when receipts need to be created for invoices in workflow for your purchase orders.
  - **Note:** that you will only receive notifications for invoices that are directly connected to purchase orders that you created as the Receiver.

- To turn them on please follow these instructions:
  - Go up to your name and click on User Information and Settings, then on Email Preferences
  - Then scroll to the “Settlement” section and select your preferred option from the drop down menus provided. We suggest turning on the first seven (7) in that section.
    - Your choices are: Email, Notification, or Email & Notification
    - Then hit Save.
GATEWAY DESK MANUAL

REPORTS

January 2014

University of California, Santa Barbara
3203 Student Affairs and Administrative Services Building (SAASB)
Santa Barbara, CA 93106-1150

Vol.1 Christine Griffin and Hannah Morand
Reports to Consider for Your Department

- There are a few reports that we recommend setting up in your department and running periodically to get a better picture of the receiving needs of your department.

- These reports are:
  1. All of the Vendor Blankets in your department
  2. All of the Purchase Orders in your department that do not show any receiving
  3. All of the Purchase Orders in your department that show partial receiving
  4. All of the Invoices for your department

- These reports are easy to set up, save to your profile and re-run again and again at any time that you need order status snapshots.
  - You can also request using the Helpdesk to create a shared folder for your department, so that many individuals can access any of the reports at any time.

1. Vendor Blanket Report

- This report is great to run to keep up with all of your department’s current Vendor Blankets. You can easily see in one report all of the Vendor Blankets and their status.

- To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the “Advanced Search” link to bring you out of “Simple Search”)

- Make sure that you have selected “Purchase Order” from the drop down menu at the top.
• Scroll down slightly until you see the “Form Type” field. Click the spyglass on the right hand side and select “Vendor Blanket” from the options. Click “Add”.

• Finally, scroll all the way to the bottom and enter in your 4-digit department code.
  o If you have more than one department code, you may add more by clicking “Add another Department” at the right.

• Then hit Go!
To save your search, click “save search” from the menu on the left hand side of the screen.

Give your saved search a name; one that clearly describes the parameters of your search.

Then either select a current folder to save your search in or create a new “Top level personal folder” to save the search in. Then hit save!
2. **Report – Purchase Orders with No Receiving**
   - This report is great to run to keep up with all of your department’s current Purchase Orders that do not show any receiving.
   - To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the “Advanced Search” link to bring you out of “Simple Search”)
   - Make sure that you have selected “Purchase Order” from the drop down menu at the top.

   ![Image of search screen with Purchase Order selected]

   - Scroll about half way down the page and select “No Receipts” from the “Receipt Status” section.
Report Guide

- Then continue to scroll down the page and enter in your 4-digit department code in the Custom Fields section.

- Then hit go!
- To save your search, click “save search” from the menu on the left hand side of the screen.

- Give your saved search a name; one that clearly describes the parameters of your search.
- Then either select a current folder to save your search in or create a new “Top level personal folder” to save the search in. Then hit save!
3. **Report – Purchase Orders with Partial Receiving**
   - This report is great to run to keep up with all of your department’s current Purchase Orders that show some receiving and need to be completed.
   - To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the “Advanced Search” link to bring you out of “Simple Search”)
   - Make sure that you have selected “Purchase Order” from the drop down menu at the top.

   - Scroll about half way down the page and select “Partially Received” from the “Receipt Status” section.
• Then continue to scroll down the page and enter in your 4-digit department code in the Custom Fields section.

• Then hit go!
• To save your search, click “save search” from the menu on the left hand side of the screen.

• Give your saved search a name; one that clearly describes the parameters of your report.
• Then either select a current folder to save your search in or create a new “Top level personal folder” to save the search in. Then hit save!
4. **Invoice Report**
   - This report is great to run to keep up with all of your department’s Invoices.
   - To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the “Advanced Search” link to bring you out of “Simple Search”)
   - Make sure that you have selected “Invoices” from the drop down menu at the top.

   ![Invoice Search](image)

   - Then continue to scroll down the page and enter in your 4-digit department code in the Custom Fields section.

   ![Custom Fields](image)

   - If you would like to narrow your search to invoices that have completed the Accounts Receivable process, go to “Payment Status” and select both “Paid” and “Payable” – this way items in process will not be displayed.
   - Then hit go!
To save your search, click “save search” from the menu on the left hand side of the screen.

Give your saved search a name; one that clearly describes the parameters of your report.

Then either select a current folder to save your search in or create a new “Top level personal folder” to save the search in. Then hit save!
Accessing Your Saved Searches

- Your saved searches can be accessed under the “Document Search” tab.
- By pulling up your desired folder from the Saved Searches selections, you can click on the saved search to run it at any time.

- You also have the option to “Add Shortcut”. This will put the search on the same page as your Document Search for ease of access. Next time you want to find it, just go to your Document Search tab, scroll to the bottom and you will find your search!
Homepage Features:

- With Phoenix, users will now have access to some quick links in the system directly accessible from their homepage. These include:

  - A quick link of a user’s recent requisitions, recent purchase orders and any pending orders. This is found by clicking your name at the top of the screen.
  - Items needing your attention will appear in the “Action Item” section at the top of the screen. You can click this link to be directed immediately to the items needing your attention, rather than performing searches.
  - The “Notification” link is also available at the top right hand side of the screen. Here, users will find that they receive notifications for pending orders and approvals.

- To access your profile at any time, simply click on the profile link at the top of the page by accessing your name.
  - Click “View My Profile” to gain access to the menu.
Once on this screen, you can view and/or update your personal user settings from the following links:

- User Information and Settings
- User Access and Security

Email Preferences and Notifications:

- To review and update, go to your User Information and Settings Tab and select “Email Preferences”
- This will bring up your preset preferences which you can review and adjust according to your preferences.
  - With Phoenix, many settings can be adjusted between Email, Notification or Both.
GATEWAY TRAINING GUIDE

Saving Account Code Favorites

- Access your name at the top, right hand side of the screen and select “View My Profile”

- Under the “User Information and Settings” Header, select “Custom Field and Accounting Code Defaults”

- Access the “Code Favorite” tab and select “Add” to create a new Account Code Favorite.

- Enter in the information for the account code that you wish to save.
  - You must give the account code a nickname.
  - You have the option to make the string your default.
  - Under the department field you must click “select from all values” and search for your department code. (If you just type your department code in the box you will be unable to choose an account string)
  - Under the account code field, you must click “select from all values” once again.
    - Smaller departments with less than 50 account strings enabled will have a drop down menu to choose from.
    - Larger departments will more than 50 account strings enabled will have a search bar to utilize. Those departments will need to search using asterisks around their search terms.
      - For example: *8-123456-00000* or *ABCDE*
  - Once all of these values are selected, click “Save”. You do not need to worry about the Sub Account and Cost Type Fields.
<table>
<thead>
<tr>
<th>Restricted Items</th>
<th>Department Approvals</th>
<th>EHS Approvers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Primary</td>
</tr>
<tr>
<td>Above ground &amp; Underground storage tanks</td>
<td>EH&amp;S Environ. and Campus Purchasing</td>
<td>Stacey Calloway</td>
</tr>
<tr>
<td>Alcoholic beverages</td>
<td>Restricted on State funds; if a vendor is serving alcohol, they must be ABC certified</td>
<td></td>
</tr>
<tr>
<td>Animals</td>
<td>Vivarium</td>
<td></td>
</tr>
<tr>
<td>Autoclaves (Steam Sterilizer)</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Automatic External Defibrillator (AED)</td>
<td>EH&amp;S Gen Safety</td>
<td>Jesus Rios</td>
</tr>
<tr>
<td>Auctions – Ebay</td>
<td>Not Allowed</td>
<td></td>
</tr>
<tr>
<td>Bio hazardous Agents</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Bio-safety cabinets</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Boats</td>
<td>EH&amp;S Dive and Campus Purchasing</td>
<td>Eric Hessell</td>
</tr>
<tr>
<td>Carpets, rugs &amp; floor coverings</td>
<td>Design &amp; Construction</td>
<td></td>
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<tr>
<td>Catering</td>
<td>UCEN</td>
<td></td>
</tr>
<tr>
<td>Charters – Air, Bus, Boat, Shuttle, etc.</td>
<td>Campus Purchasing and Risk Management</td>
<td></td>
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<tr>
<td>Child Care</td>
<td>Campus Purchasing and Risk Management</td>
<td></td>
</tr>
<tr>
<td>Compressed Toxic or Pyrophoric Gases</td>
<td>EH&amp;S Lab Safety and Campus Purchasing</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Construction equipment rental, remodeling or services</td>
<td>Design &amp; Construction</td>
<td></td>
</tr>
<tr>
<td>Controlled Substances (DEA controlled substances such as narcotics)</td>
<td>EH&amp;S Lab Safety and Campus Purchasing</td>
<td>Derek Iverson</td>
</tr>
<tr>
<td>Consultant, Professional Service, Personal Service, Independent Consultant Agreements &amp; Contract Employee Services</td>
<td>Contracts &amp; Property</td>
<td></td>
</tr>
<tr>
<td>Cranes, Hoists, Forklifts and Aerial Lift Platforms</td>
<td>EH&amp;S Gen Safety, Risk Management and Campus Purchasing</td>
<td>John Seaman</td>
</tr>
<tr>
<td>Diesel portable generator 50 horsepower or greater</td>
<td>EH&amp;S Environ. And Campus Purchasing</td>
<td>Stacey Calloway</td>
</tr>
<tr>
<td>Diesel self-propelled off-road vehicles 25 horsepower or greater</td>
<td>EH&amp;S Environ. And Campus Purchasing</td>
<td>Stacey Calloway</td>
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<tr>
<td>Diesel stationary generator 50 horsepower or greater</td>
<td>EH&amp;S Environ. And Campus Purchasing</td>
<td>Stacey Calloway</td>
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<td>Ethyl Alcohol</td>
<td>EH&amp;S Lab Safety and Campus Purchasing</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Equipment rental or lease</td>
<td>Campus Purchasing</td>
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<tr>
<td>Facility repairs, remodeling or renovations (carpentry, electrical, painting, etc.)</td>
<td>Design &amp; Construction</td>
<td></td>
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<tr>
<td>Firearms and ammunition</td>
<td>Equipment Management and Purchasing</td>
<td></td>
</tr>
<tr>
<td>Fire extinguishers and other fire suppression systems, and Fireworks or other pyrotechnic devices</td>
<td>EH&amp;S Lab Safety</td>
<td>Jim Caesar</td>
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<tr>
<td>Restricted Commodity &amp; Routing List</td>
<td></td>
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<td>-------------------------------------</td>
<td></td>
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<tr>
<td>Fume hoods / fume extraction devices/slot hoods</td>
<td>EH&amp;S Lab Safety</td>
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<td>Harbor/Marine</td>
<td>Campus Purchasing and Risk Management</td>
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</tr>
<tr>
<td>Human and/or Primate Tissues/Fluids/Cell Lines</td>
<td>EH&amp;S Biosafety</td>
<td></td>
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<tr>
<td>International purchases routed through US Customs</td>
<td>Campus Purchasing</td>
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<td>Janitorial Services</td>
<td>Design &amp; Construction</td>
<td></td>
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<tr>
<td>Lasers</td>
<td>EH&amp;S Radiation</td>
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<tr>
<td>Legal Services</td>
<td>Contracts &amp; Property</td>
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<tr>
<td>Logo: any item being purchased using the UC name and/or logo. (includes UC, UCSB, and the University of California) – either printed material or apparel items</td>
<td>Campus Purchasing</td>
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<td>Moving and Relocation Expenses</td>
<td>Campus Purchasing</td>
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<td>Office Trailers</td>
<td>Campus Purchasing and Risk Management</td>
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<tr>
<td>Personal items: Refrigerators, Microwaves, coffee makers, artwork, plants, coffee, cards) &amp; Insurance</td>
<td>Not Allowed</td>
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<td>Precious Metals</td>
<td>Campus Purchasing</td>
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</tr>
<tr>
<td>Pressure vessels (excluding compressed gas cylinders)</td>
<td>EH&amp;S Dive</td>
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</tr>
<tr>
<td>Preventative Maintenance Agreements</td>
<td>Campus Purchasing</td>
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</tr>
<tr>
<td>Propane Gas</td>
<td>EH&amp;S Lab Safety</td>
<td></td>
</tr>
<tr>
<td>Radioactive materials, or devices which contain radioactive material</td>
<td>EH&amp;S Radiation and Campus Purchasing</td>
<td></td>
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<tr>
<td>Refrigerators &amp; freezers (laboratory use)</td>
<td>EH&amp;S Lab Safety</td>
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<tr>
<td>Respirators</td>
<td>EH&amp;S Lab Safety</td>
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<td>Rentals - trucks or trailers (example: U-Haul or United Rentals)</td>
<td>Campus Purchasing</td>
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<tr>
<td>SCUBA Equipment (compressors, air tanks, regulators, wet suits, etc.)</td>
<td>EH&amp;S Dive and Campus Purchasing</td>
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<tr>
<td>Security Services (alarms)</td>
<td>Campus Purchasing</td>
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<td>Superconducting magnets</td>
<td>EH&amp;S Radiation</td>
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<tr>
<td>Toxin – a poison produced by a microorganism</td>
<td>EH&amp;S Biosafety</td>
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<td>Campus Purchasing and Risk Management</td>
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<td>“Virgin” paper – non-recycled copy paper</td>
<td>Purchase not acceptable</td>
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<td>Website Creation</td>
<td>Contracts &amp; Property</td>
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<td>Welding equipment</td>
<td>EH&amp;S Gen Safety</td>
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<td>X-Ray machines, cabinet radiography, electron microscopes</td>
<td>EH&amp;S Radiation and Campus Purchasing</td>
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<td>Commodity Code</td>
<td>Description</td>
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<td>Mining &amp; Oil &amp; Gas Services (Object Code 7200)</td>
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<td>Building &amp; Construction &amp; Maintenance Services (labor) (Object Code 7100</td>
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<td>Industrial Production &amp; Manufacturing Services (Object Code 7260)</td>
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<td>Industrial Cleaning Services (Object Code 5272</td>
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<td>Environmental Services (environmental fee) (Object Code 7200</td>
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<td>Transportation &amp; Storage &amp; Mail Services (shipping, handling, freight) (Object Code 3000</td>
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<td>Radio &amp; Television Services (Object Code 8080)</td>
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<td>Politics &amp; Civic Affairs Services (Object Code 7200)</td>
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<td>Organizations &amp; Clubs (Object Code 7220</td>
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<td>Land &amp; Buildings &amp; Structures &amp; Thoroughfares (Object Code 1063)</td>
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</tbody>
</table>
**Gateway Requisition Workflow**

**Shopper** is the “default” role in Gateway automatically given to everyone on campus with UCSB Net ID. Can create cart and assign it to a **Requester**. Cannot enter account string or approve funding.

**Requester** role is assigned to someone with some training and knowledge about accounts. Can shop and create cart, and also modify cart assigned by **Shopper**. Enters account string, but does not approve funding.

**Account Approver** account “owner” or PI someone delegated by the PI to approve spending on an account string. Reviews cart and account string, and approves requisition to next step, or returns requisition to the **Requester**. Cannot edit cart or account string. If **Account Approver** is acting as **Requester** on an order using an account string on which they can approve, Gateway will “self-approve” on this step.

**Department Buyer** reviews for availability of funds, allowability, and appropriateness on the selected account string. Selects the sub and commodity code in Gateway. Can, but should not, edit cart or account string. Assigns **Ad Hoc Approver** if necessary. Approves requisition to the next step, or returns requisition to the **Requester**.

**Ad Hoc Approver** can be a C&G Analyst, Financial Mgr., MSO, or Chair. Assigned to the workflow by the **Department Buyer** when additional review/approval is needed (i.e., on contracts/grants to verify equipment item is appropriate and in budget, or on department funds above a certain $ level). Cannot edit cart or account string. Approves requisition to the next step, or returns requisition to the **Requester**.

**Account String Validation** is an automatic step in the workflow that verifies that selected account string is open and valid on the GL. If not valid, returns requisition to the **Requester**.

**Post-dept Approvals** are automatically invoked in the workflow (if applicable) and include EH&S/Risk Management, Equipment Management, Campus Buyer, and/or Purchasing Manager (determined by $ threshold, fed funds flag, commodity code, etc. as selected in the previous steps). Approves requisition to the next step or returns requisition to the **Requester**.

The Purchase Order is created in Gateway and “sent” to the vendor by whatever transmission method has been set up in their vendor profile in Accounting (fax, email, mail, walk-in, print in dept.)
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 workflow 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 themselves 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.
Phoenix User Interface – Training Guide

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Section 2 – Classic vs. Phoenix

1. Introduction:
In March 2013 the Gateway site was upgraded to version 13.1. The upgrade included an option to change your user interface style. The new interface, referred to as Phoenix, will replace the original, referred to as Classic. Phoenix offers a streamlined approach to navigating and using Gateway to enhance the user experience and make interacting with the system easier.

A view of the Phoenix Interface:
Section 2 – Classic vs. Phoenix

2. Departmental Rollout Recommendations

- While using Phoenix is not required, we do recommend you select a subset of users in your department to being using and learning the new interface.

- We anticipate that by early 2014 we will transition the campus to Phoenix. The plan is for the classic interface to no longer be available with the 14.1 release in March 2014.

- Keep in mind, as a department, this transition can be made at any time by changing the interface in your personal profile. We recommend rollout of the interface at a time most appropriate for your department based on resources and workload constraints.

- Important Note: Phoenix interface is not available in the following browsers IE7, IE8, and IE9 in compatibility mode. If you are using one of these browsers and attempt to switch to the Phoenix interface, you will be reverted to the Classic interface, and receive a message stating your browser is not supported. You will need to update your IE browser.
Section 2 – Classic vs. Phoenix

3. Activating Phoenix Interface
   - Access the Personal Settings tab in your user profile
   - In the User Interface Style drop down box, select Phoenix
   - Click Save
Section 2 — Classic vs. Phoenix

   - Classic navigation is performed by clicking on tab-driven navigation menus and sub-menus that are always present on the screen. In Phoenix, tab navigation has been replaced by a clean, slide-out side menu that displays the available menu options.

   **Classic**
   - Classic is navigated via a tab-driven menu that is always present across the top of the page. Sub-Menu items located in sub-navigation tabs.

   **Phoenix**
   - Phoenix Interface features a slide out menu. Menu items stay out of the way until they are needed, for a cleaner, less cluttered site.
Section 2 – Classic vs. Phoenix

2. Classic vs. Phoenix – Menu Item Groupings
   - In Classic, related menu options are often located in separate menu tabs. In Phoenix, the menu has been reorganized in a more logical manner to make locating pages easier. A brand new feature in the Phoenix interface is a Menu Search option to help find pages that are not frequently used.

Classic
   - Classic often separates pages on to separate tabs. For example, the shopping page, favorites page, and forms page are located in individual tabs.

Phoenix
   - Phoenix Interface features a slide out menu. Menu items stay out of the way until they are needed, for a cleaner, less cluttered site. Suggest in lieu: Phoenix Interface places Shopping, Favorites and Forms in the slide-out Shop Menu.
• Pages are easier to find with a Menu Search option. A keyword search returns a list of pages containing that keyword. Search results are clickable to take you directly to the page. Breadcrumbs display that tell you how to navigate to the page.

3. Classic vs. Phoenix – Action Items
Section 2 – Classic vs. Phoenix

- In Classic, action items are located on the shopping page. If you are in another area of the application, you are required to return to the Shopping page to view them. In Phoenix, action items are located in the top banner area, making them accessible from anywhere in the application.

**Classic**

- Action Items are located on the shopping page.

**Phoenix**

- Action Items are located in the top banner making them accessible from all areas of the site.

- As with Classic, clicking on the action item takes you to the appropriate area of the application to complete the action.
Section 2 – Classic vs. Phoenix

4. Classic vs. Phoenix – Notifications

- Certain action items and/or tasks in Gateway, such as a submitted requisition or a document awaiting approval, will trigger notification to specified users. These notifications are not viewable in Classic, and are available only by email. In Phoenix, you can view these notifications in the top banner. As with action items, notifications can be accessed from anywhere in the application.

- Note: Not all notification types are available in the current Phoenix interface.

Classic

- Notifications are not viewable in the application. You are notified by email only.

From: support@sciquest.com
To: Christine Griffin
Cc:
Subject: PO Fax Non-Delivery Notification UCSB PO# GW0000005953 Sciquest Ref # 28617130 - GLAXOSMITHKLINE PHARMACEUTICALS

Re: PO Fax Non-Delivery Notification UCSB PO# GW0000005953 Sciquest Ref # 28617130 - GLAXOSMITHKLINE PHARMACEUTICALS

Dear Christine Griffin,

This email is to inform you that the following purchase order was not delivered to the supplier listed below. Please review the explanation and confirm the order distribution fax number and resend the order as appropriate.

PO No.: GW0000005953
PO Total: 2,216.70 USD
PO Priority: 1:Normal
Supplier Name: GLAXOSMITHKLINE PHARMACEUTICALS Order Distribution Fax No.: +1 (877) 406-8430 Failure message: The dialed number rang, but did not answer.

Click the link below to log in and access the PO Distribution Maintenance page.


If, after validating the fax number, you need additional information, please contact your systems administrator or SciQuest Support.

Support Team Contact Information:
help@gateway.procurement.ucsb.edu

Thank you,
SciQuest Customer Support
Phoenix

- Notifications are located in the top banner making them accessible from all areas of the site.
- Notifications are clickable and take you to the appropriate area within the site (i.e. to the requisition).
- Newer notifications are highlighted.
- You will continue to receive email notifications.
Section 2 – Classic vs. Phoenix

5. Classic vs. Phoenix – User Profile
   - In Classic, user profile information and options are located in a series of navigation tabs and sub-tabs. In Phoenix, the user profile contains simpler navigation. A main user profile menu groups similar tasks in a logical manner and Quick Links contain most commonly used tasks.

   Classic
   - User profile tasks are accessed from a series of navigation tabs and sub-tabs.

   ![User Profile Navigation Tabs]
   - Additional task buttons display in the main page of the user profile.

   ![User Profile Main Page]
   - Users access their own profiles through the profile link.
Phoenix

- All options are in a single user profile menu. Options are grouped by similar tasks.

- Users access their own profiles by selecting the drop-down menu besides the user’s name and selecting View My Profile.
6. Classic vs. Phoenix – Cart Preview

Classic

- In order to view your current cart in Classic, it is necessary to leave the page you are on and go to your active shopping cart tab.

Phoenix

- Phoenix features a cart preview. By clicking on the shopping cart icon, you can get a quick view of the active cart from anywhere in the application.
- Clicking the View My Cart button takes you to the active cart.
7. Classic vs. Phoenix – Quick Search

Classic

- Quick search is located at the top right of the screen.

Phoenix

- Quick Search is still accessible from all pages, but is hidden until you select the icon to display it.
- You can also use the quick-key ALT+Q to access the Quick Search menu.
Section 3 – Phoenix Menu Options

1. Phoenix Interface – Menu Options: Shop

The Shop menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favorites and access to carts and orders.

- Accessed directly from the shop menu, Product Quick Search allows you to do a simple item search by keyword, catalog number, or CAS number. Note: You can also use the quick key ALT+P to access the product search.

- From the Shopping sub-menu, users can access the shopping page, forms and favorites. These options were located on a separate navigation tab in Classic.
The My Carts and Orders sub-menu contains options for viewing your active cart, draft shopping carts and your most recent orders.
2. Phoenix Interface – Menu Options: Orders and Documents

In Phoenix, orders related to Documents Search and Approvals are located in the Orders and Documents menu.

- Document search tasks are accessed from the Document Search sub-menu.

- All tasks related to the approvals are available on the Approvals sub-menu.
Section 3 – Phoenix Menu Options

3. Phoenix Interface – Menu Options: Accounts Payable

The Accounts Payable menu contains all tasks related to AP Director and Settlement Manager.

- From the Invoices and Receipts sub-menu you can access the AP Dashboard and other tasks related to invoices and receipts.

- Users with AP administration or receiving permissions will be able to access the AP Administration menu. From this menu, you can configure the AP Settings and matching rules and tolerances.