HOW TO PLACE AN ORDER IN GATEWAY

1) Go to the Gateway login page - [https://gateway.procurement.ucsb.edu](https://gateway.procurement.ucsb.edu)

2) On the right hand side of the screen, login with your UCSBNetID and password.

3) From the main **Homepage**, there are several ways to shop:

   a. You can use the **Search Box** function to shop across all **Showcase Vendors** (each order can only contain items from one vendor at a time).
      • This will search across all available suppliers; you can review the individual options and price check across multiple companies.

   b. If you know the SKU numbers, you can use the **Quick Order** function (linked below the **Search Box** shown above). All items need to be from the same vendor.
c. **Showcase Suppliers** are vendors that have their catalogs hosted on the Gateway site.
   - Note that this section changes as Purchasing continues to add more vendors.

   ![Showcased Suppliers]

   • You can search directly from their icon on the homepage:

   ![BIOEXPRESS view info...]

   d. **Punch-Out Suppliers** are vendors that have granted access to their catalogs through the Gateway portal.

   ![Gateway Punchout]

   • Clicking on the vendor’s icon from the homepage, the system will transfer you to the UCSB version of their website.
   • When you “punch-out” to a linked vendor, their site will show UCSB pricing.
   • You will know you are still working within Gateway if the large navy banner is across the top.

   • After you have added the products you need to the Punch-Out shopping cart, click on the Cart in the upper right-hand corner to view your items.
• After reviewing your order, click on the Green button that says “Return Cart to Purchasing Application” to send the items to Gateway. Note: Some vendor sites will show “Transfer Cart” or “Submit Requisition” instead.

![Gateway screenshot](image)

- You can get back to Gateway without adding anything to your cart by clicking on the yellow Cancel Punch Out button on the top right-hand side of the screen.

![Gateway screenshot](image)

e. **Non-Catalog Items** are for vendors that do not currently have a relationship with Gateway.
   - You can find the link to the non-catalog item option under the Shop/Search box:

![Gateway screenshot](image)

- You can select a vendor from the Purchasing system and manually enter a product or quote for purchase through the Gateway portal.

![Gateway screenshot](image)

- You can upload quotes from vendors directly into the system on the right hand side of the screen, above the line items.

![Gateway screenshot](image)

- If you have paperwork to attach to the order, send it to purchasing@eri.ucsb.edu to upload when they approve the order.
f. **Walk-In PO forms** are available for local vendors (such as Home Depot, K-Mart, Bio-Pac, etc.) that will accept POs for items that you cannot order online or need immediately. From the main homepage, the link to the form is on the left-hand toolbar above the **Action Items** section.

- The link will take you to a new tab.
- Fill in the appropriate sections and click the **Go** button at the top of the form to add the items to your cart.
CHECKING OUT

1. Once you have all of your items from one vendor in your cart and are ready to checkout, click on the Cart icon in the upper right corner.

2. Once you have the Cart open, you can rename it from the default of the date and your UCSBNetID to something more descriptive (in case you need to quickly search your Order History) or would like to save the Cart contents for duplicate future orders.

3. At this point, you can either select Finalize Cart to input the accounting and shipping information or Assign Cart to send the cart to another person to add items and/or fill in the account information for you.

   a. Assuming you have already set up a Favorite Address and marked it as a default, the only Alert you should see is select the appropriate Accounting Codes alert.

   b. Clicking on either of the yellow boxed “Required Field” texts will open the Account Code pop-up.
c. Because ERTH (or CBER) was elected as the default Favorite earlier, and you have set up the individual accounts that you have purchase authority for, you only need to click on the Select from profile values... link to see a short list of accounts, instead of searching through the entire department’s accounts.

d. Once you select the appropriate account, you can either select the Sub Account or let the Department Buyer do that when they review the order.

e. Select Save when you are finished.

f. Click on the Final Review link in the yellow box.

g. Double check all of the information entered and select the Submit Requisition button if there are no changes.

h. This will route your order through the appropriate channels for approval.

4. In the scenario below, you would be the Requestor (far left), your PI would be the Account Approver, it would go to ERI Purchasing, then to the Purchasing Department or the Vendor.

5. Once it clears the department approvals, it is automatically pushed through the Purchasing system and non-standard orders will be flagged and routed accordingly (i.e., drug orders will automatically route to EH&S).
ORDER TRACKING

1. You can track your order on the main homepage at the bottom left corner:

2. Or use the Document Search tab along the top of the homepage.

3. You can select the type of document you want to Search (All Documents; Requisitions; Purchase Order; Invoice; Receipt) at the top of the page.
   a. Limiting the Search to the ERTH (or CBER, ICES, CRUS) department by clicking on Advanced Search and scrolling to the bottom of the page and selecting our department under the Custom Field section will return more focused results.