

How To Place An Order In

Gateway



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 "Hosted Catalog Search" to build their cart in the system.

The screenshot shows the Gateway interface. At the top is a red banner with "Gateway Notices" and a link to "Register for Gateway and GMC training classes at the HR Learning Center." Below this are three main sections: "Office Supplies, Print, Furniture, Hardware/Software", "Hosted Catalog Search", and "Sustainability". The "Hosted Catalog Search" section contains a search bar, an "Advanced Search" link, and a link to "Order a Non-Catalog Item", which is highlighted with a red arrow. The "Sustainability" section includes a "Product Search Tool" and a "Supplier Flags" section.

- 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".

The "Add Non-Catalog Item" dialog box is shown. It has a dark blue header with the title and a close button. Below the header is a section for "Existing Supplier" with a search box labeled "Select Supplier". Underneath is the "Item" section, which is a table with columns for "Product Description", "Catalog No.", "Quantity", "Price Estimate", and "Packaging". The "Packaging" column has a dropdown menu currently set to "EA - Each". At the bottom of the dialog, there are three buttons: "Save", "Save And Add Another", and "Close". A legend indicates that stars next to field names denote required fields.

- "Save" 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.

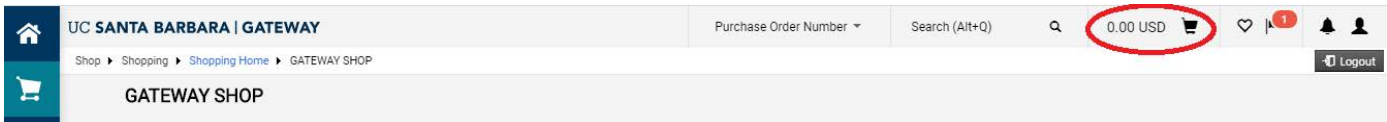
How To Finalize An

Order In Gateway

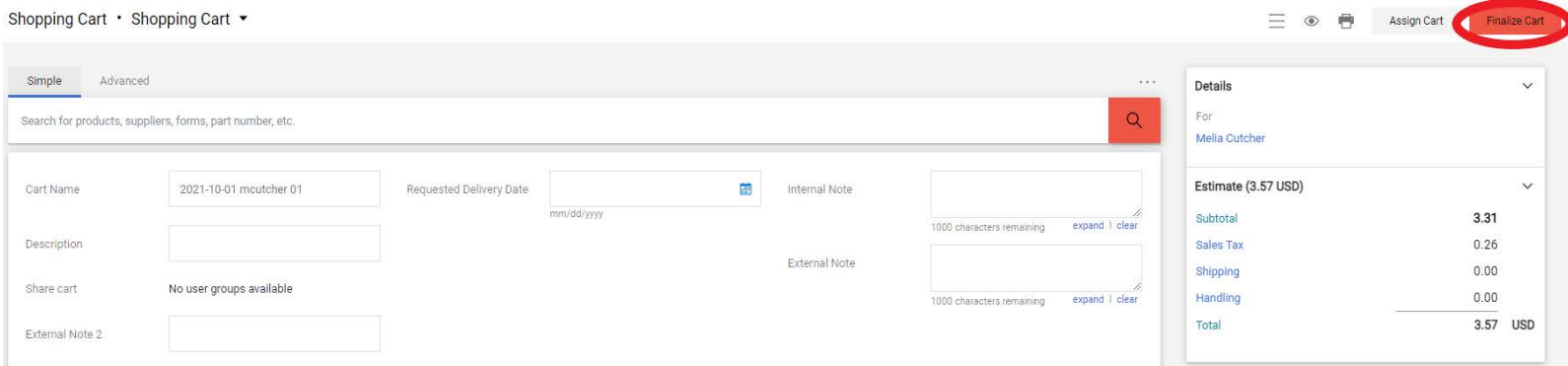


FINALIZING YOUR ORDER – CHECKOUT

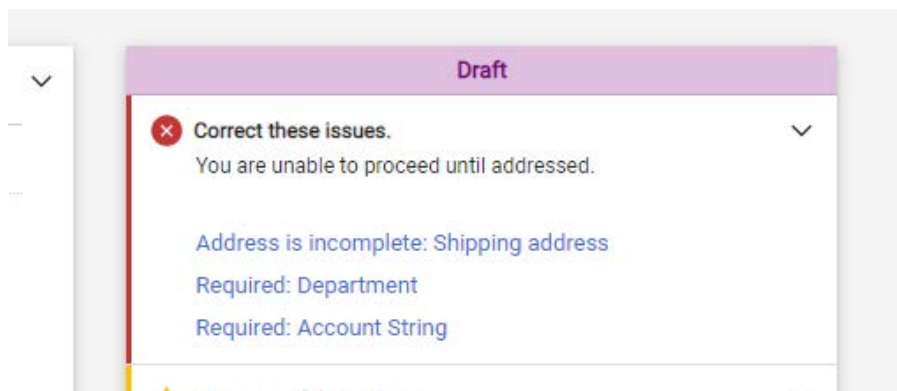
- Once you have all of your desired goods in your cart, you can quickly access your cart by clicking the shopping cart icon on the upper right hand side of the screen.



- 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 drop down menu.
- Select the “Finalize Cart” button to review and input order information.



- In the Finalize Cart section, users will be brought to the Requisition Summary screen to enter in Ship-To Information, Account Code information, and any other specific information that is important for the specific order.
- The Review Steps on the right side of the screen provide links to specific areas on the requisition that need to be completed before the requisition can be submitted.



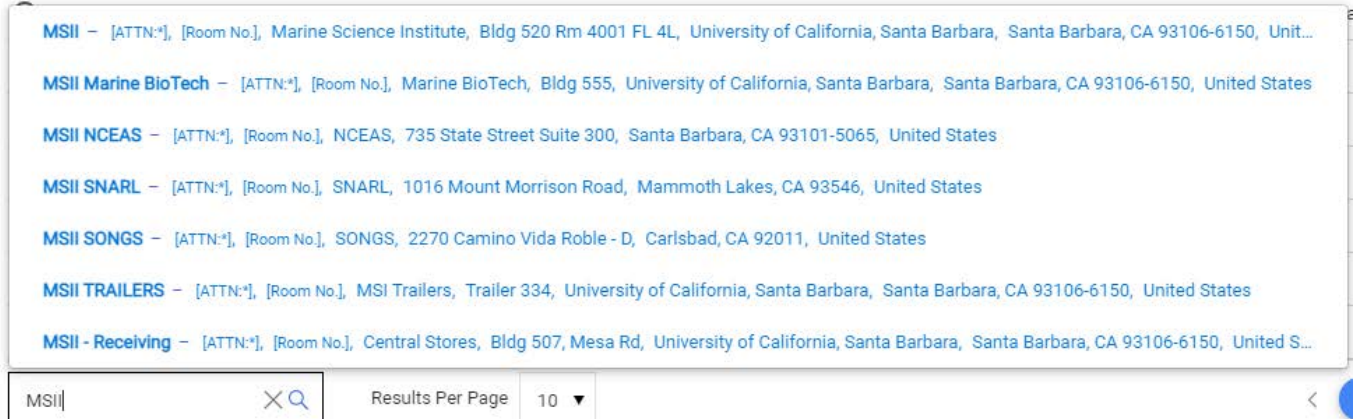
How To Finalize An

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○ Addresses:

- The Ship-to address needs to be updated before the order is complete. Search for the proper address using the search feature in the Edit Addresses section.



MSII - [ATTN:*], [Room No.], Marine Science Institute, Bldg 520 Rm 4001 FL 4L, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, Unit...

MSII Marine BioTech - [ATTN:*], [Room No.], Marine BioTech, Bldg 555, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United States

MSII NCEAS - [ATTN:*], [Room No.], NCEAS, 735 State Street Suite 300, Santa Barbara, CA 93101-5065, United States

MSII SNARL - [ATTN:*], [Room No.], SNARL, 1016 Mount Morrison Road, Mammoth Lakes, CA 93546, United States

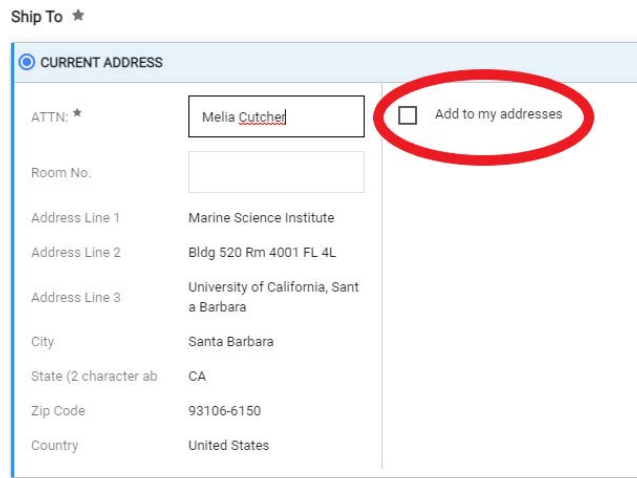
MSII SONGS - [ATTN:*], [Room No.], SONGS, 2270 Camino Vida Roble - D, Carlsbad, CA 92011, United States

MSII TRAILERS - [ATTN:*], [Room No.], MSI Trailers, Trailer 334, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United States

MSII - Receiving - [ATTN:*], [Room No.], Central Stores, Bldg 507, Mesa Rd, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United S...

MSII | X Q Results Per Page 10

- Search for either a 4-digit department code (Ex: MSII) 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 “Add to my addresses” for future use.



Ship To ★

CURRENT ADDRESS

ATTN: * Melia Cutcher Add to my addresses

Room No.

Address Line 1 Marine Science Institute

Address Line 2 Bldg 520 Rm 4001 FL 4L

Address Line 3 University of California, Santa Barbara

City Santa Barbara

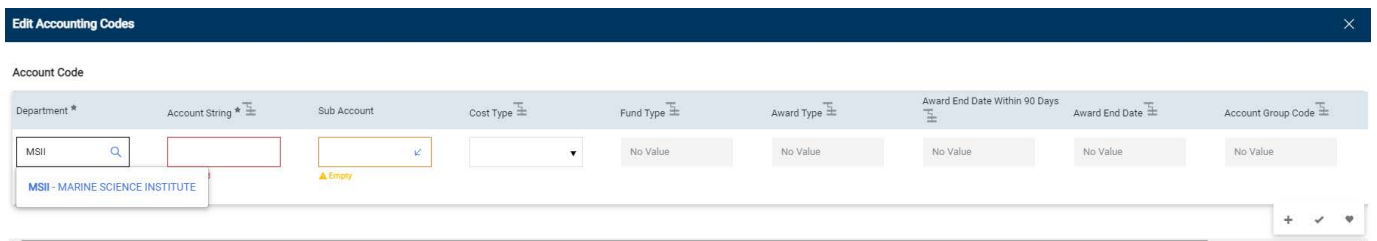
State (2 character ab) CA

Zip Code 93106-6150

Country United States

○ Account Codes:

- The accounting code that will be used for the purchase needs to be inputted before the order can be submitted.



Edit Accounting Codes

Account Code

Department *	Account String *	Sub Account	Cost Type	Fund Type	Award Type	Award End Date Within 90 Days	Award End Date	Account Group Code
MSII				No Value	No Value	No Value	No Value	No Value

MSII - MARINE SCIENCE INSTITUTE

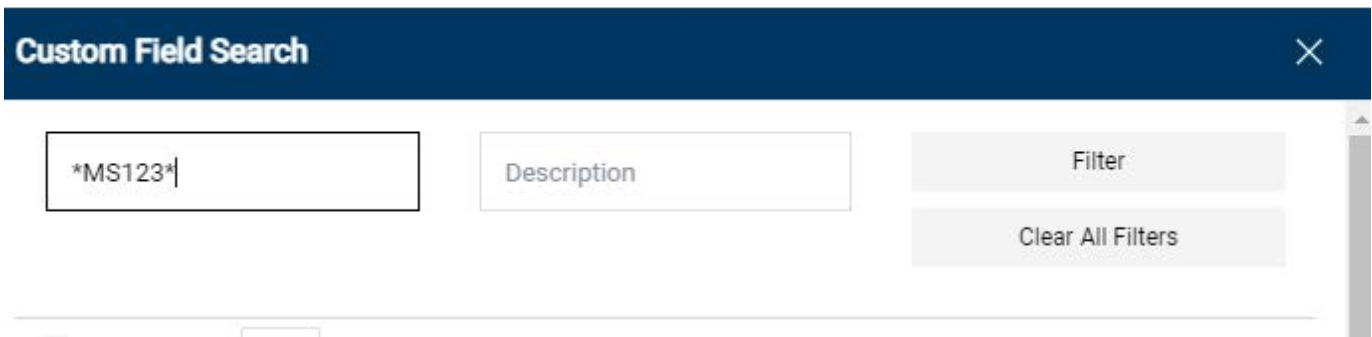
- Always start with the Department section first. Search using MSI's 4-digit departmental code: MSII.

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- Once that code is entered, you can move on to the Account String section.
 - Click the magnifying glass to bring up the Custom Field Search box to search for a specific account string.
 - In the "value" section of the search box, you should use asterisks around your search term to find your string. Common searches are either the account string or project code. Ex. *8-123456-78900* or *MS123*



The screenshot shows a 'Custom Field Search' dialog box with a dark blue header. Below the header, there is a search input field containing the text '*MS123*'. To the right of the input field is a 'Description' field. Further right are two buttons: 'Filter' and 'Clear All Filters'. A close button (X) is located in the top right corner of the dialog box.

- Please note: the sub account does not need to be entered before the cart can be submitted. MSI's Purchasing team will complete this section.
-
- **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.

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Notes and Attachments	Equipment Management	Purchase Details
Internal Notes and Attachments Internal Note <i>no note</i> Internal Attachments add attachment... Supplier Notes & Attachments External Note <i>no note</i> External Attachments add attachment... Supplier Account Number <i>no value</i>	Equipment Information Inventory Equipment? <i>no value</i> Custody Code <i>no value</i> Title Vests with? <i>no value</i> Add-On to Property No. <i>no value</i> Location <i>no value</i> Fabrication Information Fabrication? <i>no value</i> Fabrication Name <i>no value</i> Fabrication Property No. <i>no value</i> Fabrication ID No. <i>no value</i>	Purchase Type Type of Purchase <i>no value</i> Restricted Items Restricted Items <i>no value</i> Work Order Information Work Order No. <i>no value</i> Work Order Building <i>no value</i> Location Special Handling Special Handling <i>no value</i>

- **“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.