Ordering through Gateway for MCDB Labs

Gateway is the purchasing application used for ordering at UCSB. It is rather complex, and aspects of it can be confusing and mystifying. This document is an attempt to give the basics.

This guide applies only to accounts administered by MCDB. If your funds are administered by another unit (MSI, NRI, another department or unit), ordering will likely be very similar, but your items will NOT show up at MCDB receiving. They’ll show up at your unit’s designated receiving location. IF YOU HAVE PROBLEMS CONTACT YOUR UNIT, NOT MCDB! MCDB can’t help you!!!

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1). **Training**: Register for training at: [https://learningcenter.ucsb.edu](https://learningcenter.ucsb.edu)- search "Gateway." All new users should get this basic training.

2). **When should you use Gateway?** Use Gateway for all low-value Purchase Orders (<$5000) placed through typical vendors with an online presence. For high value purchases, see the Departmental Purchasing Manager (Doug Hart). You can also generate a “Walk-in” Purchase Order to purchase items from certain local vendors (UCen Bookstore primarily).

3). **Who can use Gateway?** Lab P.I.s can order through Gateway. P.I.s can also designate individuals to have purchasing authority. P.I.s can also have people in their labs set up Requisitions in Gateway, then assign the Requisition to someone in the lab with purchasing authority for final approval.

4). **How do I log on to Gateway?** Go to [https://gateway.procurement.ucsb.edu/](https://gateway.procurement.ucsb.edu/). Log in with your UCSB NetID and NetID password.

5). **What is a Purchase Order?**: All purchases made with funds administered by UCSB require that a Purchase Order be generated PRIOR to making a purchase. The initial step in purchasing in Gateway is to complete a Requisition. This has all of the information needed, such as Vendor, Catalog Number, Price, and Source of Funds. The Requisition is submitted and reviewed by the appropriate purchasing authority (e.g. Doug Hart for grants and funds run through MCDB; other units such as MSI and NRI have their own approvers); if all is OK, a Purchase Order is generated which (generally) goes directly to the vendor. There are certain situations where the purchaser prints out the Purchase Order and brings it to the Vendor. For example, for some DNA sequencing services one would submit the requisition for a “Walk-In P.O.”, then once the Purchase Order is generated the user would log in to the service’s web site and enter the P.O. number [see “Walk In Purchase Orders” below].

6). **What types of vendors can I access through Gateway?**

There are a number of different ways to set up a purchase using Gateway. Which way depends on the Vendor.

-- There are a number of Vendors directly accessible via buttons from the main shopping page of Gateway:

- a. Vendors with “Catalog PunchOuts” (e.g. Fisher Scientific): Certain Vendors allow Gateway direct access to their online web catalog.

- b. Vendors with “Hosted Catalogs” (e.g. New England Biolabs). For these vendors you can search the catalog to find specific items, but you don’t get direct access to view the online catalog.
There are many other vendors accessible through Gateway that don’t have a direct connection to their catalogs.

7). My vendor isn’t on one of the buttons on the main page. How do I find if I can purchase from them through Gateway?

On the main shopping page, next to “Browse” click on “suppliers”. Then, click on the “+” sign of “Click to expand Search for Supplier Filter, and put in the vendor you are looking for. For example, if you put in “Agilent” because you want to buy Pfu UltrAll Polymerase from Agilent, you get the following result:

There are three different Agilent entries. Key things to look at are the “Type” (in this case all three Agilent entries are “Non-catalog”, meaning there is no connection to their catalog but they are Gateway vendors. Under “Preference” one of the entries is a “Price Schedule Supplier” and “Price Includes Shipping”, a desirable attribute.

If your vendor doesn’t show up, you can’t order through Gateway. [CHECK THIS]

8). How do I place an order in Gateway?

You can only order from a single vendor at a time in Gateway. There are a number of ways to set up a shopping cart, but probably the most used way is to search everything and then evaluate the results. As an example, let’s say you want some of the enzyme “T4 DNA ligase”, which you know is probably available from a number of different suppliers.
A). Search for a product from all available suppliers. This way lets you compare prices from different vendors.

On the shopping home page, at the top is the “Shop” search box. Type in the item you are looking for here:

Below are the first returns from the search:

On the left you have options for filtering the results. For each return, there is useful information. The first hit is from Fisher, but the enzyme was manufactured by Promega. Circled are some icons with important info, such as Price Includes Shipping. By scrolling through the results, you can compare the prices from different suppliers and whether shipping is included. When you choose, put in the quantity you want and click “Add to Cart” [“Finalizing” the cart is dealt with below]

B). Search a specific vendor with a catalog PunchOut or Hosted catalog:

i). Catalog Punchout (e.g. Fisher Scientific): Click on the Fisher Scientific button on the main shopping page. You’ll get a message about “Connecting to Punchout” or something, then the main Fisher Scientific web page will appear:
At button at top right will allow you to cancel the punchout and return to Gateway. You should see your name, showing that your Gateway session successfully integrated with the Fisher Catalog. From here, you can search the catalog and add what you want to your shopping cart.

When you are done shopping, click on the shopping cart icon at upper right to see the contents of your cart. To get back to Gateway is a 2-step process. First, click on the green “Return Cart to Purchasing Application” button:

Then, in the next screen click on the “Submit” button to return to Gateway:

[we’ll cover “Finalizing” your Gateway shopping cart below.

i). Hosted Catalog (e.g. New England Biolabs): Click on the New England Biolabs button on the main shopping page. You’ll get a search box, where you can search for an item, then add it to your Gateway shopping cart. [We’ll cover “Finalizing” your cart below]. If you have a catalog number for something that isn’t generally listed in the hosted catalog (e.g. a repair part for a piece of BioRad equipment that isn’t listed in the BioRad catalog) click on “non-catalog item”.
C). Order a “non-catalog item” from a listed Gateway vendor. If your vendor is listed as “Non Catalog” supplier, things are slightly different (why the heck isn’t “Non Catalog Item” a button on the Gateway Forms area?). Click on the very small “non-catalog item” link up top on the main shopping page:

![Gateway shopping page with non-catalog item link highlighted](image)

In the pop-up window, you’ll see:

![Pop-up window for non-catalog item](image)

Do NOT type in the name of the vendor. Instead, click on “Supplier Search”, search for the vendor, and select. Then put in the product info. If you are ordering additional items from the same vendor, click on “Save and add another”, otherwise click on “Save and Close”.

D). Finishing up the order

In Gateway, click on the shopping cart icon at upper right. Click “View my cart” if you want to check the contents of your cart. Click “Checkout” to finish things up.

i). If you do NOT have purchasing authority for your lab: Click on the “Assign Cart” button, then do a search for the person in your lab who can authorize purchases, and assign the cart to them. They’ll get an email that the cart is assigned to them. Confusingly, you’ll get the same email, even though the cart is assigned to them, not to you!
ii). If you have purchasing authority: To finish things up, you have to provide the Department and the funding source (the “Account String”).

**IMPORTANT:** Don’t try to type in the Department and Account String info. You must select from available choices.

**VERY IMPORTANT:** You MUST fill in the Department field BEFORE you try to fill in the Account String field.

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Populate the Department field first. Click on the “Required field” link in the Department yellow box:

In the next popup, do NOT type in MCDB. Instead, click on “Select from all values”

Then, put in “mcdb” in the “value” field and click “Search”:

You’ll see “MCDB”, and “Select” to the right. Click on “Select” to populate the Department field. The popup closes.
Now, and only now, you can do the same for the Accounting String field: Click on “Required field”, then click on “Select from all values”, then in the “value” field put something to search for (typically the first two letters of the account string are the last and first initials of the PI. If the PI is Millard Fillmore, the first two letters would be FM.

You will only see Account Strings that you are authorized to use

Once you’ve populated the two fields, click on Save, then Submit Requisition. The requisition will be reviewed and if OK a purchase order will be generated. If the vendor is a Punchout, Hosted Catalog, or Non-Catalog vendor, Gateway sends the Purchase Order to the vendor. When the item is received, you’ll be notified by email and you can pick it up at MCDB Receiving.

9). When should I use a “Walk-in P.O.”? There are two situations where you should use a “Walk In P.O.”

One is for local vendors who accept UCSB Purchase Orders. There are very few of these, the major one of which is the UCen Bookstore. The second is for certain vendors that provide a service and who accept UCSB Purchase Orders. For example, if you need to send in a Pipetteman to Integrated Instruments for repair, you’d requisition a Walk-In P.O., and then print out the P.O. and send it along with your Pipetteman for repair. Some DNA sequencing services accept UCSB P.O.s (you will likely have to set up an account with the service first). You’d requisition a Walk-In P.O., then enter the P.O. number (which will start with “GW”) on the service’s web site before you send your samples in for sequencing.

Many oligo and sequencing services offer convenient “Cards” that simplify things. You use a single Walk-In P.O. to load the card with some amount of money (e.g. $100). Then, when you need an oligo or a few samples sequenced you set it up at the vendor’s web site and have the cost deducted from your Card, without the need for you to get a new P.O. for each oligo or sequencing run. When the card runs low, you’d use another Walk-In P.O. to add money to the card.

Important note: To be paid, all things bought on P.O.s need to be “received”. For physical objects purchased with a P.O., Kurt or Doug in MCDB Shipping/Receiving checks that the objects are there and marks them “Received” in Gateway. However, services paid for with a Walk-In P.O. such as sequencing, Oligo Cards, etc, don’t have a physical entity received by Kurt or Doug. So that everything can be reconciled properly, when you get your sequences or Oligo Card, send an email to Doug with the P.O. number saying you “received” so it can be dealt with in GateWay.

Stay tuned: As of March 2017, Business and Financial Services are saying Oligocards and Sequencing Cards cannot be used any longer because the products cannot be “received”.

10). What can’t I purchase through Gateway? UC policy restricts certain items being purchased through Gateway. These include:

High Value Items, equipment, personal items, animals, alcohol, radioactivity, controlled drugs, precious metals, refrigerators/freezers, respiratory protection, among other things. See the MCDB purchasing manager (Doug Hart) if you have questions about such items.

11). Approvals

There are some situations where you have to “Approve” a requisition before it can proceed. For example, if you are a P.I. and allow your grad students to set up requisitions, you or your lab manager may want final approval authority. You’ll get an email from Gateway saying you have a requisition needing approval, with a link to the approval. Click on the link (or log into Gateway and look at your Pending Requisitions, then click on the requisition number). In the upper right, there is a drop-down box labelled “Available Actions”. From the drop down list you can approve the requisition.