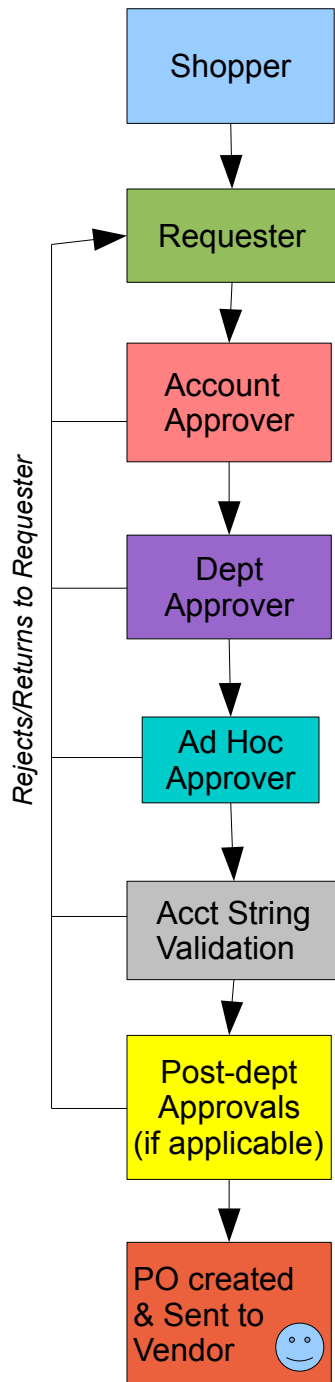


ECE Requisition Workflow in “Gateway”



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 LAFP 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 LAFP, but does not approve funding.

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

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

Ad Hoc Approver can be the ECE C&G Analyst, Financial Mgr., MSO, or Chair. Assigned to the workflow by the **Department Approver** 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.)