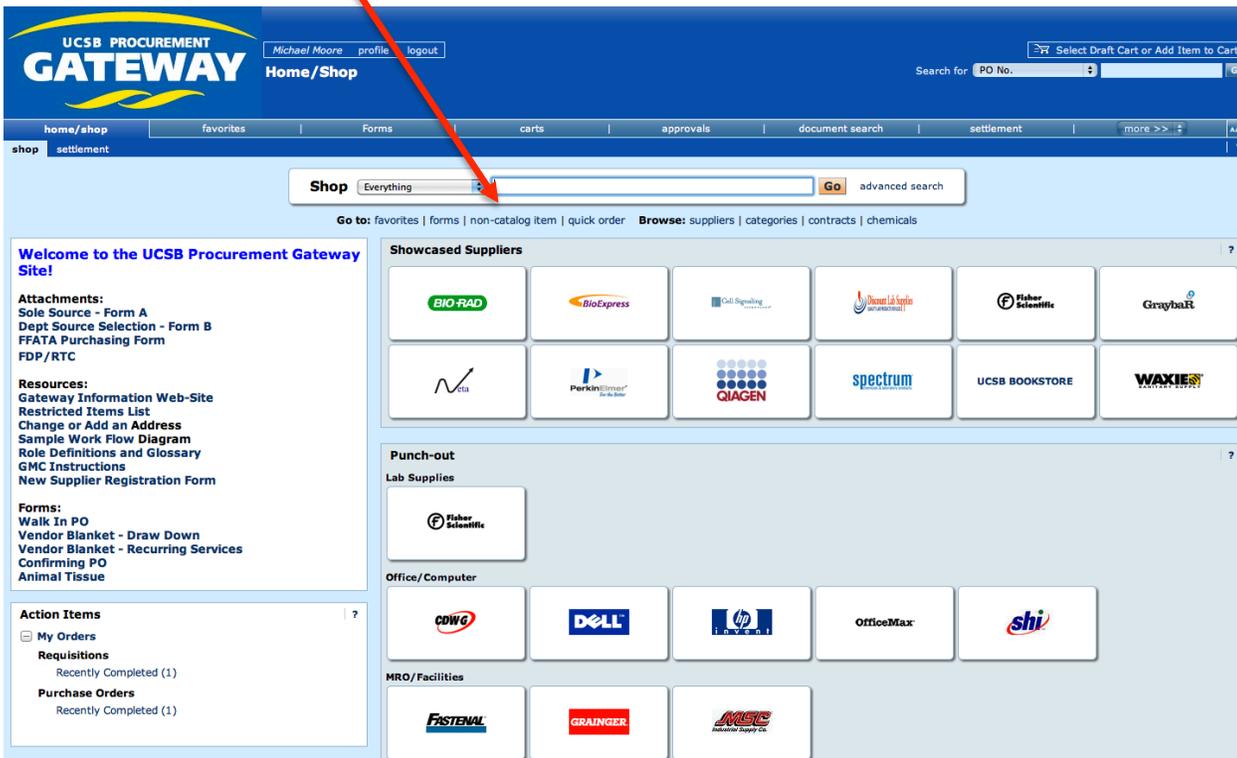


GATEWAY: Shopper/Requester – Quick Start

1. Build a shopping cart by searching for items among the suppliers displayed in the tiles. If the supplier you want is not among these, start your order by clicking on the “Non-catalog item” link.



The screenshot shows the UCSB Procurement Gateway Home/Shop interface. At the top, there is a navigation bar with the UCSB Procurement Gateway logo, a user profile for Michael Moore, and a search bar. Below the navigation bar, there are tabs for home/shop, favorites, forms, carts, approvals, document search, and settlement. The main content area features a 'Shop' dropdown menu, a search bar, and a 'Go' button. Below the search bar, there are links for 'Go to: favorites | forms | non-catalog item | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. The page is divided into several sections: 'Welcome to the UCSB Procurement Gateway Site!', 'Attachments' (Sole Source - Form A, Dept Source Selection - Form B, FFATA Purchasing Form, FDP/RTC), 'Resources' (Gateway Information Web-Site, Restricted Items List, Change or Add an Address, Sample Work Flow Diagram, Role Definitions and Glossary, GMC Instructions, New Supplier Registration Form), 'Forms' (Walk In PO, Vendor Blanket - Draw Down, Vendor Blanket - Recurring Services, Confirming PO, Animal Tissue), 'Action Items' (My Orders, Requisitions, Purchase Orders), 'Showcased Suppliers' (BIO-RAD, BioExpress, Cell Signaling, ThermoFisher Scientific, Grzybowski, etc.), 'Punch-out' (Lab Supplies, Office/Computer, MRO/Facilities), and 'My Orders'.

2. Go to your cart, Finalize or Assign it to someone else. Finalizing it, takes you to the Requisition page where you enter the Ship To and Account String info.

Finalizing your cart and “checking out”

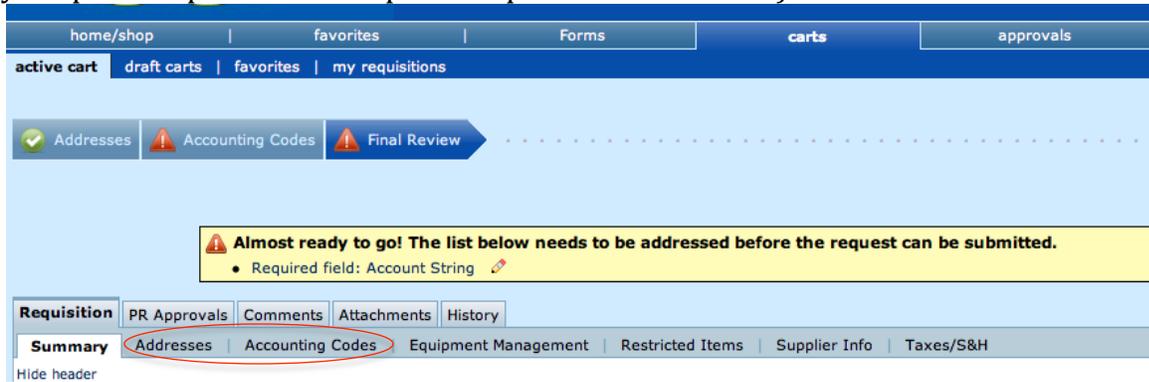
1. Review your cart by clicking on its icon in the upper right corner of the screen.



The screenshot shows the UCSB Procurement Gateway interface with a focus on the cart icon in the upper right corner. The cart icon is a shopping cart with a red arrow pointing to it. The cart icon displays the text '2012-08-30 mrmoo 01 | 1 item(s), 72.19 USD'. Below the cart icon, there is a search bar with the text 'Search for PO No.' and a 'Go' button. The navigation bar at the bottom of the page includes tabs for carts, approvals, document search, settlement, and more >>.

2. Click “Finalize Cart” (you can also assign the cart to someone else at this step for that person to complete and finalize). **Note:** “Finalizing” the cart does not send it off for approvals, it simply takes you to the next step in the requisition.

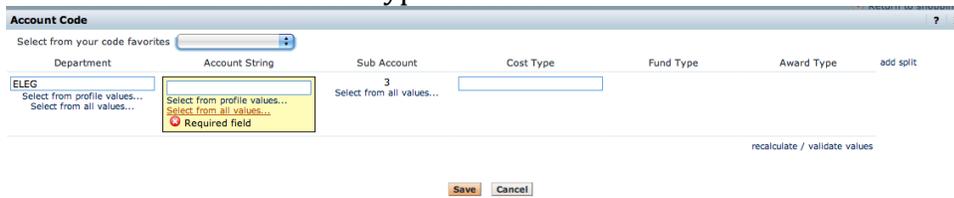
- Red icons will alert you to any required information you will need to include before the requisition can be submitted. Shipping Address and Accounting Codes are required on all orders (you can set your profile up to make this process quicker in the future).



- Click on the edit icon in the shipping address section. Click the “search from org addresses” link and type in the key word “Harold”; choose the ECE Shop in Harold Frank Hall, room 1160. (If you click the check box “Save this address for future use” you will not need to do this step on future orders.)



- Click on the Accounting Code link in the navigation bar. Under the Department field heading click the “select from all values” link, and search for “ELEG” in the Value field and press Select. Then, under the Account String field heading click the “select from all values” link and search for your account in the Description field, choose the account string and press Select. You do not need to put in the Sub Account or Cost Type. Press Save.



- For most orders (low dollar supply orders), you are done and you can press the Submit Requisition button, which will send the requisition on to the Account Approver, then to the Department Buyer, and finally the vendor. (See “What Forms Do I Include?” if your order is: Inventorial Equipment, a Fabrication, a Restricted Item, Greater than \$3k on Federal Funds or Greater than \$100k on any Funds.)

What do I do once I receive my items?

When your shipment arrives, you will be notified by the ECE Shop to come pick up your items. After you have opened the package and verified the goods, you must sign and date the packing slip and submit it to the ECE Budget Office (HFH Room 4121) or email a scanned version of the packing slip to purchasing-admin@ece.ucsb.edu. Please be sure the packing slip has the PO number printed on it.