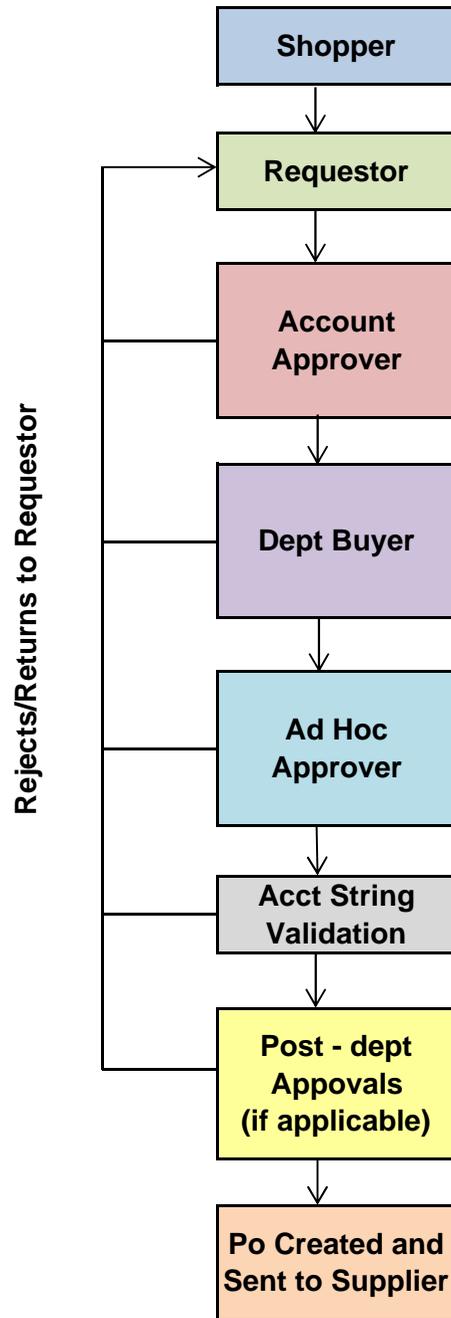# Gateway Requisition Workflow

Shopper

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 account string or approve funding.

Requestor

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 account string, but does not approve funding.

Account Approver

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

Dept Buyer

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

Ad Hoc Approver

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

Acct String Validation

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 Appovals (if applicable)

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**.

Po Created and Sent to Supplier

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.)

Rejects/Returns to Requestor