

GATEWAY DESK MANUAL

APPROVING



GATEWAY TRAINING GUIDE

How to Approve in Gateway – For Account Approvers

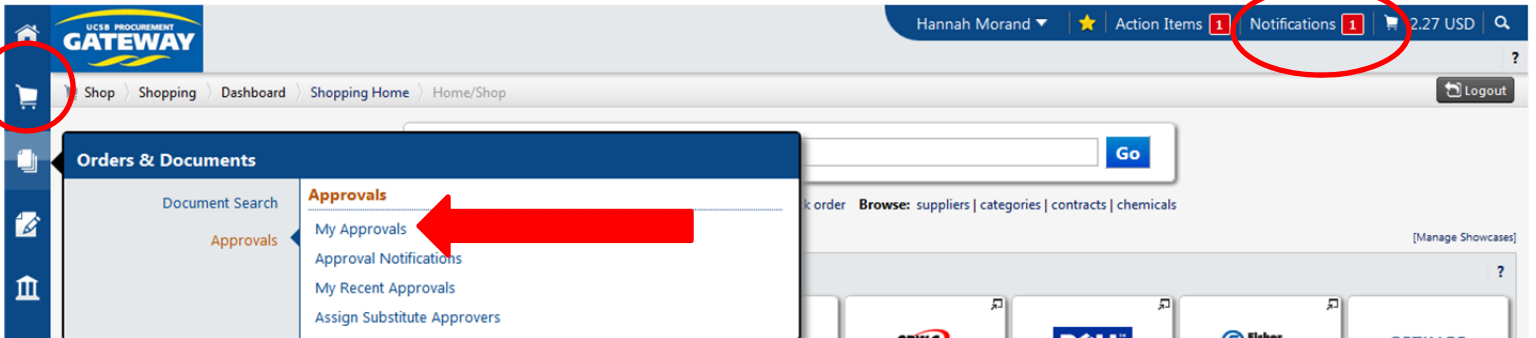


INTRODUCTION

- Account Approvers are designated by each department’s Department Purchasing Administrator in the Gateway Management Console. They have been given this role as they have signature authority over a particular account(s) or have been delegated authority over a particular account(s).
- Account Approvers can be assigned one or all of the following approval limits:
 - Under \$500
 - \$500 - \$2,500
 - \$2,500 - \$5,000
 - \$5,000 - \$10,000
 - \$10,000 - \$25,000
 - Over \$25,000

HOW TO APPROVE – LOGGING INTO THE SYSTEM

- When there is a new requisition needing review and approval, Account Approvers will receive an email notifying them of the new submission. The email will be automated from the system (help@gateway.procurement.ucsb.edu) and will be titled “New Pending Approval for Requisition...”
 - The body of the email will include all the details about the order (vendor, account/fund, items, total) for you to review.
- Scroll to the bottom of the email and find a link that says “Click here to view the document in your organization’s site”.
 - Clicking this link will bring you directly into Gateway if you are already logged in. Otherwise, it will bring you to a log-in page. Simply enter in your UCSB Net ID if you need to log in.
- If logging in does not automatically redirect you to your approvals page, simply select the “stack of paper” icon on the left hand side of the screen. Then select “Approvals” > “My Approvals”.
- The Phoenix Interface will also leave notifications for pending approvals in your Notification bar at the top of the screen. Users can click the Notification bar and follow the links directly to the pending requisitions there as well.



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- This will bring access to your approvals folder(s), which will list all pending requisitions needing your approval.

The screenshot shows the 'My Approvals' page in Gateway. The left sidebar contains a 'Filter My Approvals' section with options for 'Date Range' (All Dates) and 'Folders' (Vendor Blanket, Campus Purchasing Non-Enabled, My PR Approvals, etc.). A red arrow points to this section. The main area displays a list of requisitions under 'My PR Approvals [4 results]', including items like 'Campus Procurement Ad Hoc 2: Insurance' and 'Campus Purchasing Non-Enabled'.

- Click the requisition number on the left hand side to access the order to review.

The screenshot shows a detailed view of a requisition. The requisition number '46191298' is circled in red. The table below shows details for two requisitions:

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
46191298	BAY ALARM COMPANY	Calli Price	12/20/2013 9:56 AM	Heidi Poley	1,802.00 USD	Approve
45676822	SSD SYSTEMS	Calli Price	12/12/2013 4:14 PM	Diana Russell	10,000.00 USD	Approve

- Since there can be more than one Account Approver on a funding source, it is important to “Assign” the requisition to yourself before it can approved. This should be done in the “Available Actions” drop down menu on the right hand side of the order.

The screenshot shows the 'Available Actions' dropdown menu for a requisition. A red arrow points to the dropdown, and a red circle highlights the 'Assign to myself' option. The menu includes options like 'Add Comment/Attach Files', 'Add Notes to History', 'Assign to myself', 'Approve/complete step & show next', 'Approve/complete step', and 'Copy to New Cart'.

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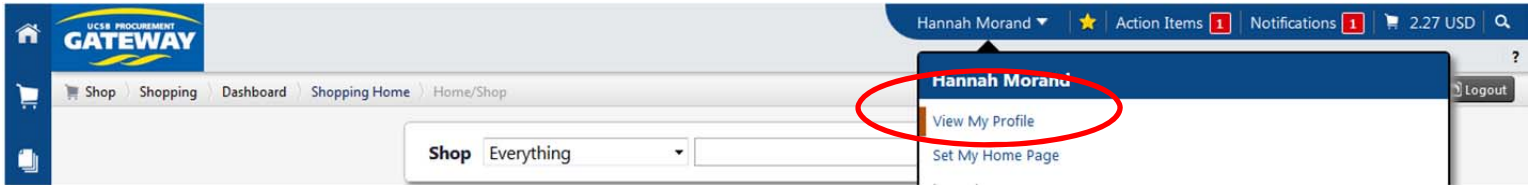
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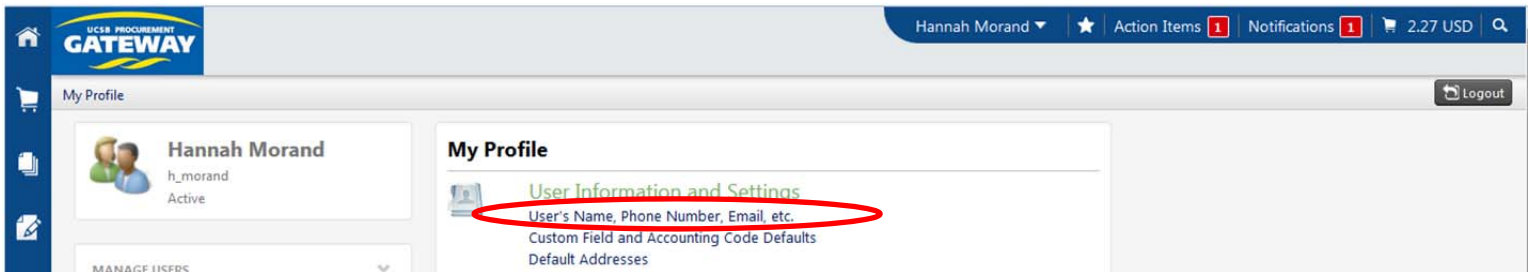
- Then from this same “Available Actions” drop down menu, you have the option to approve.
 - “Approve/complete step” – This just approves the current requisition
 - “Approve/complete & show next” – This approves the current requisition and brings up the next requisition that needs approval.
- When you have completed your approvals, it will bring you to a page that says “No Documents Found”. This simply means that all of your approvals are complete and there are no more requisitions that require your attention.

HOW TO APPROVE – SETTING UP AN APPROVE VIA EMAIL PIN

- In order to be able to approve directly from an email you will first need to modify your profile in Gateway.
- Log into Gateway using your UCSB Net ID - <https://gateway.procurement.ucsb.edu>
- Select your name from the top right hand side of the screen. This will allow you to “View My Profile”.



- Under “User Information and Settings”, access the “User’s Name, Phone Number, Email, etc.” link.

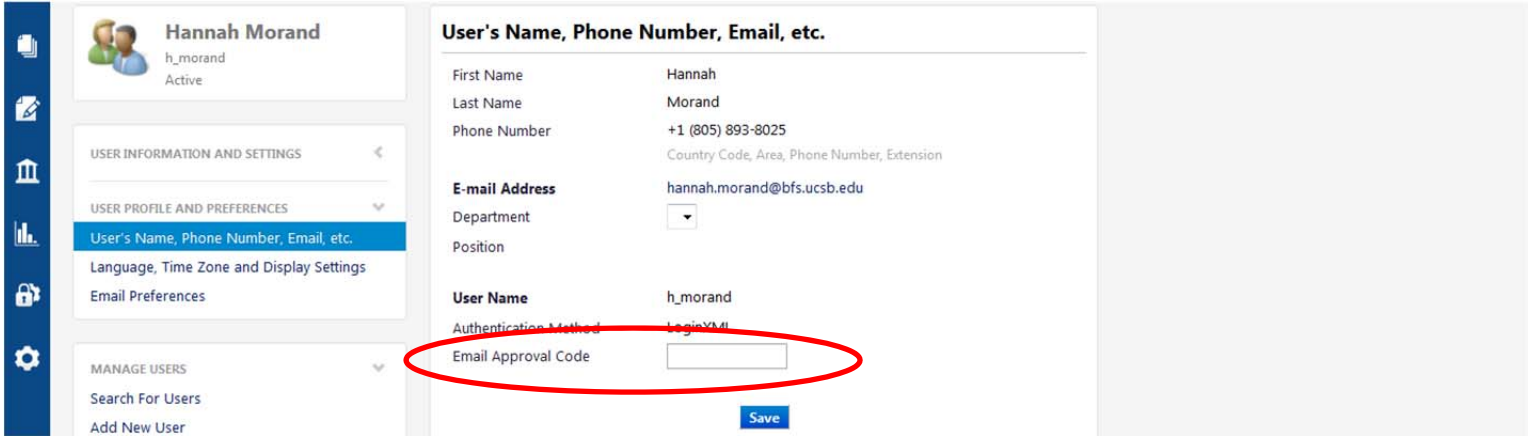


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- In the “Email Approval Code” section, enter a 4-digit numerical code.




The screenshot shows the user profile page for Hannah Morand. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options: 'USER INFORMATION AND SETTINGS', 'USER PROFILE AND PREFERENCES', and 'MANAGE USERS'. The main content area is titled 'User's Name, Phone Number, Email, etc.' and contains the following fields: First Name (Hannah), Last Name (Morand), Phone Number (+1 (805) 893-8025), E-mail Address (hannah.morand@bfs.ucsb.edu), Department (dropdown), Position (dropdown), User Name (h_morand), Authentication Method (Login/2FA), and Email Approval Code (input field). The 'Email Approval Code' field is circled in red. A 'Save' button is located at the bottom right of the main content area.

- Hit Save.
- The next time that you receive an email from the system notifying you of a pending requisition for approval, you will now see in the Accounting Codes section:

Ready to approve, reject or assign this document to yourself? [Take Action](#)

- Click the “Take Action” button, which will open a small browser window allowing you to take action on the requisition without logging into the system. It will look like this:



The screenshot shows a dialog box titled 'University of California, Santa Barbara'. It contains the following information: Requisition (32972063), Status (Pending), Shopper (Jaclin Spier), and Approver (Michael Moore). Below this information, there is a section titled 'Select an action:' with four radio button options: 'Approve' (selected), 'Assign to myself', 'Reject', and 'Return to Requisitioner'. There is also a 'Comment (Optional):' section with a text input field. At the bottom, there is a section titled 'Enter your approval code to submit:' with a 4-digit masked input field and a 'Submit' button.

- Select an action (approve, assign to myself, reject or return) and enter in your approval code. Once you have done that, press “submit” to complete your work.