

## 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

*(If you want to be able to approve requisitions directly from email without having to log in to Gateway each time, skip to the section called "How to Approve - Setting Up an Approve Via Email Pin" further down in this document.)*

- 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 ([gatewayhelp@bfs.ucsb.edu](mailto:gatewayhelp@bfs.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 "View Requisition Approvals".
  - 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 and password if you need to log in.
- If logging in does not automatically redirect you to your approvals page, select the "paper" icon on the left hand side of the screen. Then select "Approvals" > "Requisitions to Approve".
- The Interface will also leave notifications for pending approvals in your Notifications at the top of the screen (indicated by a bell in the upper right corner). Users can click the Notification bell and follow the links directly to the pending requisitions there as well.

The screenshot shows the Gateway Shop interface. At the top, it says "UC SANTA BARBARA | GATEWAY" and "GATEWAY SHOP". Below this is a search bar and a list of menu items: Orders, Search, My Orders, Approvals, and a bell icon for notifications. The "Approvals" menu is expanded, showing a list of options: "Requisitions to Approve", "Change Requests to Approve", "Requisitions Recently Approved By Me", "Change Requests Recently Approved By ...", and "Approval Notifications". A red arrow points to the "Requisitions to Approve" link. Below the menu, there is a notification about COVID-19 related expenses and a note about product availability.

## How to Approve in Gateway – For Account Approvers



- This will bring you access to your approvals folder(s), which will list all pending requisitions needing your approval. Click on the "My PR Approvals" folder to expand the requisitions needing approval.

The screenshot shows the 'My Approvals' page in Gateway. The 'Group Results By' is set to 'Folders'. The 'Filtered By' section shows 'Type: Requisition' and 'Date Range: All Dates'. The 'Filter My Approvals' section shows 'Date Range: All Dates'. The 'Folders' section lists various folders, with 'My PR Approvals (4 results)' highlighted by a red circle. Other folders include 'Campus Procurement Ad Hoc 2: Insurance: (All Values) [1 result]', 'Campus Procurement Ad Hoc 2: Procurement Supervisor: (All Values) [1 result]', 'Campus Purchasing Non-Enabled [5 results]', 'Campus Purchasing Review [3 results]', 'Campus Purchasing Supplier Review [2 results]', 'Campus Purchasing Supplier Class Review [2 results]', 'Dollar and Adhoc Trigger [1 result]', 'Federal Fund Approval [2 results]', and 'Vendor Blanket [8 results]'. The 'Total Results Found' is 25, and the 'Sort by' is 'Submit date newest first'.

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

The screenshot shows the 'My Approvals' page in Gateway, displaying a list of requisitions. The 'Group Results By' is set to 'Folders'. The 'Filtered By' section shows 'Type: Requisition' and 'Date Range: All Dates'. The 'Filter My Approvals' section shows 'Date Range: All Dates'. The 'Folders' section lists various folders, with 'My PR Approvals (4 results)' highlighted by a red circle. The requisition number '46191298' is highlighted with a red circle. The requisition details are as follows:

| 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 requisition details page in Gateway. The 'Available Actions' dropdown menu is open, and the 'Assign to myself' option is highlighted with a red circle. A red arrow points to the dropdown menu. The requisition details are as follows:

| Order Info                          | Addresses                            | Approvals  |
|-------------------------------------|--------------------------------------|--|
| Status: Pending<br>Account Approval | Bill To: Accounts Payable Department | Additional Approvals: Ad-Hoc 1 (Dept Buyer Pre) no value |

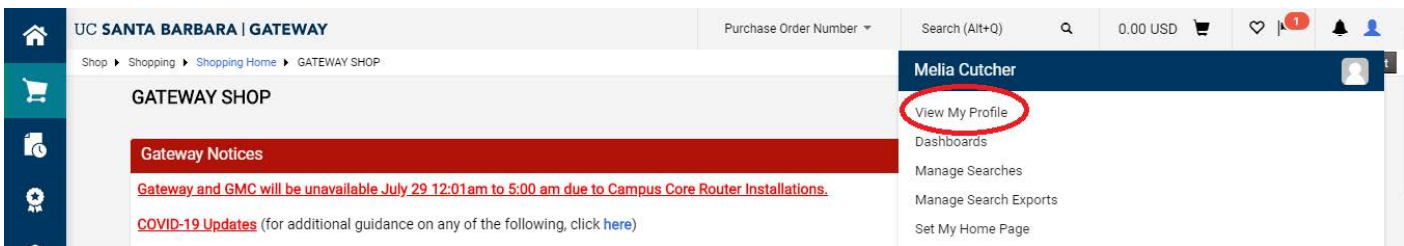
## How to Approve in Gateway – For Account Approvers



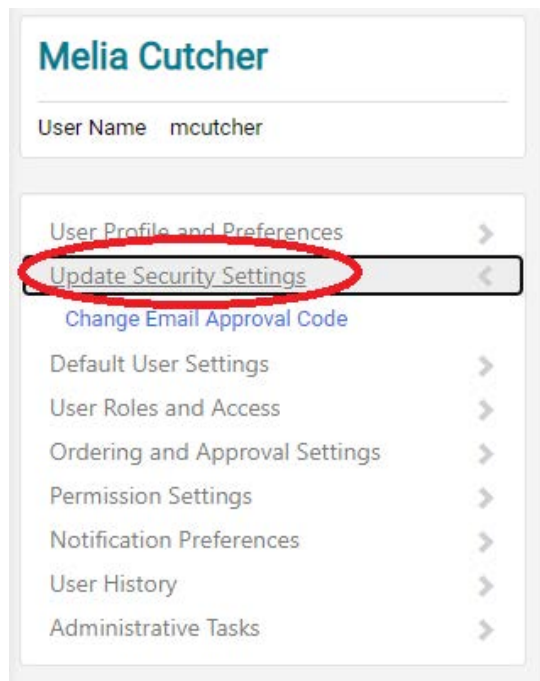
- Then from this same “Available Actions” drop down menu, you have the option to approve.
  - “Approve/complete step” – This just approves the current requisition
  - “Approve/complete & show next” – This approves the current requisition and brings up the next requisition that needs approval.
- When 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 the user icon from the top right hand side of the screen. This will allow you to “View My Profile”.



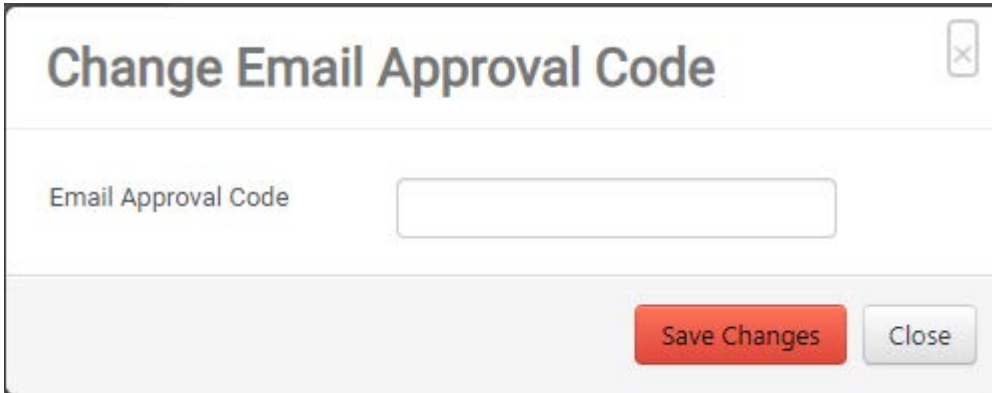
- Under “Update Security Settings”, access the “Change Email Approval Code” link.



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



- Hit Save Changes.
- 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 within the body of the email:

**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:



- 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.