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

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

  ∘ 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.
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.

Note: In ERI, only PIs can approve using a PIN

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

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:

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.