GATEWAY TRAINING GUIDE

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 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.