GATEWAY DESK MANUAL

PROFILE

January 2014

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Homepage Features:

- With Phoenix, users will now have access to some quick links in the system directly accessible from their homepage. These include:
  
  o A quick link of a user’s recent requisitions, recent purchase orders and any pending orders. This is found by clicking your name at the top of the screen.
  
  o Items needing your attention will appear in the “Action Item” section at the top of the screen. You can click this link to be directed immediately to the items needing your attention, rather than performing searches.
  
  o The “Notification” link is also available at the top right hand side of the screen. Here, users will find that they receive notifications for pending orders and approvals.

- To access your profile at any time, simply click on the profile link at the top of the page by accessing your name.
  
  o Click “View My Profile” to gain access to the menu.
Quick Profile Tips for Phoenix

- Once on this screen, you can view and/or update your personal user settings from the following links:
  - User Information and Settings
  - User Access and Security

- Email Preferences and Notifications:
  - To review and update, go to your User Information and Settings Tab and select “Email Preferences”.
  - This will bring up your preset preferences which you can review and adjust according to your preferences.
  - With Phoenix, many settings can be adjusted between Email, Notification or Both.
GATEWAY TRAINING GUIDE

Saving Account Code Favorites

- Access your name at the top, right hand side of the screen and select “View My Profile”

- Under the “User Information and Settings” Header, select “Custom Field and Accounting Code Defaults”

- Access the “Code Favorite” tab and select “Add” to create a new Account Code Favorite.

- Enter the information for the account code that you wish to save.
  - You must give the account code a nickname.
  - You have the option to make the string your default.
  - Under the department field you must click “select from all values” and search for your department code. (If you just type your department code in the box you will be unable to choose an account string)
  - Under the account code field, you must click “select from all values” once again.
    - Smaller departments with less than 50 account strings enabled will have a drop down menu to choose from.
    - Larger departments will more than 50 account strings enabled will have a search bar to utilize. Those departments will need to search using asterisks around their search terms.
      - For example: *8-123456-00000* or *ABCDE*
  - Once all of these values are selected, click “Save”. You do not need to worry about the Sub Account and Cost Type Fields.