How to Approve an Order in Gateway (for Account Approvers)

You have been assigned the Account Approver role in Gateway because:

a) You are the PI on funding and therefore have blanket authority by default to approve all transactions at any dollar level on your funds.

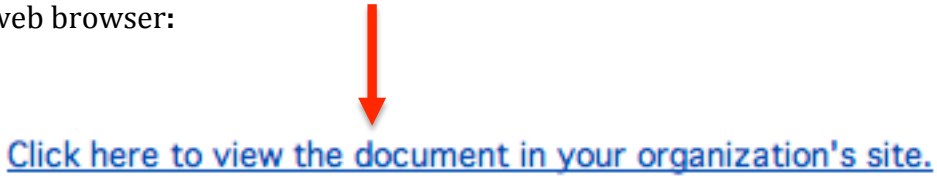
--OR--

b) A PI or fund owner has delegated account Approver Authority (up to $2,500) to you on one or more of his/her funds.

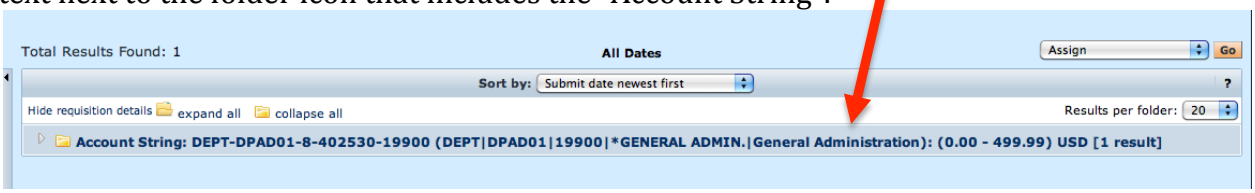
Following are the steps for approving an order within the Gateway system. *Alternatively, if you want to be able to approve requisitions directly from email (including from a smart phone or tablet) without having to log in to Gateway each time, skip to the section called "Setting Up to Approve From Email" further down in this document.*

1. You will receive an email notification each time a requisition is submitted to Gateway where the fund source is one that you are an assigned Account Approver. The email will come from help@gateway.procurement.ucsb.edu (be sure you allow this address through any spam filters you have set up on your email), with the Subject "New Pending Approval for Requisition…"

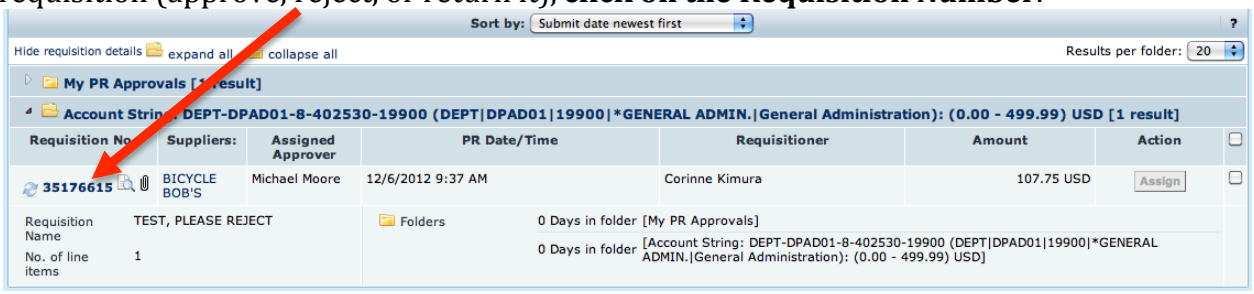
2. The body of the email will include all the details about the order (supplier, order requester, account/fund, items, total) for you to review. Scroll to the bottom of the email and **click on the link that looks like this** which will launch Gateway in your web browser**:**



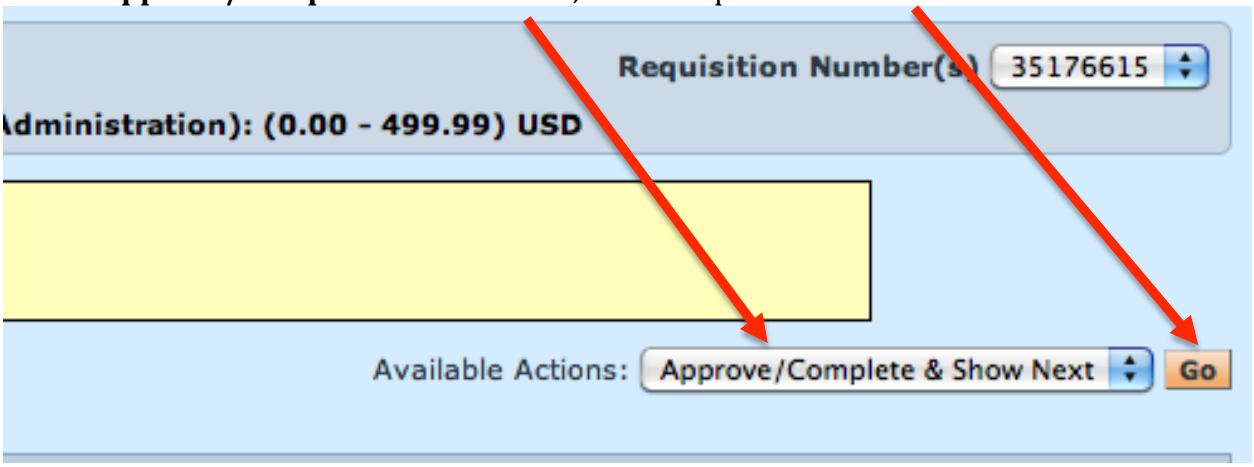
3. If you're not already logged in to Gateway, you will need to **log in using your UCSB Net ID and password**. After you log in, you should arrive at your Approvals page within Gateway, which will look something like this. The requisition(s) to approve is within the approval folder. To open the approval folder, **Click on the link** (the bold text next to the folder icon that includes the "Account String".



4. From within the approval folder, you will now see header info on the requisition(s) that you can approve. To bring up the requisition details, and take action on the requisition (approve, reject, or return it), **click on the Requisition Number**.



5. Now you should be able to see all the requisition details. Review the requisition (account, amount, items, etc), and then select an action from the "Available Actions:" dropdown at the upper right corner of the requisition. To approve the requisition, choose **Approve/Complete & Show Next**, and then press the **"Go" button**.



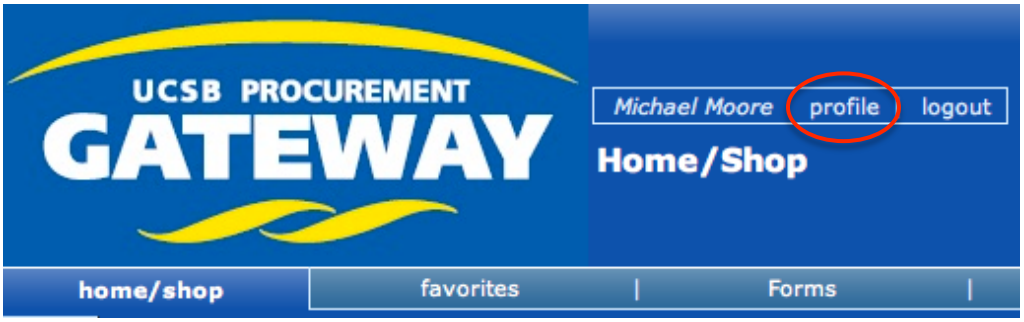
You also have the option to ***return*** the requisition if you need the requester to change account details, or line details, or ***reject*** the requisition if you do not approve of the order. To return or reject the requisition, click on the Available Actions dropdown and choose "Return" or "Reject".

Setting Up to Approve from Email

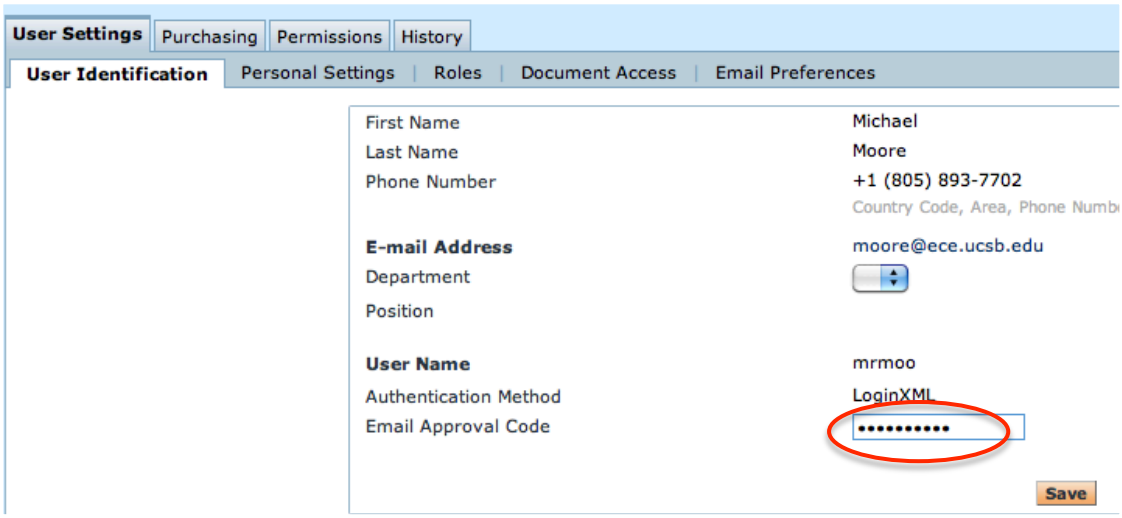
In order to be able to Account Approve directly from the "New Pending Approval for Requisition#..." email you will first need to modify your profile in Gateway to allow approval from email per the following steps:

1. Log in to Gateway at https://gateway.procurement.ucsb.edu using your UCSB Net ID and password.

2. Click on the Profile link in the header.



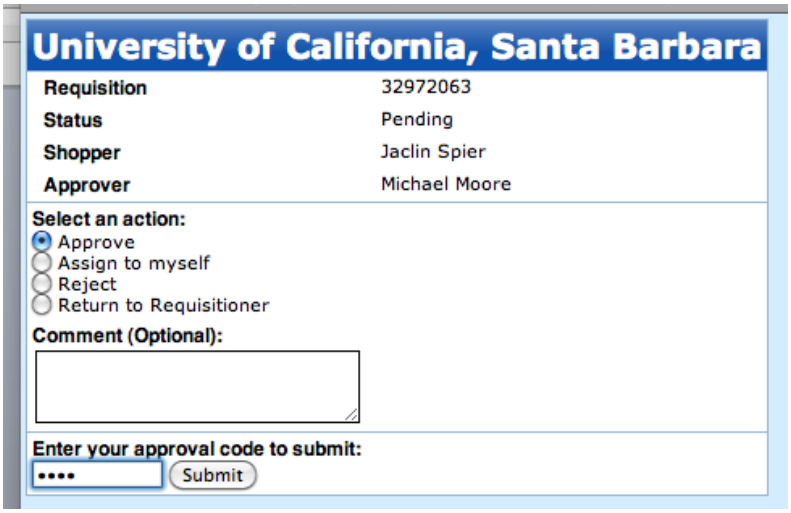
3. In the User Identification tab under the User Settings tab, enter a 4 digit security code (any 4-digit code that you will remember) in the Email Approval Field



4. Press Save. Now any future approval emails you receive will have the option to "Take Action" from the body of the email as detailed in the following steps.

5. When you receive a "New Pending Approval for Requisition#..." email, review the details of the order (account, amount, items). In the Accounting Codes section of the email, you'll come to this:

6. Click the "Take Action" button which will open a small browser window that looks like this:



7. Select an action (Approve, Reject, Return), put in a Comment if you want, Enter your 4-digit code that you set up in Step 3 above, and press Submit. Viola, you're done!

Notes on managing approvals if there is more than one Account Approver

In many cases, you may have more than one person set up to approve on a fund source. For example, the PI may be set up as an approver for all dollar values, but may delegate to one of his researchers the authority to approve up to $2,500. In this case, if an order was submitted for $125 on the PI's fund source, both the PI and his/her researcher would receive notification that an approval is pending. So who should go in and approve? That's really up to the PI to communicate to his/her researcher how they want this to be handled. Some PIs may choose to have the researcher approve all orders under $2,500, and the PI would only log in for order over $2,500. Other PIs may want to approve on all orders, and only want the researcher to approve when the PI is not available. The Gateway system won't control that, so it's up to each research group to communicate on how they want to handle approvals if more than one person is set up as an approver.