



Visit Gateway at <https://gateway.ifionline.org/login.aspx>

Gateway User Guide

Adding, Deleting, and Connecting Funds and Departments

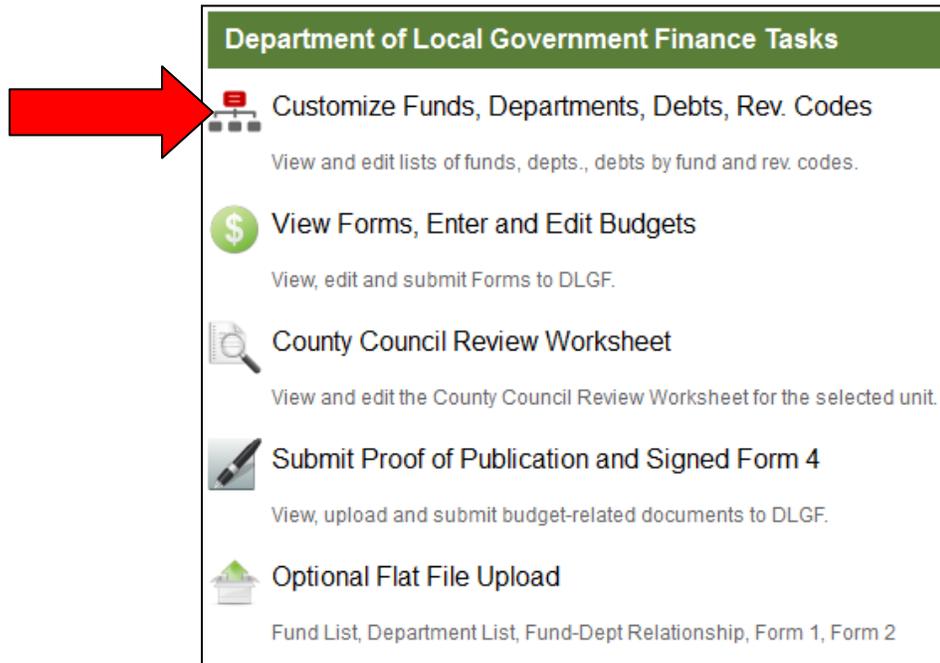


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Overview

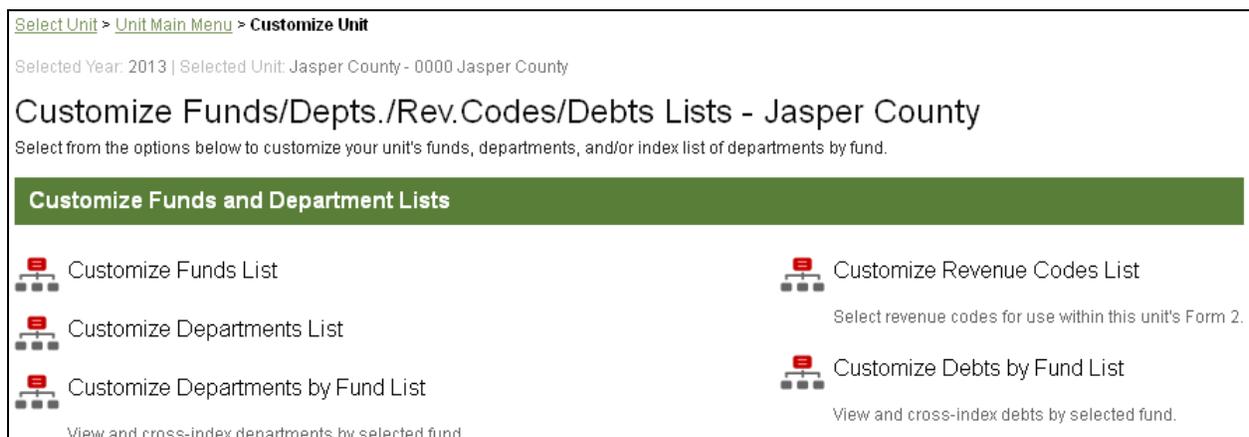
This portion of Gateway allows users to set up the lists that will help guide the completion of the budget forms. Specifically, users will set up a list of funds, a list of departments, and then establish the relationship between the departments and the funds. This portion may be accessed from the Unit Main Menu by clicking “Customize Funds, Departments, Debts, Rev. Codes.”



Department of Local Government Finance Tasks

-  **Customize Funds, Departments, Debts, Rev. Codes**
View and edit lists of funds, depts., debts by fund and rev. codes.
-  **View Forms, Enter and Edit Budgets**
View, edit and submit Forms to DLGF.
-  **County Council Review Worksheet**
View and edit the County Council Review Worksheet for the selected unit.
-  **Submit Proof of Publication and Signed Form 4**
View, upload and submit budget-related documents to DLGF.
-  **Optional Flat File Upload**
Fund List, Department List, Fund-Dept Relationship, Form 1, Form 2

This leads to the Customize Unit page that will be used to navigate between the available tools. Please note if a unit has previously completed a budget in Gateway the user should notice its funds, departments, and fund/department linkages with data entered in the previous year, carry over into this year's budget.



Select Unit > Unit Main Menu > **Customize Unit**

Selected Year: 2013 | Selected Unit: Jasper County - 0000 Jasper County

Customize Funds/Depts./Rev.Codes/Debts Lists - Jasper County

Select from the options below to customize your unit's funds, departments, and/or index list of departments by fund.

Customize Funds and Department Lists

-  **Customize Funds List**
-  **Customize Departments List**
-  **Customize Departments by Fund List**
View and cross-index departments by selected fund.
-  **Customize Revenue Codes List**
Select revenue codes for use within this unit's Form 2.
-  **Customize Debts by Fund List**
View and cross-index debts by selected fund.

Customize Funds

To customize a fund, click on the link that says “Customize Funds List.”

Customize Funds and Department Lists

 [Customize Funds List](#) 

 [Customize Departments List](#)

 [Customize Departments by Fund List](#)
View and cross-index departments by selected fund.

 [Customize Revenue Codes List](#)
Select revenue codes for use within this unit's Form 2.

 [Customize Debts by Fund List](#)
View and cross-index debts by selected fund.

In most cases, funds from last year roll over to this year. This list should be reviewed and any new funds to the unit since the previous year should be added. Once added, the fund list will continue to roll over in future years.

Fund Code	Fund Name Link	Remove Fund
0101	General	✗
0180	Debt Service	✗
0181	Debt Payment	✗
0702	Highway	✗
0706	Local Road & Street	✗
0801	Health	✗
0890	Cumulative Hospital	✗
1101	Emergency Ambulance/Med Services - Fire	✗
1192	Cumulative Jail	✗
2391	Cumulative Capital Development	✗
<div style="background-color: #ccc; padding: 5px; display: inline-block; margin-bottom: 5px;">Add a Fund</div> <div style="background-color: #ccc; padding: 5px; display: inline-block;">Add a New Home Ruled Fund</div>		

Adding a Fund to the Current List

Gateway contains a list of funds with associated codes, based on the codes used to process budget orders. When adding a fund, it is best to use this list when the desired fund is available. To add a fund from this list, simply click on “Add a Fund.”

Fund Code	Fund Name Link	Remove Fund
0101	General	X
0180	Debt Service	X
0181	Debt Payment	X
0702	Highway	X
0706	Local Road & Street	X
0801	Health	X
0890	Cumulative Hospital	X
1101	Emergency Ambulance/Med Services - Fire	X
1192	Cumulative Jail	X
2391	Cumulative Capital Development	X



This will bring up a window containing a drop-down menu. Scroll through the list to find the appropriate fund.

Add a Fund

Fund Code:

0005 – CASINO/RIVERBOAT

0005 – CASINO/RIVERBOAT

0021 – REFERENDUM FUND - EXEMPT OPERATING

0061 – RAINY DAY

0075 – COIT SPECIAL DISTRIBUTION

0102 – ELECTION/REGISTRATION

0104 – REPAIR & REPLACEMENT

0107 – PROPERTY MAINTENANCE

0113 – NONREVERTING

0123 – 2006 REASSESSMENT

0124 – 2015 REASSESSMENT

0182 – BOND #2

0183 – BOND #3

0184 – BOND #4

0185 – BOND #5

0186 – SCHOOL PENSION DEBT

0187 – REFERENDUM DEBT FUND - EXEMPT CAPITAL

0188 – EXEMPT DEBT - LAKE AND ST. JOSEPH COUNTIES ONLY

0189 – EXEMPT PENSION DEBT - LAKE AND ST. JOSEPH COUNTIES

0191 – CUMULATIVE VOTING MACHINE

0203 – SELF INSURANCE

After selecting the correct fund, click the button that says “Add New Fund.” The fund will now be part of the list.

The drop-down menu is sorted numerically by code. For convenience, the Department has placed the code list in Excel format on the Department's website at http://in.gov/dlgf/files/2014_Gateway_Budget_Code_Lists.xls. This file may be used to sort the lists alphabetically or use the "Find" feature (Ctrl + F) of Excel to locate the appropriate codes. This will make it easier to find the funds needed in the drop-down menu on Gateway. Another option for locating fund codes is to reference the 1782 notice or budget order from the previous year. These documents will contain the codes for each fund.

Adding a Home-Ruled Fund

There may be funds not part of the preset list. These are referred to as home-ruled funds. To add one of these to the list, click the link that says "Add a New Home-Ruled Fund." This will bring up a window to help create the fund.

Fund Code	Fund Name Link	Remove Fund
0101	General	X
0180	Debt Service	X
0181	Debt Payment	X
0702	Highway	X
0706	Local Road & Street	X
0801	Health	X
0890	Cumulative Hospital	X
1101	Emergency Ambulance/Med Services - Fire	X
1192	Cumulative Jail	X
2391	Cumulative Capital Development	X

First, enter a fund description. This is a fully customizable name.

The screenshot shows a web form titled "Add a Fund". It has a blue header bar with the title. Below the header, there is a text input field for "Fund Description:" which is currently empty. A red arrow points to this field from the right. Below the text field is a dropdown menu for "Fund Code:" with "9500" selected. At the bottom of the form are two buttons: "Cancel" and "Add New HR Fund".

Once the fund description is entered, select a fund code of of from the drop down list.

This screenshot shows the same "Add a Fund" form. The "Fund Description:" field now contains the text "Demo Home Ruled Fund". The "Fund Code:" dropdown menu is open, showing a list of fund codes from 9500 to 9519. The code "9506" is highlighted in blue, and a red arrow points to it from the left. The "Cancel" and "Add New HR Fund" buttons are still visible below the dropdown.

Once a description is entered and selected fund code selected, click "Add New HR Fund."

Add a Fund

Fund Description:

Fund Code:

To return to the Customize Unit Menu select “Customize Unit” at the top of the page.

Home About Account Settings Help Logout

Select Unit > Unit Main Menu > Customize Unit > Customize Funds

Selected Year: 2013 | Selected Unit: Jasper County - 0000 Jasper County

Customize Departments

To customize the unit’s department list, click on the link “Customize Departments List.” **If your unit does not have departments, you may skip this step.** Schools will use the departments in place of their program accounts.

Customize Funds and Department Lists

- Customize Funds List
- Customize Departments List
- Customize Departments by Fund List
- Customize Revenue Codes List
Select revenue codes for use within this unit's Form 2.
- Customize Debts by Fund List
View and cross-index debts by selected fund.

View and cross-index departments by selected fund.

Gateway will roll over any departments entered in a previous year. When logging in to the budget application for the current year, review the list of departments as edits may be needed, such as departments that need to be added or deleted. Please note that any newly created departments will need to be linked to a fund. The Customizing Departments by Fund List section of this guide further outlines the process.

Departments List for Jasper County

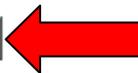
Department Code	Department Name	Remove Dept.
0002	County Auditor	

Adding a Department from the Preset List

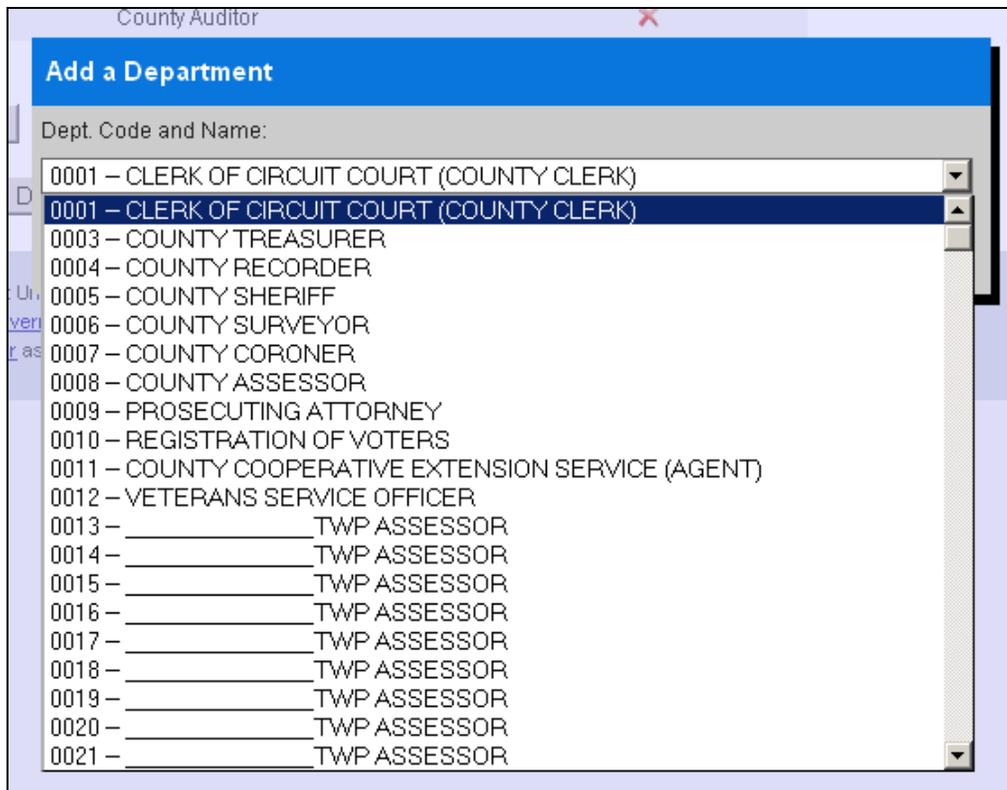
Gateway contains a preset list of departments with associated codes based on past submissions statewide. When adding a department, it is best to use this list as long as the department name is on the list. To add a department from this list, simply click on "Add a New Department."

Departments List for Jasper County

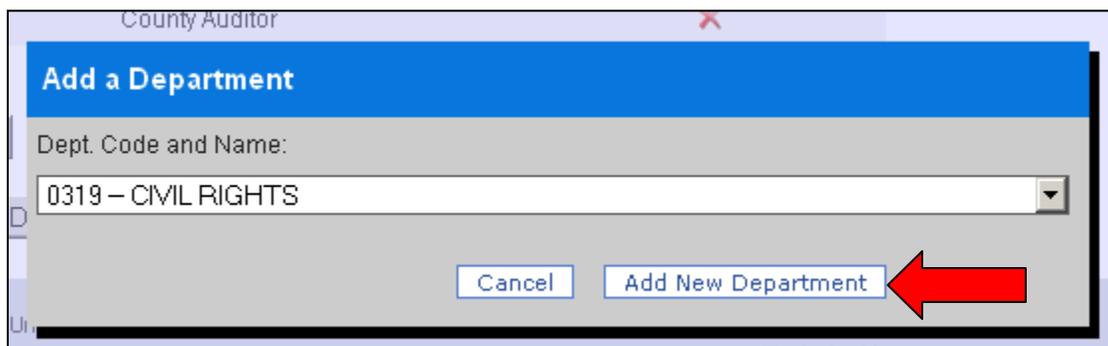
Department Code	Department Name	Remove Dept.
0002	County Auditor	



This will bring up a window containing a drop-down menu that includes a list of departments.



Upon selecting the desired department, click the button that says “Add New Department.” The department will now be part of the list on the “Department” screen.



The drop-down menu is sorted numerically by code. For your convenience, the Department has placed the code list in Excel format on the Department’s website at http://in.gov/dlgf/files/2014_Gateway_Budget_Code_Lists.xls. This file may be used to sort the lists alphabetically or use the “find” feature of Excel to locate the appropriate codes. This will make it easier to find the departments needed in the drop-down menu in Gateway.

[Adding a Home-Ruled Department](#)

A unit may have departments that are not part of the pre-set list. These are referred to as home-ruled departments. To add one of these to the list, click the link that says “Add a New Home-Ruled Department.” This will bring up a window to help create the department.

Departments List for Jasper County

Department Code	Department Name	Remove Dept.
0002	County Auditor	

[Add a New Department](#)

[Add a New Home Ruled Department](#)

First, enter a department description that may be fully customized to the unit.

Dept. Description:

Dept. Code and Name: 9600

The next step is to select the department code. Gateway will generate a set of numbers from which to choose. These will be from 9600 to 9699. These codes have been set aside for home-ruled departments. Gateway will remove codes from the list once they have been used.

Add a New Home Ruled Department

Dept. Description:

Dept. Code and Name:

- 9600
- 9601
- 9602
- 9603
- 9604
- 9605
- 9606
- 9607
- 9608
- 9609
- 9610
- 9611
- 9612
- 9613
- 9614
- 9615
- 9616
- 9617
- 9618
- 9619

Select the desired code, and then click “Add New Department.”

Add a New Home Ruled Department

Dept. Description:

Dept. Code and Name:

Customize Departments by Fund List

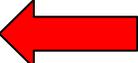
For Gateway to organize budget forms, it must be specified whether a fund is departmentalized and, if so, which departments are associated with the fund. To perform this task, click on the link that says “Customize Departments by Fund List.” **If your unit does not have departments, you may skip this step.**

All fund/department linkages in which data was entered last year should roll over into this year's budget.

Customize Funds and Department Lists

 [Customize Funds List](#)

 [Customize Departments List](#)

 [Customize Departments by Fund List](#) 

View and cross-index departments by selected fund.

 [Customize Revenue Codes List](#)
Select revenue codes for use within this unit's Form 2.

 [Customize Debts by Fund List](#)
View and cross-index debts by selected fund.

The Customize Department by Funds page displays the linkages between all funds and their departments, if any. If a fund has not been linked to any departments, it will read "0000-NO DEPARTMENT" as the default. The funds are listed along the left-hand side, and the departments are shown within the box to the right of the fund name.

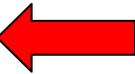
[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#) > **Customize Departments by Fund**

Selected Year: 2013 | Selected Unit: Jasper County - 0000 Jasper County

Custom Departments by Funds

Funds Descriptions	Edit Departments	Departments
0101 - GENERAL		<div style="background-color: #D9E1F2; padding: 2px;">0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK)</div> <div style="background-color: #D9E1F2; padding: 2px;">0002 - COUNTY AUDITOR</div> <div style="background-color: #D9E1F2; padding: 2px;">0008 - COUNTY ASSESSOR</div> <div style="background-color: #D9E1F2; padding: 2px;">0117 - PERSONNEL</div>
1192 - CUMULATIVE JAIL		<div style="background-color: #D9E1F2; padding: 2px;">0000 - NO DEPARTMENT</div>
0180 - DEBT SERVICE		<div style="background-color: #D9E1F2; padding: 2px;">0000 - NO DEPARTMENT</div>
0181 - DEBT PAYMENT		<div style="background-color: #D9E1F2; padding: 2px;">0000 - NO DEPARTMENT</div>

To change the fund-department relationship, click on the pencil and paper edit icon.

Custom Departments by Funds		
Funds Descriptions	Edit Departments	Departments
0101 - GENERAL	 	<ul style="list-style-type: none"> <input type="checkbox"/> 0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK) <input type="checkbox"/> 0002 - COUNTY AUDITOR <input type="checkbox"/> 0008 - COUNTY ASSESSOR <input type="checkbox"/> 0117 - PERSONNEL

This brings up a box that contains all available departments, with the current associated departments indicated by a check box. To add a new department to this fund, check the box to the left of the department name. To remove a department's association to a fund, simply uncheck the box next to the department to remove.

Custom Departments by Fund

Selected Unit: 0000 Jasper County

Selected Year: 2013

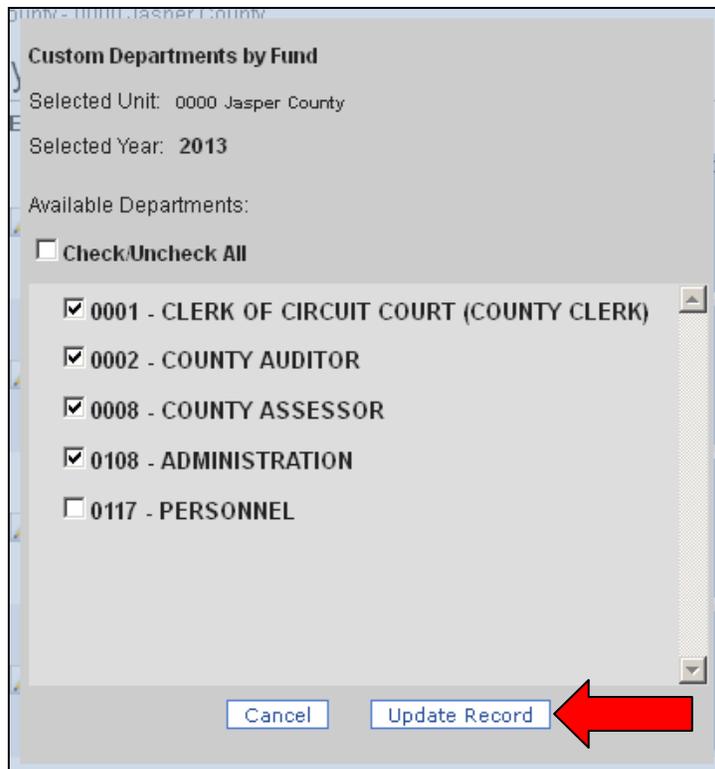
Available Departments:

Check/Uncheck All

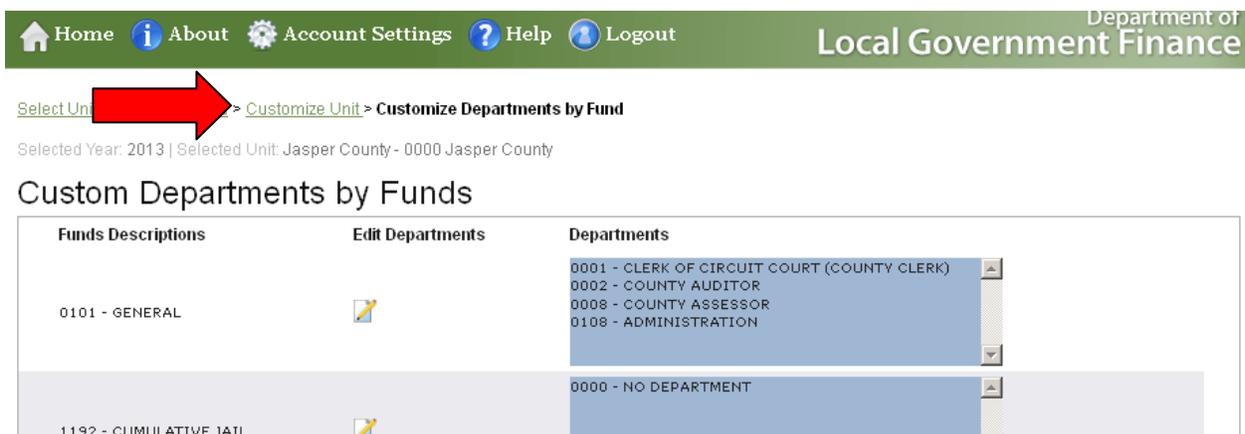
- 0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK)
- 0002 - COUNTY AUDITOR
- 0008 - COUNTY ASSESSOR
- 0108 - ADMINISTRATION
- 0117 - PERSONNEL



Click the "Update Record" button when all edits have been made.



Once all the fund-department relationships are correct, you may proceed to the next step by selecting “Customize Unit” at the top of the screen.



Congratulations! You have successfully added your funds, departments and the linkages between them. Please see our other user guides for assistance with other forms. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.