



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

Gateway User Guide

**Adding, Deleting, and
Connecting Funds and
Departments**

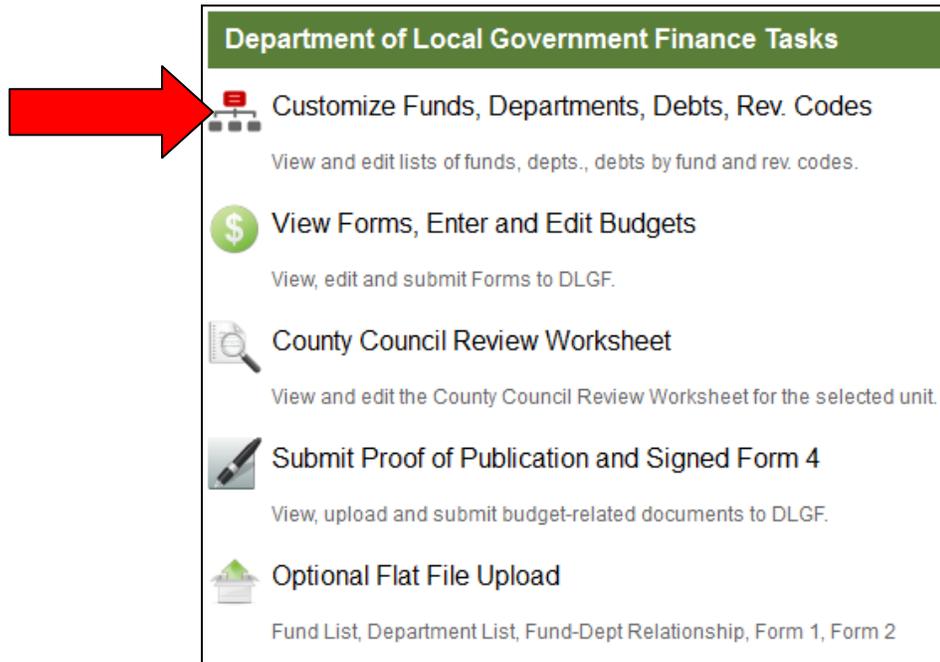


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Overview

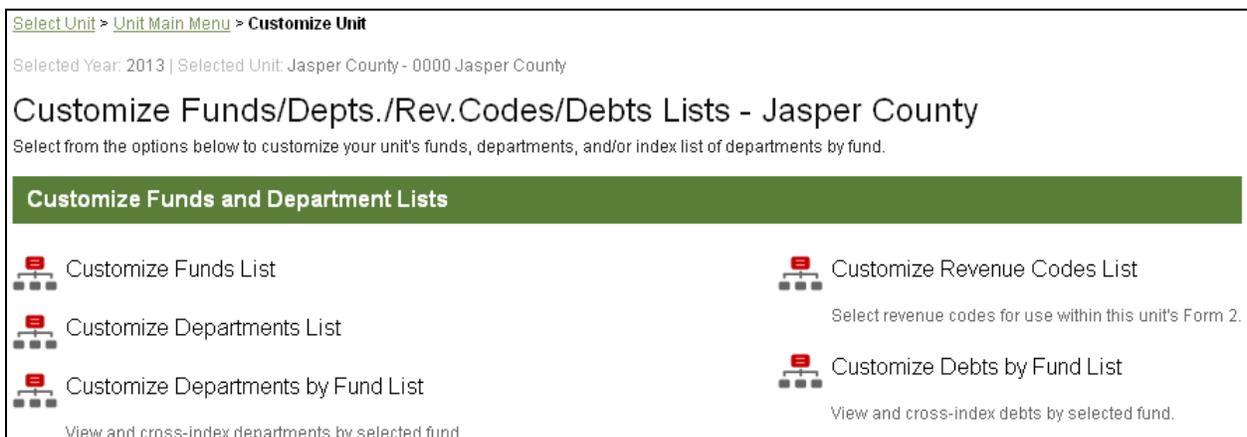
This portion of Gateway allows you to set up the lists that will help guide the completion of the budget forms. Specifically, you will set up a list of funds, a list of departments, and then establish the relationship between the departments and the funds. You may access this portion from the Unit Main 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 will take you to the Customize Unit page that will be used to navigate between the available tools. Please note that if you have previously completed a budget in Gateway you should notice your 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.

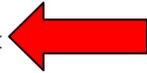
Customize Funds and Department Lists

-  **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.

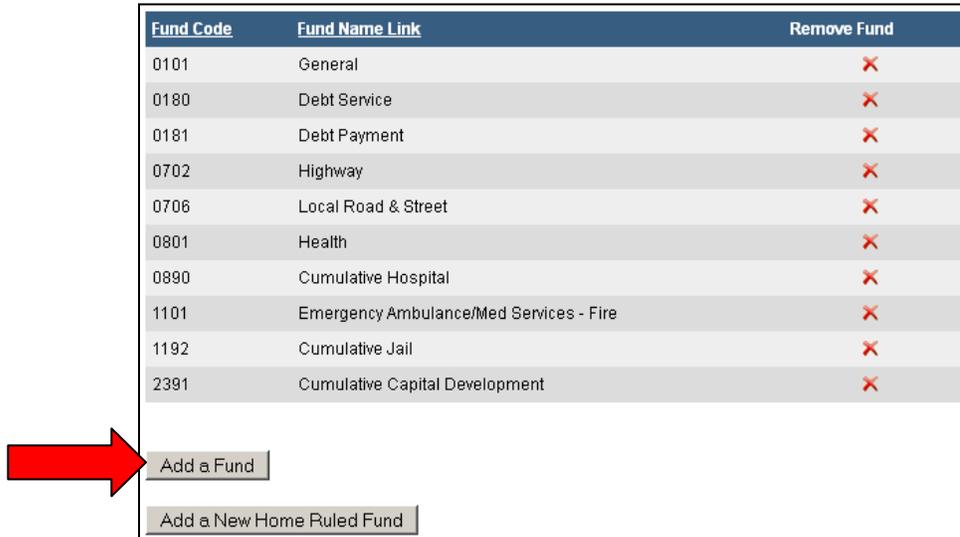
 [Customize Debts by Fund List](#)
View and cross-index debts by selected fund.

In most cases, you should notice that the funds from last year have rolled over to this year. You will want to review this list and add any additional funds your unit has added since the previous year. Once added, the fund list should continue to 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

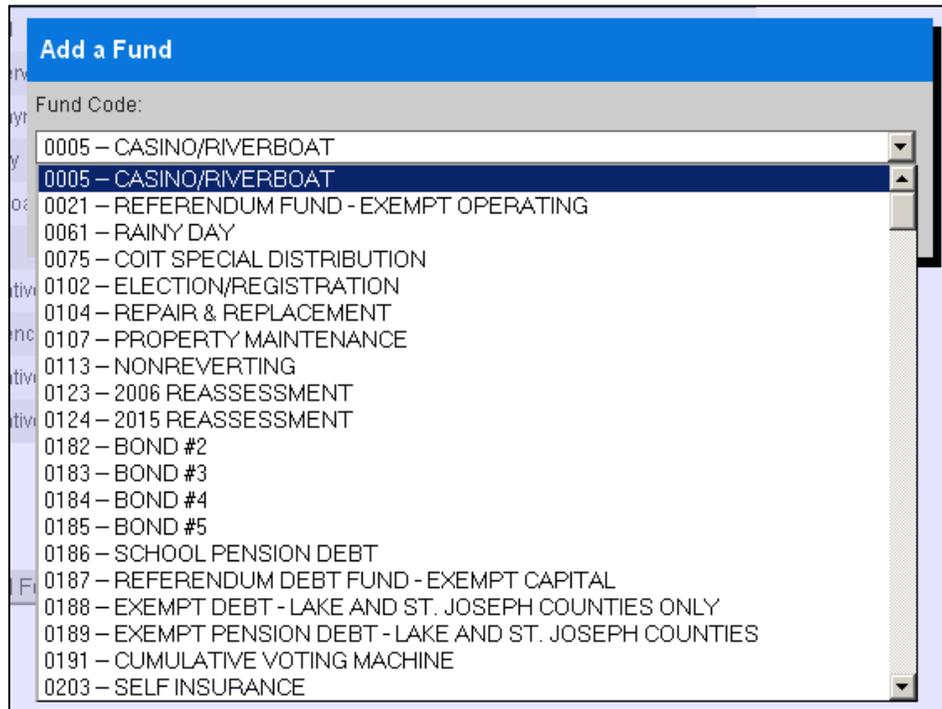
Gateway contains a list of funds with associated codes, based on the codes used to process budget orders. When adding a fund, it is best to use this list if you can find the desired fund on the list. To add a fund from this list, simply click on “Add a Fund.”



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	✗



This will bring up a window containing a drop-down menu. You may 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

Once you have selected the correct fund, click the button that says “Add New Fund.” The fund will now be part of the list.

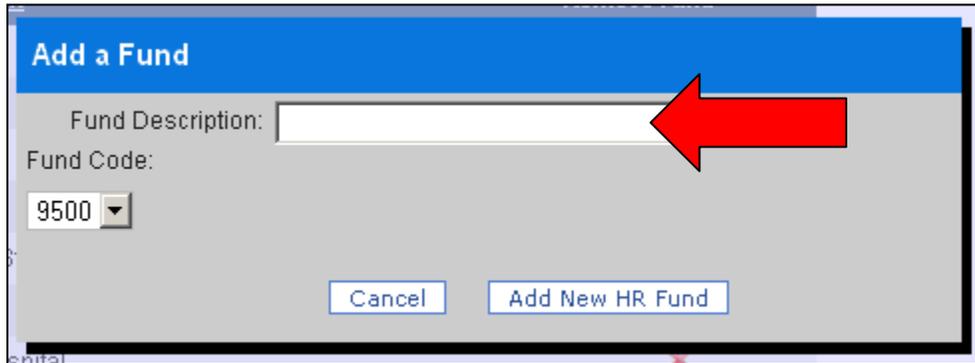
The drop-down menu is sorted numerically by code. For your convenience, we have placed the code list in Excel format on our website at http://in.gov/dlgf/files/2014_Gateway_Budget_Code_Lists.xls. You may use this file to sort the lists alphabetically or use the “Find” feature (Ctrl + F) of Excel to locate the appropriate codes. This will make it easier to find the funds you need in the drop-down menu on Gateway. Another option for locating fund codes is to reference your 1782 notice or budget order from last year. These documents will contain the codes for each fund.

Adding a Home-Ruled Fund

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

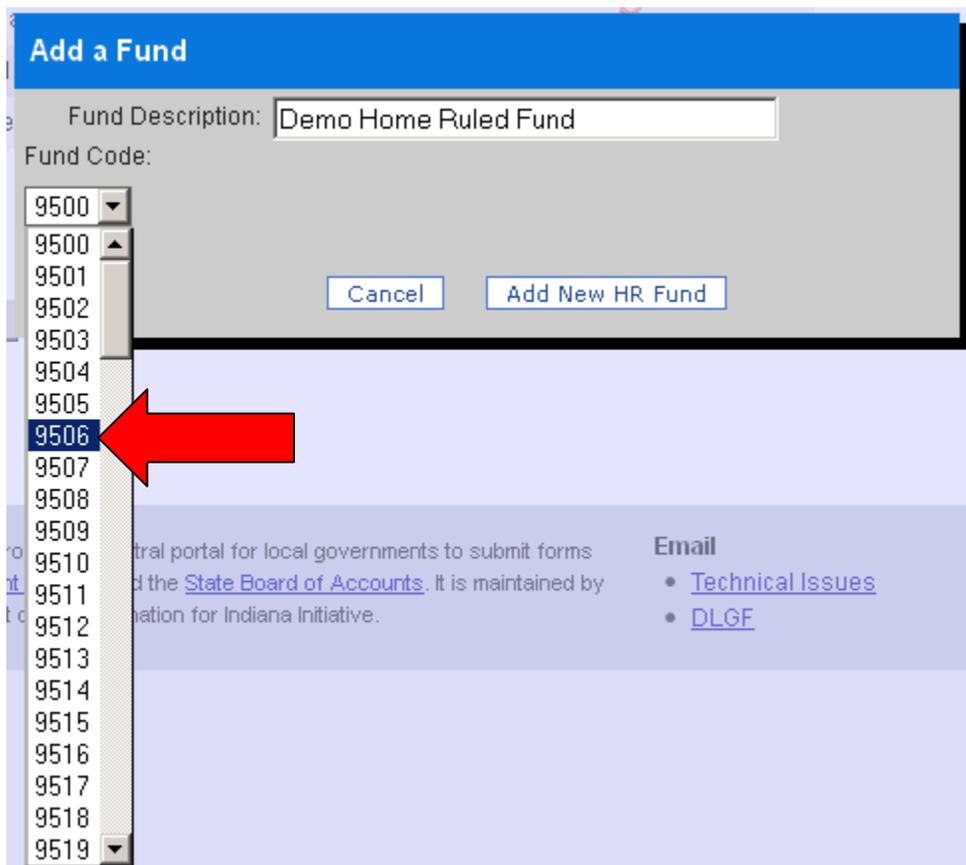
Fund Code	Fund Name Link	Remove Fund
0101	General	✗
0180	Debt Service	✗
0181	Debt Payment	✗
0702	Highway	✗
0706	Local Road & Street	✗
0801	Health	✗
0890	Cumulative Hospital	✗
1101	Emergency Ambulance/Med Services - Fire	✗
1192	Cumulative Jail	✗
2391	Cumulative Capital Development	✗

You will first enter a fund description. This is your opportunity to put a custom name on the fund.



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

Once you enter a fund description you will need to select a fund code of your choice from the drop down list.



The screenshot shows the same "Add a Fund" form, but now the "Fund Description:" field 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. In the background, there is some faint text and a section titled "Email" with links for "Technical Issues" and "DLGE".

Once you have entered a description and selected a fund code, 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 your department list, click on the link that says “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](#)
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.

Gateway will roll over any departments entered previously. The first time you log in to the budget application this year, you will want to review the list of departments as you may need to add or remove departments. 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 will walk you through this process.

Departments List for Jasper County

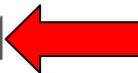
Department Code	Department Name	Remove Dept.
0002	County Auditor	

[Adding a Department from the Preset List](#)

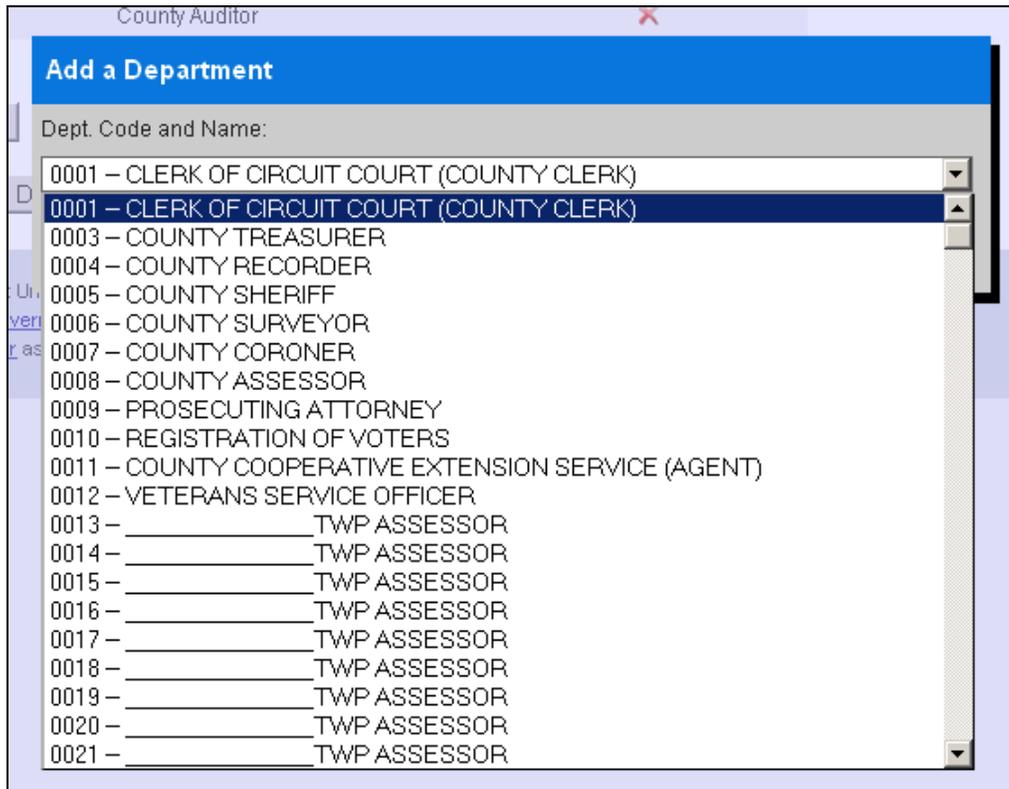
Gateway contains a preset list of departments with associated codes, based on past submissions statewide. When adding a department, it is best to use this list as long as you can find the department name on the list. To add a department from this list, simply click on “Add a New Department.”

Departments List for Jasper County

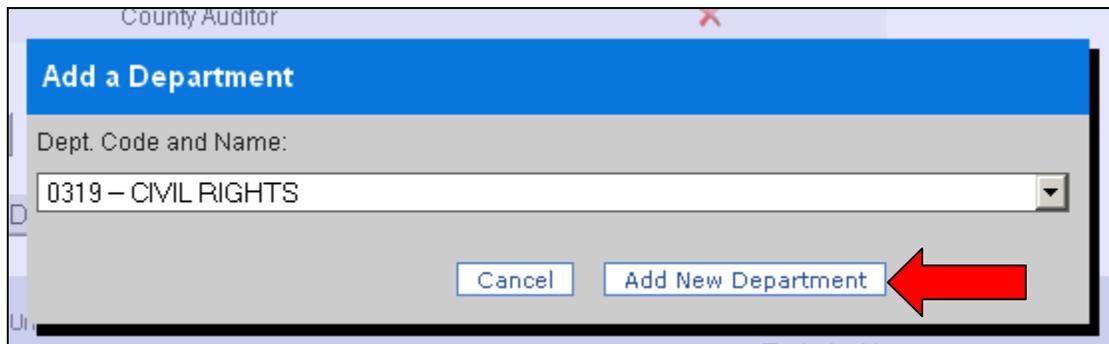
Department Code	Department Name	Remove Dept.
0002	County Auditor	



This will bring up a window containing a drop-down menu. You may scroll through the list to find the appropriate department.



Once you have selected the desired department, click the button that says “Add New Department.” The department will now be part of the list on your “Department” screen.



The drop-down menu is sorted numerically by code. For your convenience, we have placed the code list in Excel format on our website at http://in.gov/dlgf/files/2014_Gateway_Budget_Code_Lists.xls. You may use this file 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 you need in the drop-down menu in Gateway.

Adding a Home-Ruled Department

You 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 your list, click the link that says “Add a New Home-Ruled Department.” This will bring up a window to help you create the department.

Department Code	Department Name	Remove Dept.
0002	County Auditor	

[Add a New Department](#)

[Add a New Home Ruled Department](#)

You will first enter a department description. This is your opportunity to put a custom name on the department.

Add a New Home Ruled Department

Dept. Description:

Dept. Code and Name: 9600

[Cancel](#) [Add New Department](#)

The next step is to select the department code. The Gateway will give you a set of numbers to choose from. 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.

The screenshot shows a web form titled "Add a New Home Ruled Department". The "Dept. Description" field contains the text "Demo Home Ruled Department". The "Dept. Code and Name" dropdown menu is open, displaying a list of codes from 9600 to 9619. The code 9601 is highlighted in blue, and a red arrow points to it from the right. To the right of the dropdown, there is a "Cancel" button and an "Add New Department" button.

Select the code you wish to use, and then click "Add New Department."

The screenshot shows the same web form, but now the "Dept. Code and Name" dropdown menu is closed and displays "9601". The "Add New Department" button is highlighted with a red arrow pointing to it from the right. The "Cancel" button is also visible.

Customize Departments by Fund List

For Gateway to organize your budget forms, you must specify 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 have rolled 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 will display 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		0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK) 0002 - COUNTY AUDITOR 0008 - COUNTY ASSESSOR 0117 - PERSONNEL
1192 - CUMULATIVE JAIL		0000 - NO DEPARTMENT
0180 - DEBT SERVICE		0000 - NO DEPARTMENT
0181 - DEBT PAYMENT		0000 - NO DEPARTMENT

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

Funds Descriptions	Edit Departments	Departments
0101 - GENERAL		0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK) 0002 - COUNTY AUDITOR 0008 - COUNTY ASSESSOR 0117 - PERSONNEL

This will bring 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 you wish 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
Cancel Update Record

Click the “Update Record” button when all departments you wish to connect have been checked.

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

Cancel Update Record

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.

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Department of Local Government Finance

Select Unit > 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		0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK) 0002 - COUNTY AUDITOR 0008 - COUNTY ASSESSOR 0108 - ADMINISTRATION
1192 - CUMULATIVE JAIL		0000 - NO DEPARTMENT

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 DLGF at gateway@dlgf.in.gov or at (317) 232-3777.