



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

# Gateway User Guide

## Customize Unit



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# Overview

This portion of the 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 will also establish your revenue codes and link debts reported in Debt Management to debt service 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.
-  **Submit Proof of Publication and Signed Ordinance**  
View, upload and submit proof of publication 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 on Gateway you should notice your funds, departments, the linkages between them, and revenue codes carry over into the 2013 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

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

The first time you login to the Gateway, the list of funds will contain any fund that was part of your DLGF-approved budget last year. You will need to add any additional funds your unit has during this visit. When you return to Gateway, the funds will still be saved. Further, once entered, the fund list will 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	✗

## 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 that option 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	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. 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.

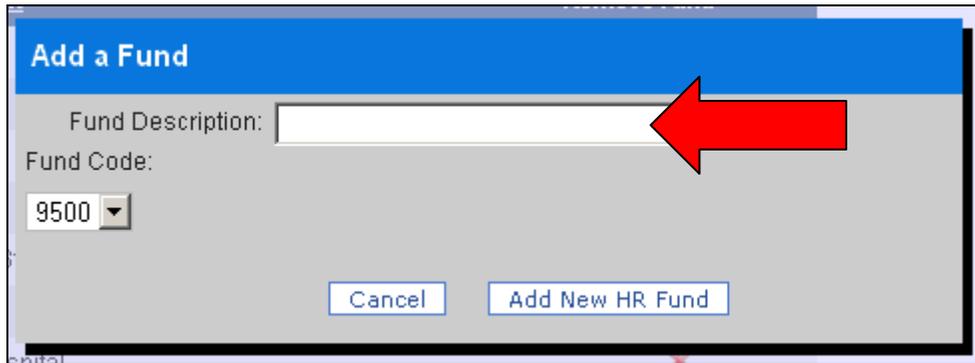
The drop-down menu is sorted numerically by code. For your convenience, we have placed the code list in Excel format on our website at [http://in.gov/dlgf/files/2013\\_Gateway\\_Budget\\_Code\\_Lists.xls](http://in.gov/dlgf/files/2013_Gateway_Budget_Code_Lists.xls). You may use this file to sort the 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. We refer to these 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.

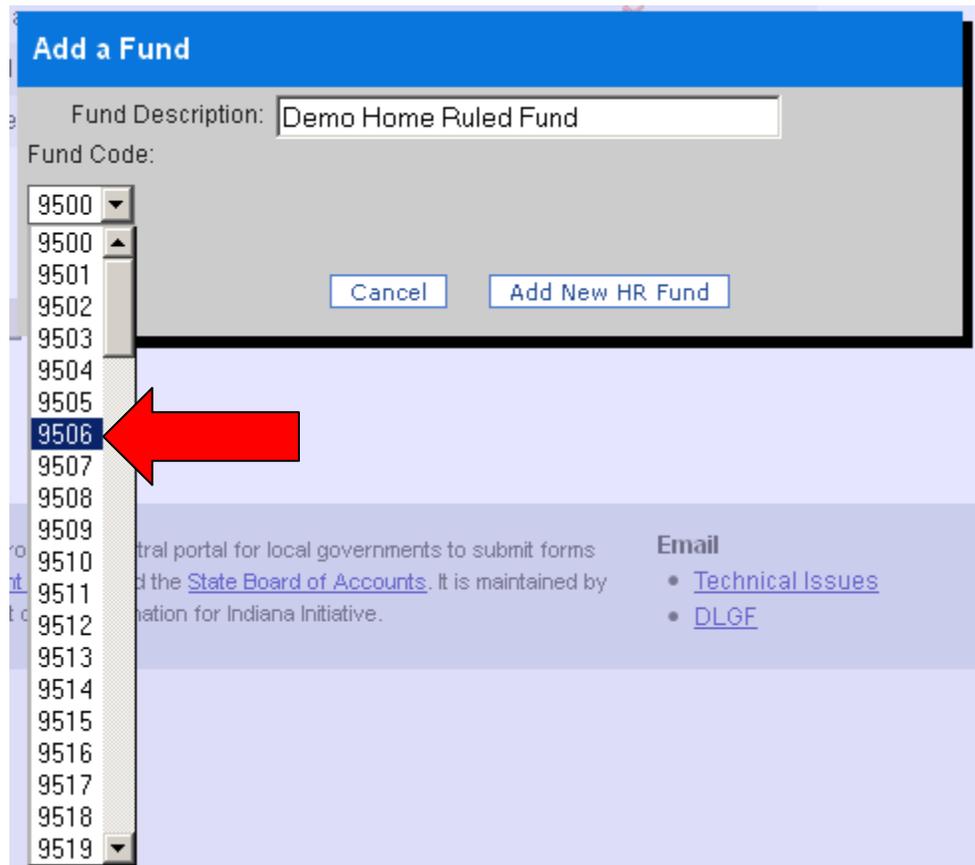
Fund Code	Fund Name Link	Remove Fund
0101	General	✗
0180	Debt Service	✗
0181	Debt Payment	✗
0702	Highway	✗
0706	Local Road & Street	✗
0801	Health	✗
0890	Cumulative Hospital	✗
1101	Emergency Ambulance/Med Services - Fire	✗
1192	Cumulative Jail	✗
2391	Cumulative Capital Development	✗

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



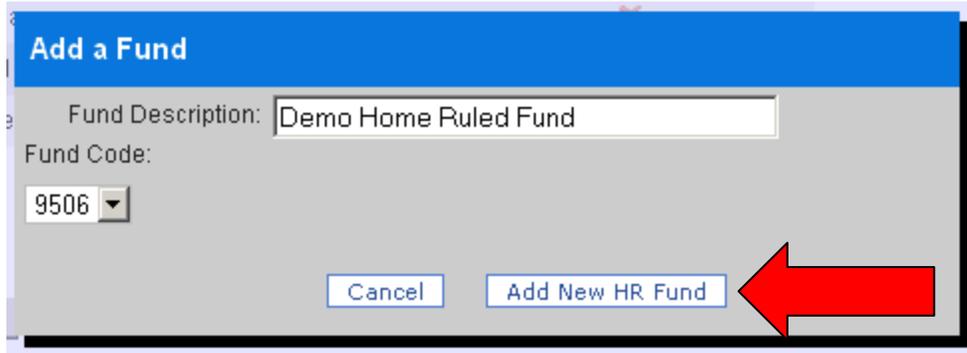
The screenshot shows a web form titled "Add a Fund". It has a blue header bar with the title. Below the header, there is a text input field for "Fund Description:" which is currently empty. A red arrow points to this field. Below the text field is a dropdown menu for "Fund Code:" with "9500" selected.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

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



The 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. The "Cancel" and "Add New HR Fund" buttons are still visible.

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.



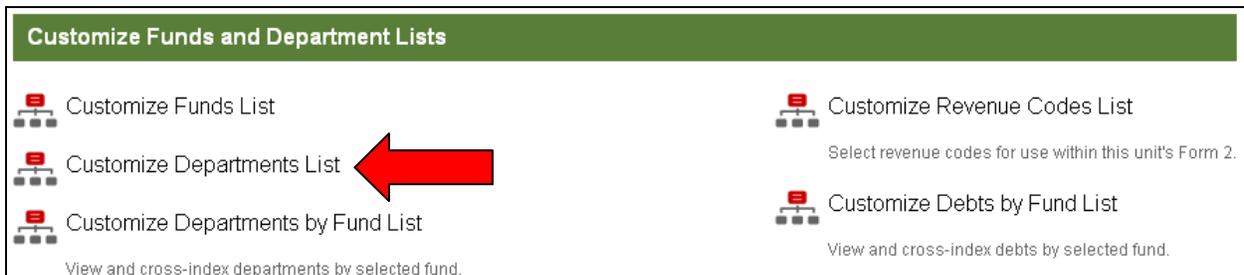
Home About Account Settings Help Logout

[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 Department 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 Gateway, you will want to review the list of departments. You may need to add additional 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

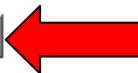
Department Code	Department Name	Remove Dept.
0002	County Auditor	

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

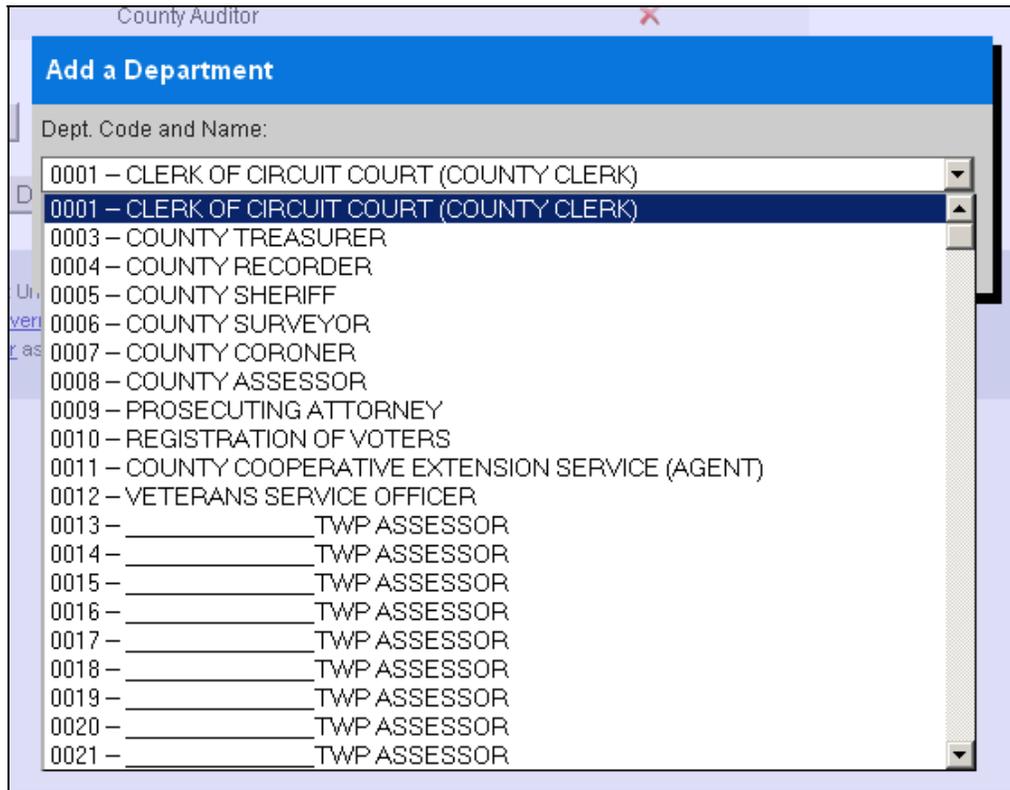
Gateway contains a preset list of departments with associated codes, based on past submissions statewide. When adding a department, it is best to use this list if you can find the department name on the list. To add a department from this list, simply click on “Add a New Department.”

### Departments List for Jasper County

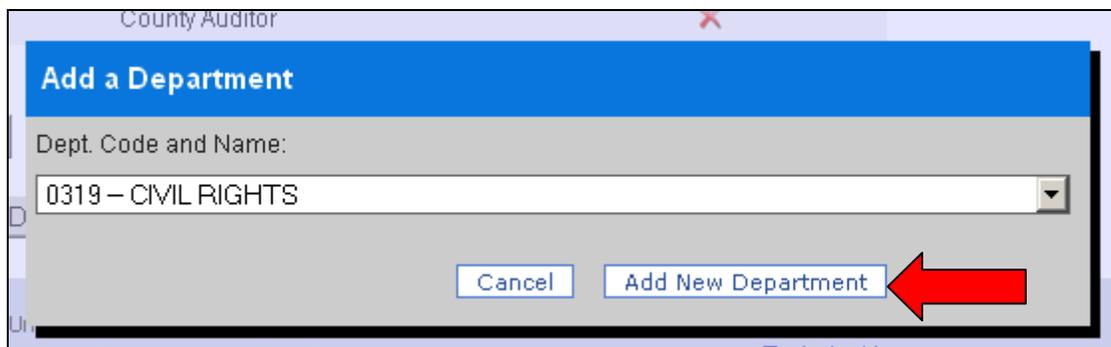
Department Code	Department Name	Remove Dept.
0002	County Auditor	



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



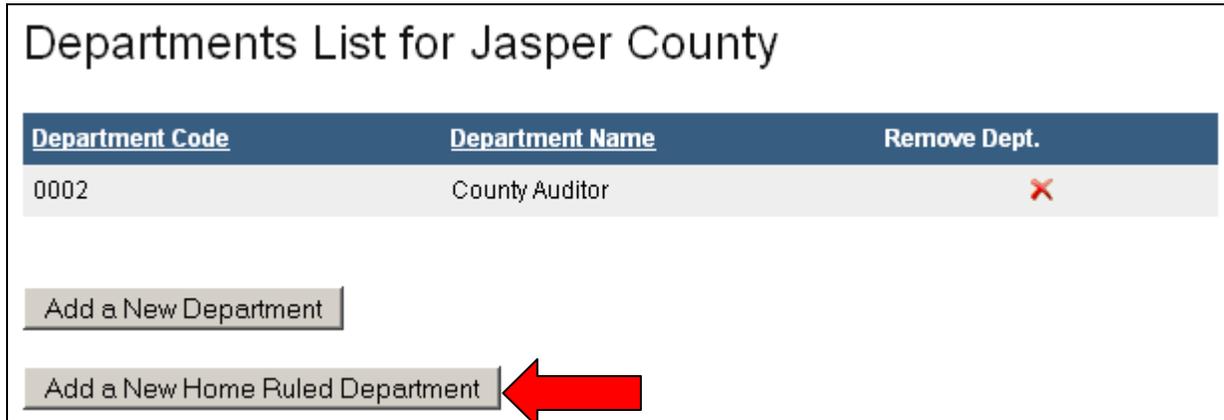
Once you have selected the correct department, click the button that says “Add New Department.” The department will now be part of the list on your “Department” screen.



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/2013\\_Gateway\\_Budget\\_Code\\_Lists.xls](http://in.gov/dlgf/files/2013_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 on the Gateway.

## Adding a Home-Ruled Department

You may have departments that are not part of the pre-set list. We refer to these 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	X

[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.

**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

• [DLGF](#)

Select the code you wish to use, 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 your budget forms, you must specify whether a fund is departmentalized, and if so, what 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.**

Customize Funds and Department Lists

<ul style="list-style-type: none"> <li> <a href="#">Customize Funds List</a></li> <li> <a href="#">Customize Departments List</a></li> <li> <a href="#">Customize Departments by Fund List</a> </li> </ul> <p style="font-size: small; margin-top: 5px;">View and cross-index departments by selected fund.</p>	<ul style="list-style-type: none"> <li> <a href="#">Customize Revenue Codes List</a> <small>Select revenue codes for use within this unit's Form 2.</small></li> <li> <a href="#">Customize Debts by Fund List</a> <small>View and cross-index debts by selected fund.</small></li> </ul>
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Gateway has default associations. Specifically, the general fund (#0101) is associated with each department in the department list. The remaining funds are associated with “0000-NO DEPARTMENT” as the default. The screen will show you the default associations. The funds are listed along the left-hand side, and the departments are shown within the box to the right of the fund name.

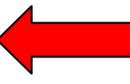
[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#) > **Customize Departments by Fund**

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)                      0002 - COUNTY AUDITOR                      0008 - COUNTY ASSESSOR                      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.

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 association, check the box to the left of the department name. To remove a department association simply uncheck the box next to the department you wish to remove.

**Custom Departments by Fund**

Selected Unit: 0000 Jasper County

Selected Year: 2013

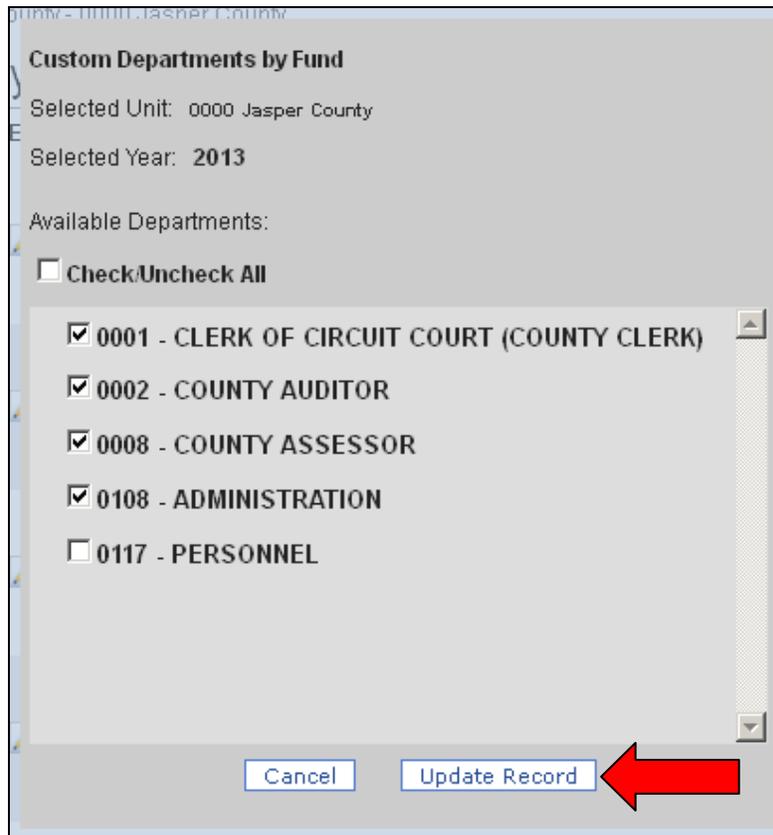
Available Departments:

Check/Uncheck All

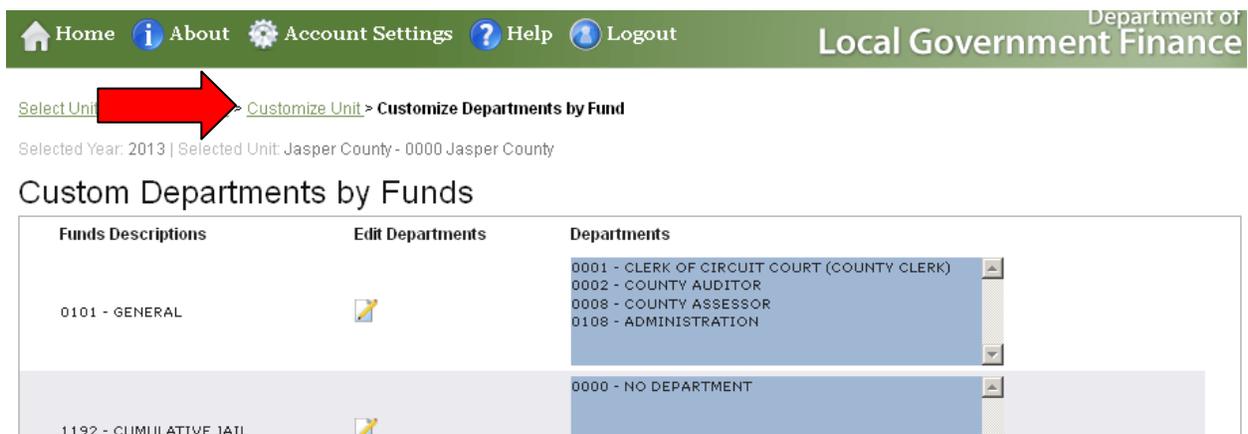
- 0001 - CLERK OF CIRCUIT COURT (COUNTY CLERK)
- 0002 - COUNTY AUDITOR
- 0008 - COUNTY ASSESSOR
- 0108 - ADMINISTRATION
- 0117 - PERSONNEL



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



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.



## Customize Revenue Codes

If you completed a budget last year you should notice your revenue/receipt codes carry over to the current year. However, please be sure to review your revenue codes to make sure they are all listed. This year in Gateway the addition and deletion of revenue codes will now only be done under the Customize Revenue Codes List page. To access this page select the “Customize Revenue Codes 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.

The following Customize Revenue Codes Lists to Funds page can be used to add any revenue codes that did not automatically rollover into the 2013 Budget forms. For your convenience, a crosswalk is available at [www.in.gov/dlgf/files/DLGF\\_Receipt\\_Codes\\_Crosswalk.xlsx](http://www.in.gov/dlgf/files/DLGF_Receipt_Codes_Crosswalk.xlsx).

### Customized Revenue Codes Lists to Funds

		Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Utility Penalties	Other Receipts
+ ADD REVENUE CODE TO SELECTED CATEGORY							
Delete	Specify Funds	Revenue Code and Description			Funds Receiving Revenue		
✗		R102 - County Adjusted Gross Income Tax (CAGIT) Certified Shares			0005 - CASINO/RIVERBOAT 0101 - GENERAL		
✗		R104 - County Option Income Tax (COIT)			0005 - CASINO/RIVERBOAT 0101 - GENERAL		
✗		R108 - Other Taxes			0005 - CASINO/RIVERBOAT 0101 - GENERAL		

To add a revenue first select the appropriate revenue classification by clicking on the corresponding blue tab at the top of the page.

### Customized Revenue Codes Lists to Funds

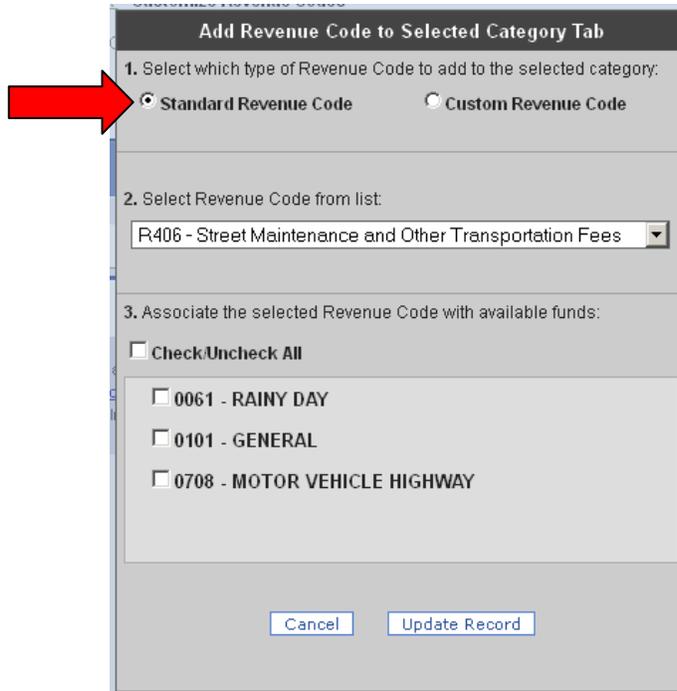
Taxes And Intergovernmental | Licenses And Permits | **Charges For Services** | Fines, Forfeitures, And Fees | Utility Penalties | Other Receipts

+ ADD REVENUE CODE TO SELECTED CATEGORY

Once the desired category is selected click on the “+ Add Revenue Code to Selected Category.”

## Adding a Standard Revenue Code

From here you have the option of entering a standard revenue code or a custom revenue code. We will first review how to add a standard revenue code. Schools will continue to use the revenue code list as prescribed by the Department of Education.



**Add Revenue Code to Selected Category Tab**

1. Select which type of Revenue Code to add to the selected category:

Standard Revenue Code       Custom Revenue Code

2. Select Revenue Code from list:

R406 - Street Maintenance and Other Transportation Fees

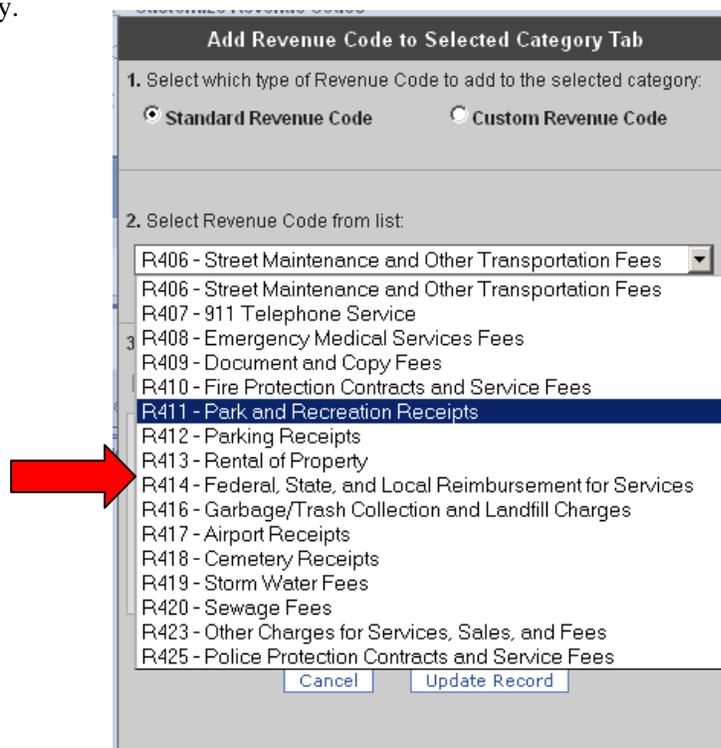
3. Associate the selected Revenue Code with available funds:

Check/Uncheck All

0061 - RAINY DAY  
 0101 - GENERAL  
 0708 - MOTOR VEHICLE HIGHWAY

Cancel      Update Record

Leave standard revenue selected and then click the drop-down menu underneath, “2. Select Revenue Code from list.” This will bring up a menu of all of the revenue codes associated with your unit type and selected category.



**Add Revenue Code to Selected Category Tab**

1. Select which type of Revenue Code to add to the selected category:

Standard Revenue Code       Custom Revenue Code

2. Select Revenue Code from list:

R406 - Street Maintenance and Other Transportation Fees

R406 - Street Maintenance and Other Transportation Fees  
R407 - 911 Telephone Service  
R408 - Emergency Medical Services Fees  
R409 - Document and Copy Fees  
R410 - Fire Protection Contracts and Service Fees  
R411 - Park and Recreation Receipts  
R412 - Parking Receipts  
R413 - Rental of Property  
R414 - Federal, State, and Local Reimbursement for Services  
R416 - Garbage/Trash Collection and Landfill Charges  
R417 - Airport Receipts  
R418 - Cemetery Receipts  
R419 - Storm Water Fees  
R420 - Sewage Fees  
R423 - Other Charges for Services, Sales, and Fees  
R425 - Police Protection Contracts and Service Fees

Cancel      Update Record

Once you select the revenue code you wish to add, we still need to associate it with one or more of the available funds. In the third section, select which funds you would like to associate the revenue with and select “Update Record” to add the revenue.

**Add Revenue Code to Selected Category Tab**

1. Select which type of Revenue Code to add to the selected category:  
 Standard Revenue Code     Custom Revenue Code

2. Select Revenue Code from list:  
R411 - Park and Recreation Receipts

3. Associate the selected Revenue Code with available funds:  
 Check/Uncheck All

0061 - RAINY DAY  
 0101 - GENERAL  
 0708 - MOTOR VEHICLE HIGHWAY

Cancel    Update Record

Below you will notice the revenue code was added successfully. The blue box to the right shows which funds are receiving funds from the added revenue.

		Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Utility Penalties	Other Receipts
<b>+ ADD REVENUE CODE TO SELECTED CATEGORY</b>							
Delete	Specify Funds	Revenue Code and Description			Funds Receiving Revenue		
		R411 - Park and Recreation Receipts			0101 - GENERAL		

## Adding a Custom Revenue Code

Non-school units also have the option to add a custom revenue. In order to add a custom revenue code, simply select “Custom Revenue Code” and enter a revenue description. Once you associate it with the desired funds, select “Update Record” and you have added a custom revenue code.

**Add Revenue Code to Selected Category Tab**

1. Select which type of Revenue Code to add to the selected category:

Standard Revenue Code  Custom Revenue Code

2. Select Revenue Code from list:

9700 - Home-Rule Revenue #1

Add a custom Revenue Code description:

Home-Ruled Revenue Example

3. Associate the selected Revenue Code with available funds:

Check/Uncheck All

0061 - RAINY DAY

0101 - GENERAL

0708 - MOTOR VEHICLE HIGHWAY

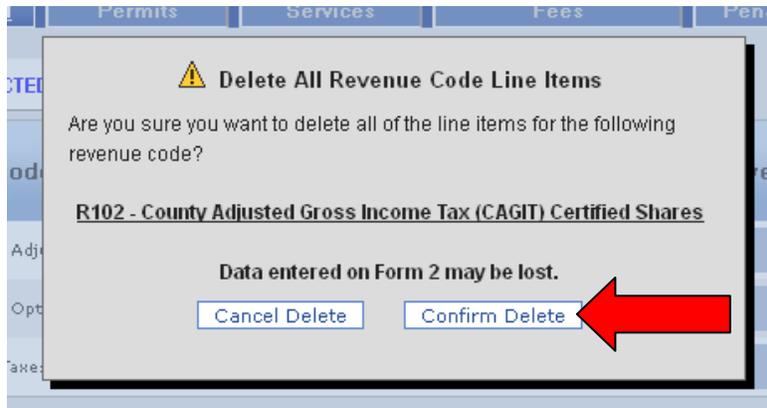
Cancel Update Record

## Deleting a Revenue Code

If you would like to delete an existing revenue code, select the red X on the far left of the page next to the revenue code you wish to delete.

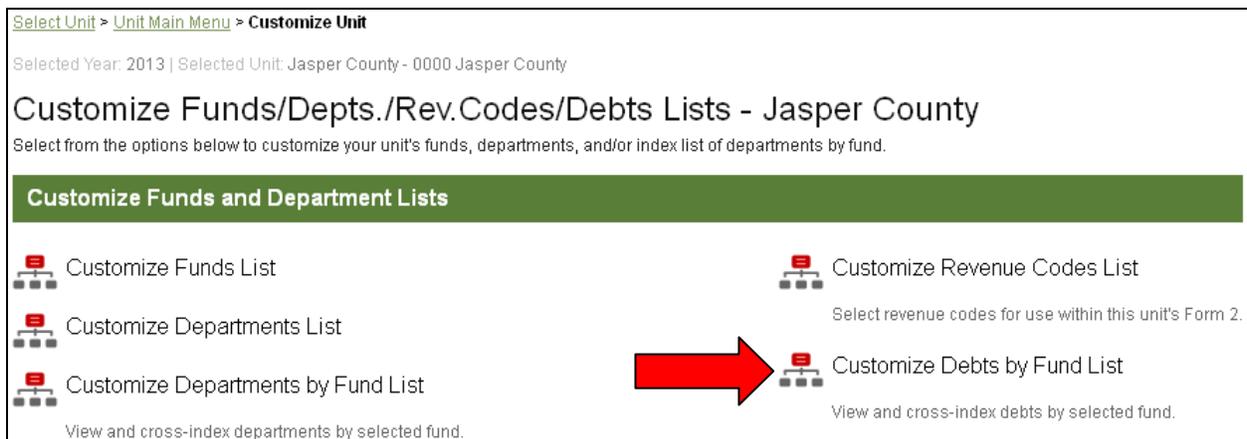
Taxes And Intergovernmental						
+ ADD REVENUE CODE TO SELECTED CATEGORY						
Delete	Specify Funds	Revenue Code and Description	Funds Receiving Revenue			
X		R102 - County Adjusted Gross Income Tax (CAGIT) Certified Shares	0061 - RAINY DAY	0101 - GENERAL		
X		R104 - County Option Income Tax (COIT)	0061 - RAINY DAY	0101 - GENERAL		
X		R108 - Other Taxes	0061 - RAINY DAY	0101 - GENERAL		

After clicking on the delete button a window will appear warning that any amounts entered in the selected revenue code will be deleted. Select “Confirm Delete” to continue. Doing so will delete a single revenue code.



## Customizing Debts by Funds List

New to the 2013 Budget is the ability to link debt reported in Gateway’s Debt Management application to a debt service fund. In order to link a reported debt to a debt service fund, first select “Customize Debts by Fund List” on the “Customize Unit” menu. Once your funds and debts are linked, you will be able to complete your Debt Worksheet and levy funds to fulfill upcoming debt service payments.



You should now be on the “Customize Debts by Fund” page. On this page, you should notice debt related funds on the left and any linked reported debts to the right. If you do not see any funds and need to levy funds to meet debt service payments, you would need to access the “Customize Funds List” and add a debt related fund.

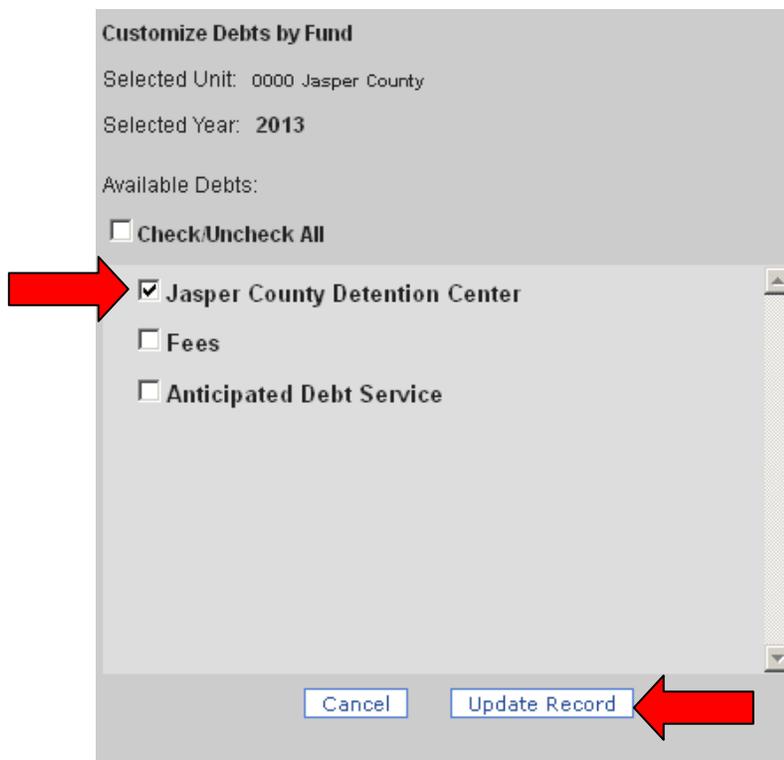
In order to link a debt reported in Debt Management to a debt service fund, please click the “pencil and paper” edit icon.

### Customize Debts by Funds

Debts are available as listed under the Debt Management application. Each debt may be attached to only one fund per year.

Fund Descriptions	Edit Debts	Debts
0180 - DEBT SERVICE		NO DEBTS ATTACHED
0186 - SCHOOL PENSION DEBT		NO DEBTS ATTACHED

Clicking on the edit icon next to a fund will bring up a list of reported debts along with an option to link fees and anticipated debt service with the fund as well. By checking the box to the left of listed options and selecting “Update Record,” you have linked a reported debt, fees, and or anticipated debt service to the selected fund. You will now be able to begin on your Debt Worksheet.



**Customize Debts by Fund**

Selected Unit: 0000 Jasper County

Selected Year: 2013

Available Debts:

Check/Uncheck All

Jasper County Detention Center

Fees

Anticipated Debt Service

Cancel    Update Record

Please see our other user guides for assistance with additional forms.