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

Gateway User Guide

Adding, Deleting, and Connecting Funds and Departments

Table of Contents

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 (if applicable), and then establish the relationship between the departments and the funds. Once these have been established by the unit, they roll over every year.

The Customization page

This portion may be accessed from the Unit Main Menu by clicking "Customize Funds, Departments, Debts, Rev. Codes."

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.

Customize Funds

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

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	✕
0840	Township Assistance	✕
1111	Fire	✕
1181	Fire Building Debt	✕
1303	Park	✕

Add a Fund

Add a New Home Ruled Fund

Deleting a Fund

If you need to delete a fund from your list, simply click the red "X" under "Remove Fund". It should immediately be removed.

Fund Code	Fund Name Link	Remove Fund
0101	General	✕
0840	Township Assistance	✕
1111	Fire	✕
1181	Fire Building Debt	✕
1303	Park	✕

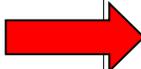# Adding a Fund to the Current List

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."

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

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 the following link: 2016 Gateway Budget Code lists

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	✖
0840	Township Assistance	✖
1111	Fire	✖
1181	Fire Building Debt	✖
1303	Park	✖

Add a Fund

Add a New Home Ruled Fund
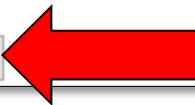
First, enter a fund description. This is a fully customizable name, and will often be the same name as it appears on your fund report. Begin by entering your fund name in the box provided.

Add a Fund

Fund Description: [   ]
Fund Code:
9500 ▼

Cancel   Add New HR Fund
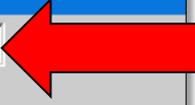
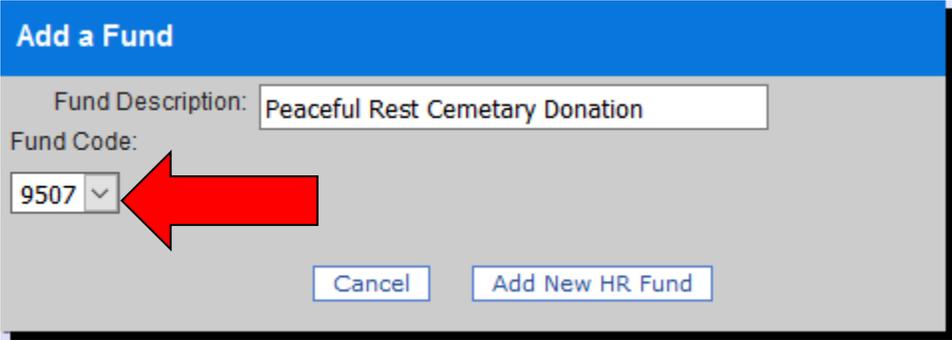Once the fund description is entered, select a fund code of from the drop down list. Most often officials choose the next available number.

Add a Fund

Fund Description: Peaceful Rest Cemetary Donation
Fund Code:

9507

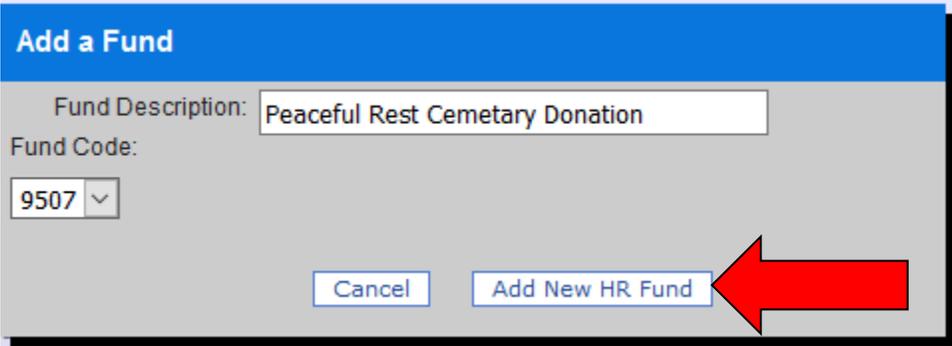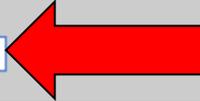Cancel   Add New HR Fund
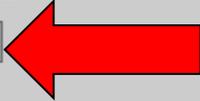
Once a description is entered and selected fund code selected, click "Add New HR Fund".

Add a Fund

Fund Description: Peaceful Rest Cemetary Donation
Fund Code:

9507

Cancel   Add New HR Fund

To return to the Customize Unit Menu, select "Customize Unit" at the top of the page. Please remember to use these "bread crumbs" as we call them to maneuver between pages within Gateway. Use of the back button may cause you to be kicked out of the system.
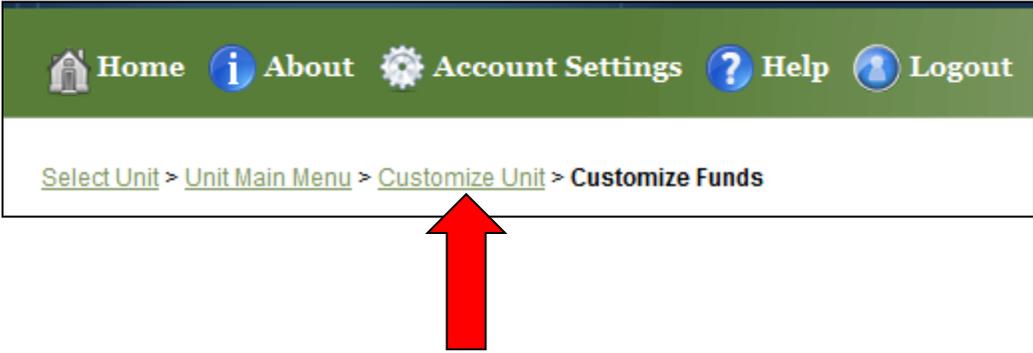
Customize Departments

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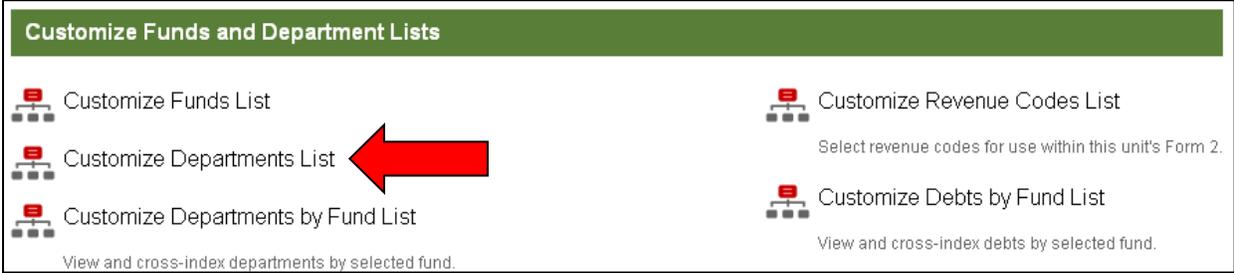
Gateway will roll over any departments entered in a previous year. When logging in to the budget application for the current year, review the list of departments as edits may be needed, such as departments that need to be added or deleted. Please note that any newly created departments will need to be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

Departments List for Dlgf City 1, Gateway1 Co.

Department Code	Department Name	Remove Dept.
0041	Clerk-Treasurer (City/Town Units Only)	✗
0044	Mayor	✗
0069	City Council/Town Board (Common Council)	✗
0151	Lease Rental	✗
0360	Public Safety	✗
0164	City/Town Hall	✗

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 Dlgf City 1, Gateway1 Co.

Department Code	Department Name	Remove Dept.
0041	Clerk-Treasurer (City/Town Units Only)	✗
0044	Mayor	✗
0069	City Council/Town Board (Common Council)	✗
0151	Lease Rental	✗
0360	Public Safety	✗
0164	City/Town Hall	✗

Add a New Department

Add a New Home Ruled Department

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 the following link: 2016 Gateway Budget Code lists

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.
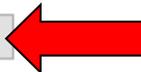
Adding a Home-Ruled Department

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.

First, enter a department description that may be fully customized to the unit.
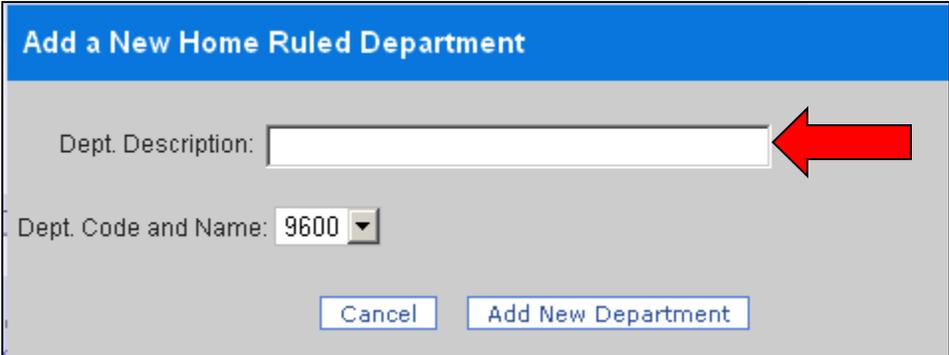
The next step is to select the department code. Gateway will generate a set of numbers from which to choose. These will be from 9600 to 9699. These codes have been set aside for home-ruled departments. Gateway will remove codes from the list once they have been used.
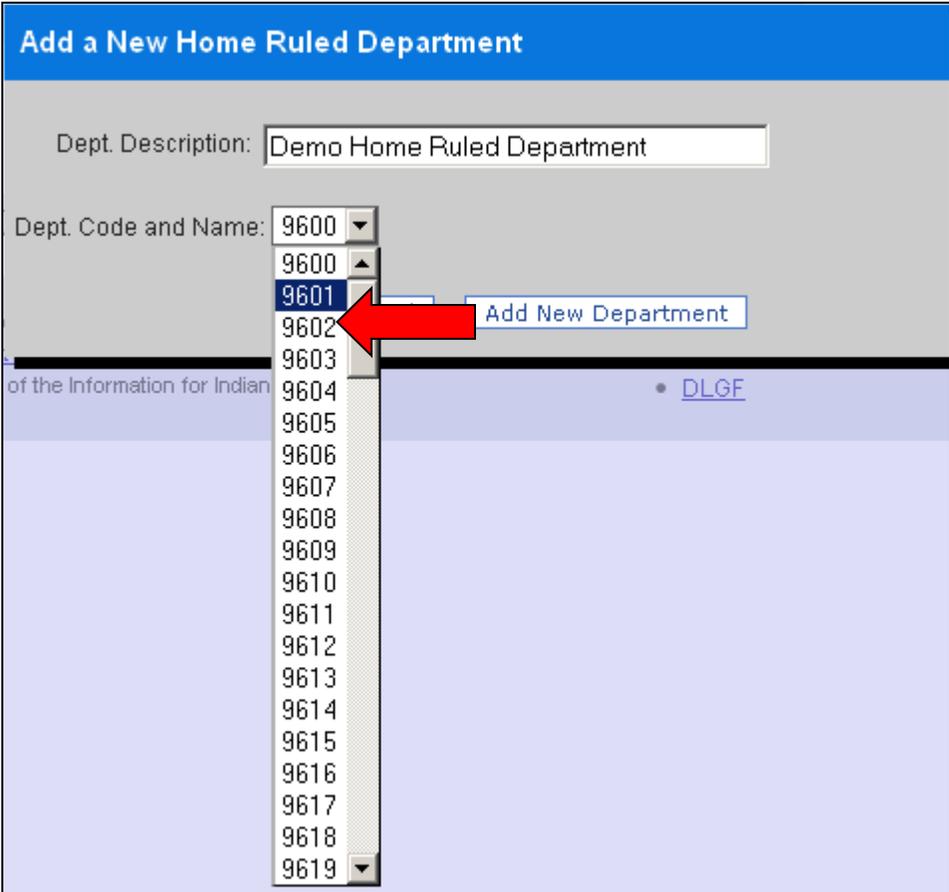
Select the desired code, and then click "Add New Department."

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.

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.

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

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: 9983 Dlgf City 1, Gateway1 Co.

Selected Year: 2018

Available Departments:

☐ **Check/Uncheck All**

☑ 0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY)

☐ 0044 - MAYOR

☐ 0069 - CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)

☐ 0079 - PLAN COMMISSION

☐ 0151 - LEASE RENTAL

☐ 0164 - CITY/TOWN HALL

☐ 0260 - PUBLIC SAFETY

[Cancel] [Update Record]

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

Custom Departments by Fund

Selected Unit: 9983 DIgf City 1, Gateway1 Co.

Selected Year: 2018

Available Departments:

☐ Check/Uncheck All

☑ 0044 - MAYOR

☑ 0069 - CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)

☑ 0079 - PLAN COMMISSION

☐ 0151 - LEASE RENTAL

☑ 0164 - CITY/TOWN HALL

☑ 0360 - PUBLIC SAFETY

☑ 9600 - Clean City Project

[Cancel] [Update Record]

Now all of the selected departments should show in the blue box.

Customize Departments by Funds

Funds Descriptions	Edit Departments	Departments
0101 - GENERAL	✎	0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY) 0044 - MAYOR 0069 - CITY COUNCIL/TOWN BOARD (COMMON COUNCIL) 0079 - PLAN COMMISSION 0164 - CITY/TOWN HALL 0360 - PUBLIC SAFETY

Once all the fund-department relationships are correct, you may proceed back to your main screen by selecting "Unit Main Menu" at the top of the screen. From here you may proceed with your next step.
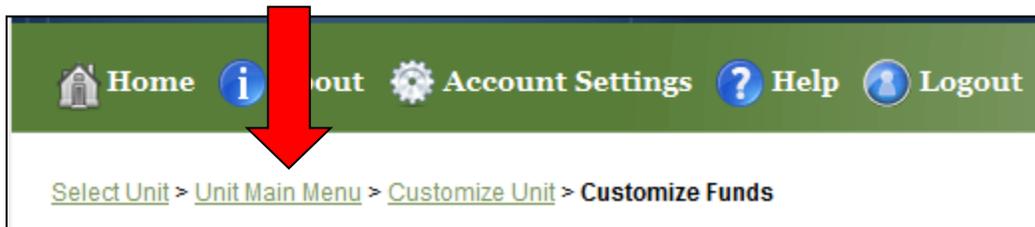
Congratulations! You have successfully added your funds, departments and the linkages between them. Please see our other user guides for assistance with other forms. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.