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# 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 (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.”

**Department of Local Government Finance Tasks**

-  **Pre-Budget Worksheet** - Submitted on 5/26/2017 12:52:58 PM  
Provide information and estimates in advance.
-   **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 Signed Form 4 and Other Documents**  
View, upload and submit budget-related documents to DLGF.
-  **Property Tax Cap Info**  
View Property Tax Cap Data Currently Entered on all Forms
-  **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.

### Customize Funds/Depts./Rev.Codes/Debts Lists - Fieldrep9, Gateway1 Co.

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**

<p> <a href="#">Customize Funds List</a></p> <p> <a href="#">Customize Departments List</a></p> <p> <a href="#">Customize Departments by Fund List</a> <small>View and cross-index departments by selected fund.</small></p>	<p> <a href="#">Customize Revenue Codes List</a> <small>Select revenue codes for use within this unit's Form 2.</small></p> <p> <a href="#">Customize Debts by Fund List</a> <small>View and cross-index debts by selected fund.</small></p>
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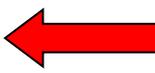
## Customize Funds

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

### Customize Funds/Depts./Rev.Codes/Debts Lists - Fieldrep9, Gateway1 Co.

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**

<p> <a href="#">Customize Funds List</a> </p> <p> <a href="#">Customize Departments List</a></p> <p> <a href="#">Customize Departments by Fund List</a> <small>View and cross-index departments by selected fund.</small></p>	<p> <a href="#">Customize Revenue Codes List</a> <small>Select revenue codes for use within this unit's Form 2.</small></p> <p> <a href="#">Customize Debts by Fund List</a> <small>View and cross-index debts by selected fund.</small></p>
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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	X
0840	Township Assistance	X
1111	Fire	X
1181	Fire Building Debt	X
1303	Park	X

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

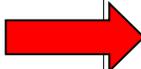




## Adding a Fund to the Current List

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



This will bring up a window containing a drop-down menu. Scroll though 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 screenshot shows a dialog box titled "Add a Fund". It contains a "Fund Code:" label and a text box with "0061 -- RAINY DAY" and a dropdown arrow. Below the text box are two buttons: "Cancel" and "Add New Fund". A red arrow points to the "Add New Fund" button.

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](#)

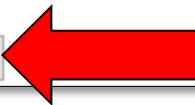
This file may be used to sort the lists alphabetically or use the “Find” feature (Ctrl + F) of Excel to locate the appropriate codes. This will make it easier to find the funds needed in the drop-down menu on Gateway. Another option for locating fund codes is to reference the 1782 notice or budget order from the previous year. These documents will contain the codes for each fund.



## Adding a Home-Ruled Fund

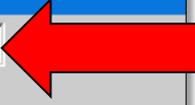
There may be funds not part of the preset list. These are referred to as home-ruled funds. To add one of these to the list, click the link that says “Add a New Home-Ruled Fund.” This will bring up a window to help create the fund.

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



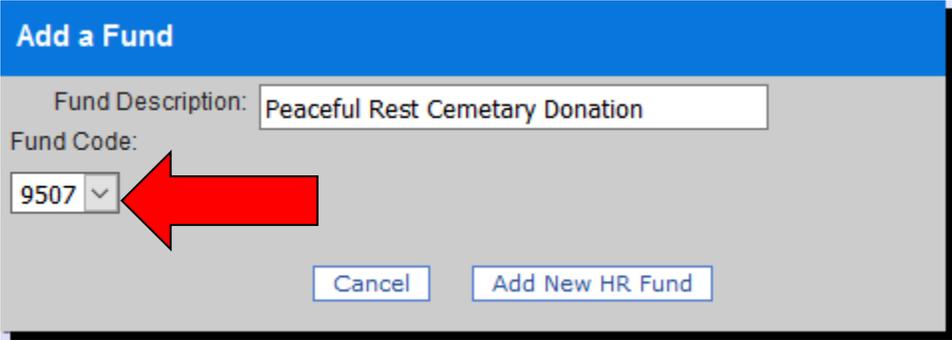
First, enter a fund description. This is a fully customizable name, and will often be the same name as it appears on your fund report. Begin by entering your fund name in the box provided.

### Add a Fund

Fund Description:  

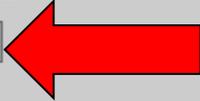
Fund Code:  
9500

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

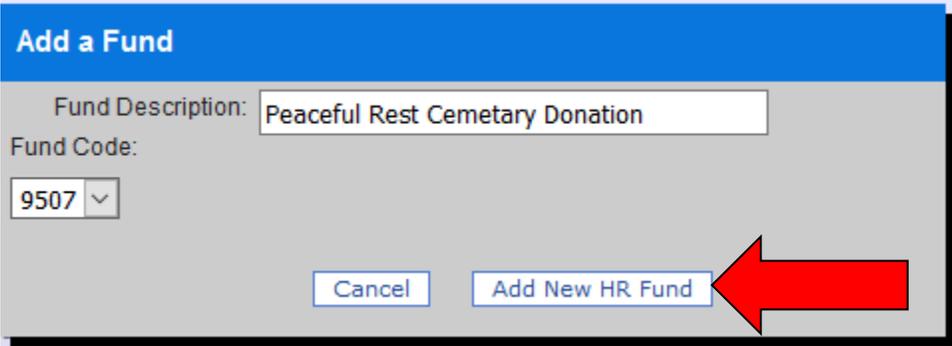


**Add a Fund**

Fund Description:

Fund Code:  

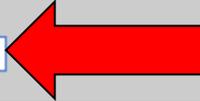
Once a description is entered and selected fund code selected, click "Add New HR Fund".



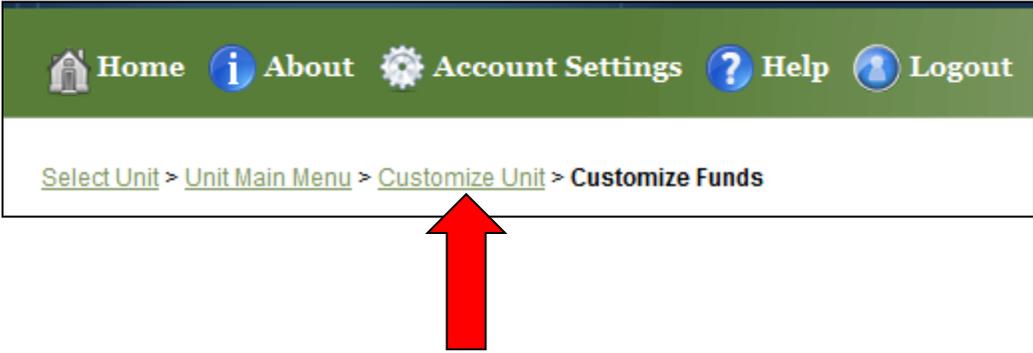
**Add a Fund**

Fund Description:

Fund Code:

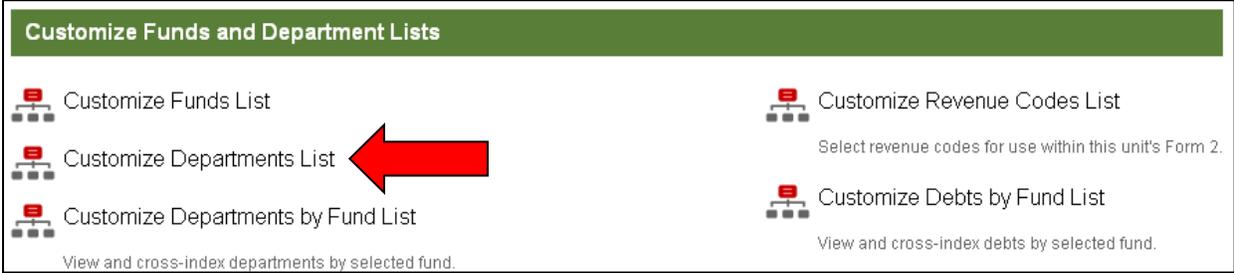


To return to the Customize Unit Menu, select “Customize Unit” at the top of the page. Please remember to use these “bread crumbs” as we call them to maneuver between pages within Gateway. Use of the back button may cause you to be kicked out of the system.



### 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 Dlgef City 1, Gateway1 Co.

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

### 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 Dlgef City 1, Gateway1 Co.

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

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.

The screenshot shows a window titled "Add a Department" with a label "Dept. Code and Name:" above a list box. The list contains the following items:

- 0001 – CLERK OF CIRCUIT COURT (COUNTY CLERK)
- 0003 – COUNTY TREASURER
- 0004 – COUNTY RECORDER
- 0005 – COUNTY SHERIFF
- 0006 – COUNTY SURVEYOR
- 0007 – COUNTY CORONER
- 0008 – COUNTY ASSESSOR
- 0009 – PROSECUTING ATTORNEY
- 0010 – REGISTRATION OF VOTERS
- 0011 – COUNTY COOPERATIVE EXTENSION SERVICE (AGENT)
- 0012 – VETERANS SERVICE OFFICER
- 0013 – \_\_\_\_\_ TWP ASSESSOR
- 0014 – \_\_\_\_\_ TWP ASSESSOR
- 0015 – \_\_\_\_\_ TWP ASSESSOR
- 0016 – \_\_\_\_\_ TWP ASSESSOR
- 0017 – \_\_\_\_\_ TWP ASSESSOR
- 0018 – \_\_\_\_\_ TWP ASSESSOR
- 0019 – \_\_\_\_\_ TWP ASSESSOR
- 0020 – \_\_\_\_\_ TWP ASSESSOR
- 0021 – \_\_\_\_\_ TWP ASSESSOR

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 screenshot shows the same "Add a Department" window. The drop-down menu now displays "0079 -- PLAN COMMISSION". At the bottom of the window, there are two buttons: "Cancel" and "Add New Department". A red arrow points to the "Add New Department" button.

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

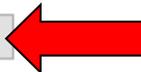
A unit may have departments that are not part of the pre-set list. These are referred to as home-ruled departments. To add one of these to the list, click the link that says “Add a New Home-Ruled Department.” This will bring up a window to help create the department.

### Departments List for Dlqf City 1, Gateway1 Co.

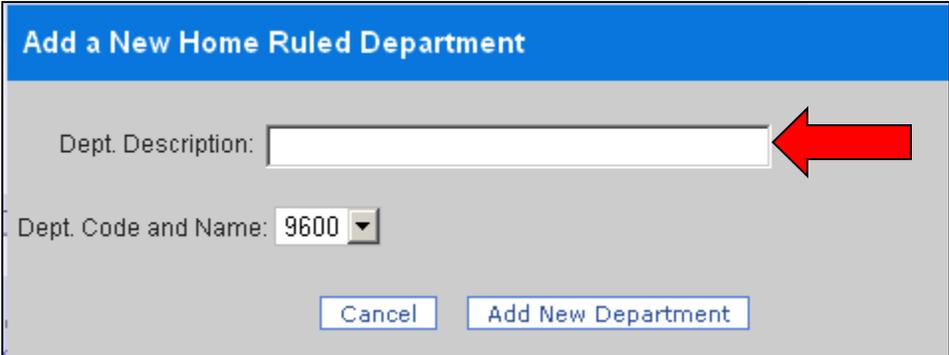
Department Code	Department Name	Remove Dept.
0041	Clerk-Treasurer (City/Town Units Only)	X
0044	Mayor	X
0069	City Council/Town Board (Common Council)	X
0079	Plan Commission	X
0151	Lease Rental	X
0164	City/Town Hall	X
0360	Public Safety	X

Add a New Department

Add a New Home Ruled Department



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

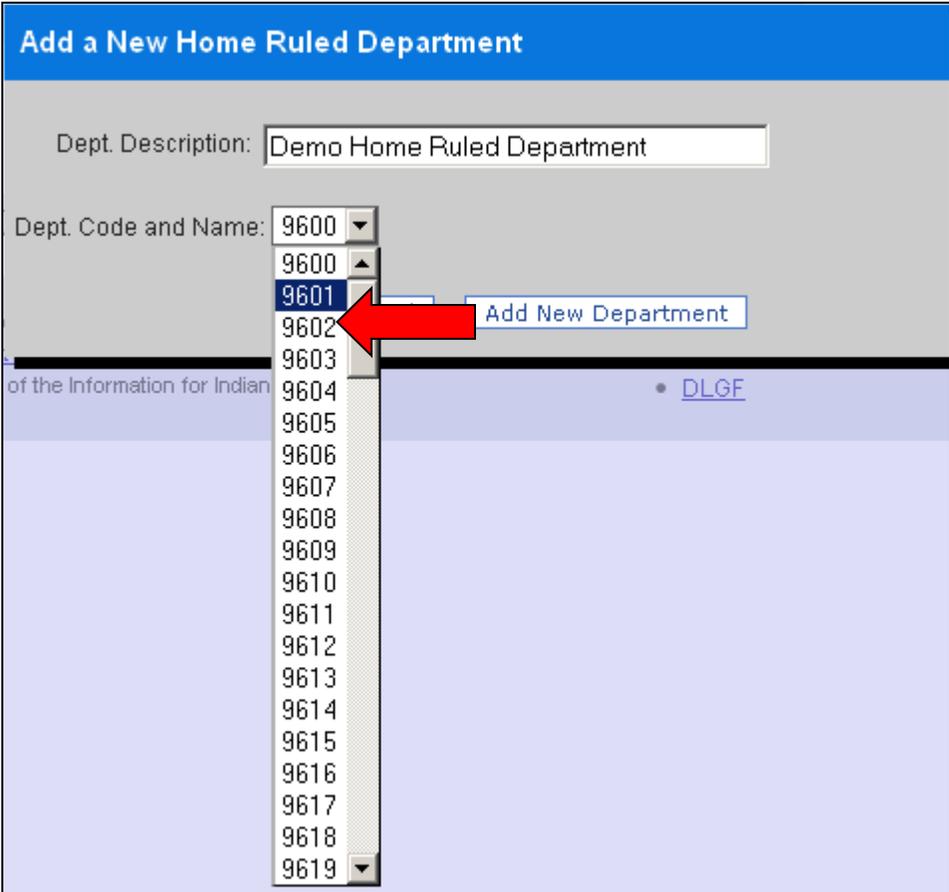


**Add a New Home Ruled Department**

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

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

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• [DLGF](#)

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

<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></li> <li style="font-size: small; margin-top: 5px;">Select revenue codes for use within this unit's Form 2.</li> <li> <a href="#">Customize Debts by Fund List</a></li> <li style="font-size: small; margin-top: 5px;">View and cross-index debts by selected fund.</li> </ul>
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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.

Funds Descriptions	Edit Departments	Departments
0101 - GENERAL		0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY) 0082 - PROPERTY TAX CAP IMPACT - BUDGET PURPOSES ONLY
0124 - 2015 REASSESSMENT		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		0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY) 0082 - PROPERTY TAX CAP IMPACT - BUDGET PURPOSES ONLY



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

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

**Custom Departments by Fund**

Selected Unit: 9983 Dlgf 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

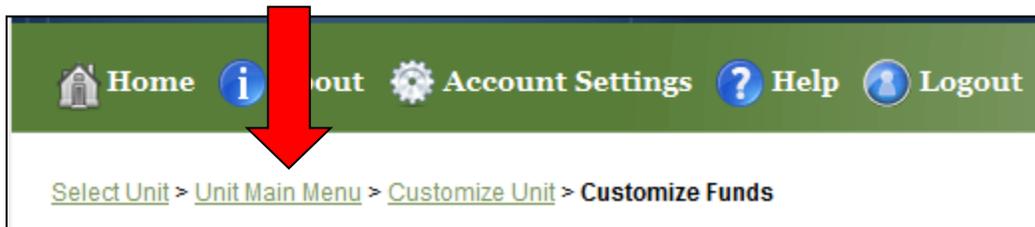


Now all of the selected departments should show in the blue box.

Customize Departments by Funds		
Funds Descriptions	Edit Departments	Departments
0101 - GENERAL		<ul style="list-style-type: none"> <li>0041 - CLERK-TREASURER (CITY/TOWN UNITS ONLY)</li> <li>0044 - MAYOR</li> <li>0069 - CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)</li> <li>0079 - PLAN COMMISSION</li> <li>0164 - CITY/TOWN HALL</li> <li>0360 - PUBLIC SAFETY</li> </ul>



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](mailto:gateway@dlgf.in.gov) or at (317) 232-3777.