What is the GMC?

• The Gateway Management Console (GMC) is an online application that gives department administrators the ability to create, edit and review their Gateway workflow, including user roles and spend authority.
• Generally, access is given to a department’s manager, business officer, and/or director. It should be someone familiar with the departmental fund and personnel structure as decisions made in the GMC will effect roles and funds available in Gateway.

GMC Roles

• There are two campus level administrator roles for the GMC.
  – DSA – This role is given outside of the GMC; Campus Level administrative permission.
  – DPA – This role can is granted in the GMC, by the DSA. As the DSA may not handle the day-to-day management of roles and spend authority, the DPA should be considered the primary role for handling GMC responsibilities. Please note – it is acceptable for a departments’ DSA and DPA to be the same person.
Where Do I Even Start in the GMC?

- **Accounts Tab**
  - Create a New Account
    - (Cost Center / Project Code / Cost Type)
    - (Account Strings > Build New Account)
  - Edit/Review Accounts (Account Strings)
- **Assignments Tab**
  - Get an Account String into Gateway (Assignments by User/Role)
  - Create a New Role (Assignments by User / Role)
  - Edit Existing Roles (Manage Assignments)
  - Remove Someone Leaving My Department
    - (Manage Assignments or Bulk Assignment Management)
- **Reports Tab**
  - Get some quick Data on spend authority assignments

Accounts Tab – *Creating and Managing LAFS*

- The Account tab is where departments will manage their accounts for use in Gateway.
- Accounts active with the Chart of Accounts will ‘sync’ into the GMC; you will never have to manually enter a LAF (Location-Account-Fund).
  - Please note that only expenditure accounts are available at this time, income accounts are not.
- Accounts sync from the Chart of Accounts using a general format that does not include department specific cost centers or project codes.
  - EX. PURC-000000-9-661556-19941
  - (Cost Center-Project Code-L-A-F)
Accounts Tab – Creating and Managing LAFS

- Subtabs:
  - Cost Center –
    - Create Cost Centers (if used by your dept.)
  - Project Code –
    - Create Project Codes (if used by your dept.)
  - Cost Type – Coming Soon!
    - Create Cost Types (if used by your dept.)
  - Account Strings –
    - Manage/Review LAFS
  - Bulk –
    - Bulk Update of LAFS
  - Speed Types – Coming Soon!
    - "Replacing" Low Value Numbers / Creation and Editing

Assignments Tab – Creating and Managing Roles

- The Assignments Tab is where departments will manage their roles for the GMC and Gateway.
- Roles are important as they determine your workflow in Gateway!
  - The system will know automatically where to send an order based on Department Code, LAF, and dollar amount based on what you set up in the GMC!

Assignments Tab – Creating and Managing Roles

- Subtabs:
  - Manage Assignments
    - Review and Manually Edit Assignments
  - Assignments by User
    - Add New Role (User – Down Approach)
  - Assignments by Role
    - Add New Role (Role – Up Approach)
  - Bulk Assignment Management
    - Editing Roles in Bulk
  - Assignments Log
    - Audit Log for reviewing who made updates to roles
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Task: Creating a New Account

- Where: Account Tab > Account Strings
- If you use Project Code and/or Cost Center, that is the only time you need to “Build a New Account” to add your unique Project Code and/or Cost Center.
  - “Template” LAF will sync from Chart of Account, so if you do not use Project Code and/or Cost Center, you do not need to Build a New Account ever

Task: Creating a New Account

- How To:
  - Cost Center and/or Project Code needs to be created first before new LAF can be built!
  - Access Accounts > Cost Center
  - Enter in the Cost Center and a description. The system will auto-enable your Cost Center for use in Gateway. If you need the Cost Center to be PPS enabled – please also be sure to check the PPS box as well
  - Click “Add”
  - Follow the same steps for Project Code
Task: Creating a New Account

• How To:
  – Now that Cost Center and Project Code have been created, the new LAF can be built
  – Access Accounts > Account Strings
  – Click “Build New Account String”
  – You will notice your recently built CC and PC choices are dropdown options in the “Build New” popup. Select your desired CC and PC options, with your LAF selection.
  – When ready, click either:
    • “Save” – which will complete the creation of the new LAF combo
    • “Save & Add Another” – which will save and let you continue

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Task: Edit/Review Accounts

• Where: Account Tab > Account Strings
• If you have Account Strings that you do not want in Gateway, you have the option to “spring clean”
  – Next to each Account is the options:
    • Edit
      – (will only show for Accounts that have not yet synced to Gateway)
      – This lets you edit description, etc.
    • Disable
      – This will remove the LAF from your view leaving you with only the strings that you are currently managing
      – It will not remove it from the GMC, so if you change your mind, you can always add it at a later time
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Task: Get An Account String Into Gateway

Where: Assignments > Assignments by User/Role
The key piece to remember, is that until you link an Account Approver to an Account String, it will NOT sync to Gateway.
- Remember: Strings sync twice a day: 10:30am and pm
You can do this under either:
- Assignments by User
  - User-Down Approach
- Assignments by Role
  - Role-Up Approach/Good for Assigning Large Groups at Once

Task: Get An Account String Into Gateway

Assignments By User:
- Lookup User
- Select Account Approver Role
- Select Department from Drop-down
- Find the Account String this person will be the approver for
  - You can look via the Cost Center, Project Code or LAF drop-down
- Select the limits they will approve (or select all)
  - Each box needs to be checked; the box above will not supersede the boxes below
- You have the option to "Display Account String(s)" to view what strings you are about to add this person to before hitting save.
- Hit Save!
  - You will see "X new assignments created" above your selection when complete.
  - If you need to add another person to this same set-up, leave everything in place, just change the name. It will keep all of your data in place and you can hit save again to continually add additional approvers.
Task: Get An Account String Into Gateway

Assignments By User:

Task: Get An Account String Into Gateway

Assignments By Role:
- Select Account Approver Role
- Select Department from Drop-down
- Find the Account String these users will be the approver for
  - You can look via the Cost Center, Project Code or LAF drop-down
- Select the limits they will approve (or select all)
  - Each box needs to be checked; the box above will not supersede the boxes below
- You have the option to "Display Account String(s)" to view what strings you are about to add this person to before hitting save.
- Search for each users name
  - Selecting their name and clicking "assign", will add them to a list below. You can continue to build your list below. Once you have a large list of all the people you would like added:
- Hit Save!
  - You will see "X new assignments created" above your selection when complete.

Task: Get An Account String Into Gateway

Assignments By Role:
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Task: Create a New Role

- **Where:** Assignments > Assignments by User/Role
  - GMC Roles: DPA
  - Gateway Roles: Account Approver, Department Buyer, Requester, Receiver
- **Tips for Success!**
  - GMC Roles – Update Instantly
  - Requester and Receiver roles – Update Instantly
  - Account Approver and Department Buyer roles, need to catch a sync to be active – either the 10:30am or pm
  - All Gateway Roles are Mandatory
    - In fact your Department cannot be active without the Dept. Buyer!

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Task: Edit Existing Roles

- Where: Assignments > Manage Assignments
- This is a great place to see who is currently set up in your roles, make quick changes or see who was set up in the past.
- The "header" portion, lets you filter the information that you want to see.
  - If in the "assigned" view – this is all your current assignments
  - If you choose the "unassigned" view – this is past assignments

Task: Edit Existing Roles

- Where: Assignments > Manage Assignments
- If in the "assigned" view – this is all your current assignments
  - Clicking "unassign" next to a role will remove it
- If you choose the "unassigned" view – this is past assignments
  - Clicking "reassign" next to a role will add it back
  - *This is where you want to go if you are getting the message “assignment already exists”*

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Task: Remove Someone Leaving Dept.

- Where: Assignments > Bulk Assignment Management
- This gives you the option to remove roles/assignments all at once, rather than individually through the Manage Assignments Tab
- Quick Note:
  - You cannot use this to remove someone who has separated from PPS – their UCSB Net ID needs to be active

Task: Remove Someone Leaving Dept.

- Where: Assignments > Bulk Assignment Management
- Select your Department from the drop-down
- Choose a File to Download
  - User Roles (Requester, Receiver)
  - Department Roles (Department Buyer)
  - Account String Assignments (Account Approver)
- This will give you a CSV File
- Leave all the header information in tact
- Put an "X" in Column A, next to all of the information that you want to delete
- Save to your computer
- Go back to the GMC
- Upload back to the respective location
- This will mass delete roles/assignments for you
- Please note: Mac Computers love to change "000000" project codes to "0", a great way to get around it is to save to your computer and leave the file open to preserve formatting when you upload.
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**Task: Report Tab**

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**Tips for Success!**

• Two daily syncs:
  - 10:30am and 10:30pm

• Account Strings need Account Approvers

• “Assignment Already Exists” Message
  - Check Manage Assignments > Flip to Unassigned View!