GATEWAY MANAGEMENT CONSOLE
(GMC)
DESK MANUAL

2015

Procurement Services
Business and Financial Services

V.1 Hannah Morand
Introduction

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.

A campus department will generally have 1-3 administrators that have access to the GMC; it is not accessible by all campus users. 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.

Users with access to the GMC can log in here: https://gateway.procurement.ucsb.edu/gmc/login

*Please note,* Gateway administration is available for guidance and troubleshooting, but will not physically edit any departmental workflow for audit purposes.

Role Overview

1. **GMC Roles** –

   There are two campus level administrator roles for the GMC. These are the Department Security Administrator (DSA) and Department Purchasing Administrator (DPA).

   - 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.

2. **Gateway Roles** –

   The GMC is where a department creates and manages their departmental roles for Gateway. There are five (5) roles that your department will manage in the GMC. For in-depth descriptions of the roles, visit our Gateway Requisition Workflow document here:

**Accounts Tab: Creating and Managing Accounts**

1. **Introduction**

   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-000000-8-661556-19941 (Cost Center-Project Code-L-A-F)

   ![Image of Account Tab]

    | Department            | Cost Center | LAF       | Project Code | Description                  |
    |-----------------------|-------------|-----------|--------------|------------------------------|
    | PURC - PURCHASING OFFICE | PUIC        | 8-661556-19941 | 0D000        | PURCHASING / UC GENERAL - CARRYFWD |
    | PURC - PURCHASING OFFICE | PUIC        | 8-661556-68311  | 0D000        | PURCHASING / SALE SURPLUS PROPERTY |
    | PURC - PURCHASING OFFICE | PUIC        | 8-661556-69750  | 0D000        | PURCHASING / FED C&G OVERHEAD OFF-THE-TOP |
    | PURC - PURCHASING OFFICE | PUIC        | 8-661556-19941 | 0D000        | PURCHASING /UC GENERAL - CARRYFWD |
    | PURC - PURCHASING OFFICE | PUIC        | 8-661556-07427  | 0D000        | PURCHASING / UNIVERSITY OPPORTUNITY FUND |

2. **Cost Centers**

   Some departments that use Cost Centers will need to update these “general format” account strings that have synced in directly from the Chart of Accounts to include their unique Cost Centers (beyond 4-digit department codes). Before they can be added to any LAF – they need to be created in the GMC in the Cost Center sub tab.

   - Access Accounts > Cost Centers
   - 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”.  

   ![Image of Admin Cost Centers]
3. **Project Codes**

The same goes for Project Codes - some departments that use Project Codes will need to update these “general format” account strings that have synced in directly from the Chart of Accounts to include their unique Project Codes (beyond the “000000” template). Before they can be added to any LAF – they need to be created in the GMC in the Project Code sub tab.

- Access Accounts > Project Codes
- Enter in the Project Code and a description. The system will auto-enable your Project Code for use in Gateway. If you need the Project Code to be PPS enabled – please also be sure to check the PPS box as well.
- Click “Add”.

4. **Coming Soon – Cost Types**

Departments may be familiar with the use of Cost Types. Currently, Gateway’s Cost Type field is an open field. With the addition of the new Financial System, PeopleSoft, Cost Types will need to be validated rather than open ended values. Cost Types will need to be built first in the GMC, in the same manner as Cost Centers and Project Codes. However, they will not need to be added to each LAF as part of the FAU, but will instead become a dropdown selection in Gateway (much like sub account is now). Here is how it will look in Gateway in the coming months:
5. **Account Strings**

Accounts strings will be available for use in the GMC as long as they are open for transactions on the Chart of Accounts. If they are available there, they will automatically sync to the GMC. As mentioned in the introduction, they will sync over in a general format that does not include department specific cost centers or project codes. Departments can use the Account Strings tab to manage what LAFs they want to utilize in Gateway.

Remember, that unless you need to add the unique tags of project codes and/or cost centers, you do not need to “Build New Account String”; the system will grab any available LAFs for your department for your use. It is only if you need to add unique project codes and/or cost centers to LAFs that the “Build New Account String” button should be used.

Some features of the Account String section of the GMC:

- Ability to filter through department account strings using project codes, cost centers, LAFs in the header table.
- The “show disabled” box will populate LAFs that have been disabled by the department or by general accounting. They will appear as greyed in the table.
- Clicking the “Build New Account String” button will bring up a pop-up allowing you to create a new string containing a mix of new cost center, project code and LAF combinations.
  - Following the steps previously to create the cost centers and/or project codes will allow them to pre-populate the dropdown fields now that you are ready to build your new strings.
  - Save and close will just create one new LAF combination
  - Save and add another will save one new LAF combination and allow you to continue creating.
6. Bulk Management

In cases where a department has many LAFs that need unique combinations of cost center and/or project code additions, rather than manually creating each combination using the “Build New Account String” function under the Account Strings sub tab, DPAs can use the Bulk Tool under Accounts to mass create LAF combinations and update them all at once.

Under the “Bulk” sub tab, users can find their department code and download a CSV file of their current LAFs in Gateway.

- Click “Download Account Strings” to get the file.
- Using the file to bulk create LAF combinations, is fairly simple:
  - Copy a row off of the file that you would like to create a new combination off of and paste it at the bottom of the file (you can do this for as many new LAF combinations as you would like to create)
  - Write over the cost center and/or project code fields with what new combination you would like
    - Please note that you do not have to create your Cost Center and Project Codes in the GMC first, if you are doing your LAF build this way. The file upload will create them for you.
  - The last two lines of the PURC download are a great example:
• The most important part of this process is to ensure that you preserve the formatting of the file (i.e. do not change the header information, or delete columns). You will get an error message when you try to upload the file.
• When you are finished with your updates, save the file to your computer.
• For best results, save and keep the document open.
• Go back to the Bulk page and “Browse” your computer for where you saved the document.
• Once selected, “Upload Account Strings”.

7. Coming Soon – Speed Types

Departments are no longer using “low value” purchasing since Gateway was rolled out. “Low value numbers” have only remained for interdepartmental recharges. They are being re-branded for PeopleSoft and are now called “Speed Types”. Departments will still have their same numbers, but since the legacy mainframe is being replaced by PeopleSoft, they will create new “Low Value Numbers” now “Speed Types” in the Gateway Management Console.

Assignments Tab: Creating and Managing Roles

1. Introduction

The Assignments Tab is where departments will create and edit roles for 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! Gateway has been rolled out to all departments on campus, so at this point generally speaking, most of the GMC work for a department will be upkeep and minor edits, rather than larger implementation efforts.

2. Manage Assignments

Manage Assignments is a great tool to allow departments the ability to review current assignments, past assignments and make individual edits to assignments.

Some features of the Manage Assignments section of the GMC:

• Application: Ability to switch between viewing GMC and Gateway assigned roles
• Role: Filter departmental users by role (Department Buyer, Account Approver, Receiver, etc.)
  o Workflow Step – will auto fill depending on the choice above
• Department: Especially important if you have access to more than one department code
• Status: Filter between roles that have synced into Gateway and ones that are still pending synchronization
• Assigned Status: Assigned vs. Unassigned – to filter between current and past assignments
• First Name / Last Name – Filter users to see what roles/approval authorizations they have
• LAF: Filter by LAF to see who is set to approve on the LAF
• Project Code: Filter by Project Code to see who is set to approve on the Project Code
• Cost Center: Filter by Cost Center to see who is set to approve on the Cost Center
• Add New Assignment: Routes to “Assignment by User”

Manage Assignments can be used to make small, individual edits to a users’ assignments. Removal (by clicking “unassign” next to their assignment) can be done:

Re-assigning past roles can also be accomplished by looking through “unassigned” roles for the user and clicking “reassign” next to their name. (Most users will find that sometimes they try to create a new assignment, but the system throws an error message telling them that it “already exists”. This is exactly where you can search to reassign the role!)
Manage Assignment is not recommended for large additions or removals. In cases like that, users should work with the Bulk Tool.

3. Assignments by User

“Assignments by User” is where DPAs will go to assign roles for both the GMC and Gateway. This is more of the “user-down” approach as the user is selected first and added to the role. To work with this:

- Start by selecting which application you are assigning a role for: GMC or Gateway
- Select the user by clicking “Lookup User”
- Select the role that you would like to assign the user to
  - Note that selecting some roles will bring more dropdown options
    - Department Buyer: You will need to select PRE or POST for their workflow step
    - Account Approver: You will need to select the LAF that they will have spend authority over
- Select the Department Code to assign the role/user under
- Hit Save to create the new assignment

A few tips to remember:

- GMC roles will sync and update immediately upon login.
- Requester and Receiver roles will sync and update immediately upon login.
- Department Buyer and Account Approver roles need to catch a daily sync to be available in Gateway.
  - There is a 10:30am and a 10:30pm daily sync.
4. Assignments by Role

“Assignments by Role” is another location where DPAs will go to assign roles for both the GMC and Gateway. This is more of the “role-down” approach as the role is selected first this time and many users are added to the role at one time. To work with this:

- Start by selecting which application you are assigning a role for: GMC or Gateway
- Select the role that you would like to assign users to
  - Note that selecting some roles will bring more dropdown options
    - Department Buyer: You will need to select PRE or POST for their workflow step
    - Account Approver: You will need to select the LAF that they will have spend authority over
- Select the Department Code that you will be assigning the role/users under
- Use the First Name/Last Name field to search for users that you would like added to this role
- The users will appear in the first table; click “assign” to send them to the final table. The final table is the list of users that you will be building to add simultaneously to the role
- Once your table at the bottom is full of all of the users, hit Save to create the new assignments

A few tips to remember:

- GMC roles will sync and update immediately upon login.
- Requester and Receiver roles will sync and update immediately upon login.
- Department Buyer and Account Approver roles need to catch a daily sync to be available in Gateway.
  - There is a 10:30am and a 10:30pm daily sync.
5. Bulk Assignment Management

Bulk Assignment Management is a great tool for bulk removals. While it can be used to add users to departmental roles, Gateway Administration advises that it is most useful for large scale removal purposes.

Under the “Bulk Assignment Management” sub tab, users can filter with their department code and download one of the following files:

- User Role Assignments – Receiver/Requester Roles
- Department Assignments – Department Buyer / Ad Hoc Roles
- Account String Assignments – Account Approvers & LAF Assignments

Click “Download Account Strings” to get the desired file.
- The most important part of this process is to ensure that you preserve the formatting of the file (i.e. do not change the header information, or delete columns). You will get an error message when you try to upload the file!
- The large scale removal process is quite simple:
  - In column A, place an “X” next to every assignment that needs to be removed.
- When you are finished with your updates, save the file to your computer.
- For best results, save and keep the document open.
- Go back to the Bulk page and “Browse” your computer for where you saved the document.
- Once selected, “Upload”

Please note that Mac computers will generally have the most issues with the formatting of the CSV file. Leaving the file open when uploading is a key component for troubleshooting on a Mac!

Reports

1. Introduction

The reports contained in the GMC can be helpful for a quick snapshot of users assigned to roles within your department(s) and their contact information. It can also give a guided snapshot of spend authority assigned on all LAFs within the department as well.
2. **User Roles Report**

The “User Roles Report” allows the filtering of users or roles by department and gives current email data. Some departments will find the data helpful for sending emails to certain users with particular role assignments within a department.

3. **Signature Authorization Report**

The “Signature Authorization Report” shows all departmental LAFs and the highest spend authority assignments for each LAF.

- If “6. Over $25K” is seen – you know that the LAF has full spend authority assigned for that individual user.

4. **Assignments Report**

The “Assignments Report” is a duplicate of the Manage Assignments screen – it just allows departments the ability to export the same data that shows up under Manage Assignments. It lacks some of the header details that Manage Assignments allows for filtering, but gives departments a general ability to export the same data.