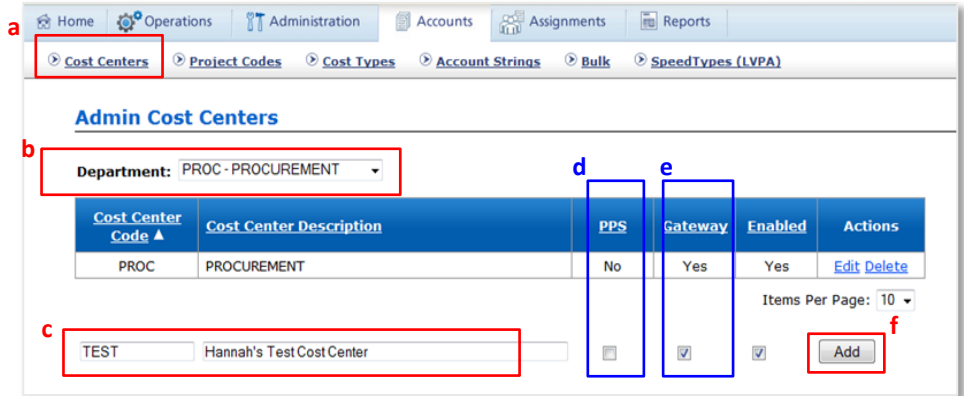


This document provides instructions on **How to Create and Manage Department Chart Fields and SpeedTypes in the GMC** with the implementation of the New PeopleSoft Financial System. New steps are highlighted in **blue fonts**. Locate a complete copy of GMC Desk Manual under GMC Resources here: <http://www.bfs.ucsb.edu/procurement/gateway/training>

IMPORTANT NOTE: While some of the changes made to the GMC impact Gateway users (Cost Type changes), non-Gateway users are also impacted. This is because after Go Live, ALL new Projects, Cost Centers, and Cost Types (as well as SpeedTypes/LVPA's) will have to be added to the GMC, regardless of whether they are used in Gateway or elsewhere (i.e. web apps, PPS, e-Journals, etc.). Currently, only users who need Projects and Cost Centers for use in Gateway have had to use the GMC.

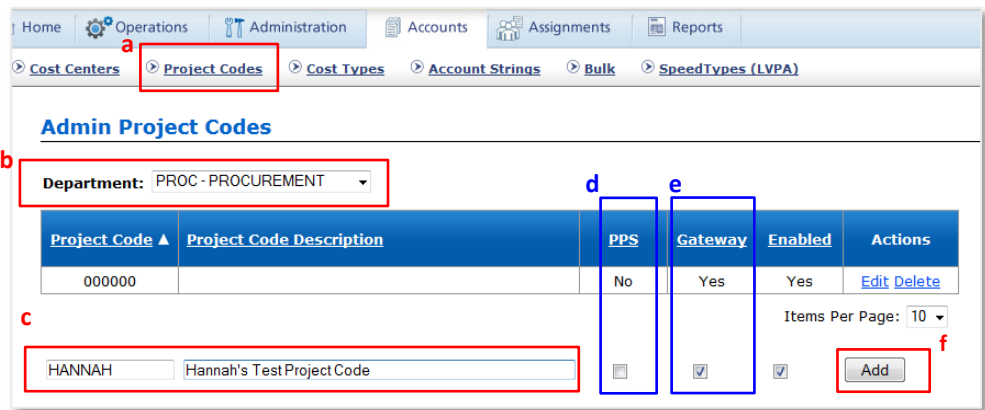
I. Creating and Managing Cost Centers

- Access Accounts > Cost Centers.
- Use the Department dropdown to select appropriate department.
- Enter in the Cost Center and a description. The system will auto-enable your Cost Center for use in Gateway
- Check the PPS Box if you need the [Cost Center to be PPS-enabled](#)
- [Uncheck the Gateway box if the Cost Center is for non-Gateway use.](#)
- Click "Add".



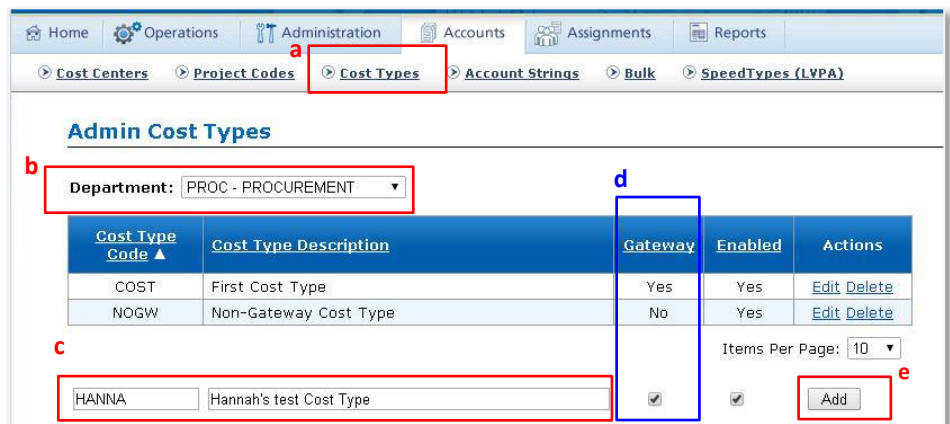
II. Creating and Managing Project Codes

- Access Accounts > Project Codes.
- Use the Department dropdown to select appropriate department.
- Enter in the Project Code and a description to auto-enable your Project Code for use in Gateway.
- Similar to Cost Center, [Check the PPS Box if you need the Project Code to be PPS-enabled.](#)
- [Uncheck the Gateway box if the Project Code is for non-Gateway use.](#)
- Click "Add".



III. Creating and Managing Cost Types

- Access Accounts > Cost Types.
- Use the Department dropdown to select appropriate department.
- Enter in the Cost Type and a description to auto-enable your Cost Type for use in Gateway.
- [Uncheck the Gateway box if the Project Code is for non-Gateway use.](#)
- Click "Add".



Creating and Managing Cost Types (Cont'd.)

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 entering 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's a preview of how **Cost Types** will look in **Gateway**:

IV. Creating and Managing SpeedTypes

Since Gateway was rolled out, "Low value numbers" have remained for use by FlexCard, Mailroom, Furniture Services, and Bookstore. These will be re-branded for PeopleSoft to "**SpeedTypes**". Effective July 1st, new SpeedTypes (LVPA's) will need to be created in the GMC.

a. Access Accounts > SpeedTypes (LVPA)

b. Use the "Department" dropdown to select the appropriate department if necessary.

c. Click "Build New SpeedType" button.

The "Build New SpeedType" pop-up window will appear.

d. Fill in the appropriate fields. LAF, Sub, and Object Code are required fields.

e. Close the pop-up window by clicking any of these options:

- i. **Save** - saves info, assigns a sequential number to the SpeedType, and returns to the Manage SpeedTypes list screen.
- ii. **Save & Add Another** - saves the info, assigns a sequential number to the SpeedType, and resets the Build New SpeedType screen for creation of another SpeedType.
- iii. **Save & Add Another with same LAF** - saves the info, assigns a sequential number to the SpeedType, and resets all of the Build New SpeedType screen except for the LAF field, thus allowing for creation of another SpeedType with the same LAF.
- iv. **Close** - cancels creation of the SpeedType and returns to the Manage SpeedTypes list screen.