All-In-Two
Financial System
Authorizations
Functions Guide

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The Basics:

Destination Link:

Access the Gateway Management Console via a browser, such as Internet Explorer, Safari, Mozilla Firefox or Chrome.

The destination link is:
https://gateway.procurement.ucsb.edu/gmc

Login:

To login to the Gateway Management Console, enter your UCSB Net ID and password and click on the LOGIN button (or press Enter).

The message “Welcome to the UCSB eProcurement GATEWAY Management Console!” is displayed.

If the UCSB Net ID and password are not recognized, the message “The UCSBNetID and password combination could not be authenticated. Please try again” is displayed.

Menu bar:

After a login to GATEWAY, the menu bar is displayed.

For All-in-Two, only the “Home” and “Assignments” functions are available.
Note: the Operations, Administration, Accounts and Reports functions will NOT be available for All-in-Two.

Logoff:

To Logoff of GATEWAY, click the “Logoff” icon located in the upper right of the Gateway Management Console.

The “You have successfully logged out” message is displayed.

Nonactivity:

After 120 minutes (2 hours) of non-activity, you will be logged off.
The Assignments Menu:

To access All-in-Two functions, click the “Assignments” function on the Gateway Management Console.

The following menu options are displayed:

- Manage Assignments
- Assignments by User
- Assignments Log
- Assignments by Role (not used by ALLN02)

Manage Assignments

This function is primarily used to look up and display or list All-in-Two roles (permissions).

Notes:
- Pressing Clear button will clear all attributes and Application=Gateway is displayed.
- Greyed out attributes cannot be used.
- All searches can be customized by using additional attributes (such as Department or First Name).
Display the roles for a staff member:
Application <ALLN02>.
Assigned Status <Assigned>.
Last Name <type>.
Click Search or press Enter.
Shows the roles for any staff matching that name.

List staff roles for all users in the department:
Application <ALLN02>.
Assigned Status <Assigned>.
Department <select>.
Click Search or press Enter.
Lists the roles for all staff in the department.

List staff with the same role:
Application <ALLN02>.
Assigned Status <Assigned>.
Department <select>.
Role <select>.
Click Search or press Enter.

Display a staff member's unassigned roles:
Application <ALLN02>.
Assigned Status <Unassigned>.
Department <select>.
Last Name <type>.
Click Search or press Enter.

List all staff with unassigned roles:
Application <ALLN02>.
Assigned Status <Unassigned>.
Department <select>.
Click Search or press Enter.
**Search Results:**
Search Results are displayed in a results table, right below the search filters.

<table>
<thead>
<tr>
<th>Role</th>
<th>Dept</th>
<th>First Name</th>
<th>Last Name</th>
<th>Unassign</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRVL-DU</td>
<td>CCTR</td>
<td>Terry</td>
<td>Malosh</td>
<td>Unassign</td>
</tr>
<tr>
<td>T0F-DB</td>
<td>CCTR</td>
<td>Terry</td>
<td>Malosh</td>
<td>Unassign</td>
</tr>
<tr>
<td>T0F-PRE1</td>
<td>CCTR</td>
<td>Terry</td>
<td>Malosh</td>
<td>Unassign</td>
</tr>
</tbody>
</table>

**Add New Assignment (button):**
The “Add New Assignment” button which appears in the lower left corner can be used to assign new roles. Once clicked, the “Assignments by User” function is displayed.

[Add New Assignment]
Assignments by User

This function is used primarily to assign, or, unassign All-in-Two roles (permissions).

Adding a role to existing user

1. Search and Display existing roles.
   Application <ALLN02>.
   Click on “Lookup User”.

   User Search box opens; try a search on Last Name and/or First Name.

   (Other search filters such as the UCSBnetID or COMPLETE ID) can be used if you select Advanced Search Options)

   Select the staff member matching that name.

   The current assigned roles are displayed.
   Review the list of assigned permissions.

2. Select the Role to be added.
   Application <ALLN02>.
   User: <name is displayed from the search, but greyed out>.
   Role <select from pull-down>.
   Role is displayed (Note: some roles are restricted to a specific department)

   Department <select from pull-down>.
Department is displayed.

**Department:** 

Click Save to update the entry.

![Save Button]

Role is added to assignments for the staff member.

*Repeat to add any additional roles, as needed.*

**Adding a new user to All-in-Two**

1. Search and Display existing roles. 
   Assignments by User. 
   Application <ALLN02>. 
   Click on “Lookup User”.

![Lookup User Button]

**User Search** box opens; try a search on Last Name and/or First Name.

(Other search filters such as the UCSBnetID or COMPLETE ID) can be used if you select Advanced Search Options)

*Select the staff member matching that name.*

The current assigned roles are displayed. 
Review the list of assigned permissions.

2. No default department, or roles, is assigned to this user.

Under Default Department the message: 
“A department-level ALLN02 assignment must be made before selecting a Default Department” is displayed.

Under Current Assignments, “No assignments found” is displayed.
3. Select a Role to be assigned.
   Role <select from pull-down>.
   Role is displayed.

   **Role:**
   ![Role dropdown]

   Department <select from pull-down>.
   Department is displayed.

   **Department:**
   ![Department dropdown]

   The check box “Set as user’s default department” is checked, but greyed out.

   Click Save.

   ![Save button]

   The Role is added to assignments for the staff member.
   The Default Department has been set.

   *Repeat for assigning other additional roles, as needed.*

**Removing a User from All-in-Two**

1. Search and Display existing roles.
   Assignments by User.
   Application <ALLN02>.
   Click on “Lookup User”.

   ![Lookup User button]

   **User Search** box opens; try a search on Last Name and/or First Name.

   (Other search filters such as the UCSBnetID or COMPLETE ID) can be used if you select Advanced Search Options)
Select the staff member matching that name.

The current assigned roles are displayed.
Review the list of assigned permissions

2. Unassign the user from each role by clicking on “Unassign”.
A dialog box will be displayed with the message “Are you sure you want to Unassign”; click OK to unassign.

When all assignments have been removed, “No assignments found” is displayed.

After the last role is unassigned for all departments, the default department is removed.

**Default Department:**

A default department is required for all users of All-in-Two.

When you as the DSA add a new user to All-in-Two, your department becomes their default.

```
Default Department for Terry Malosh:
INFO - OIST  Change Default Department
```

Note: The default department can be changed by any DSA by clicking on ‘Change Default Department’.
Assignments Log

Log files are created whenever an update is made to user roles. You can do a basic log search, or can customize log searches by selecting Department, Name, Role, or other attributes. In addition, Log files can be exported to a comma delimited file (CSV).

**Basic Log search:**
- Application<ALLN02>.
- Date Range:<click and select dates>.
- Click Search or press Enter.

**Log files for a specific person:**
- Application<ALLN02>.
- Date Range:<click and select dates>.
- Last Name: <type in Last Name>.
- Click Search or press Enter.

**Log Files for a Department:**
- Application<ALLN02>.
- Date Range:<click and select dates>.
- Department:<pull down and select>.
- Click Search or press Enter.

**Log Files for a Specific Role:**
- Application<ALLN02>.
- Date Range:<click and select dates>.
- Role:<click and select role>.
- Click Search or press Enter.

Other attributes that might be used for searches include “Update Type” (Assign, Unassign) and “Updated By” (the UCSBnetID of the person who made a change).