



Navigating Gatekeeper

A step-by-step training to help agencies confidently navigate GateKeeper and complete the new contract management process with accuracy and efficiency.

GateKeeper Training Purpose

- **Understanding Your Role in the Contract Workflow** - Learn where agency responsibilities begin and end in the contract lifecycle, including document submission, task completion, and communication with internal teams.
- **Master The Core Feature of GateKeeper** - Gain hands on knowledge of essential system functions navigating the dashboard, uploading documents, responding to corrections, and signing contracts.
- **Live System Walkthrough & Demo** - Experience a step-by-step demonstration of how to complete tasks in GateKeeper, including logging in, uploading documents, and tracking your contract's progress in real time.

What Is Gatekeeper?

- **Centralized Contract Management System** - Serves as the primary platform for managing contracts, vendors, documents, and approvals in one secure and accessible location.
- **Streamlined Internal & External Collaboration** - Connects Programs, Finance, Contracts, and Agency users in a single environment, making it easy to share information, request revisions, and approve documents without relying on scattered emails or spreadsheets.
- **Automates Key Workflow Steps** - GateKeeper automates tasks like contract creation, notifications, approvals, and vendor syncing to reduce delays and manual processing.

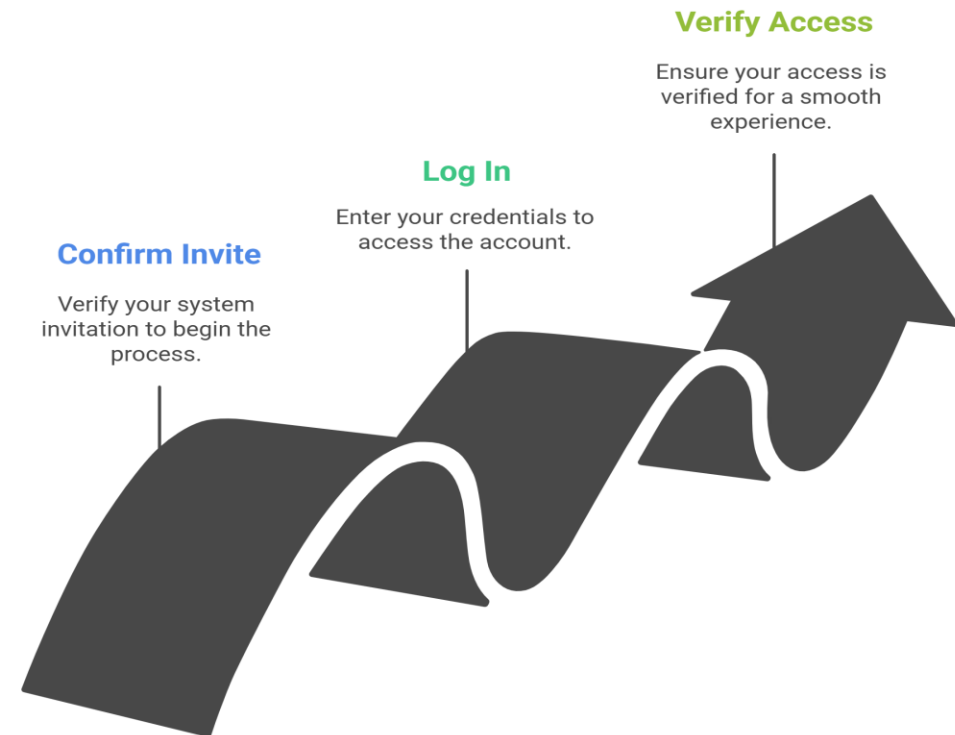
Gatekeeper System Access




What you need to get started and securely log into the GateKeeper Partner Portal.

System Access Prerequisites

- **Access to Gatekeeper Account:** Access the GateKeeper platform at https://us.gatekeeperhq.com/6393/supplier_portal
- **Confirm Your System Invite:** Ensure you have received your GateKeeper invitation email to access the system. If not, please send a request to ithelpdesk@chicookworks.org
- **Log In & Verify Access:** Log in to confirm you can successfully access the dashboard. You should see your name, assigned tasks, and role-based permissions.



Logging In To Gatekeeper



This demonstration will show you how to access GateKeeper, enter your credentials, and begin navigating the system confidently.

System Navigation



Get familiar with the GateKeeper dashboard layout and learn where to find your tasks, documents, and key contract updates.

Dashboard



Your central hub for managing tasks, tracking contract progress, and accessing key documents in GateKeeper.



- Dashboard
- Partners
- Contracts
- Events
- Messages
- Forms
- Files



Partner Portal Dashboard

Home

Quick Links > [Update Profile](#) [Contact Us](#)

My Open Forms

Form Name	Card name	Linked To	Status	Progress
Partner & Contract Request Workflow (1)	2025-391-00	Agency Test	Request In Progress	Phase 5 (of 9) View more

My Open Events

Event Type	Event Title	Linked to	Due Date
There are no items to display.			

My Messages

Live Messages (8) > Sort by: Oldest

- Eric Horn - Agency Test Account Gatekeeper Rule Ok thanks for the heads up, I will come over and take a look at this soon. 1 4 days ago
- Zaida Chaidez Gatekeeper Rule Hi Eric, ... 1 4 days ago
- Eric Horn - Agency Test Account Test Test Message 12 days ago
- Eric Horn - Agency Test Account [NO SUBJECT] Ok thanks uploading documents now about 1 month ago
- Dave Swanson Test Eric -- ... 3 about 1 month ago



Partners



View and manage your agency's profile, submitted documents, and contract-related activities within the Partner Portal.



- Dashboard
- Partners
- Contracts
- Events
- Messages
- Forms
- Files



Partners

Home / Partners List


Pipeline & Live Partners (1) > Filter list x

Partner	Internal Owner	Status	Live Contracts	Financial Year End
Agency Test	Kendall Test	Live	8	Jul 12

Show 20 entries



Contracts



Access, review, and track the status of your agency's contracts throughout the full contract lifecycle.

Contracts | Gatekeeper https://us.gatekeeperhq.com/6393/supplier_portal/contracts

Chicago Cook Workforce Partnership >

Home / Contracts List


Contracts

(Pipeline & Live Contracts (21) > Filter list

Contract	Status	End Date	Contract Amount
Test CDW Agreement	Pipeline	10-Jun-2026	\$500
Test Contract - 123456	Pipeline	30-Jun-2026	\$300,000
Test123	Pipeline	29-Jun-2026	\$300,500
Test850-900	Pipeline	15-Jul-2026	\$650,000
2025-238	Pipeline	30-Jun-2026	\$300,000
605Test	Pipeline	21-Jul-2025	\$80,000
Test-800	Pipeline	13-Jul-2026	\$56,000
2025-0	Pipeline	30-Jun-2026	\$300,000
2025-391-00	Pipeline	30-Jun-2026	\$350,000
402-0-0142	Pipeline	30-Jun-2026	\$752,450
999-888	Pipeline	11-May-2026	\$200,000
922-888	Pipeline	30-Jun-2026	\$157,000
7650-800	Pipeline	02-Jun-2026	\$520,000
941-008	Live	02-Jun-2026	\$20,000
939-888	Live	11-May-2026	\$200,000
969-888	Live	14-May-2026	\$200,000
949-888	Live	12-May-2026	\$20,000
67900-234	Live	09-Jun-2026	\$200,000
5255-600	Live	01-Jun-2026	\$250,000
T800-123	Live	14-Jul-2026	\$8,500,000

Show 20 entries << < 1 2 > >>

Messages



Communicate directly with internal teams, respond to requests, and keep all contract-related conversations in one place.

My Messages | Gatekeeper

https://us.gatekeeperhq.com/6393/supplier_portal/messages

Chicago Cook Workforce Partnership >

Knowledge Base USD Eric Horn - Agency Test Account >

Home / My Messages

My Messages

Live Messages (8) > Filter list x Sort by: Oldest

	Eric Horn - Agency Test Account	Gatekeeper Rule Ok thanks for the heads up, I will come over and take a look at this soon.	1	4 days ago
	Zaida Chaidez	Gatekeeper Rule Hi Eric, ...	1	4 days ago
	Eric Horn - Agency Test Account	Test Test Message		12 days ago
	Eric Horn - Agency Test Account	[NO SUBJECT] Ok thanks uploading documents now		about 1 month ago
	Dave Swanson	Test Eric - ...	3	about 1 month ago
	Eric Horn - Agency Test Account	Test Ok, thanks. Please see the attached to see what the messaging would look like on my end. ...	3	about 1 month ago
	Kendall Griffin	Test Im writing you back via Outlook. ...	3	about 2 months ago
	Eric Horn - Agency Test Account	Test @Kendall Griffin @Dave Swanson I wanted to send out this test message to see how this would look	3	about 2 months ago

Show 20 entries

Copyright © 2010 - 2025. Gatekeeper™ is a registered trademark of Cinergy Technology Ltd.

https://us.gatekeeperhq.com/6393/supplier_portal/messages

Files



Upload, manage, and access all contract-related documents in one secure, organized location.



- Dashboard
- Partners
- Contracts
- Events
- Messages
- Forms
- Files



Chicago Cook Workforce Partnership >

Files

Home / Files

Filter list x

Overdue 0 | 30 Days 0 | 60 Days 0 | All 7

Title	File Type	Added at	Added by
▼ AwardLetter.pdf (68.4 KB)		10-Jun-2025	Eric Horn - Agency Test Account
▼ AwardLetter.pdf (68.4 KB)		10-Jun-2025	Eric Horn - Agency Test Account
▼ AwardLetter.pdf (68.4 KB)		11-Jun-2025	Eric Horn - Agency Test Account
▼ FINAL_PY24_Sector_Centers_Scope_of_Services_07_26_24_docx (60.4 KB)		05-Jun-2025	Eric Horn - Agency Test Account
▼ GK_Messaging_-_KG_to_EH.jpg (64.7 KB)		09-Jun-2025	Eric Horn - Agency Test Account
▼ ScopeOfWork.pdf (249 KB)		10-Jun-2025	Eric Horn - Agency Test Account
▼ ScopeOfWork.pdf (249 KB)		11-Jun-2025	Eric Horn - Agency Test Account

Show 20 entries

Copyright © 2010 - 2025. Gatekeeper™ is a registered trademark of Cinergy Technology Ltd.



Contract Phases



An overview of the 9 key steps that guide each contract from initial request to full execution in the Contract Management Process.

Partner & Contract Request (Phases)


Contract Management Process Phases



Contract Management Process Breakdown

Phase #	Phase Name	Responsibility	Description	Additional Information
1	Partner Portal - Onboarding	Agency	Downloading, then reuploading their copies under "Agency	Agencies can update key business information (e.g., address, Tax ID, W-9, Certificate of Insurance), begin communication with their Relationship Manager, and access award documents such as the SOW, budget, and award letter.
2	Partner Portal - Corrections	Agency	making necessary adjustments then re-upload.	
3	Finance Review	Partnership	Reviewing the Agency uploaded budget and setting the invoice due date	If approved, this will allow the Agency to begin invoicing, depending on the set due date
4	Partner Portal - Corrections	Agency	Reviewing SOW, Loading Plans, & second look at budget	Programs can reject a pre-approved budget and any other documents submitted by the Agency.
5	Programs Review	Partnership	Reviewing all documents and info provided by agency	
6	Update Contract PDF	Partnership	Responsible for downloading and reviewing all approved documents and consolidation	
7	E-Sign	Agency & Partnership	Signatory or anyone included for signature	The signature process takes place outside of GateKeeper via DocuSign. Emails will be sent from DocuSign on behalf of The Partnership.
8	Contract Rejected	Agency & Partnership		
9	Contract Executed	Agency & Partnership		

GateKeeper Notifications



All GateKeeper notifications will be sent from either no-reply@gatekeeperhq.com or reply@gatekeeperhq.com. We recommend creating a dedicated email folder and setting up a rule to automatically route these messages for easy access and a timely response.

How To Download Contract Documentation From GateKeeper



This section provides a step-by-step guide for agencies on how to locate and download essential contract documentation. The three key documents include the Scope of Work Template, Budget Template, and Loading Plan / Exploding Plan Template.

[Click HERE to access step-by-step training resources that will guide you through completing this task.](#)

Uploading Completed Contract Documentation to GateKeeper



This step-by-step guide helps agencies properly upload completed contract documentation to GateKeeper. The key documents to be uploaded include the finalized Scope of Work Template, Budget Template, and Loading Plan / Exploding Plan Template.

[Click HERE to access step-by-step training resources that will guide you through completing this task.](#)

Reviewing Contract Status



Responding To Correction Request



This step-by-step guide helps agencies to easily review what needs to be fixed, make the updates, and resubmit your documents

[Click HERE to access step-by-step training resources that will guide you through completing this task.](#)

Accessing & Signing Contracts (via DocuSign)



GateKeeper Training Resources



This step-by-step guide helps agencies to easily review what needs to be fixed, make the updates, and resubmit your documents

Gatekeeper Training Resources

Resource Name	Resource For	Description	Resource Location
How To Onboard A New External User in Gatekeeper	Agency	The purpose of this document is to provide step-by-step instructions for onboarding an external agency user into Gatekeeper.	Click Here To Access Training Resource
How an Agency Can Access GateKeeper	Agency	This guide provides a step-by-step process for logging into the Gatekeeper Agency Portal, ensuring users can access essential services efficiently.	Click Here To Access Training Resource
How an Agency Can Reset Their Password in GateKeeper	Agency	This guide provides a straightforward process for resetting your GateKeeper password, allowing you to regain access to your account quickly and easily	Click Here To Access Training Resource
How To Download Contract Documentation From GateKeeper	Agency	This process provides a clear, step-by-step guide for agencies to successfully download the contract management templates needed for completion and upload into GateKeeper.	Click Here To Access Training Resource
Uploading Completed Contract Documentation to GateKeeper	Agency	This process provides a clear, step-by-step guide for agencies to upload their completed documentation to GateKeeper successfully.	Click Here To Access Training Resource
Responding To Correction Request	Agency	This process provides guidance on how to respond to a correction request within GateKeeper	Click Here To Access Training Resource
Gatekeeper Training Videos For Agencies	Agency	Training Video For Agencies To Conduct The Contract Management Process	Click Here To Access Training Video



Thank You & Next Steps

