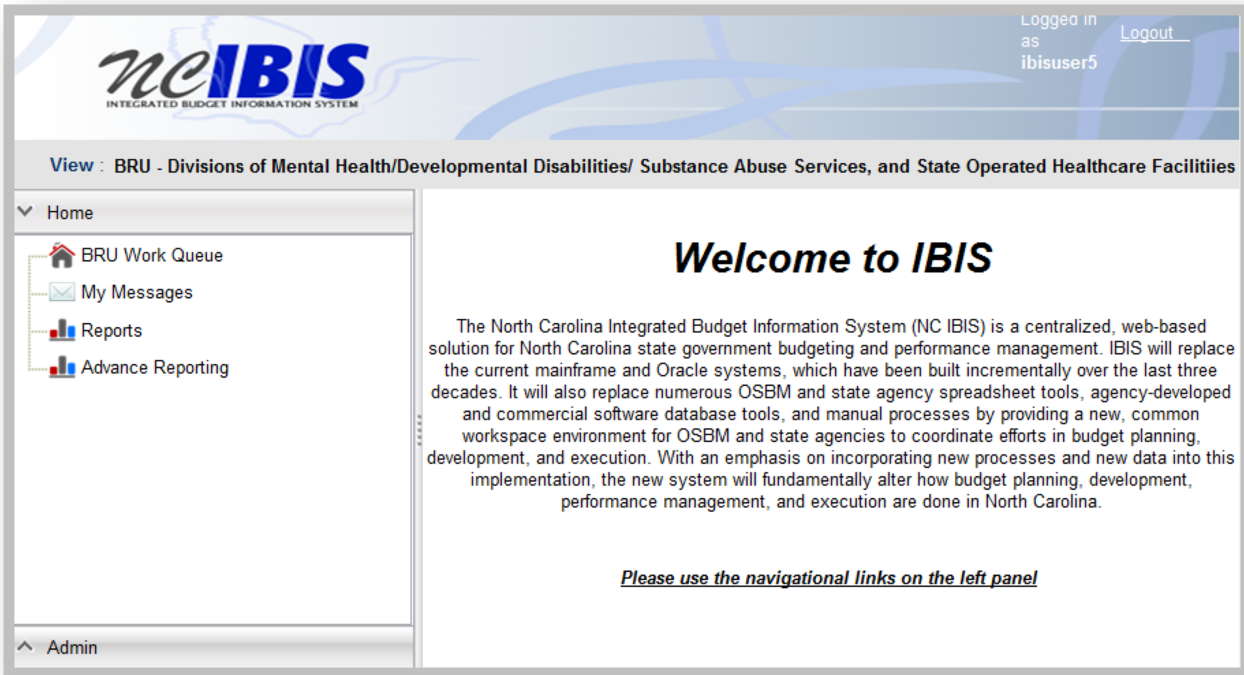
INTEGRATED BUDGET INFORMATION SYSTEM (IBIS)

TRAINING GUIDE

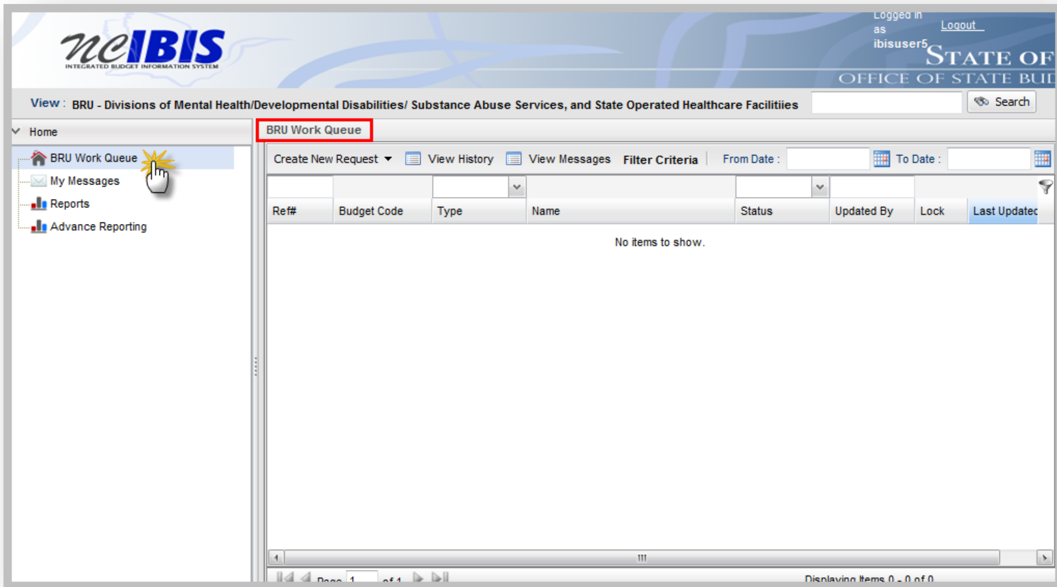
SECTION 3: WORKSHEET I – INCREASE/DECREASE



Step 1: Once you have successfully logged in, you should see the above NC IBIS Home Page.

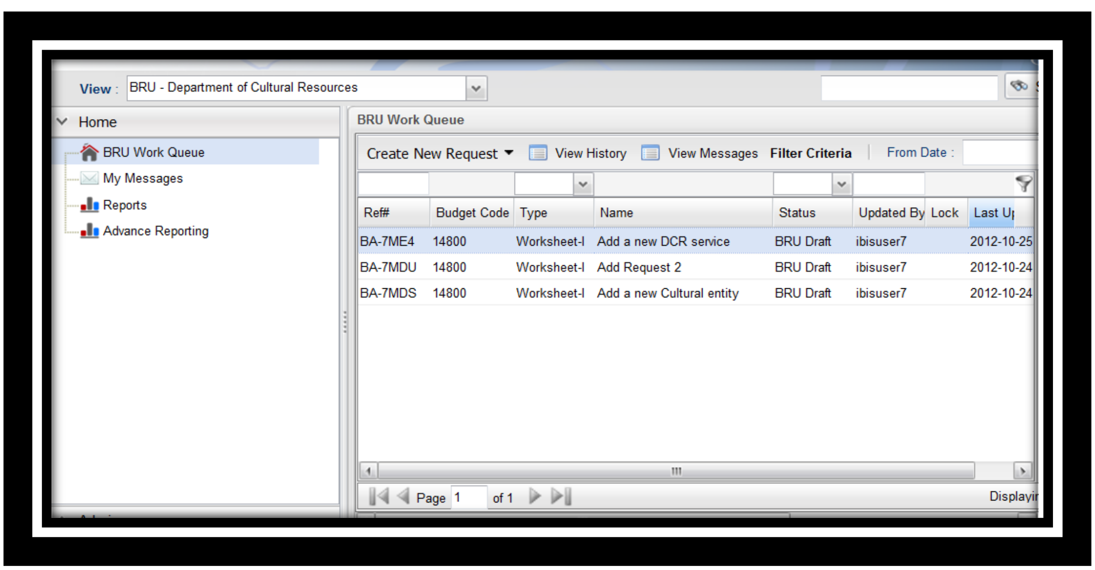
Step 1: If you have access to multiple Divisions and/or Agencies, find the View drop-down list in the upper left-hand corner. Click on the drop-down arrow. You will need to select one.

Step 2: Click on the BRU Work Queue in the left pane of the screen. (See the hand click image below.)

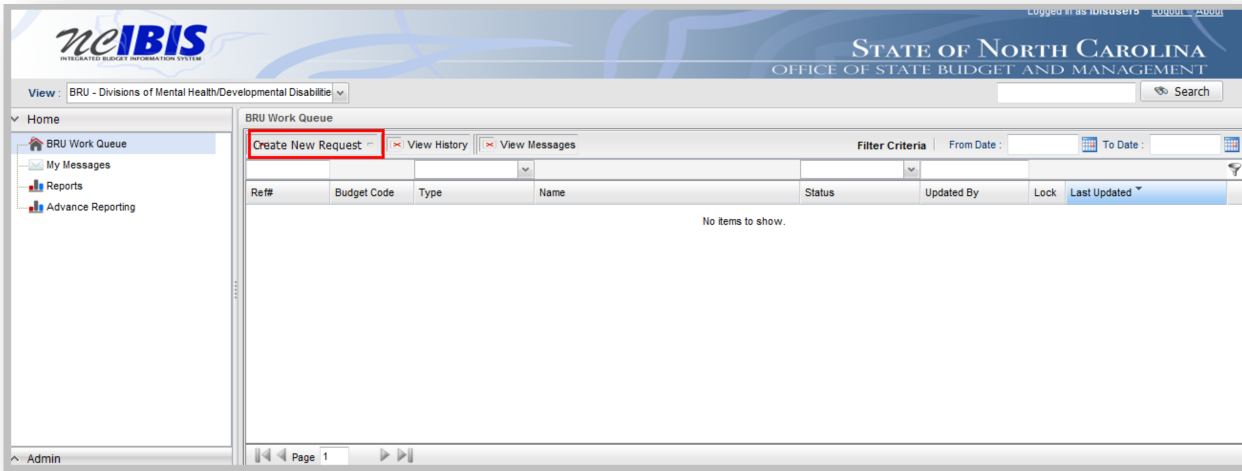


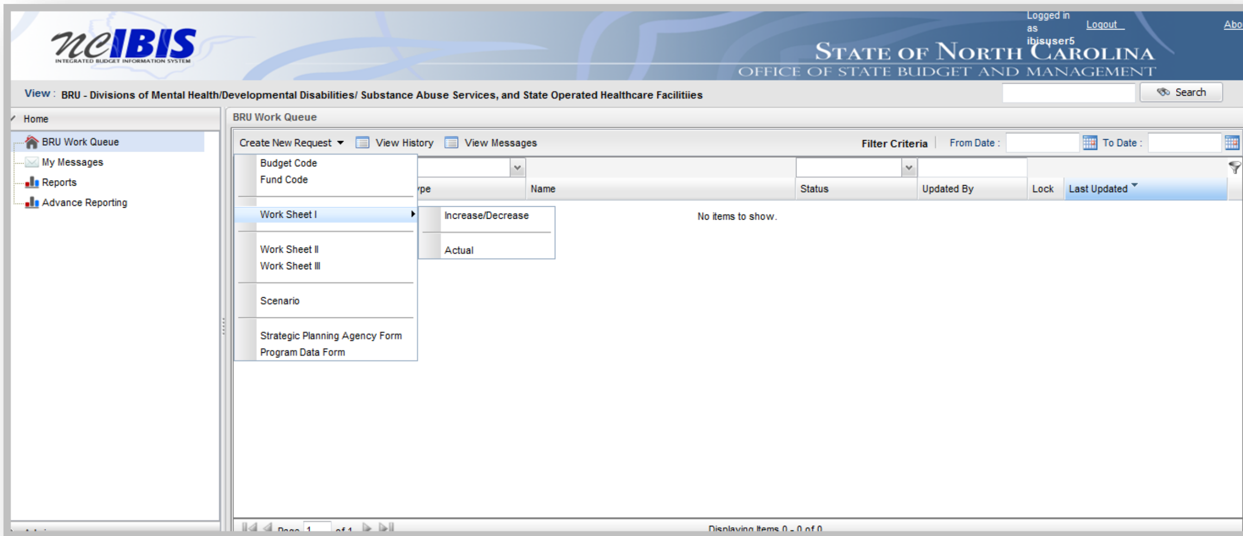
Step 2 Result (See above): The right pane of the window will display the BRU Work Queue, when one exists. In this case, there is nothing in the Work Queue yet, so the right pane shows only the label for the Work Queue – which you will be creating in the next few steps.

Step 3: Once requests are added, the queue will look like the following with the Requests shown in right pane:



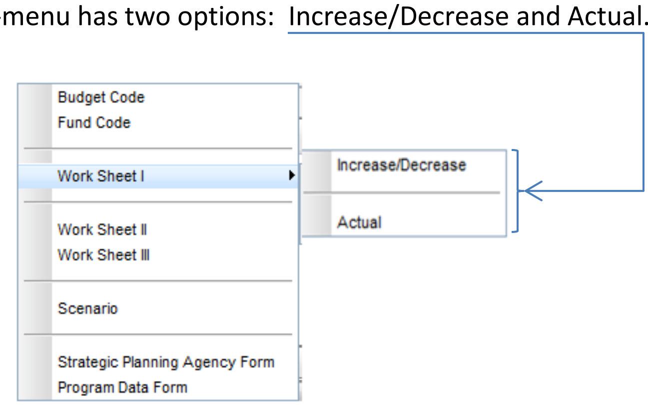
Step 4: Click Create New Request drop-down, on the right pane of the window, as outlined in red:





Step 4 Result (above): When you click on 'Create New Request', the drop-down will display the following:

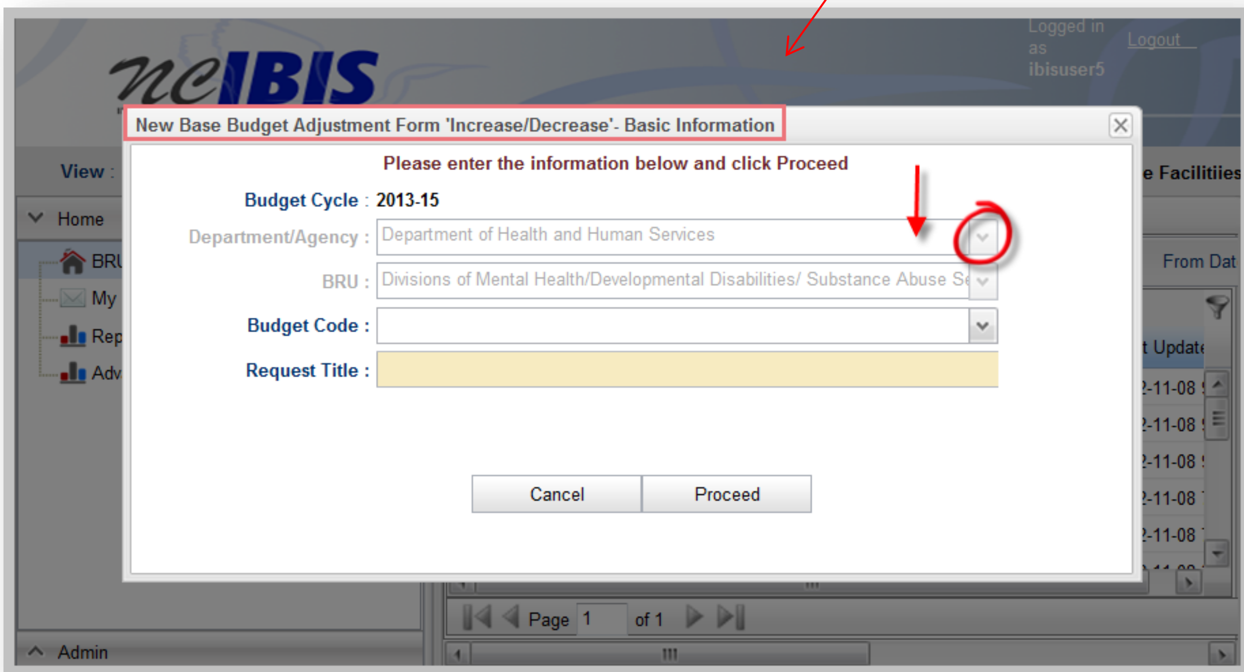
Work Sheet I sub-menu has two options: Increase/Decrease and Actual.



Step 5: Click on the Increase/Decrease option on the sub-menu (above).

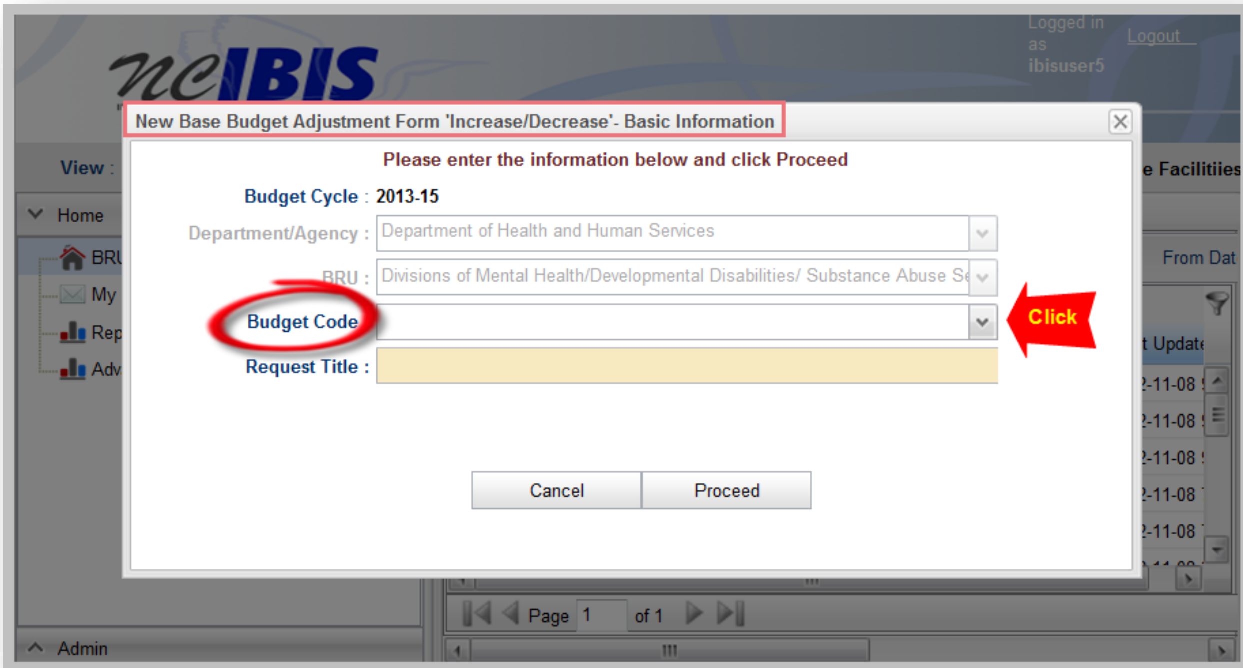
Step 5 Result (below): You will see a New Base Budget Adjustment Form "Increase/Decrease" – Basic Information window.

Step 6: Note the Department/Agency field. [See the red arrow.]

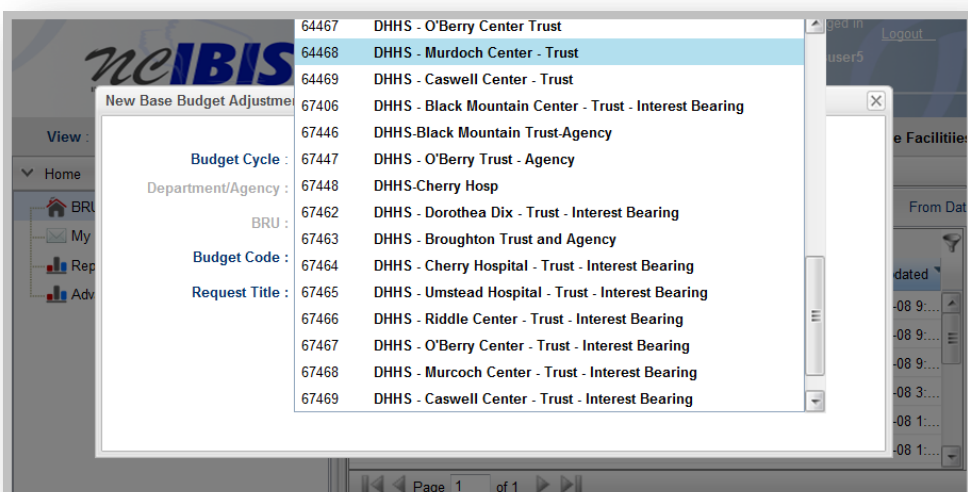


Step 6 Result (above): In your case, likely you only have access to your department/agency, so it will default to your Department/Agency. If you have access to multiple departments and/or agencies, those you have access to will appear in the drop-down (circled) for you to select from.

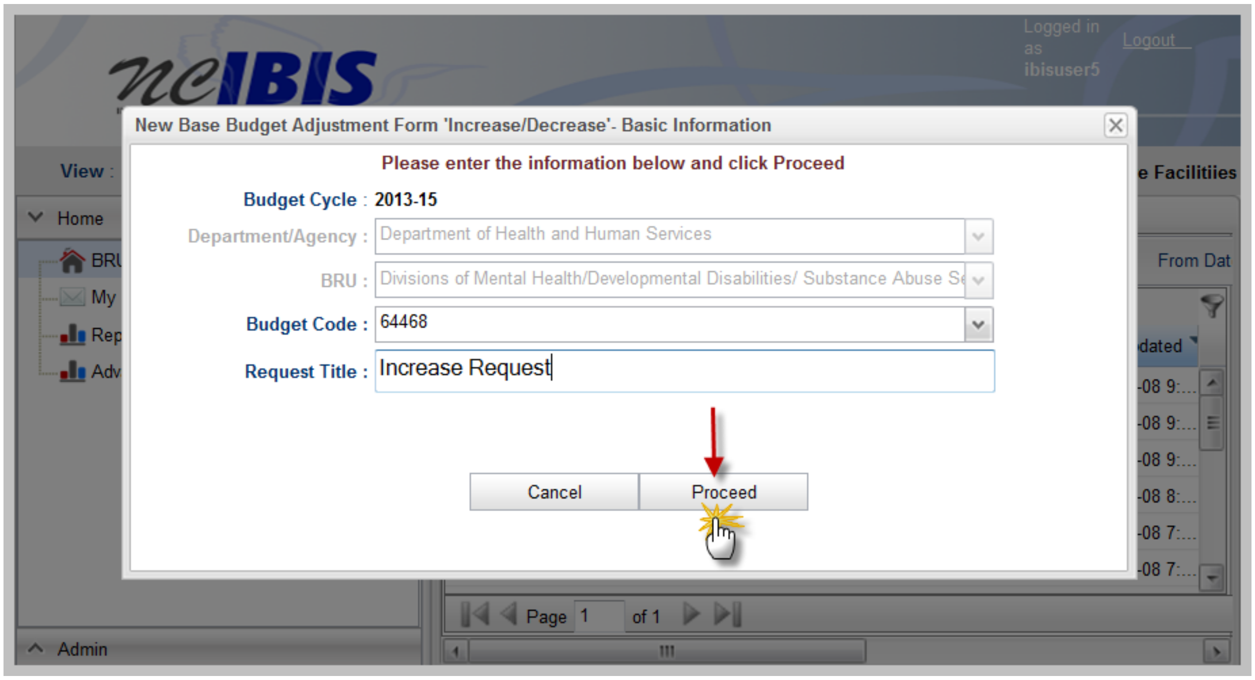
Step 7: Click on the dropdown arrow for the Budget Code field.



Step 7 Result (below): You will see a list of valid Budget Codes for the selected Department/Agency and BRU.



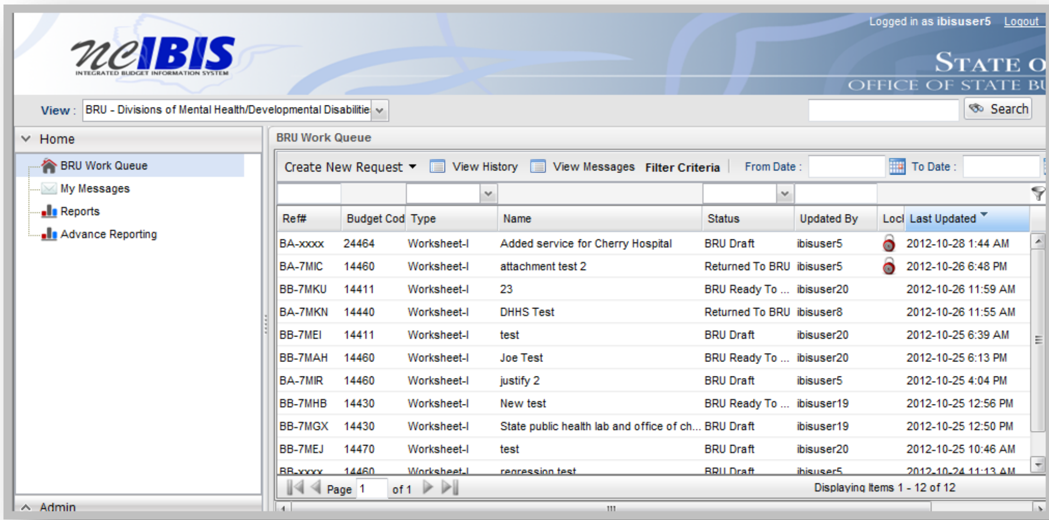
Step 8 Use the pointer to select the Budget Code from the list that corresponds to the Worksheet I request.



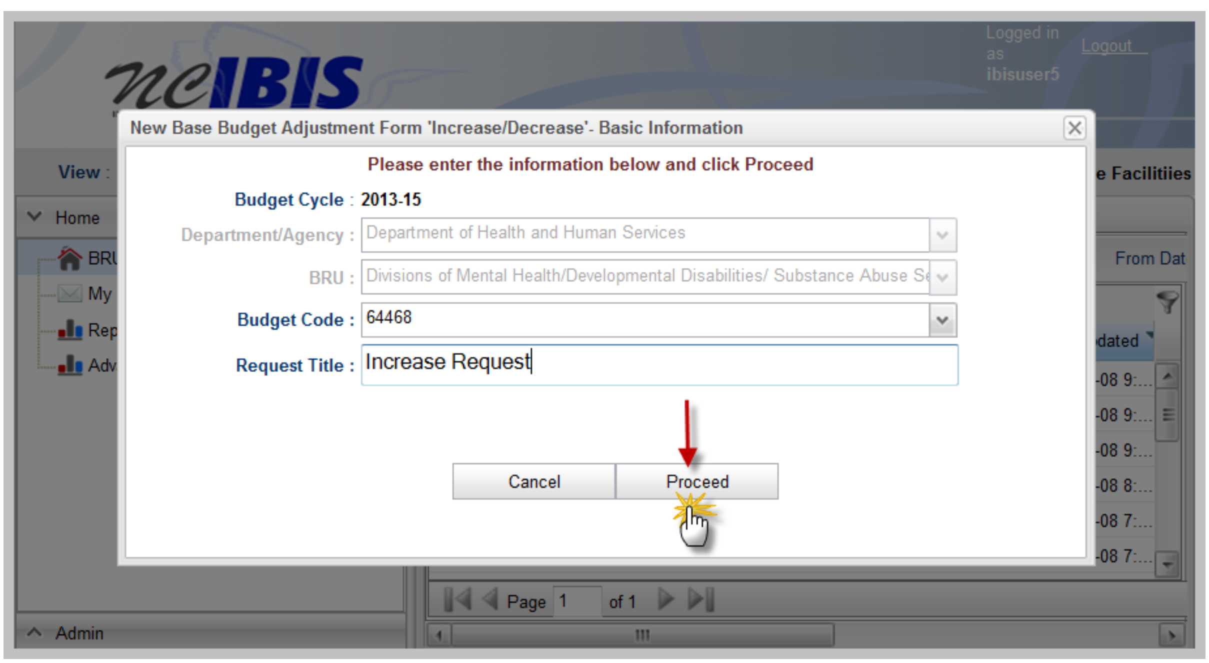
Step 8 Result (above): You will see that the field is populated with the Budget Code selected, and the Budget Code list disappears.

Step 9: Click in the Request Title field. You will see a flashing cursor in the field. Type in the Title for the Worksheet Request. Click on the Proceed button to continue to add the request.

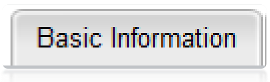
Step 10: If you click on the Cancel button (above), the window on the prior step closes, **nothing is saved**, and you return to the BRU Work Queue.



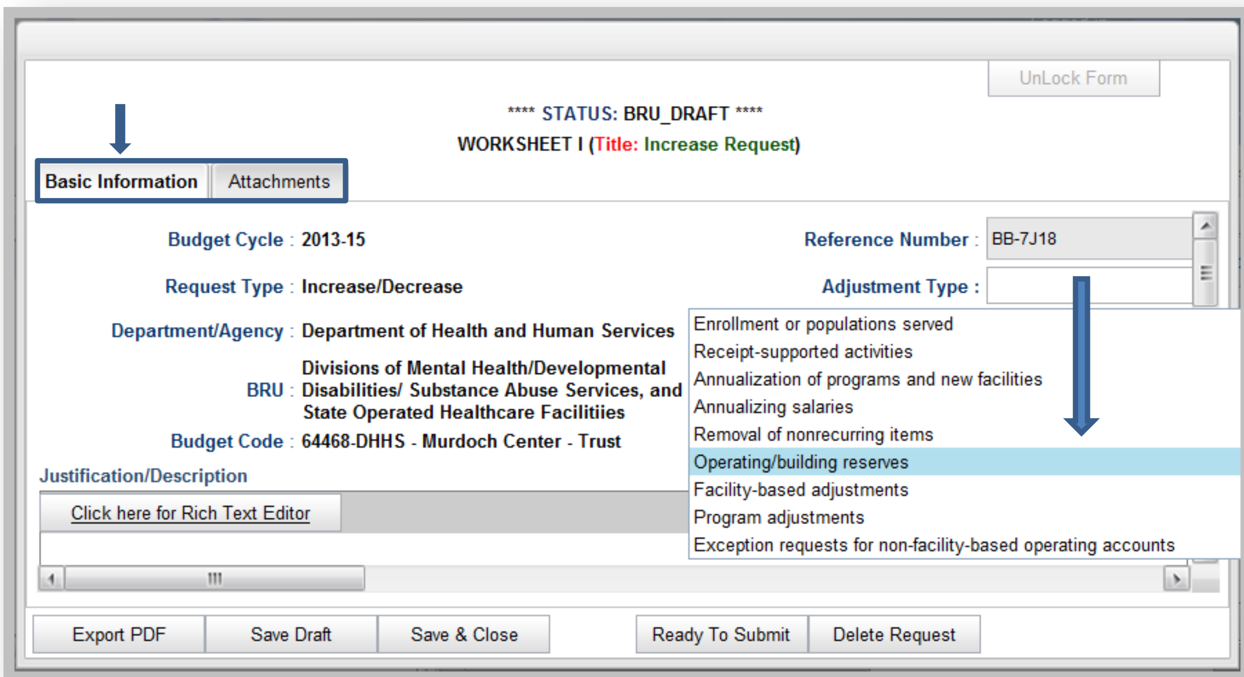
Step 11: If, instead of Canceling in the prior step, you are satisfied with your entries and want to continue on, click on the Proceed button. [If you did cancel, repeat Steps 7 through 13 and SKIP Step 14.]



Step 11 Result (Below): You will see a Worksheet I form open. Note: The Worksheet's two tabs (Basic Information and Attachments) will appear in the upper left corner of the screen. This section will only address the Basic Information tab. The Attachments tab is used throughout the Guide and will be addressed in a different section, making it centrally accessible to all IBIS forms.



In the Basic Information tab, select the Adjustment Type from the dropdown.

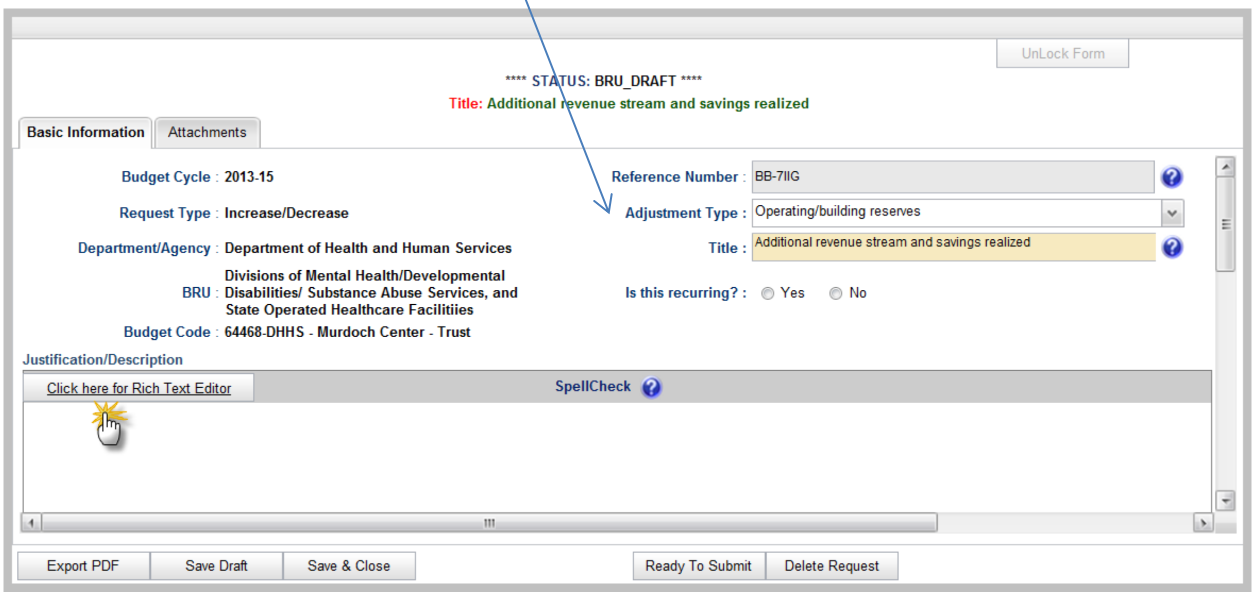


Step 12 (above): Verify the information displayed in the following fields – all but Title are non-editable:

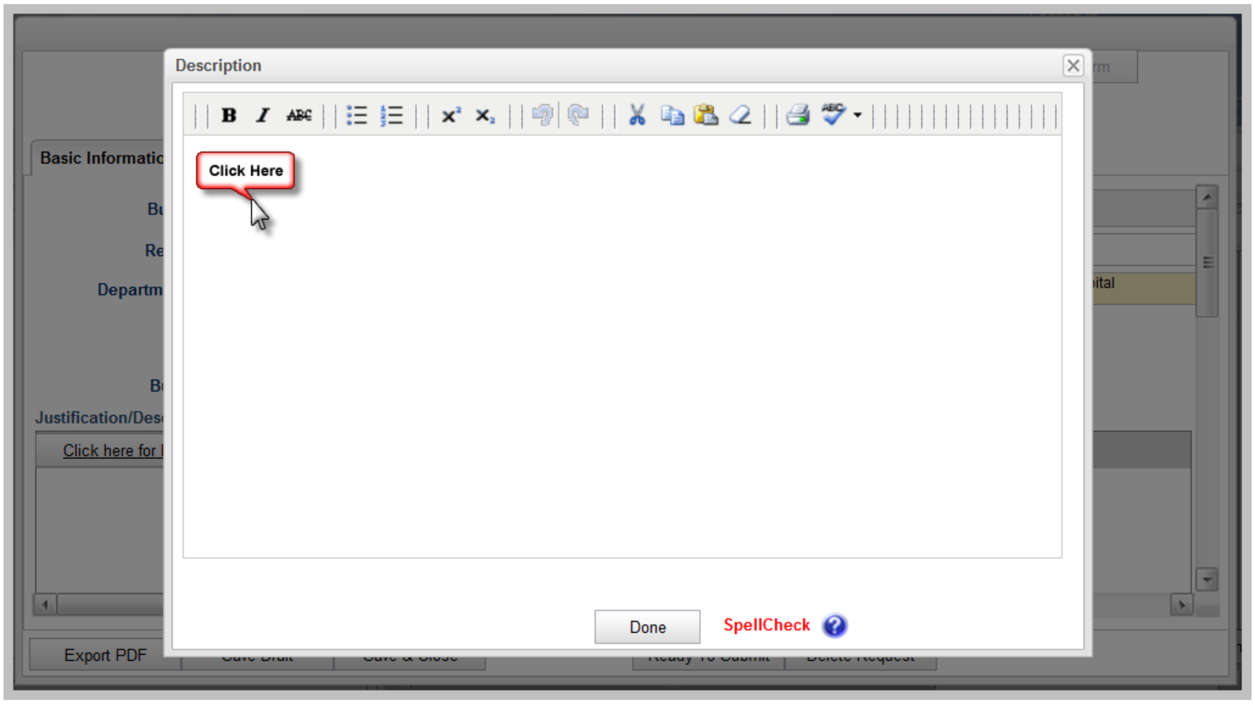
Budget Cycle: The form will show Budget Cycle year 2013-15 (system generated)
Request Type: Actual
Department/Agency: The Department/Agency that is associated with your IBIS ID.
BRU: The BRU associated with your IBIS ID.
Budget Code: The Budget Code selected from the New Base Budget Adjustment Form "Actual" – Basic Information window when the Worksheet I form was created.
Reference Number: A unique, four digit system-generated number that can be used to track this Worksheet I form. A Worksheet I Actual form begins with "BA."
Title: Entered when you created the form. It is editable here.

Step 12 Result (below): You see the **Adjustment Type** selected (above) is populated in the screen (below).

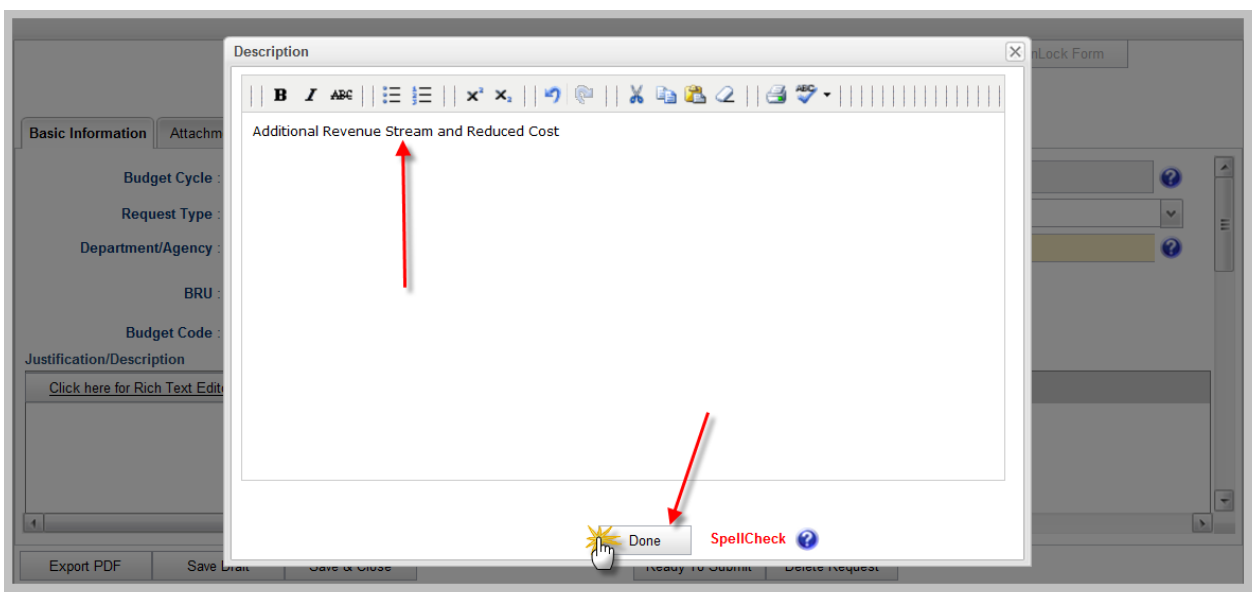
Step 13: Click in the Justification/Description field – Either click on the underscored link to the Text Editor (lower left), where it says, "Click here for Rich Text Editor" or click directly in the box below that link, if you want to bypass the editor.



Step 13 Result (below): When you click on the underscored link to the Text Editor (above), where it says, "Click here for Rich Text Editor" a new window opens (below).

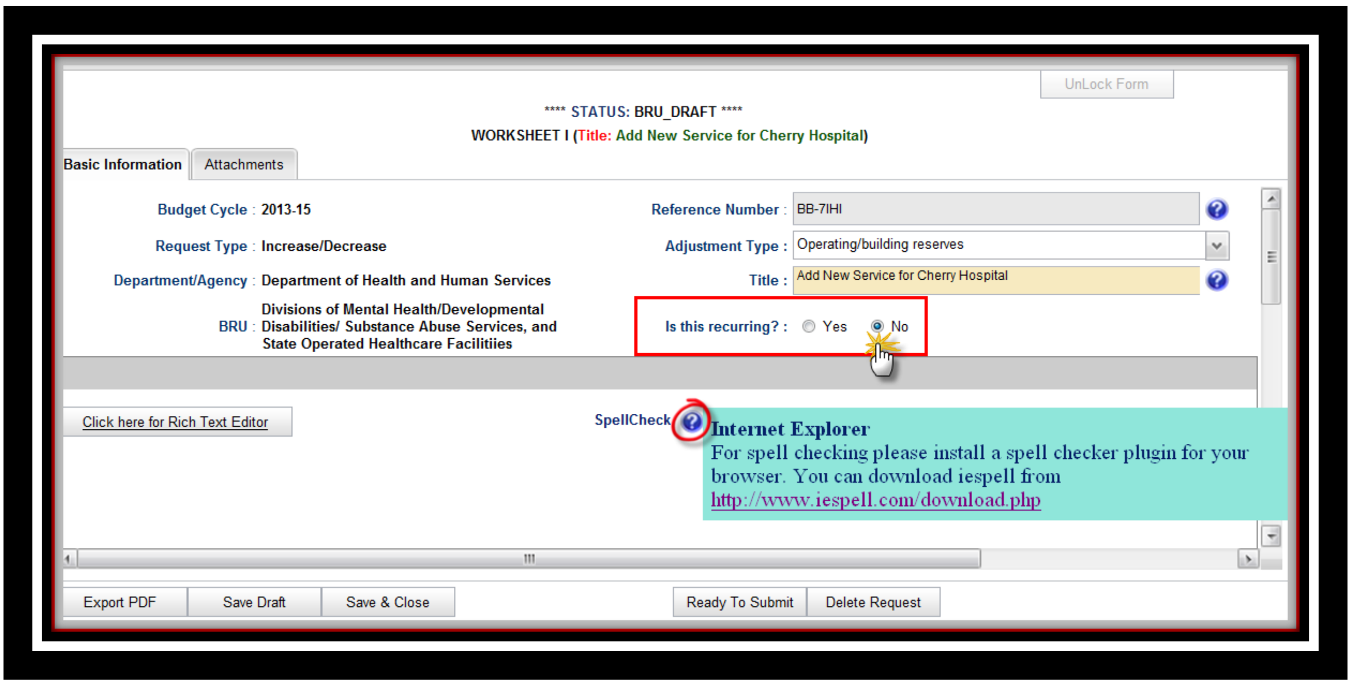


Step 14 (above): Click in the window and enter your justification/description: text editor advantages are that you can perform a spell check and you can specify formatting. Text entry is shown below.

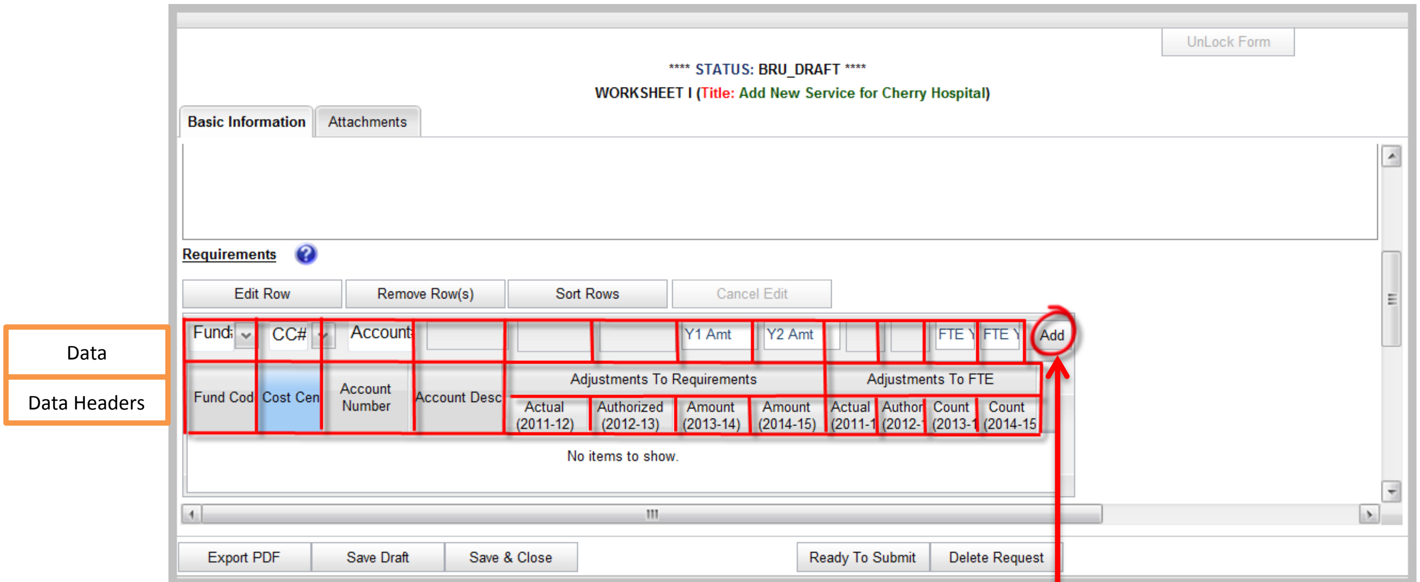


Step 15: Click on the Help Text Icon (wherever you see a blue question mark). The one highlighted below is a spell checker that you can apply once you have entered text in the Justification/Description field. Fill the circle by clicking on yes or no to the recurring question (whether the request will occur in multiple years).

Step 15 Result (below): You will see a pop up with help text displayed, which will occur whenever you click on the Help Text Icon. Also you see the answer to the question about whether this is recurring (circle filled).



Requirements – Summary of Actions: First, you will ADD a new row to the request. Second, you will EDIT a row. Third, you will remove a row from request form(s).

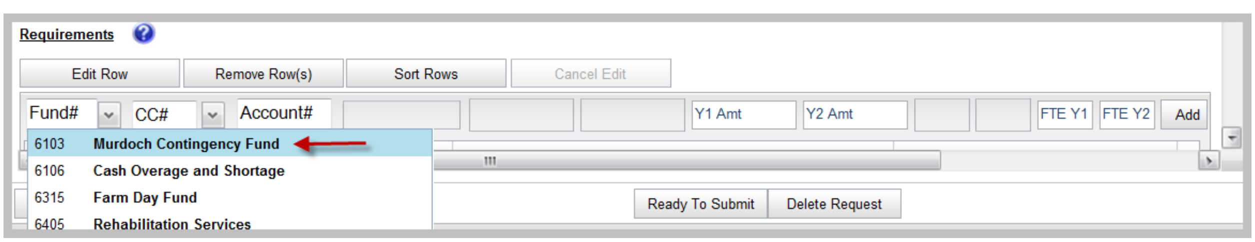


ADD Action:

Step 16 Setup: NOTE: In the Requirements section, the Add button is to the far right, and – to the left of that button, are boxes (fields) for data entry. The next row down has the Data Headers (field names) for each of those entries. Data is either system generated, selected from drop-downs, or manually input. The field names are temporarily shown in the boxes (with white backgrounds) where you enter data, as well. When you click on them to enter data, those temporary names are replaced with data entered. Data entered triggers system-generated data placement in fields shown with greyed out backgrounds.

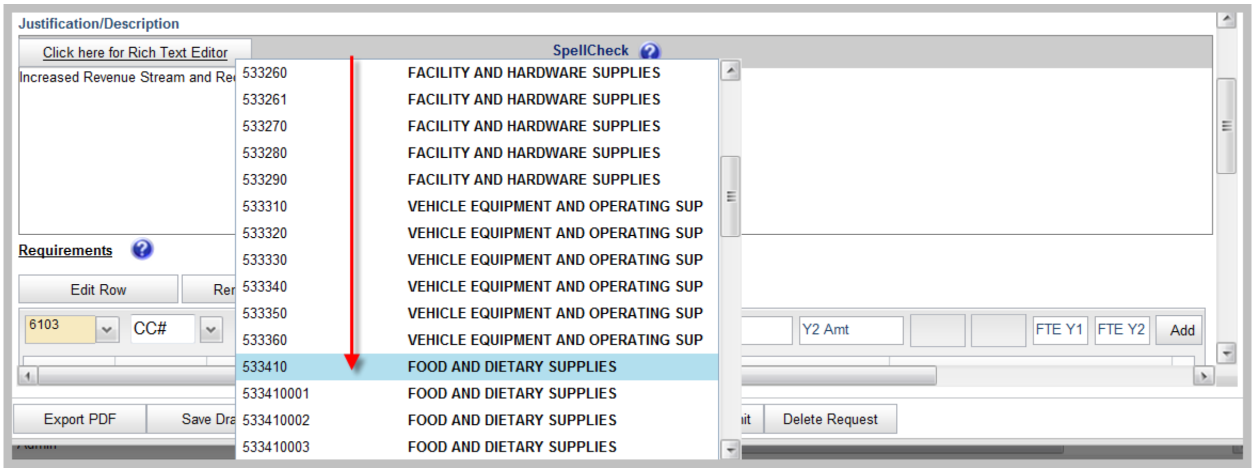
Select Fund Code and Cost Center from Drop-Downs:

Step 16 Data Selection: In the Requirements section, click on the Fund Code drop-down arrow. You will see a list of Fund Codes for the Budget Code previously entered at form creation and associated with the form. Select the Fund Code, to be populated in the form. Perform the same selection for Cost Center, if appropriate.

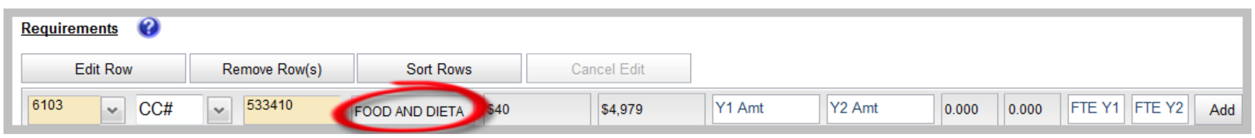


Search on Account Code (first 3 characters or more recommended) and then Select from Drop-Downs:

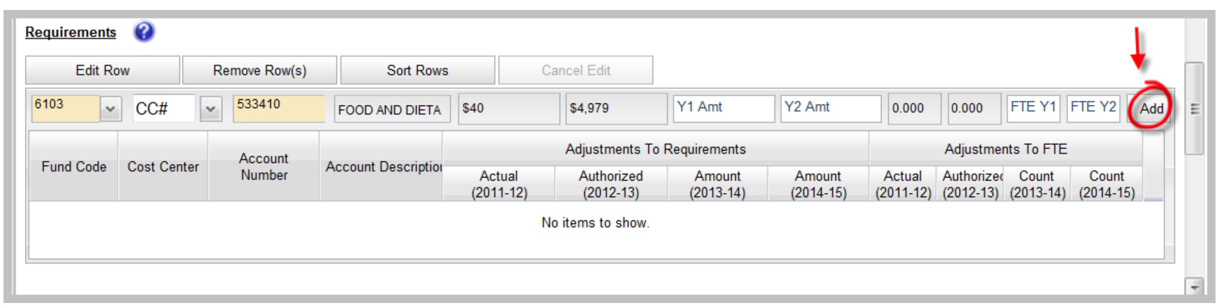
Step 16 Data Search/Selection: Account Code Search (below): In the Account_Number field, you can enter a partial search of 3 or more characters in the form (in this case 532).



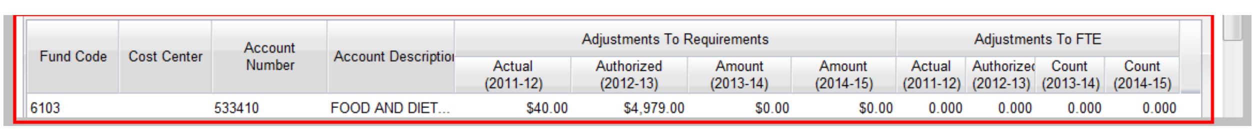
Step 16 Description (below): After providing the Account Number (above), IBIS provides the Account Description for the Account Number selected.



Step 17: ADD – You will Click on Add at the far right (circled in red, below) to add this request.

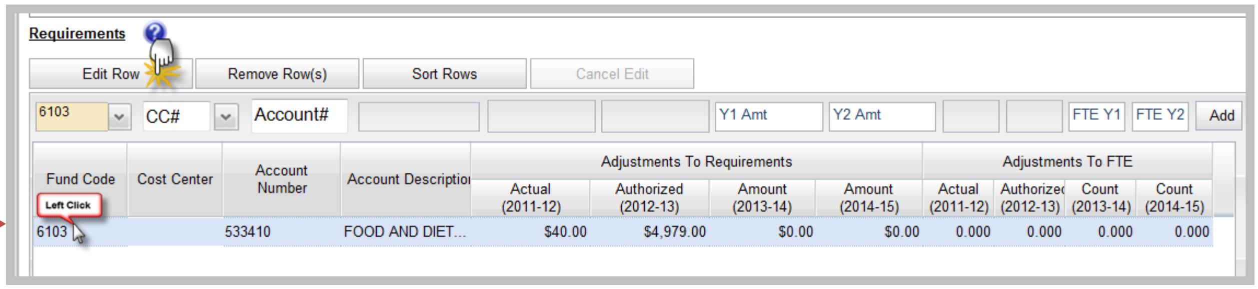


Step 17 Result (below): Once you click on the Add button, above, that results in the added row being displayed below the field name row. Once that occurs, the row may be edited using the Edit button.



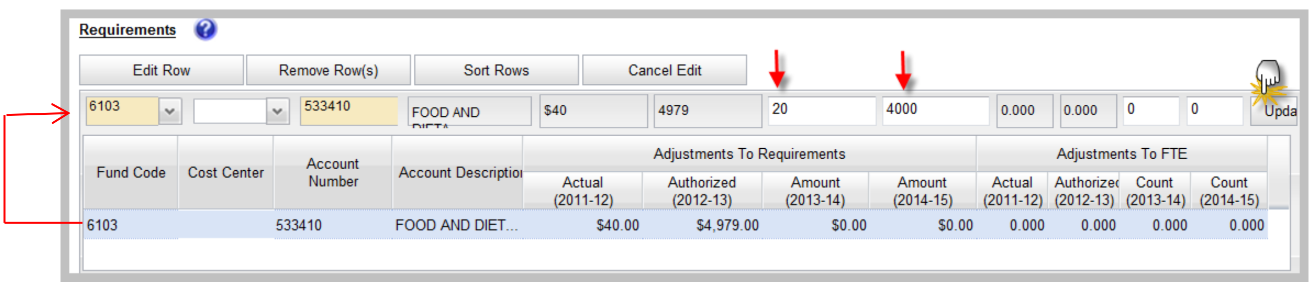
<u>EDIT Action</u>:

Step 18 (below): To edit row, click row you want to edit (red arrow) and click Edit Row button.

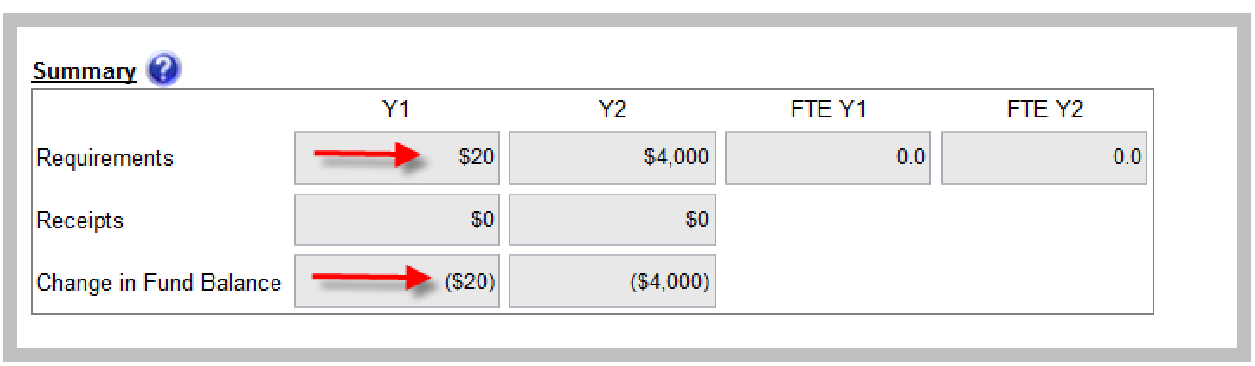


Step 18 Result (below):

1. By double clicking, the selected row is then shown below the Edit Row button, where changes are entered.
2. Once changes are entered, click on the Update button at the far right of the rectangular area to make the changes. Enter values to change in the edit row (red arrows pointing to 2 and 4000, below).

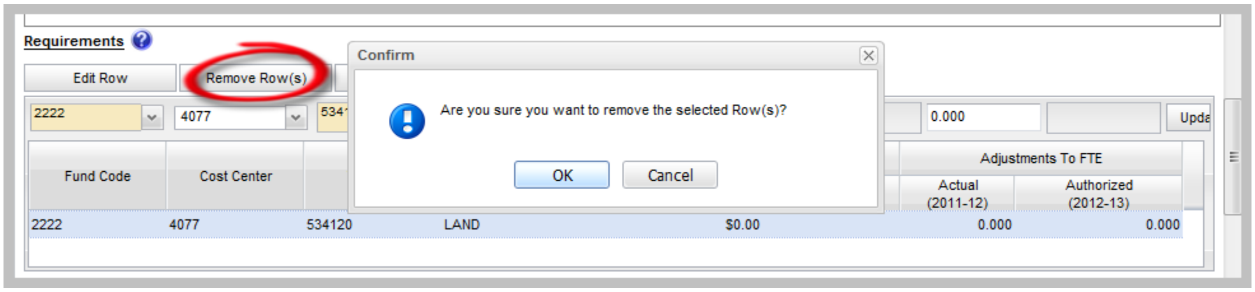


Step 19: Setup to Demonstrate Summary Tables – This is what the form depicts once you enter Fund Code, Cost Center, and Account Number in the Requirements row related to the Request. Receipts are entered in the same way as Requirements and display here as Receipts, once entered.



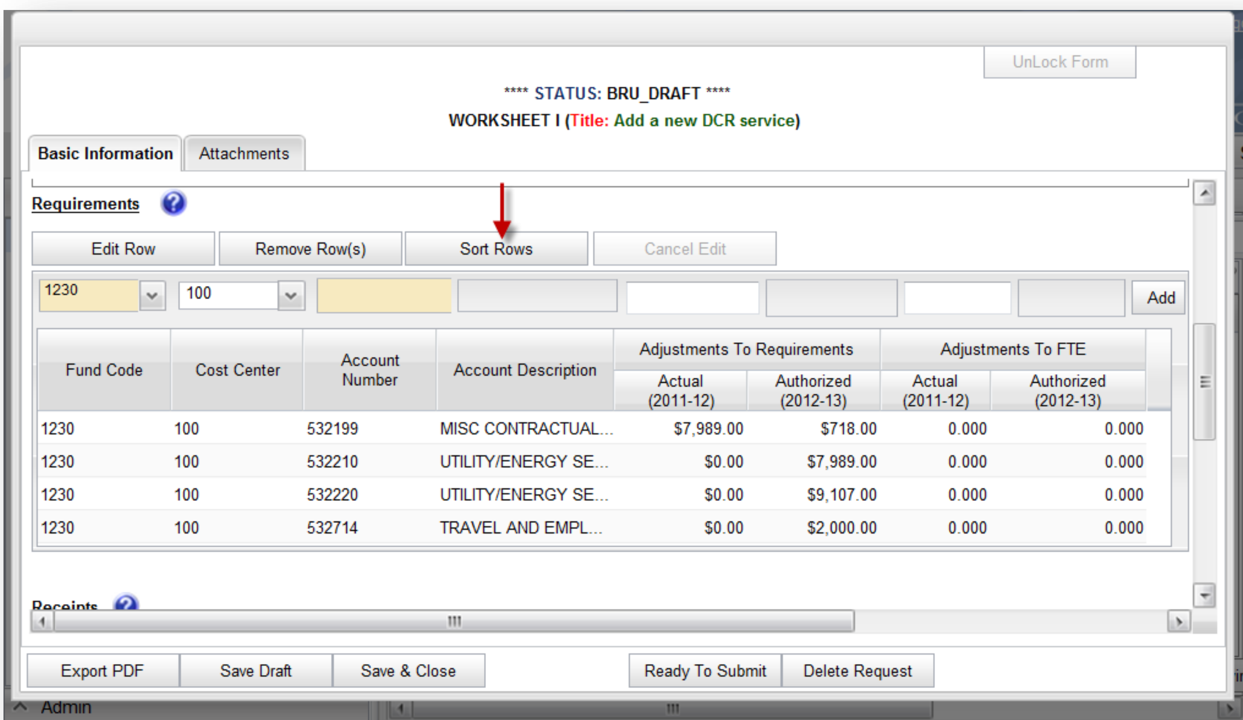
REMOVE Action:

Step 20: When you click on the Remove Row(s) Button, you are asked, “Are you sure you want to remove the selected Row(s)? Deselect any row(s) you do not want to remove. To remove the selected row, click on OK.

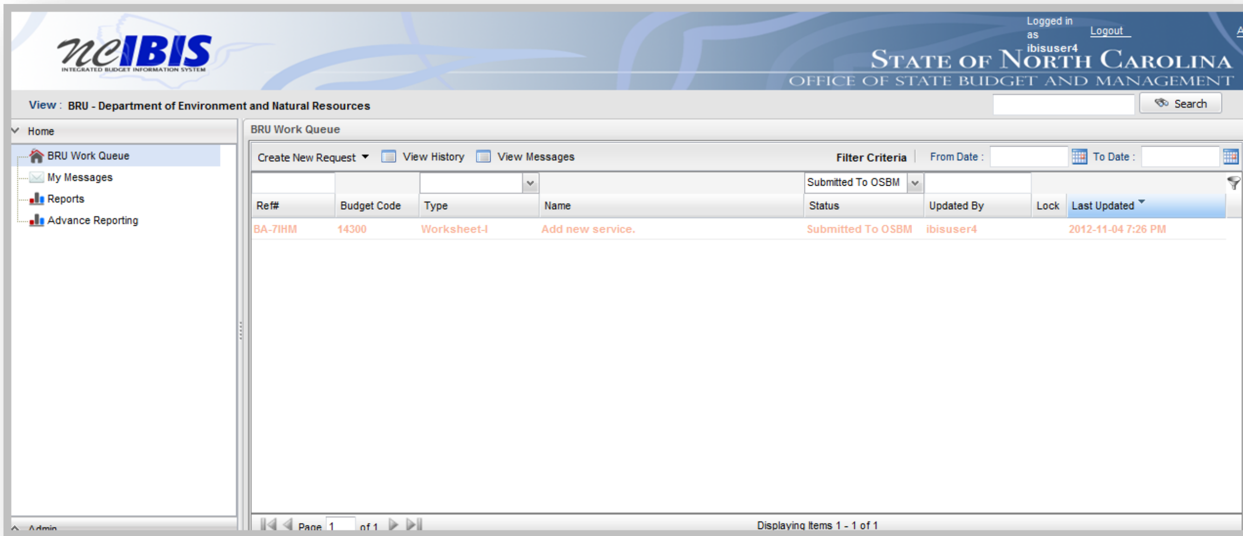


SORT Action:

Step 21: If you have multiple rows and wish to sort them, click on Sort Rows.



Step 21 Result: This will sort the rows in order by Fund Code, Cost Center, and Account Number. Alternatively, you can sort by Fund Code or Cost Center by selecting from drop downs to the right of those field names.


Logged in as ibisuser4
Logout
State of North Carolina
Office of State Budget and Management
View : BRU - Department of Environment and Natural Resources
Search
Home
BRU Work Queue
My Messages
Reports
Advance Reporting
BRU Work Queue
Create New Request
View History
View Messages
Filter Criteria
From Date :
To Date :
Submitted To OSBM
Ref#
Budget Code
Type
Name
Status
Updated By
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Last Updated
BA-7IHM
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Worksheet-I
Add new service.
Submitted To OSBM
ibisuser4
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Admin