

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS)

USER GUIDE

CERTIFICATION - OPERATING

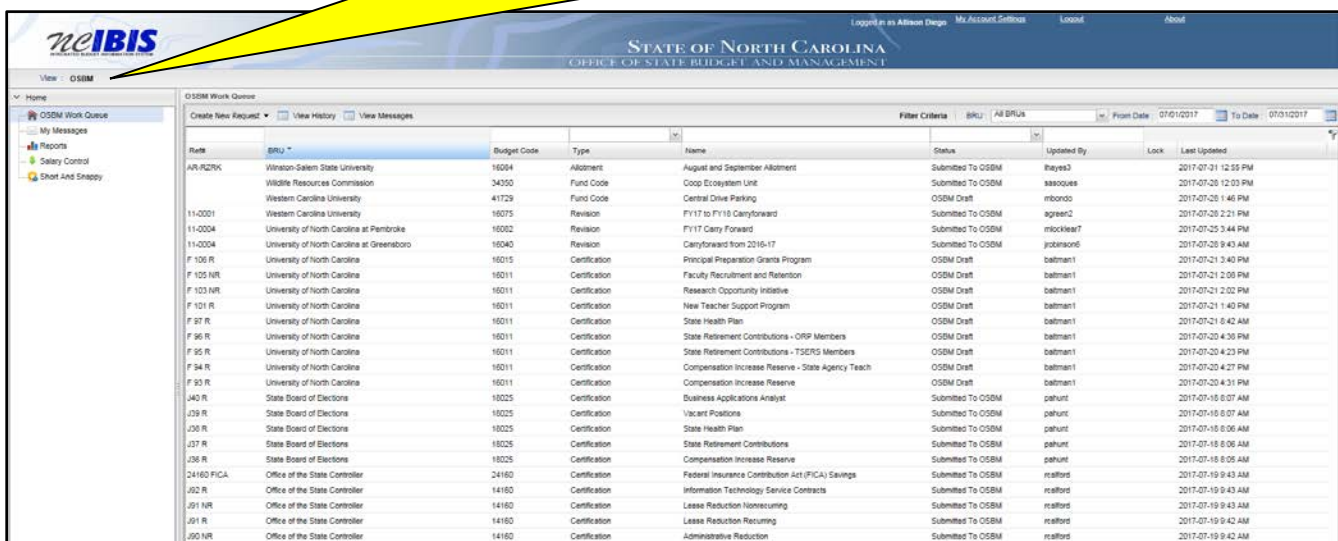
PREFACE

This user guide describes how to use IBIS to complete a certification operating form. For policy guidance regarding certification, please consult the [State Budget Manual](#).

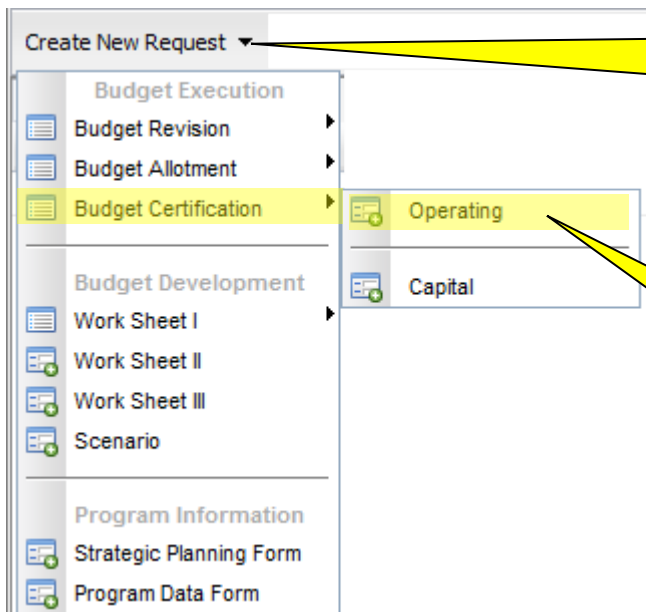
CERTIFICATION – OPERATING

Once you have successfully logged in, you should see the Work Queue page as shown below. This could be a BRU, Agency Work or OSBM Work Queue page depending on log-in credentials.

View indicator contains only your BRU, Agency or OSBM. If you have access to multiple departments and/or agencies, those you have access to will appear in a drop-down list in this field for you to select from.



Ref#	BRU *	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
AR/RZK	Winston-Salem State University	16004	Allotment	August and September Allotment	Submitted To OSBM	thayes3		2017-07-21 12:55 PM
	Wildlife Resources Commission	34350	Fund Code	Coop Ecosystem Unit	Submitted To OSBM	isaacques		2017-07-26 12:03 PM
	Western Carolina University	41729	Fund Code	Central Drive Parking	OSBM Draft	mrbondo		2017-07-26 2:46 PM
11-0001	Western Carolina University	16075	Revision	FY17 to FY18 Carryforward	Submitted To OSBM	agreen2		2017-07-26 2:21 PM
11-0004	University of North Carolina at Pembroke	16002	Revision	FY17 Carry Forward	Submitted To OSBM	mlocklear7		2017-07-25 3:44 PM
11-0004	University of North Carolina at Greensboro	16040	Revision	Carryforward from 2016-17	Submitted To OSBM	johnson6		2017-07-25 9:43 AM
F 106 R	University of North Carolina	16015	Certification	Principal Preparation Grants Program	OSBM Draft	batman1		2017-07-21 3:40 PM
F 105 NR	University of North Carolina	16011	Certification	Faculty Recruitment and Retention	OSBM Draft	batman1		2017-07-21 2:08 PM
F 103 NR	University of North Carolina	16011	Certification	Research Opportunity Initiative	OSBM Draft	batman1		2017-07-21 2:02 PM
F 101 R	University of North Carolina	16011	Certification	New Teacher Support Program	OSBM Draft	batman1		2017-07-21 1:40 PM
F 97 R	University of North Carolina	16011	Certification	State Health Plan	OSBM Draft	batman1		2017-07-21 8:42 AM
F 96 R	University of North Carolina	16011	Certification	State Retirement Contributions - ORP Members	OSBM Draft	batman1		2017-07-20 4:36 PM
F 95 R	University of North Carolina	16011	Certification	State Retirement Contributions - TSERS Members	OSBM Draft	batman1		2017-07-20 4:23 PM
F 94 R	University of North Carolina	16011	Certification	Compensation Increase Reserve - State Agency Teach	OSBM Draft	batman1		2017-07-20 4:21 PM
F 93 R	University of North Carolina	16011	Certification	Compensation Increase Reserve	OSBM Draft	batman1		2017-07-20 4:31 PM
140 R	State Board of Elections	10025	Certification	Business Applications Analyst	Submitted To OSBM	phunt		2017-07-19 8:07 AM
136 R	State Board of Elections	10025	Certification	Vacant Positions	Submitted To OSBM	phunt		2017-07-19 8:07 AM
136 R	State Board of Elections	10025	Certification	State Health Plan	Submitted To OSBM	phunt		2017-07-19 8:06 AM
137 R	State Board of Elections	10025	Certification	State Retirement Contributions	Submitted To OSBM	phunt		2017-07-19 8:06 AM
136 R	State Board of Elections	10025	Certification	Compensation Increase Reserve	Submitted To OSBM	phunt		2017-07-19 8:05 AM
24160 FICA	Office of the State Controller	24160	Certification	Federal Insurance Contribution Act (FICA) Savings	Submitted To OSBM	rcallford		2017-07-19 9:43 AM
162 R	Office of the State Controller	14160	Certification	Information Technology Service Contracts	Submitted To OSBM	rcallford		2017-07-19 9:43 AM
161 NR	Office of the State Controller	14160	Certification	Lease Reduction Nonrecurring	Submitted To OSBM	rcallford		2017-07-19 9:43 AM
161 R	Office of the State Controller	14160	Certification	Lease Reduction Recurring	Submitted To OSBM	rcallford		2017-07-19 9:42 AM
160 NR	Office of the State Controller	14160	Certification	Administrative Reduction	Submitted To OSBM	rcallford		2017-07-19 9:42 AM



The screenshot shows a 'Create New Request' dropdown menu. The menu is open, displaying a list of options under 'Budget Execution'. The 'Budget Certification' option is highlighted, and a sub-menu is visible showing 'Operating' and 'Capital' options. The 'Operating' option is also highlighted.

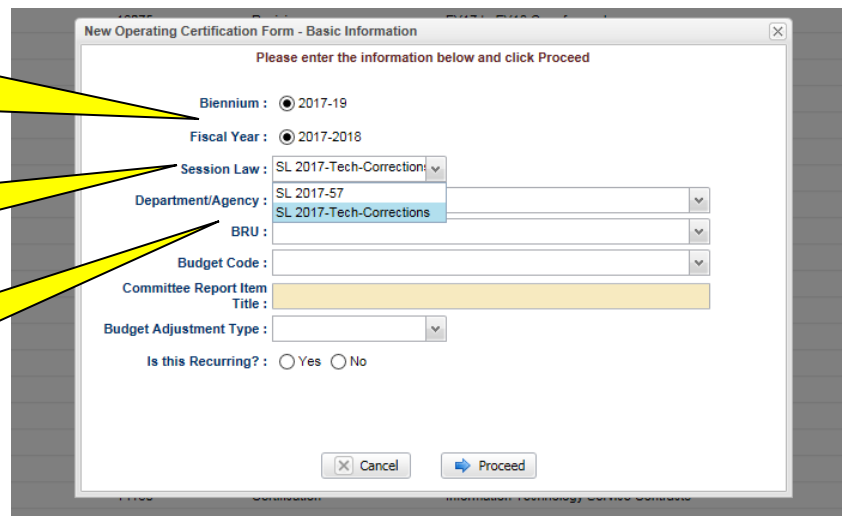
When you click on 'Create New Request', the drop-down will display the following: access to will appear in a drop-down list in this field for you to select from.

Click on the Budget Certification – Operating option on the menu. After clicking the operating option, a New Operating Certification Form – Basic Information window will appear as shown in the following screenshot.

Select the Biennium that you are certifying. Click on the radio button next to the appropriate biennium. Only one biennium may be selected at a time.

Select one option from the dropdown list in the Session Law field, only one item can be selected.

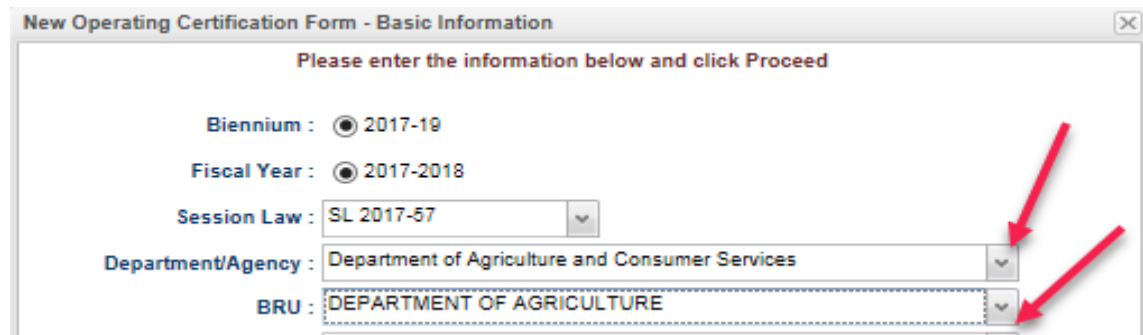
In most cases, access will be restricted to a single department/agency so it will default to your Department/Agency and BRU. If a user has access to multiple departments/agencies and BRUs, a dropdown option will appear for selection.



The screenshot shows the 'New Operating Certification Form - Basic Information' window. The window contains the following fields and options:

- Biennium:** Radio button selected for 2017-19.
- Fiscal Year:** Radio button selected for 2017-2018.
- Session Law:** Dropdown menu with 'SL 2017-Tech-Corrections' selected.
- Department/Agency:** Dropdown menu with 'SL 2017-57' selected.
- BRU:** Dropdown menu with 'SL 2017-Tech-Corrections' selected.
- Budget Code:** Dropdown menu.
- Committee Report Item Title:** Text input field.
- Budget Adjustment Type:** Dropdown menu.
- Is this Recurring?:** Radio buttons for Yes and No.
- Buttons:** Cancel and Proceed.

Note the next two fields labeled Department/Agency and BRU. In most cases, access will be restricted to a single department/agency so it will default to your Department/Agency and BRU. If a user has access to multiple departments/agencies and BRUs, a dropdown option will appear for selection.



New Operating Certification Form - Basic Information

Please enter the information below and click Proceed

Biennium : ☒ 2017-19

Fiscal Year : ☒ 2017-2018

Session Law : SL 2017-57

Department/Agency : Department of Agriculture and Consumer Services

BRU : DEPARTMENT OF AGRICULTURE

Click on the dropdown arrow for the Budget Code field. This will display a list of valid Budget Codes for the selected Department/Agency and BRU.



New Operating Certification Form - Basic Information

Please enter the information below and click Proceed

Biennium : ☒ 2017-19

Fiscal Year : ☒ 2017-2018

Session Law : SL 2017-57

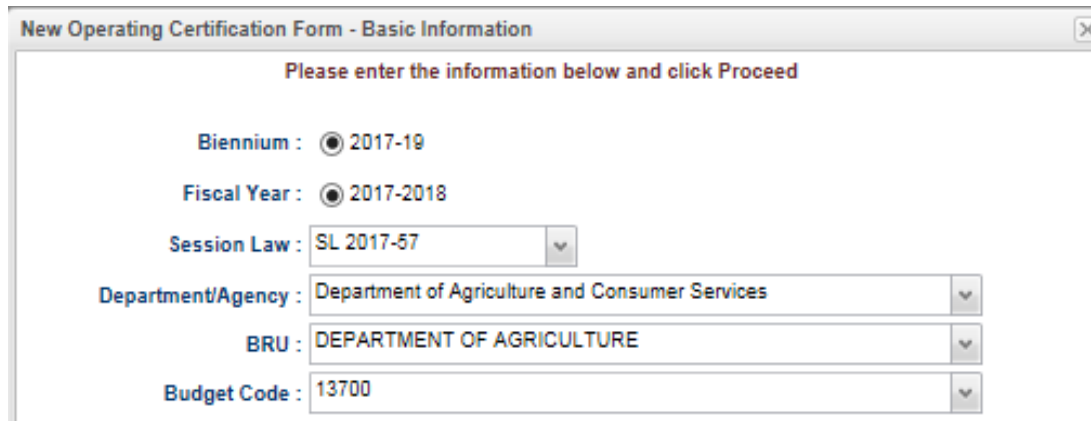
Department/Agency : Department of Agriculture and Consumer Services

BRU : DEPARTMENT OF AGRICULTURE

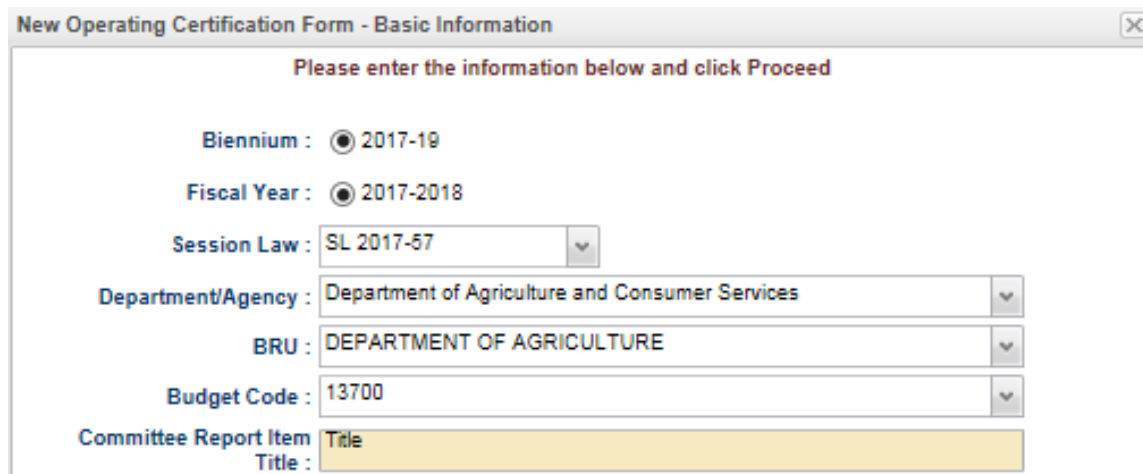
Budget Code : 13700 Agriculture and Consumer Services - General Fund

Committee Report Item Title : 13700 Agriculture and Consumer Services - General Fund

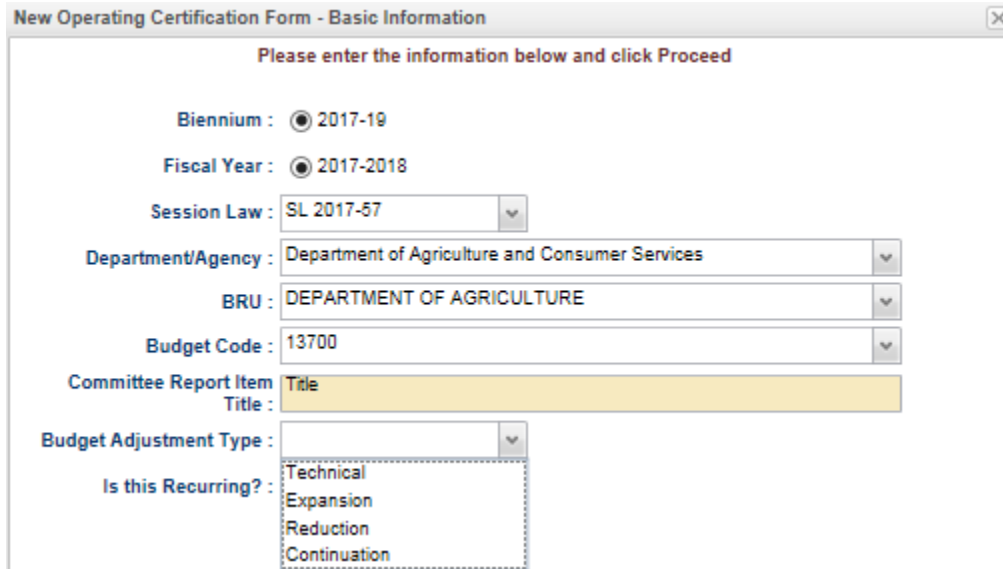
Select a Budget Code from the list. Once selected, the budget code will populate the field and the list will disappear as shown below.



Click in the Committee Report Item Title field. A flashing cursor will appear in the field. Type a title for the certification entry. As you type, the title will appear in the field as shown below.



The Budget Adjustment Type field is a dropdown field. You must select one item from the dropdown list. Once selected, you will see that the field is populated with the Adjustment Type selected and the Budget Adjustment Type list disappears.



New Operating Certification Form - Basic Information

Please enter the information below and click Proceed

Biennium : ☒ 2017-19

Fiscal Year : ☒ 2017-2018

Session Law : SL 2017-57

Department/Agency : Department of Agriculture and Consumer Services

BRU : DEPARTMENT OF AGRICULTURE

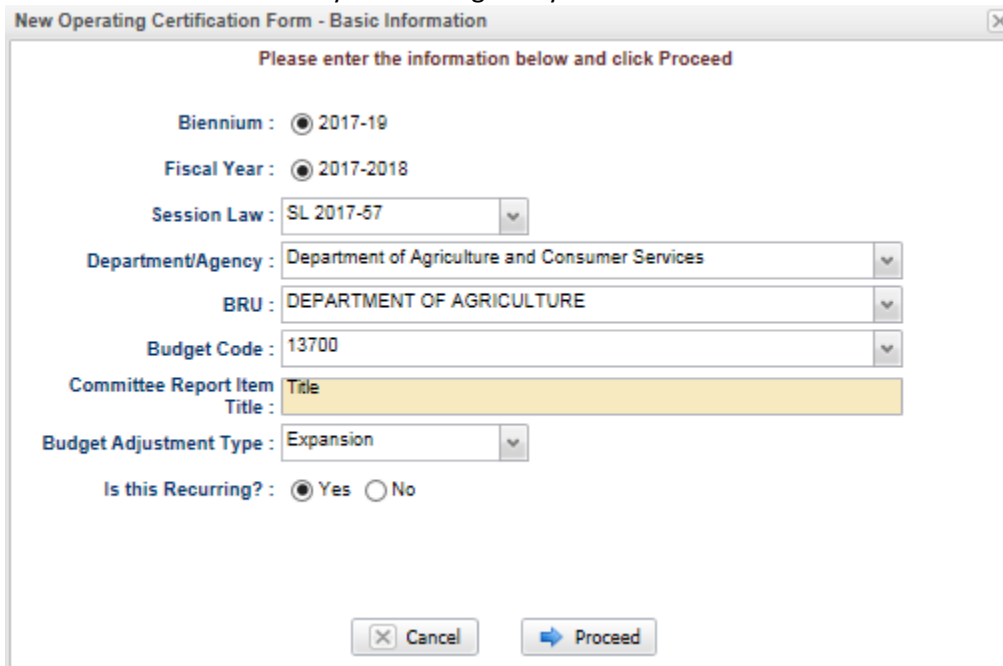
Budget Code : 13700

Committee Report Item Title : Title

Budget Adjustment Type :
 Technical
 Expansion
 Reduction
 Continuation

Is this Recurring? :

The final item on this window asks if this entry is recurring. Only one answer can be chosen.



New Operating Certification Form - Basic Information

Please enter the information below and click Proceed

Biennium : ☒ 2017-19

Fiscal Year : ☒ 2017-2018

Session Law : SL 2017-57

Department/Agency : Department of Agriculture and Consumer Services

BRU : DEPARTMENT OF AGRICULTURE

Budget Code : 13700

Committee Report Item Title : Title

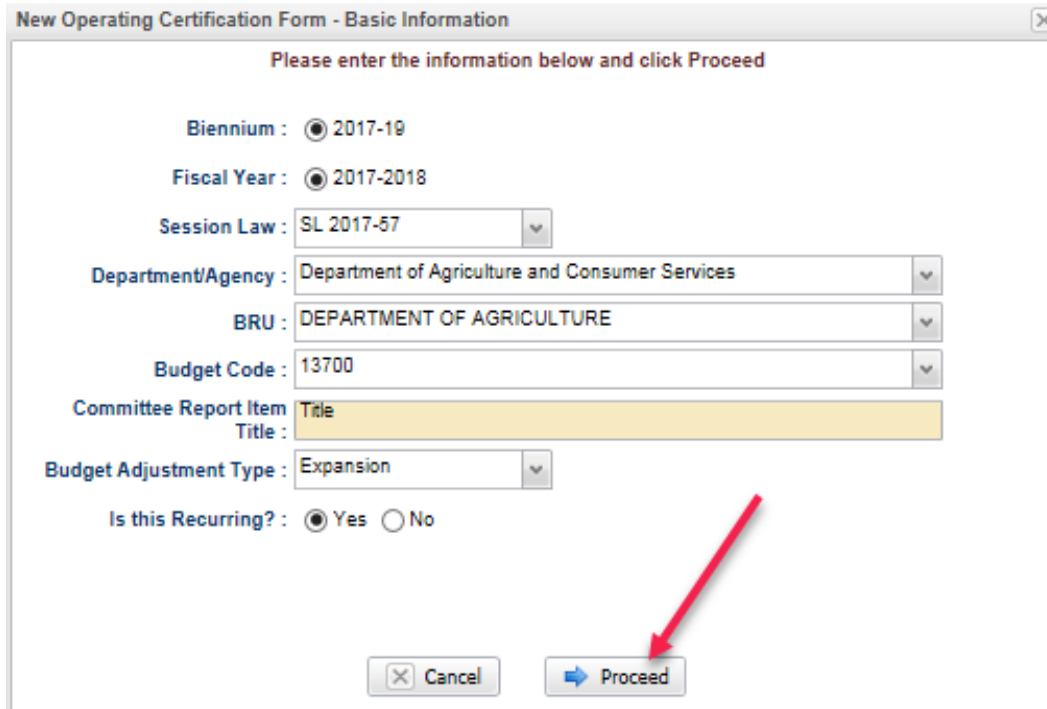
Budget Adjustment Type : Expansion

Is this Recurring? : ☒ Yes ☐ No

Cancel Proceed

If you click on the Cancel button, the window closes, nothing is saved, and you return to the BRU Work Queue.

If you are satisfied with your entries and want to continue, click on the Proceed button as highlighted below.



New Operating Certification Form - Basic Information

Please enter the information below and click Proceed

Biennium : ☒ 2017-19

Fiscal Year : ☒ 2017-2018

Session Law : SL 2017-57

Department/Agency : Department of Agriculture and Consumer Services

BRU : DEPARTMENT OF AGRICULTURE

Budget Code : 13700

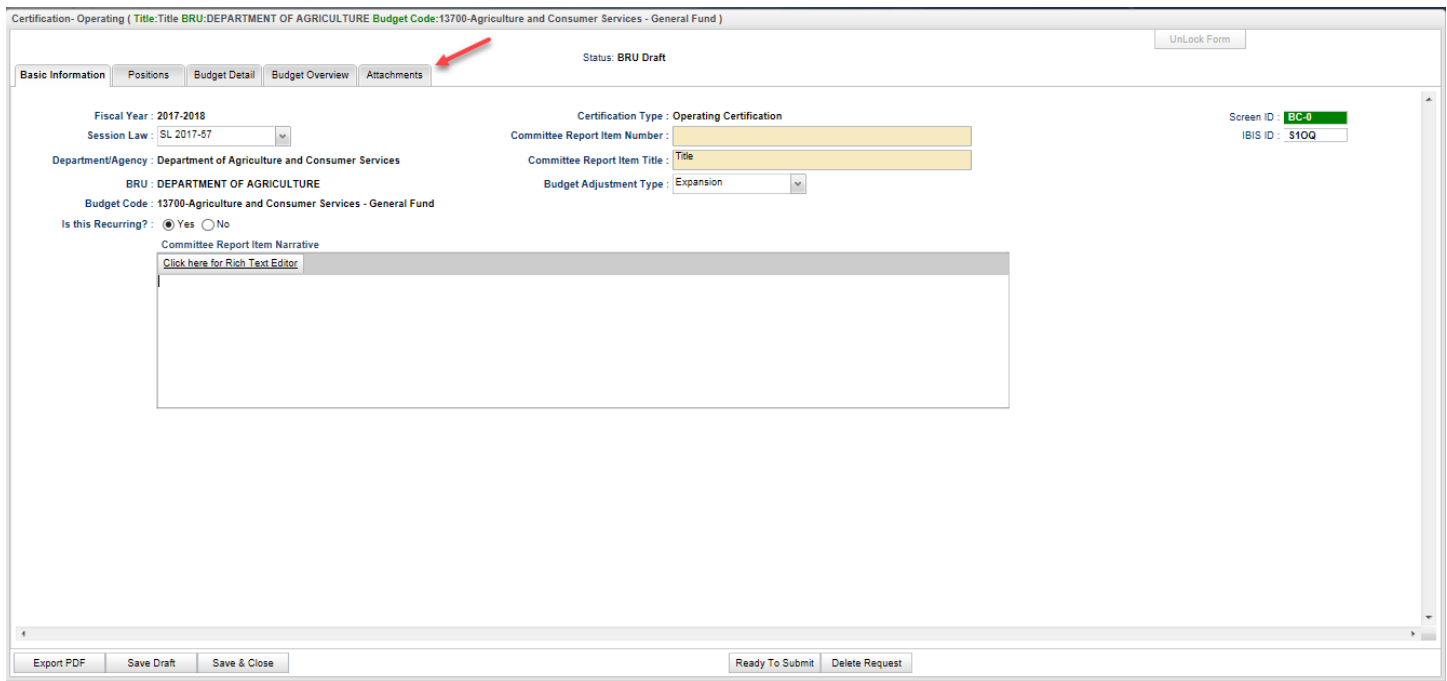
Committee Report Item Title : Title

Budget Adjustment Type : Expansion

Is this Recurring? : ☒ Yes ☐ No

Cancel Proceed

After clicking Proceed, you will see an Operating Certification form open. Note: The form's five tabs (Basic Information, Positions, Budget Details, Budget Overview and Attachments) will appear in the upper left corner of the screen as shown below.



Certification- Operating (Title:Title:BRU:DEPARTMENT OF AGRICULTURE Budget Code:13700-Agriculture and Consumer Services - General Fund)

Status: BRU Draft

UnLock Form

Basic Information Positions Budget Detail Budget Overview Attachments

Fiscal Year : 2017-2018
Session Law : SL 2017-57
Department/Agency : Department of Agriculture and Consumer Services
BRU : DEPARTMENT OF AGRICULTURE
Budget Code : 13700-Agriculture and Consumer Services - General Fund
Is this Recurring? : ☒ Yes ☐ No

Certification Type : Operating Certification
Committee Report Item Number :
Committee Report Item Title : Title
Budget Adjustment Type : Expansion

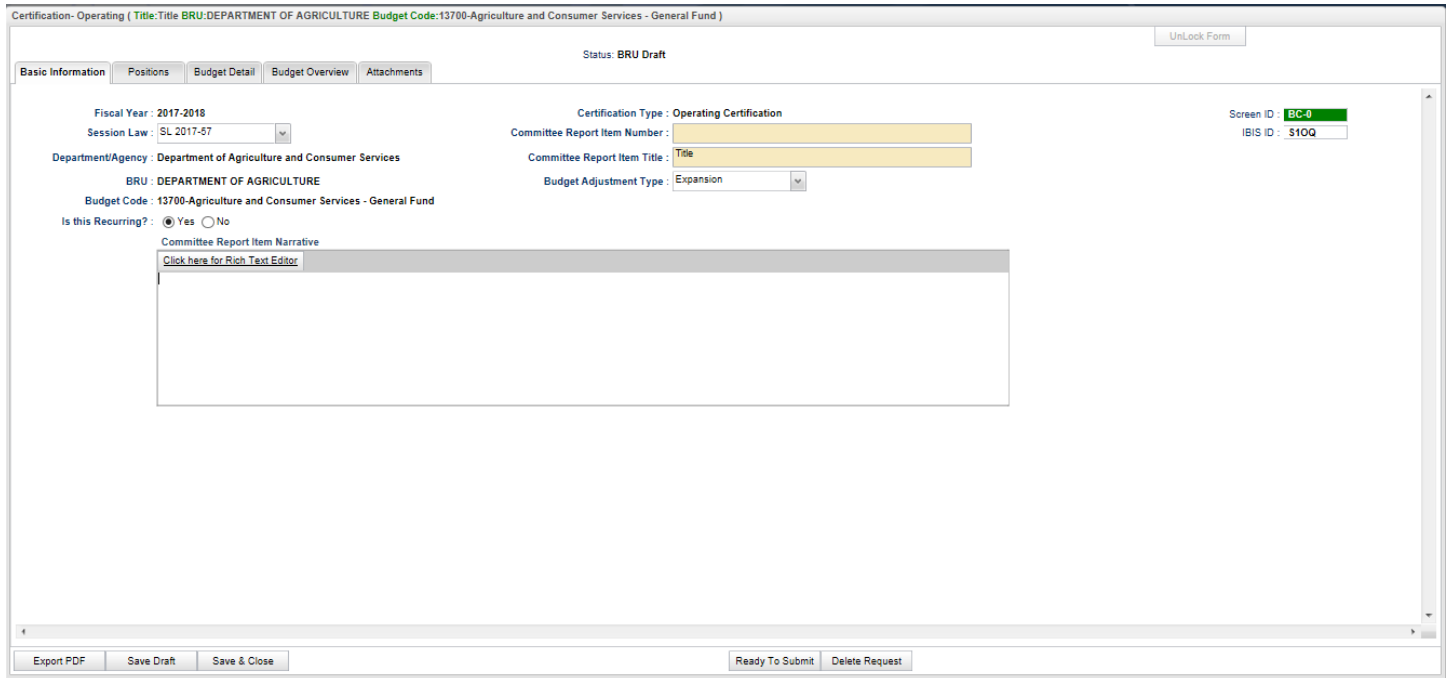
Screen ID : BC-0
IBIS ID : \$10Q

Committee Report Item Narrative
[Click here for Rich Text Editor](#)

Export PDF Save Draft Save & Close Ready To Submit Delete Request

This user guide will only address the first four tabs. The Attachments tab will be addressed in a different user guide that is available on the [IBIS website](#).

When the form opens, the Basic Information screen comes to the forefront. It is the default position when creating a new, or opening an existing form.



Certification - Operating (Title:Title BRU:DEPARTMENT OF AGRICULTURE Budget Code:13700-Agriculture and Consumer Services - General Fund)

Status: BRU Draft

Unlock Form

Basic Information | Positions | Budget Detail | Budget Overview | Attachments

Fiscal Year: 2017-2018
Session Law: SL 2017-57

Department/Agency: Department of Agriculture and Consumer Services
BRU: DEPARTMENT OF AGRICULTURE
Budget Code: 13700-Agriculture and Consumer Services - General Fund

Is this Recurring?: ☒ Yes ☐ No

Committee Report Item Narrative
[Click here for Rich Text Editor](#)

Certification Type: Operating Certification
Committee Report Item Number:
Committee Report Item Title:
Budget Adjustment Type: Expansion

Screen ID: BC-0
IBIS ID: \$10Q

Export PDF | Save Draft | Save & Close | Ready To Submit | Delete Request

Verify the information displayed in the following fields – all but Committee Report Item Number, Committee Report Item Title, Adjustment Recurrence and Budget Adjustment Type are non-editable:

Biennium: The form will show the Budget Cycle selected in the initiation window

Committee Report Item Number: Fill in the appropriate Committee Report Item number

Session Law: The form will show the Session Law reference selected in the initiation window

Department/Agency: The Department/Agency that is associated with your IBIS ID

BRU: The BRU associated with your IBIS ID and selected in the initiation window

Budget Code: The Budget Code selected in the initiation window

Committee Report Item Title: The Committee Report Item title entered in the initiation window – this may be changed at this time


Adjustment Recurrence: Displays the answer selected in the initiation window – this may be changed at this time

Budget Adjustment Type: Displays the answer selected in the initiation window – this may be changed at this time

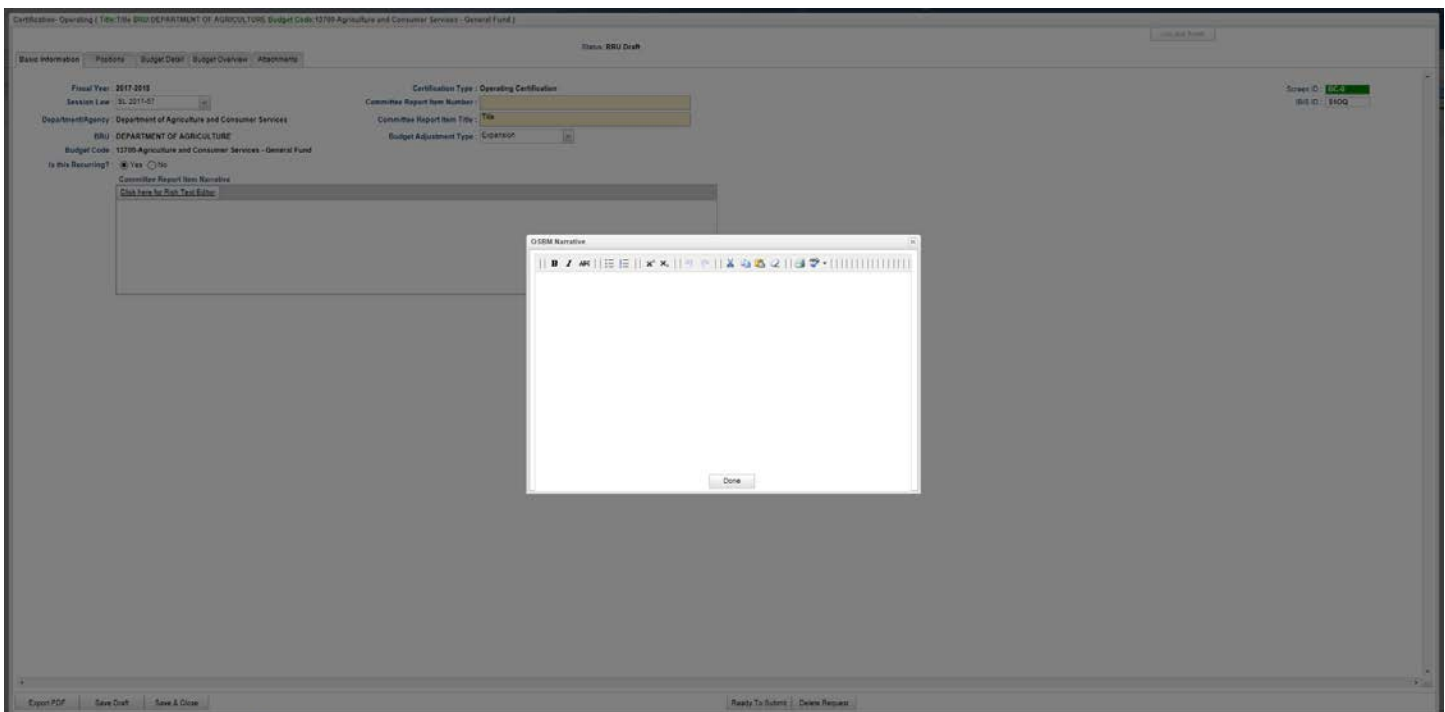
Click in the Committee Report Item Narrative field and either click on the underscored link to the Rich Text Editor where it says “Click here for Rich Text Editor” or click directly in the box to enter text.

Committee Report Item Narrative

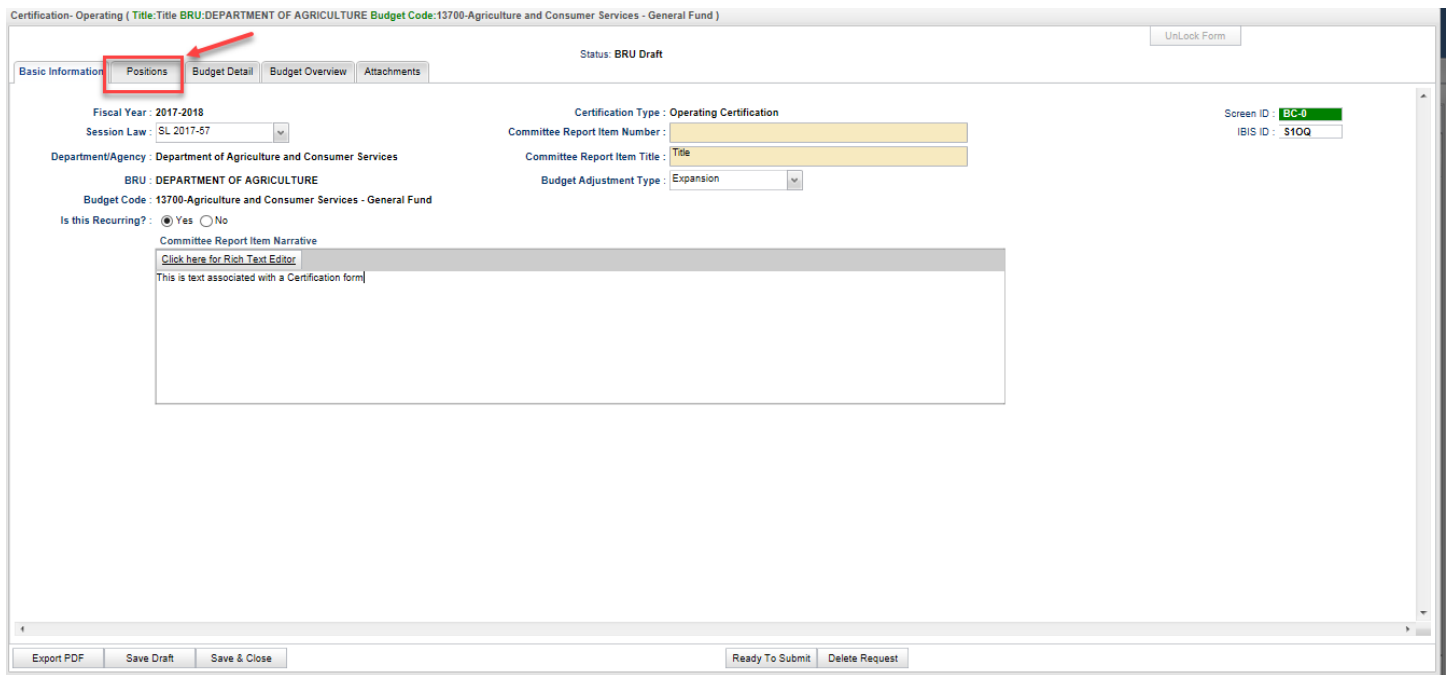
[Click here for Rich Text Editor](#)



By clicking the Rich Text Editor, a window will come up as shown below where text entered in the justification field can be edited or where a justification can be entered. Additional formatting options are available beyond those displayed on the screen by using shortcuts such as “Control + U”.



Enter the appropriate information in the field and click on the Positions tab at the top of the form to continue filling out the form. When clicked, the Positions tab will appear on your screen.



If the Certification form being developed includes staffing positions, information regarding such positions will be filled out on this tab. The information will be entered in the section labeled:

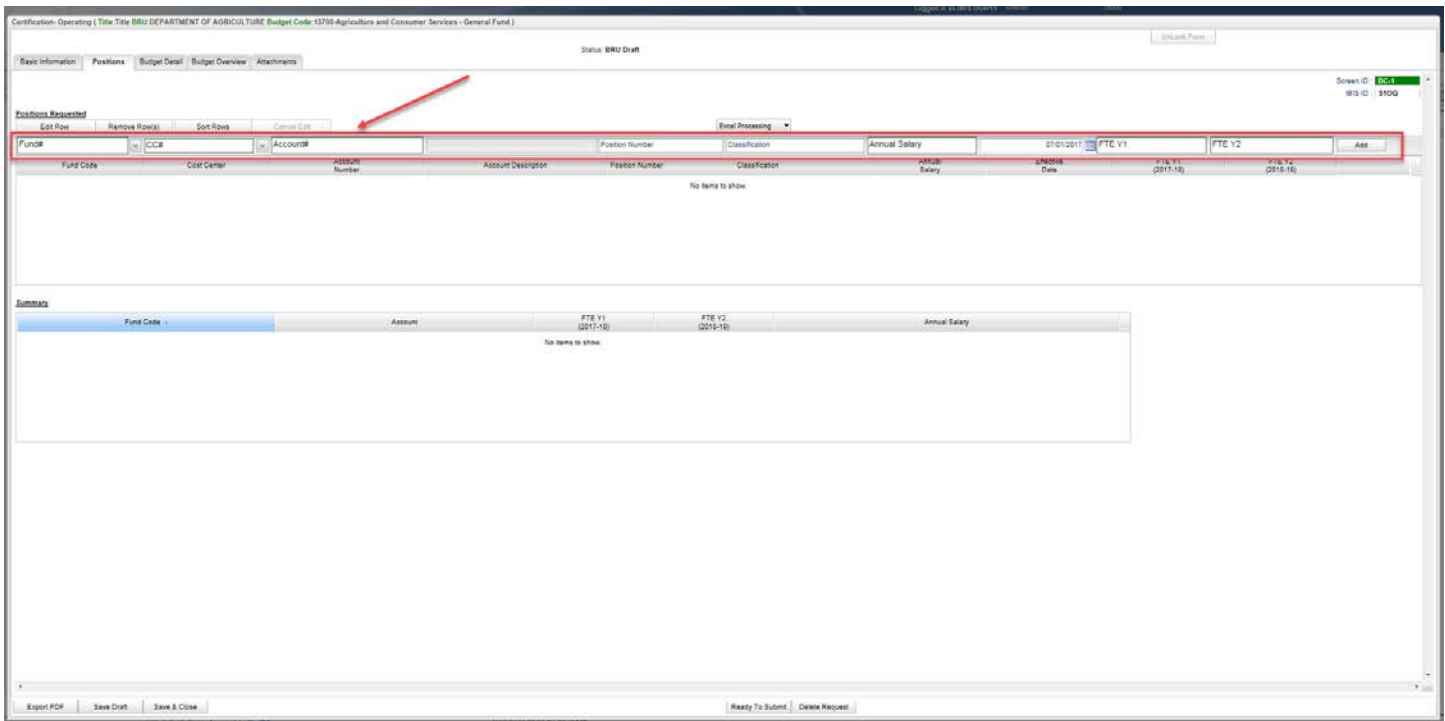
Positions Requested

In this section, four buttons appear: Edit Row, Remove Row(s), Sort Rows and Cancel Edit:

Edit Row	Remove Row(s)	Sort Rows	Cancel Edit
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The above buttons can only be utilized once rows have been created. Since this guide's focus is developing a new Certification form, we will look first at adding rows then return to describe the functionality associated with these buttons.

To Add a Row, you will work with the fields outlined with a red box below:



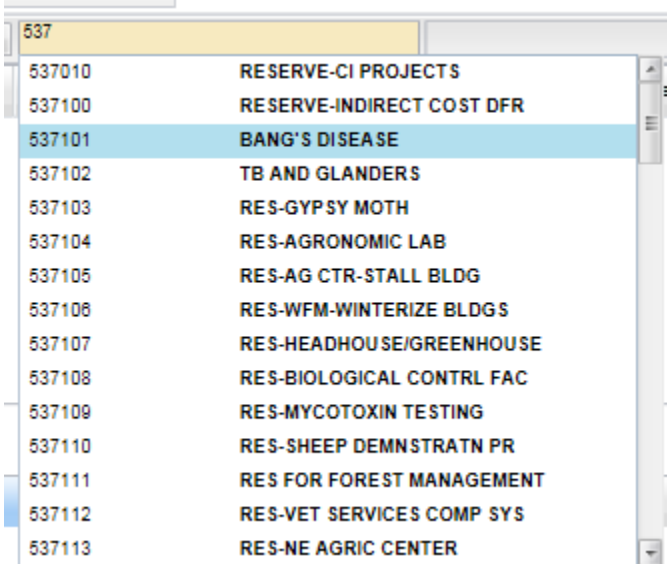
The screenshot shows the 'Certification - Operating' interface. At the top, there are tabs for 'Basic Information', 'Positions', 'Budget Detail', 'Budget Overview', and 'Attachments'. The 'Positions' tab is selected. Below the tabs, there is a 'Positions Requested' section with buttons for 'Edit Row', 'Remove Row(s)', 'Sort Rows', and 'Cancel Edit'. A red arrow points to the 'Add' button in the 'Positions Requested' section. Below this, there is a table with columns: Fund Code, Cost Center, Account Number, Account Description, Position Number, Classification, Annual Salary, Effective Date, FTE Y1 (2017-18), FTE Y2 (2018-19), and an 'Add' button. The table is currently empty, and a message 'No items to show.' is displayed. Below the table, there is an 'Addition' section with a table that has columns: Fund Code, Account, FTE Y1 (2017-18), FTE Y2 (2018-19), and Annual Salary. This table is also empty, with a message 'No items to show.' displayed. At the bottom of the interface, there are buttons for 'Export PDF', 'Save Draft', 'Save & Close', 'Ready To Submit', and 'Delete Request'.

Note that the following fields are required: Fund, Cost Center, Account#, Classification, Program, Annual Salary, Effective date, FTE Y1 and FTE Y2.

Fill in the fields in the order they appear in the row. Fund, Cost Center and Program are all dropdown lists and your entry can be selected from the dropdown lists or typed in manually.

Cost Center is an optional field and the cost center dropdown list will only display values if the Department/Agency uses cost centers and there are costs centers setup for the selected fund code. A cost center can be selected from the dropdown list or typed in manually.

The Account field will present a list of accounts once the user has entered three digits into the field. Accounts are so numerous that you can narrow the list down by entering the first few digits, or you may type the full account code manually.



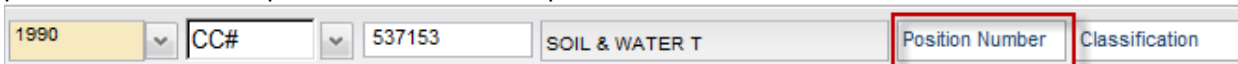
Account Code	Account Description
537	
537010	RESERVE-CI PROJECTS
537100	RESERVE-INDIRECT COST DFR
537101	BANG'S DISEASE
537102	TB AND GLANDERS
537103	RES-GYPSY MOTH
537104	RES-AGRONOMIC LAB
537105	RES-AG CTR-STALL BLDG
537106	RES-WFM-WINTERIZE BLDGS
537107	RES-HEADHOUSE/GREENHOUSE
537108	RES-BIOLOGICAL CONTRL FAC
537109	RES-MYCOTOXIN TESTING
537110	RES-SHEEP DEMNSTRATN PR
537111	RES FOR FOREST MANAGEMENT
537112	RES-VET SERVICES COMP SYS
537113	RES-NE AGRIC CENTER

Once selected or typed into the field, the account code will show and the account description will appear in the field to the right of the account code as shown below.



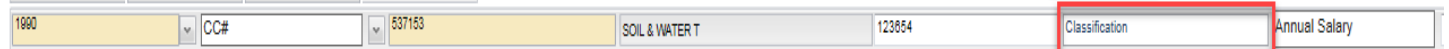
1990	CC#	537153	SOIL & WATER T
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Click in the Position Number field to make the field editable. A cursor will appear and you may type in the appropriate position number. The position number is an optional field.



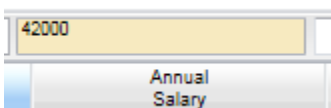
1990	CC#	537153	SOIL & WATER T	Position Number	Classification
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Click in the Classification field to make the field editable. A cursor will appear and you may type in the appropriate classification. If positions are entered in a reserve account (537XXX), the classification is optional.



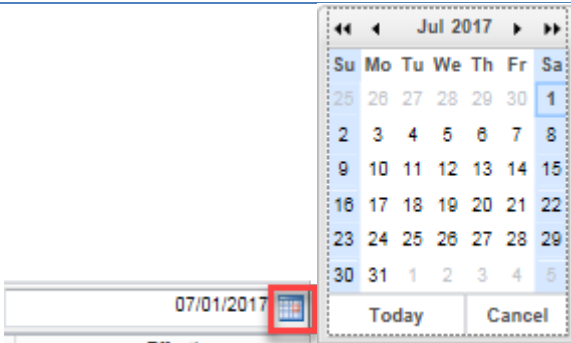
1990	CC#	537153	SOIL & WATER T	123854	Classification	Annual Salary
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Step 29: In the Annual Salary field, enter the annual wage for the position(s) in whole numbers, without a dollar sign, comma or decimal point.



42000
Annual Salary

In the Effective Date field, enter the beginning date of the position(s) requested, formatted as shown, or select the date from the calendar by clicking on the calendar icon next to the field.



In the next two fields, FTE Y1 and FTE Y2, enter the number of positions of this type that are requested for FY1 and FY2 of the budget period. Numbers may be entered as either positive or negative number.

FTE Y1	FTE Y2
1	1

Click the Add button and the row will populate the positions grid, clearing the fields for entry of another row; however, the row will retain the last fund code and cost center entered in an attempt to reduce the amount of manual entry required by the user in order to create a second row. Although these entries will be pre-filled, other Fund Codes and Cost Centers may be selected by the user.

Repeat the above process to add all the Position rows necessary for the Certification form you are creating.

To edit a row that has been entered, click on a row to highlight it:



Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1 (2017-18)	FTE Y2 (2018-19)
1990	037103	123554	SOIL & WATER TECH RESERVE	123554		\$42,000.00	07/01/2017	1.000	1.000

Click on the Edit Row button and the data in the selected row will populate the Edit/Add row line at the top of the grid.



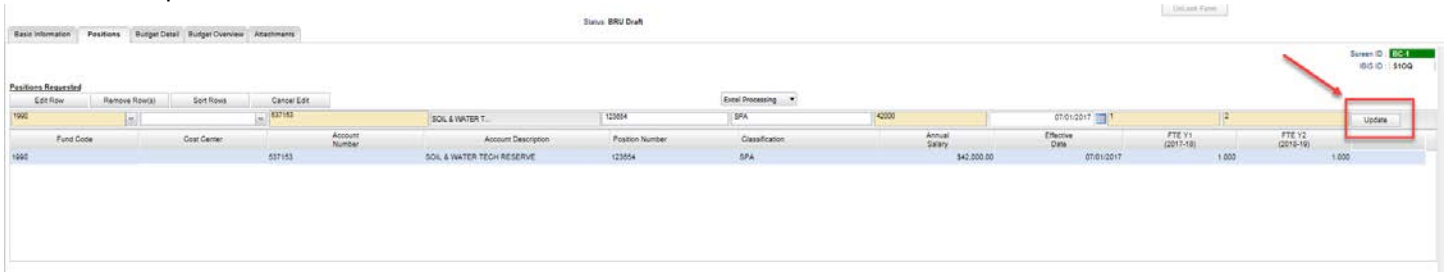
Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1 (2017-18)	FTE Y2 (2018-19)
1990	037103	123554	SOIL & WATER TECH RESERVE	123554		\$42,000.00	07/01/2017	1.000	1.000

Below is a screenshot of a row that populates the data entry row and may be edited.



Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1 (2017-18)	FTE Y2 (2018-19)
1990	037103	123554	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	1.000

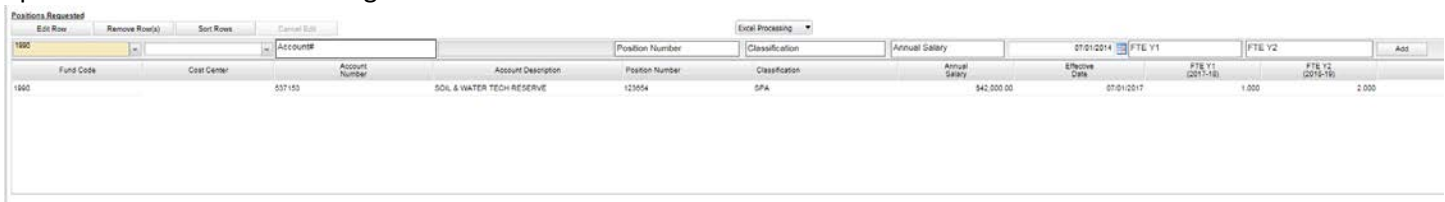
When a row has been selected for edit, you may change any of the data previously entered. To save changes you must click on the Update Button at the end of the row.



The screenshot shows the 'Positions Requested' section with a table of data. The first row is highlighted in yellow, indicating it is selected for edit. The 'Update' button at the end of this row is highlighted with a red box and a red arrow. The table columns include Fund Code, Cost Center, Account Number, Account Description, Position Number, Classification, Annual Salary, Effective Date, FTE Y1, and FTE Y2.

Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1	FTE Y2
1990		537153	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	1.000

Once Update has been clicked, the add/update row will clear (except for the Fund Code and Cost Center fields) and the updated data will show in the grid below.



The screenshot shows the 'Positions Requested' section with a table of data. The first row is highlighted in yellow, indicating it is selected for edit. The 'Add' button at the end of this row is highlighted with a red box. The table columns include Fund Code, Cost Center, Account Number, Account Description, Position Number, Classification, Annual Salary, Effective Date, FTE Y1, and FTE Y2.

Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1	FTE Y2
1990		537153	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	2.000

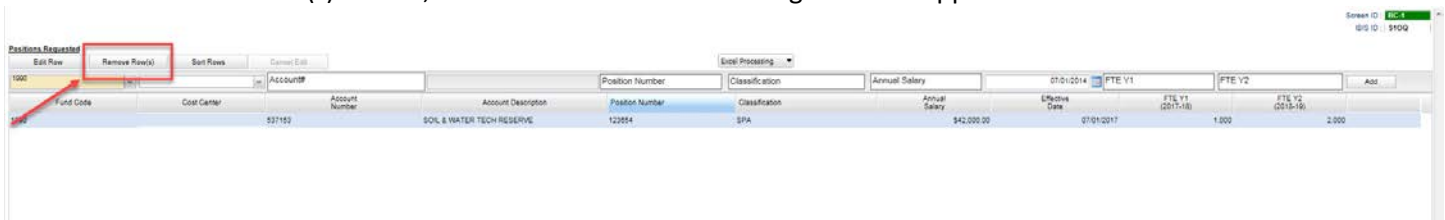
To delete a row that has been entered, click on a row to highlight it:



The screenshot shows the 'Positions Requested' section with a table of data. The first row is highlighted in yellow, indicating it is selected for deletion. The 'Remove Row(s)' button at the end of this row is highlighted with a red box and a red arrow. The table columns include Fund Code, Cost Center, Account Number, Account Description, Position Number, Classification, Annual Salary, Effective Date, FTE Y1, and FTE Y2.

Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1	FTE Y2
1990		537153	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	2.000

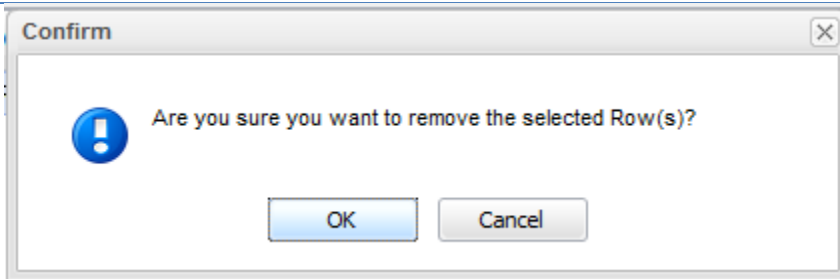
Click on the Remove Row(s) button, and a confirm deletion message box will appear.



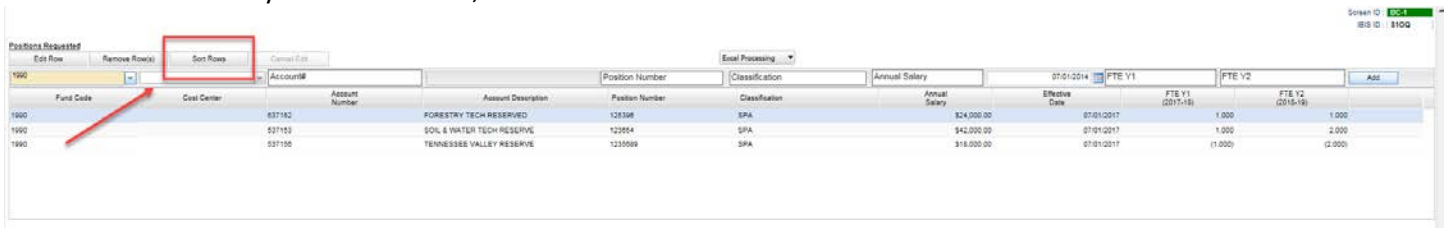
The screenshot shows the 'Positions Requested' section with a table of data. The first row is highlighted in yellow, indicating it is selected for deletion. The 'Remove Row(s)' button at the end of this row is highlighted with a red box and a red arrow. The table columns include Fund Code, Cost Center, Account Number, Account Description, Position Number, Classification, Annual Salary, Effective Date, FTE Y1, and FTE Y2.

Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1	FTE Y2
1990		537153	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	2.000

To cancel the deletion, click the Cancel button, to complete the deletion, click the OK button.



To Sort the rows that you have entered, click the Sort Rows button.

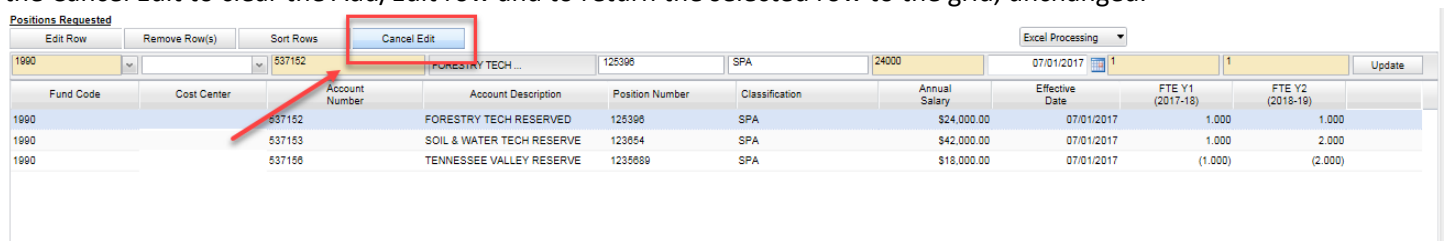


The "Positions Requested" table is shown. The "Sort Rows" button in the top toolbar is highlighted with a red box and a red arrow. The table contains three rows of data:

Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1 (2017-18)	FTE Y2 (2018-19)
1990		537152	FORESTRY TECH RESERVED	125396	SPA	\$24,000.00	07/01/2017	1.000	1.000
1990		537153	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	2.000
1990		537156	TENNESSEE VALLEY RESERVE	123559	SPA	\$18,000.00	07/01/2017	(1.000)	(2.000)

The rows will sort in Fund Code, Cost Center, Account Number order, ascending. Click a second time and they will resort in descending order.

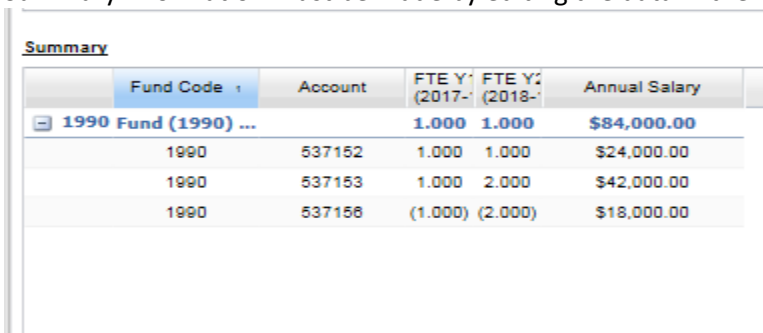
If a row has been selected for edit by highlighting and clicking the Edit Row, but then no edit is necessary, simply click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid, unchanged.



The "Positions Requested" table is shown. The "Cancel Edit" button in the top toolbar is highlighted with a red box and a red arrow. The table contains three rows of data:

Fund Code	Cost Center	Account Number	Account Description	Position Number	Classification	Annual Salary	Effective Date	FTE Y1 (2017-18)	FTE Y2 (2018-19)
1990		537152	FORESTRY TECH RESERVED	125396	SPA	\$24,000.00	07/01/2017	1.000	1.000
1990		537153	SOIL & WATER TECH RESERVE	123554	SPA	\$42,000.00	07/01/2017	1.000	2.000
1990		537156	TENNESSEE VALLEY RESERVE	123559	SPA	\$18,000.00	07/01/2017	(1.000)	(2.000)

At the bottom of the Positions tab, a Summary table is displayed. The Summary information is taken from the data entered above in the Positions Requested table and none of the data in the Summary is editable. Any changes to the Summary information must be made by editing the data in the Positions Requested table.



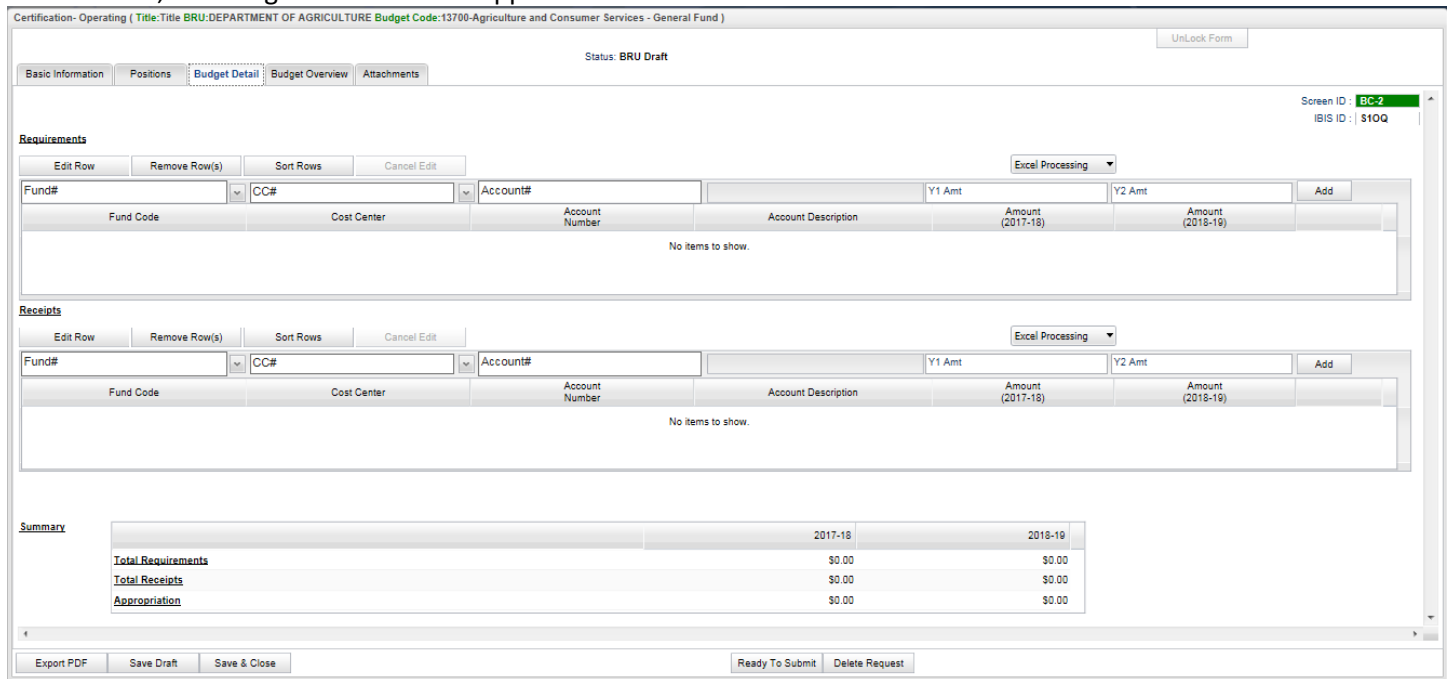
The "Summary" table is shown. It contains the following data:

Fund Code	Account	FTE Y1 (2017-18)	FTE Y2 (2018-19)	Annual Salary
1990 Fund (1990) ...		1.000	1.000	\$84,000.00
1990	537152	1.000	1.000	\$24,000.00
1990	537153	1.000	2.000	\$42,000.00
1990	537156	(1.000)	(2.000)	\$18,000.00

Move to the top of the Certification form and click on the Budget Detail tab to bring that portion of the Certification form to the forefront.



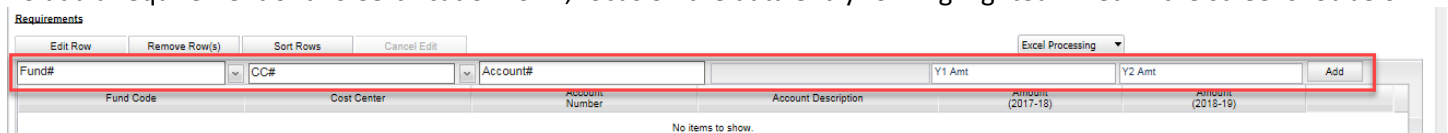
Once clicked, the Budget Detail tab will appear as shown below.



	2017-18	2018-19
Total Requirements	\$0.00	\$0.00
Total Receipts	\$0.00	\$0.00
Appropriation	\$0.00	\$0.00

Inserting rows in the Requirements and Receipts sections of the Certification form works in the same fashion as inserting rows on the Positions tab. In the Requirements section, there are four buttons that appear first: Edit Row, Remove Row(s), Sort Rows and Cancel Edit. These functions are only utilized when rows have been entered into the form and will be described later in this user guide.

To add a requirement of this Certification form, focus on the data entry row highlighted in red in the screenshot below.



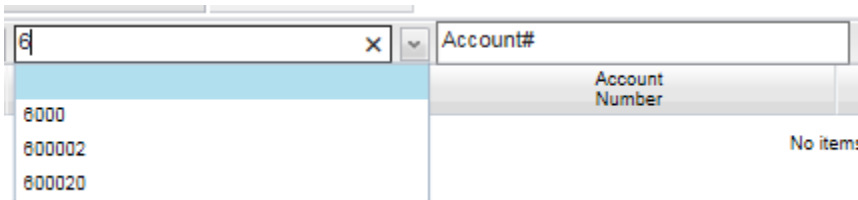
The fields in this row are editable, and when the end of the row is reached, the Add button will save this data so that another row can be entered.

The Fund field contains a dropdown list that displays Fund codes available to the agency/BRU. A fund code can be selected from the dropdown list or typed in manually.

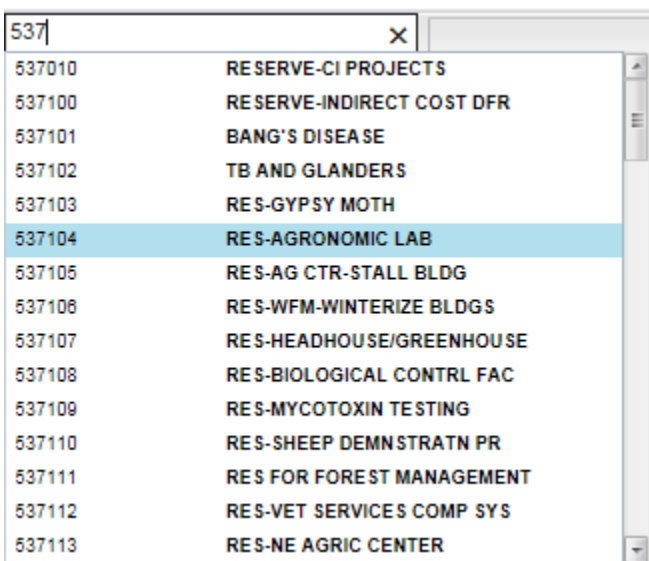
Requirements

Edit Row		Remove Row(s)		Sort Rows	
1	X			CC#	
1011	General Administration				
1012	Administrative Services				
1013	Public Affairs				
1014	Human Resources				
1017	Emergency Programs Division				
1018	Internal Audit				
1019	IT Services				
1020	Markets				
1027	Property and Construction				
1035	Small Farms				
1040	Agronomic Services				
1050	Federal - State Agricultural Statistics				
1070	Commercial Feed and Pet Food				
1080	Commercial Fertilizer Analysis				
1090	Pesticide Control and Analysis				

Cost Center is an optional field and the cost center dropdown list will only display values if the Department/Agency uses cost centers and there are costs centers setup for the selected fund code. A cost center can be selected from the dropdown list or typed in manually.

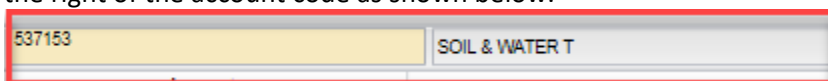


The Account field will present a list of accounts once the user has entered three digits into the field. Accounts are so numerous that you can narrow the list down by entering the first few digits, or you may type the full account code manually.

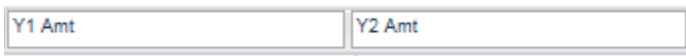


Account Number	Description
537010	RESERVE-CI PROJECTS
537100	RESERVE-INDIRECT COST DFR
537101	BANG'S DISEASE
537102	TB AND GLANDERS
537103	RES-GYPSY MOTH
537104	RES-AGRONOMIC LAB
537105	RES-AG CTR-STALL BLDG
537106	RES-WFM-WINTERIZE BLDGS
537107	RES-HEADHOUSE/GREENHOUSE
537108	RES-BIOLOGICAL CONTRL FAC
537109	RES-MYCOTOXIN TESTING
537110	RES-SHEEP DEMNSTRATN PR
537111	RES FOR FOREST MANAGEMENT
537112	RES-VET SERVICES COMP SYS
537113	RES-NE AGRIC CENTER

Once selected or typed into the field, the account code will show and the account description will appear in the field to the right of the account code as shown below.



The next set of fields in the Add/Edit Row area are Year 1 and Year 2 amount fields

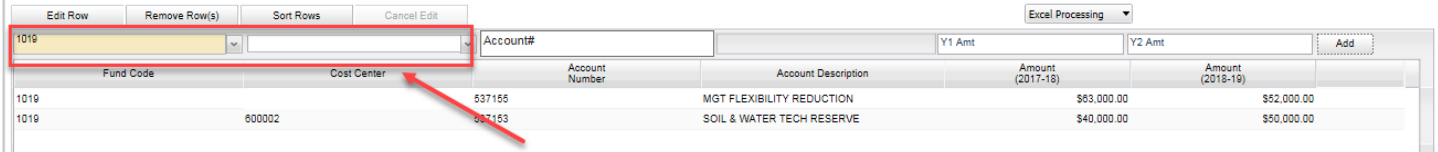


Enter amounts in the Y1 Amt and Y2 Amt fields. The values will reformat to dollars when you click Add to finish the row entry. Amounts may be entered as either positive or negative amounts. Amounts are not required to be entered in both year fields and if an amount field is left blank, then the value added to the table will be \$0.

Step 52: When you have completed the new row click on the Add button. The row will move down to the grid below, and the majority of the Add/Edit row will clear (Fund Code and Cost Center will be retained).

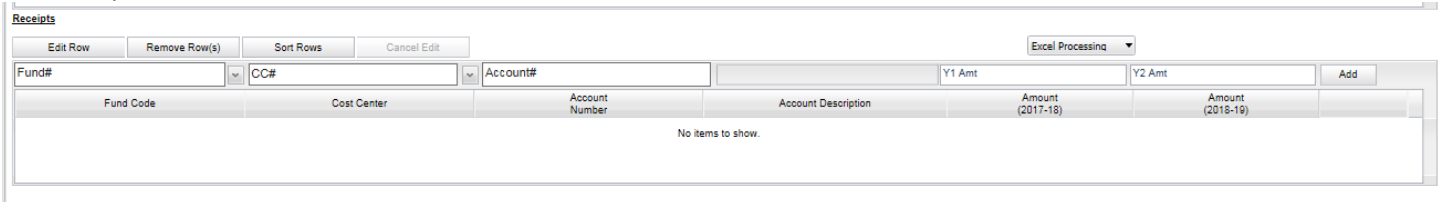
Add

Add as many rows of requirements as appropriate to complete the Certification form. Once the first row is added, the Fund Center and Cost Center codes will pre-populate with the choices made when entering that first row to help quicken the entry of subsequent rows. If these values are not appropriate for subsequent row(s), they can be overwritten.



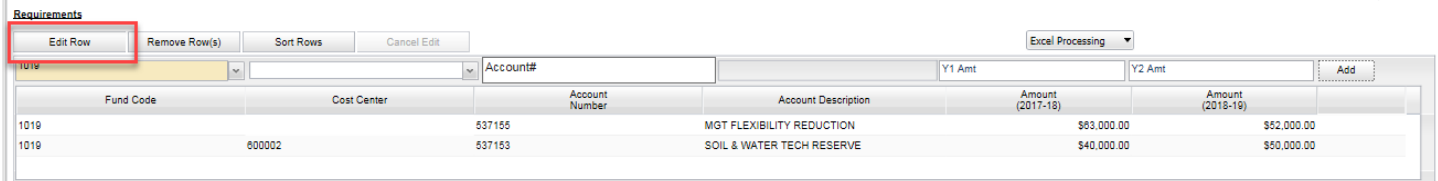
Fund Code	Cost Center	Account Number	Account Description	Y1 Amt	Y2 Amt
1019					
1019	600002	537155	MGT FLEXIBILITY REDUCTION	\$63,000.00	\$52,000.00
1019		537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

The Add/Edit Row(s) functionality for Receipts is identical to the Requirements functionality and therefore each step will not be replicated here.



Fund Code	Cost Center	Account Number	Account Description	Y1 Amt	Y2 Amt

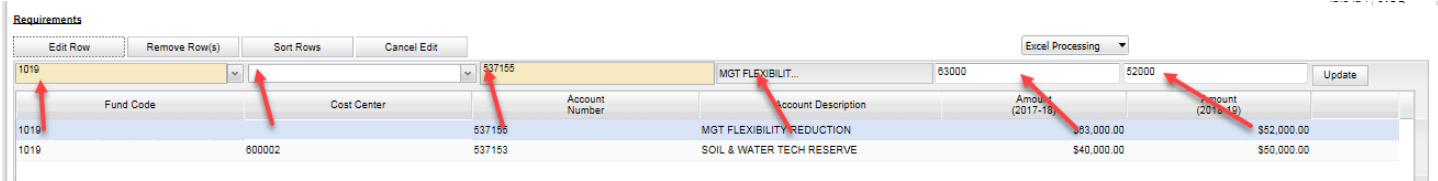
To edit a row that has been entered (in either Requirements or Receipts), click on a row to highlight it.



Fund Code	Cost Center	Account Number	Account Description	Y1 Amt	Y2 Amt
1019					
1019	600002	537155	MGT FLEXIBILITY REDUCTION	\$63,000.00	\$52,000.00
1019		537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

--Devendra

Click on the Edit Row button and the data in the selected row will populate the Edit/Add row line at the top of the grid.



Fund Code	Cost Center	Account Number	Account Description	Y1 Amt	Y2 Amt
1019					
1019	600002	537155	MGT FLEXIBILITY REDUCTION	\$63,000.00	\$52,000.00
1019		537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

When a row has been selected for edit, you may change any of the data previously entered. To save changes you must click on the Update Button at the end of the row.

Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit

Excel Processing

1019 537155 MGT FLEXIBILT... 63000 52000 Update

Fund Code	Cost Center	Account Number	Account Description	Amount (2017-18)	Amount (2018-19)
1019		537155	MGT FLEXIBILITY REDUCTION	\$83,000.00	\$52,000.00
1019	600002	537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

Once Update has been clicked, the add/update row will clear (except for the Fund Code and Cost Center fields) and the updated data will show in the grid below.

To delete a row that has been entered, click on a row to highlight it

Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit

Excel Processing

1019 537155 MGT FLEXIBILT... 63000 52000 Update

Fund Code	Cost Center	Account Number	Account Description	Amount (2017-18)	Amount (2018-19)
1019		537155	MGT FLEXIBILITY REDUCTION	\$83,000.00	\$52,000.00
1019	600002	537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

Click on the Remove Row(s) button, and a confirm deletion message box will appear.

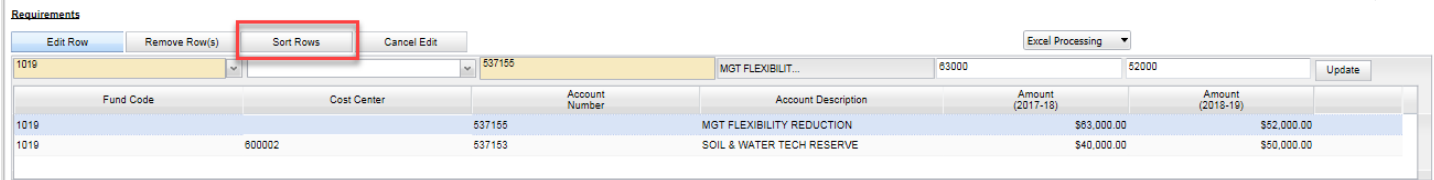
Confirm

Are you sure you want to remove the selected Row(s)?

OK Cancel

To cancel the deletion, click the Cancel button, to complete the deletion, click the OK button.

To Sort the rows that you have entered, click the Sort Rows button.

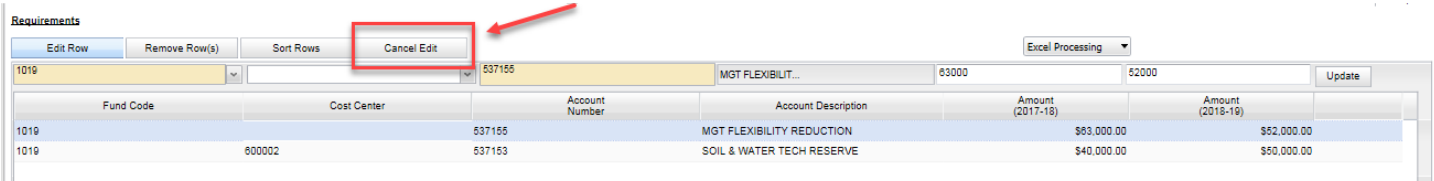


The screenshot shows the 'Requirements' section of the application. At the top, there are four buttons: 'Edit Row', 'Remove Row(s)', 'Sort Rows', and 'Cancel Edit'. The 'Sort Rows' button is highlighted with a red rectangular box. Below the buttons is a table with columns: Fund Code, Cost Center, Account Number, Account Description, Amount (2017-18), and Amount (2018-19). The table contains three rows of data. The first row is highlighted in yellow, indicating it is selected for editing.

Fund Code	Cost Center	Account Number	Account Description	Amount (2017-18)	Amount (2018-19)
1019		537155	MGT FLEXIBILT...	63000	52000
1019	600002	537155	MGT FLEXIBILITY REDUCTION	\$63,000.00	\$52,000.00
1019	600002	537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

The rows will sort in Fund Code, Cost Center, Account Number order, ascending. Click a second time and they will resort in descending order.

If a row has been selected for edit, by highlighting and clicking the Edit Row, but then no edit is necessary, simply click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid, unchanged.



The screenshot shows the 'Requirements' section of the application. At the top, there are four buttons: 'Edit Row', 'Remove Row(s)', 'Sort Rows', and 'Cancel Edit'. The 'Cancel Edit' button is highlighted with a red rectangular box, and a red arrow points to it from the right. Below the buttons is a table with columns: Fund Code, Cost Center, Account Number, Account Description, Amount (2017-18), and Amount (2018-19). The table contains three rows of data. The first row is highlighted in yellow, indicating it is selected for editing.

Fund Code	Cost Center	Account Number	Account Description	Amount (2017-18)	Amount (2018-19)
1019		537155	MGT FLEXIBILT...	63000	52000
1019	600002	537155	MGT FLEXIBILITY REDUCTION	\$63,000.00	\$52,000.00
1019	600002	537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00

When requirements and/or receipts have been entered into the Certification form, the data populates the Summary table at the bottom of the Budget Detail tab. The Summary table will add all requirements entered in this form and display them in their appropriate budget cycle. The Summary table will also add and receipts entered in this form and display them in their appropriate category/year. The Appropriation row will then calculate requirements minus receipts and display those amounts in their appropriate budget cycles.

Summary		2017-18	2018-19
Total Requirements		\$103,000.00	\$102,000.00
Total Receipts		\$100,000.00	\$100,000.00
Appropriation		\$3,000.00	\$2,000.00

Move to the top of the Certification form and click on the Budget Overview tab to bring that portion of the form to the forefront.

Certification- Operating (Title: **BRU-DEPARTMENT OF AGRICULTURE** Budget Code: 13700-Agriculture and Consumer Services - General Fund) UnLock Form

Basic Information | Positions | Budget Detail | **Budget Overview** | Attachments Status: BRU Draft

Screen ID : **BC-3**
IBIS ID : **\$10Q**

Requirements

Fund Code	Account Number	Account Description	Year1	Year2
1019				
1019	537153	SOIL & WATER TECH RESERVE	\$40,000.00	\$50,000.00
1019	537155	MGT FLEXIBILITY REDUCTION	\$63,000.00	\$52,000.00
Fund Totals:			\$103,000.00	\$102,000.00

Receipts

Fund Code	Account Number	Account Description	Year1	Year2
1019				
1019	437115	LIQU. DAMAGE COLLECTIONS	\$100,000.00	\$100,000.00
Fund Totals:			\$100,000.00	\$100,000.00

Summary

	2017-18	2018-19
Total Requirements	\$103,000.00	\$102,000.00
Total Receipts	\$100,000.00	\$100,000.00
Appropriation	\$3,000.00	\$2,000.00

Export PDF | Save Draft | Save & Close Ready To Submit | Delete Request

The Budget Overview tab is a read only tab that reflects the data entered on the Budget Detail screen and it shows summaries by fund. None of the data on this tab is editable and will not display cost center data.

At the bottom of the Certification form there are form action buttons that are available while working on every tab in the form. The buttons are: Export PDF, Save Draft, Save & Close, Ready to Submit and Delete Request. Usage of these buttons is standard within the IBIS application and their functionality is covered in the "Standard Form buttons" training document located on the [IBIS website](#).