

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

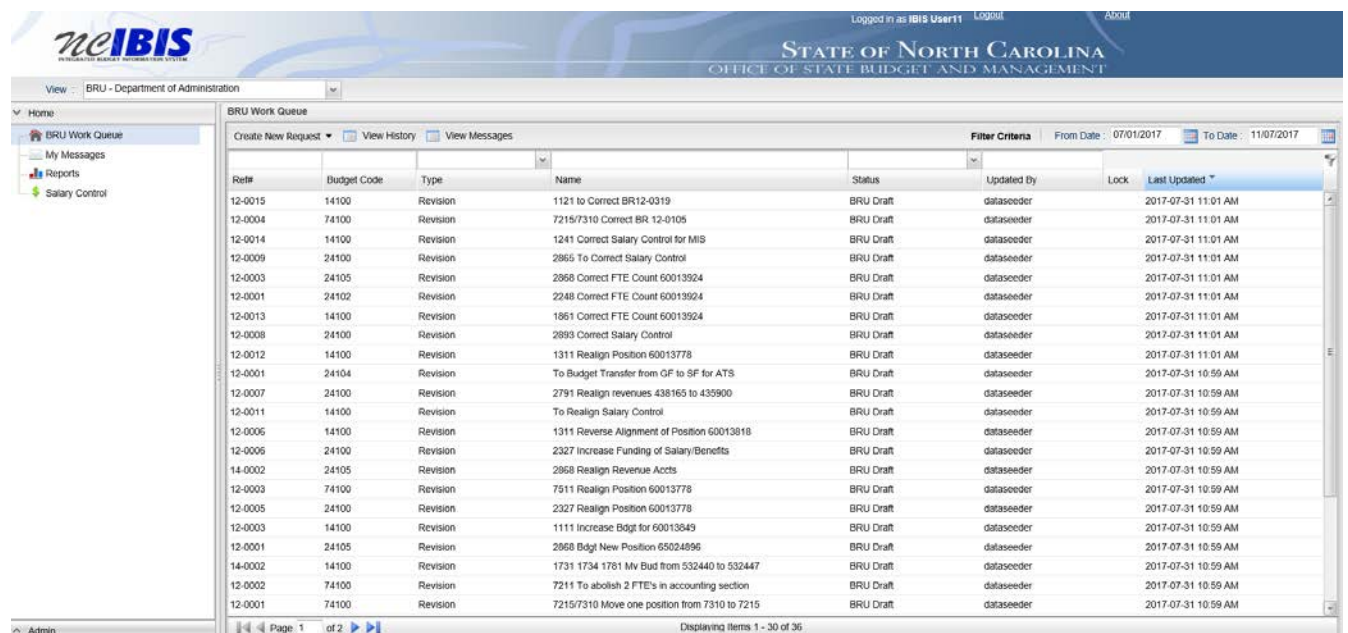
BUDGET REVISION – CAPITAL FORM

PREFACE

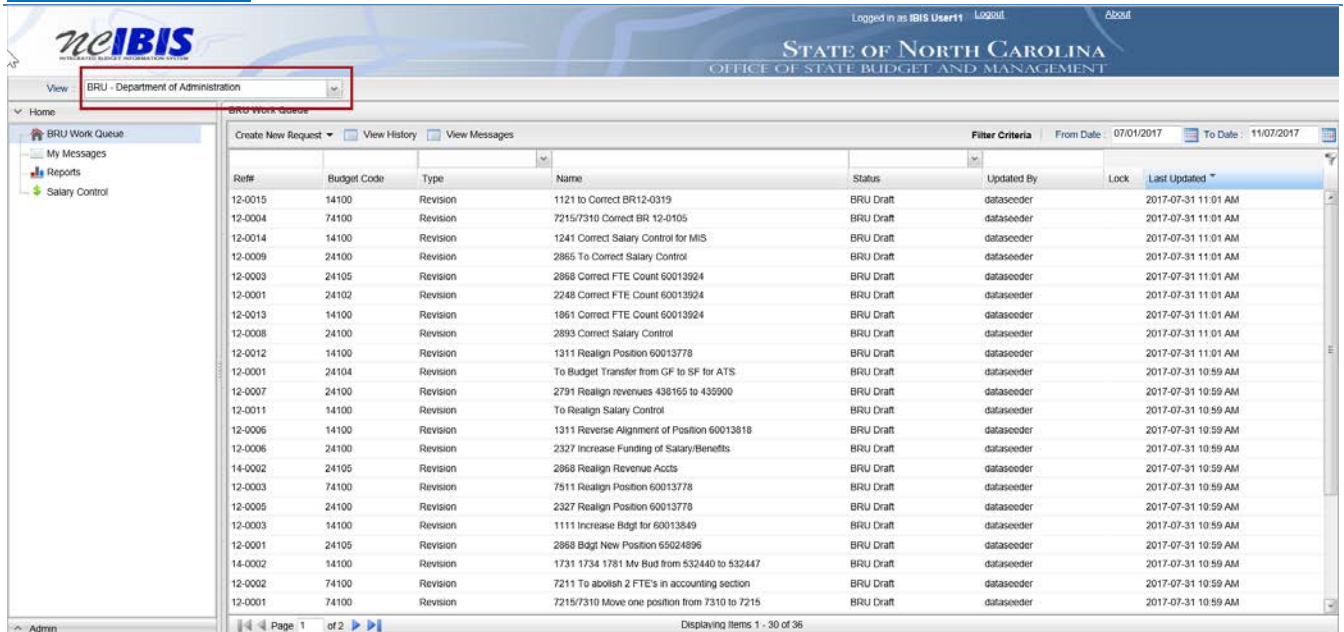
This training guide describes how to use IBIS to complete a budget revision capital form. For policy guidance regarding budget revisions, please consult the [State Budget Manual](#).

BUDGET REVISION- CAPITAL

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



Find the View indicator in the upper left-hand corner of the page. The field should contain only your BRU. 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. In the example below, the user is logged in as the Department of Administration.



View: BRU - Department of Administration

BRU Work Queue

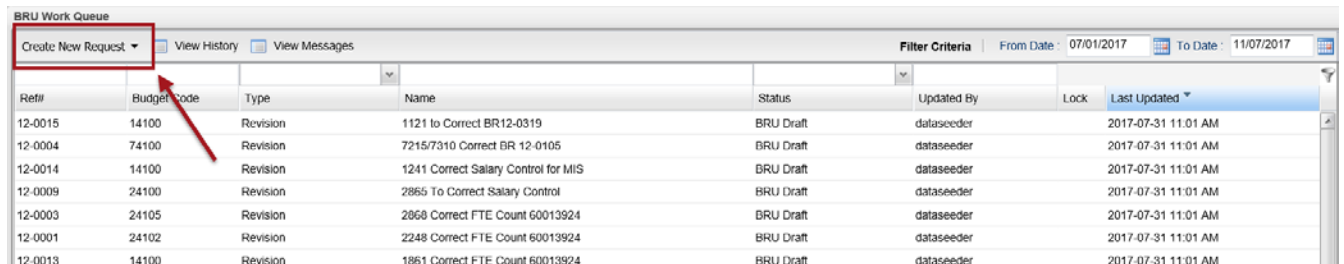
Create New Request View History View Messages

Filter Criteria From Date: 07/01/2017 To Date: 11/07/2017

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
12-0015	14100	Revision	1121 to Correct BR12-0319	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0004	74100	Revision	7215/7310 Correct BR 12-0105	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0014	14100	Revision	1241 Correct Salary Control for MIS	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0009	24100	Revision	2865 To Correct Salary Control	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0003	24105	Revision	2868 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0001	24102	Revision	2248 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0013	14100	Revision	1861 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0008	24100	Revision	2893 Correct Salary Control	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0012	14100	Revision	1311 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0001	24104	Revision	To Budget Transfer from CF to SF for ATS	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0007	24100	Revision	2791 Realign revenues 438166 to 430900	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0011	14100	Revision	To Realign Salary Control	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0006	14100	Revision	1311 Reverse Alignment of Position 60013818	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0006	24100	Revision	2327 Increase Funding of Salary/Benefits	BRU Draft	dataseeder		2017-07-31 10:59 AM
14-0002	24105	Revision	2868 Realign Revenue Accts	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0003	74100	Revision	7511 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0005	24100	Revision	2327 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0003	14100	Revision	1111 Increase Bdgt for 60013849	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0001	24105	Revision	2868 Bdgt New Position 55024896	BRU Draft	dataseeder		2017-07-31 10:59 AM
14-0002	14100	Revision	1731 1734 1781 Mv Bud from 532440 to 532447	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0002	74100	Revision	7211 To abolish 2 FTE's in accounting section	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0001	74100	Revision	7215/7310 Move one position from 7310 to 7215	BRU Draft	dataseeder		2017-07-31 10:59 AM

Page 1 of 2 Displaying Items 1 - 30 of 36

To create a new budget revision form, click on the Create New Request dropdown list in the middle of the screen.



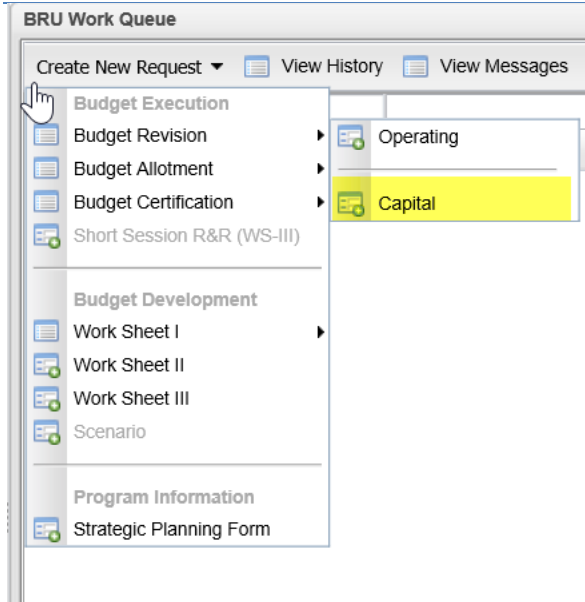
BRU Work Queue

Create New Request View History View Messages

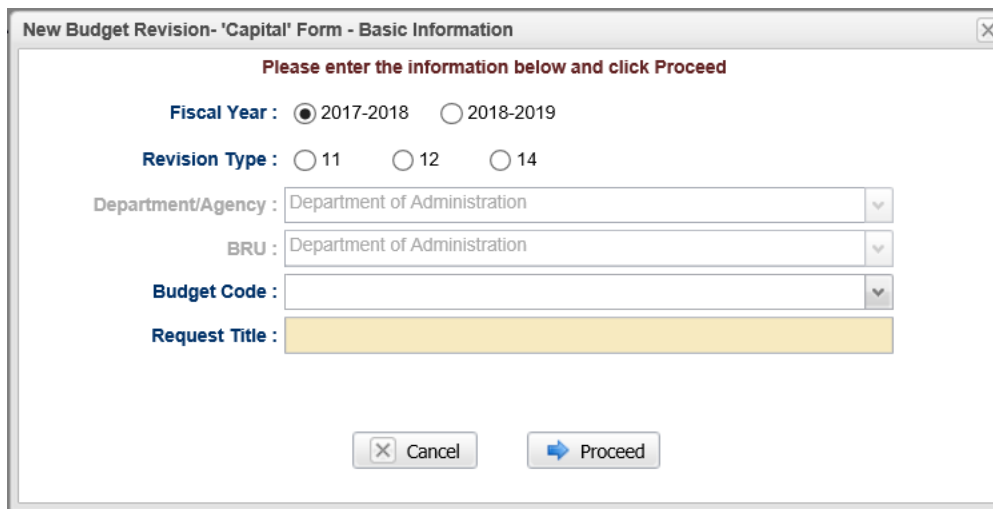
Filter Criteria From Date: 07/01/2017 To Date: 11/07/2017

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
12-0015	14100	Revision	1121 to Correct BR12-0319	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0004	74100	Revision	7215/7310 Correct BR 12-0105	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0014	14100	Revision	1241 Correct Salary Control for MIS	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0009	24100	Revision	2865 To Correct Salary Control	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0003	24105	Revision	2868 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0001	24102	Revision	2248 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0013	14100	Revision	1861 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM

When you click on 'Create New Request', the drop-down will display. Click on the Budget Revision – Capital option on the menu.



After clicking the option, a New Capital Revision Form – Basic Information window will appear as shown in the following screenshot.



The screenshot shows a window titled 'New Budget Revision- 'Capital' Form - Basic Information'. At the top, it says 'Please enter the information below and click Proceed'. The form contains the following fields:

- Fiscal Year :** Two radio buttons: 2017-2018 and 2018-2019.
- Revision Type :** Three radio buttons: 11, 12, and 14.
- Department/Agency :** A dropdown menu showing 'Department of Administration'.
- BRU :** A dropdown menu showing 'Department of Administration'.
- Budget Code :** A dropdown menu.
- Request Title :** A text input field.

At the bottom of the window, there are two buttons: 'Cancel' and 'Proceed'.

The first field allows you to select the Fiscal Year that is involved in the proposed budget revision. Click on the radio button next to the appropriate fiscal year. Only one year may be selected at a time.

Fiscal Year : 2017-2018 2018-2019

The next field allows you to select the revision type. Click the radio button next to the appropriate revision type. Note that the form allows a user to change between an 11 and 12 but will not allow a type 14 to be changed because it can be approved internally by an agency or BRU user.

Revision Type : 11 12 14

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.

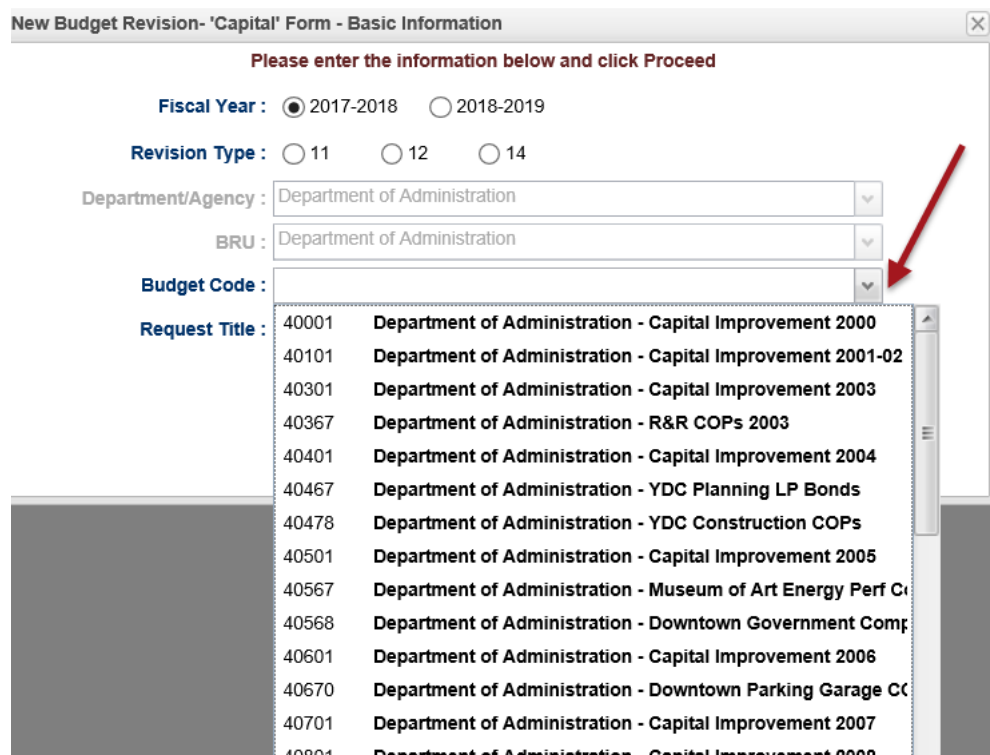
Fiscal Year : 2017-2018 2018-2019

Revision Type : 11 12 14

Department/Agency : ▼

BRU : ▼

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



New Budget Revision- 'Capital' Form - Basic Information

Please enter the information below and click Proceed

Fiscal Year : 2017-2018 2018-2019

Revision Type : 11 12 14

Department/Agency : Department of Administration

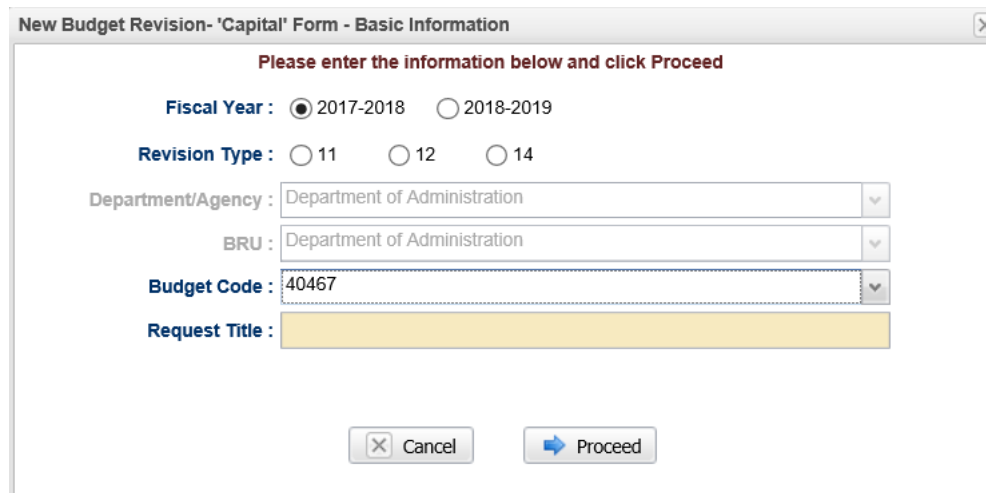
BRU : Department of Administration

Budget Code :

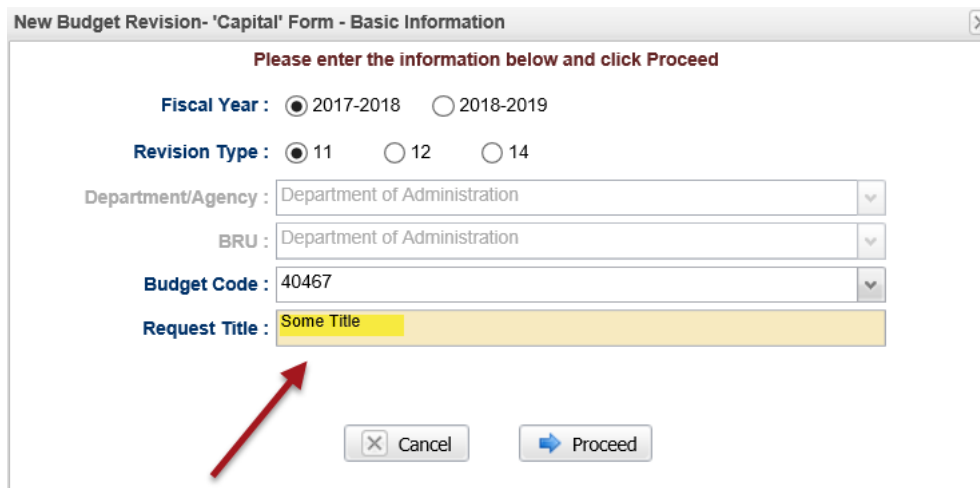
Request Title :

40001	Department of Administration - Capital Improvement 2000
40101	Department of Administration - Capital Improvement 2001-02
40301	Department of Administration - Capital Improvement 2003
40367	Department of Administration - R&R COPs 2003
40401	Department of Administration - Capital Improvement 2004
40467	Department of Administration - YDC Planning LP Bonds
40478	Department of Administration - YDC Construction COPs
40501	Department of Administration - Capital Improvement 2005
40567	Department of Administration - Museum of Art Energy Perf C
40568	Department of Administration - Downtown Government Comp
40601	Department of Administration - Capital Improvement 2006
40670	Department of Administration - Downtown Parking Garage CC
40701	Department of Administration - Capital Improvement 2007
40801	Department of Administration - Capital Improvement 2008

Use the pointer to select the appropriate Budget Code from the list. Once selected, the field becomes populated with the Budget Code selected and the Budget Code list disappears.



Click in the Request Title field. A flashing cursor will appear in the field. Type a title for the budget revision. As you type, the title will appear in the field as shown below.



Clicking on the Cancel button will close the window. Nothing will be saved and the Work Queue will reappear. If there is no need to cancel the form, bypass this step.

If instead of canceling in the prior step and the entries are satisfactory, click on the Proceed button.

New Budget Revision- 'Capital' Form - Basic Information ✕

Please enter the information below and click Proceed

Fiscal Year : 2017-2018 2018-2019


Revision Type : 11 12 14

Department/Agency : Department of Administration ▼

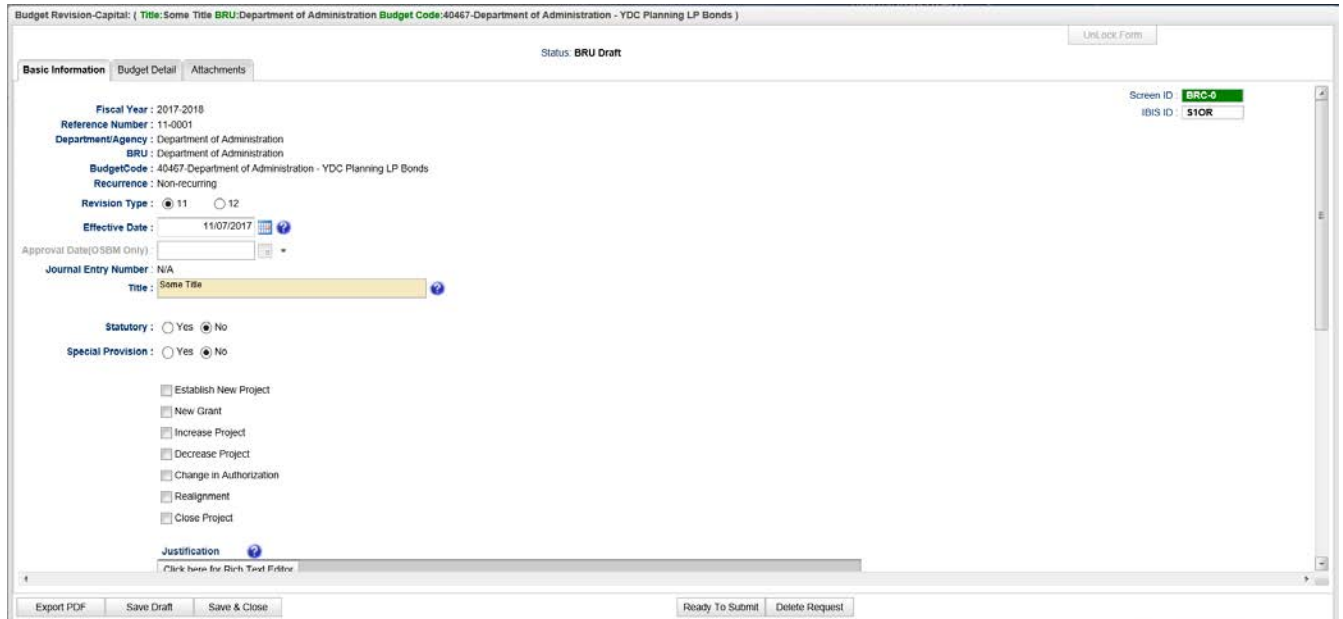
BRU : Department of Administration ▼

Budget Code : 40467 ▼

Request Title : Some Title



A Budget Revision Capital form will open as shown below. Note: The form’s three tabs (Basic Information, Budget Detail, and Attachments) will appear in the upper left corner of the screen.



Note: This section will only address the first two tabs. The Attachments tab’s functionality is addressed in a different user guide that is available on the [IBIS website](#).

Basic Information

The Basic Information screen comes to the forefront since it is the default tab when creating a new or opening an existing form.

Verify the information is displayed correctly in the following non-editable fields highlighted in the screenshot above – biennium, fiscal year, reference number, status, department/agency, BRU, and budget code.

Fiscal Year: The form will show the Fiscal Year selected in the initiation window.

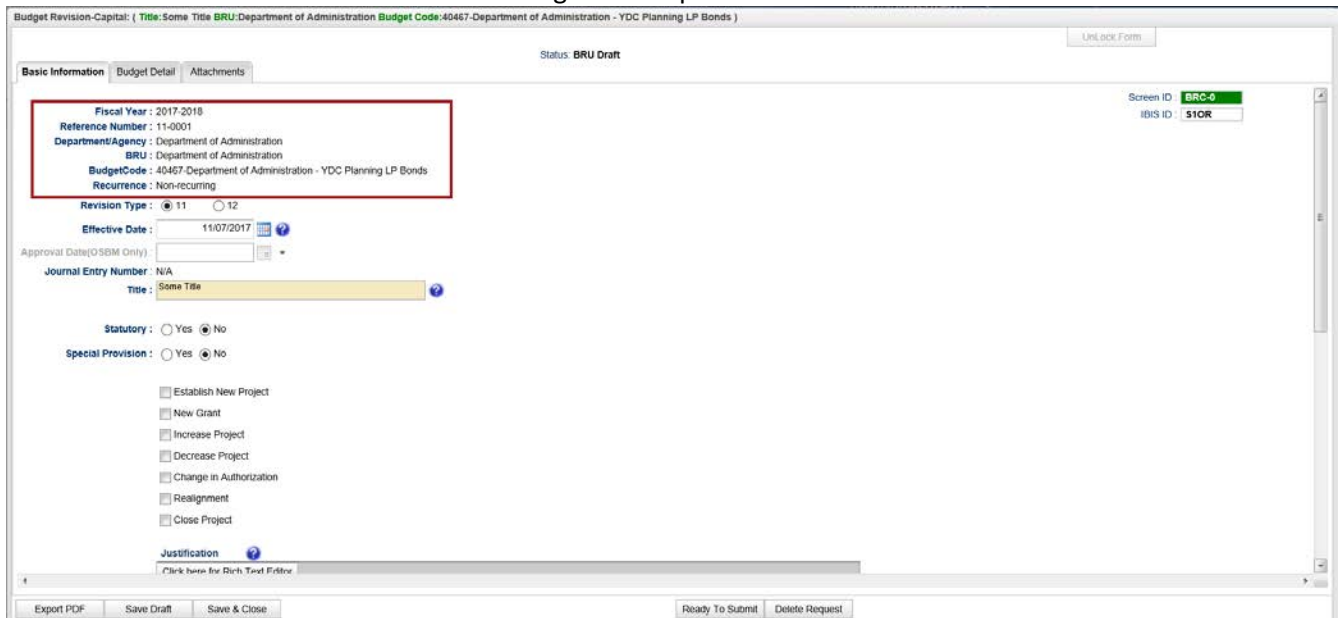
Reference Number: The form will show a reference number that begins with the revision type selected when the form was created (11, 12, or 14) followed by four system generated digits.

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.

Recurrence: This is set to Nonrecurring for all Capital revisions.



Budget Revision-Capital: (Title: Some Title BRU: Department of Administration Budget Code: 40467- Department of Administration - YDC Planning LP Bonds)

Unlock Form

Status: BRU Draft

Screen ID: BRC-0
IBIS ID: 510R

Basic Information Budget Detail Attachments

Fiscal Year : 2017-2018
Reference Number : 11-0001
Department/Agency : Department of Administration
BRU : Department of Administration
Budget Code : 40467- Department of Administration - YDC Planning LP Bonds
Recurrence : Non-recurring

Revision Type : 11 12

Effective Date : 11/07/2017

Approval Date(OSBM Only) : []

Journal Entry Number : N/A
Title : Some Title

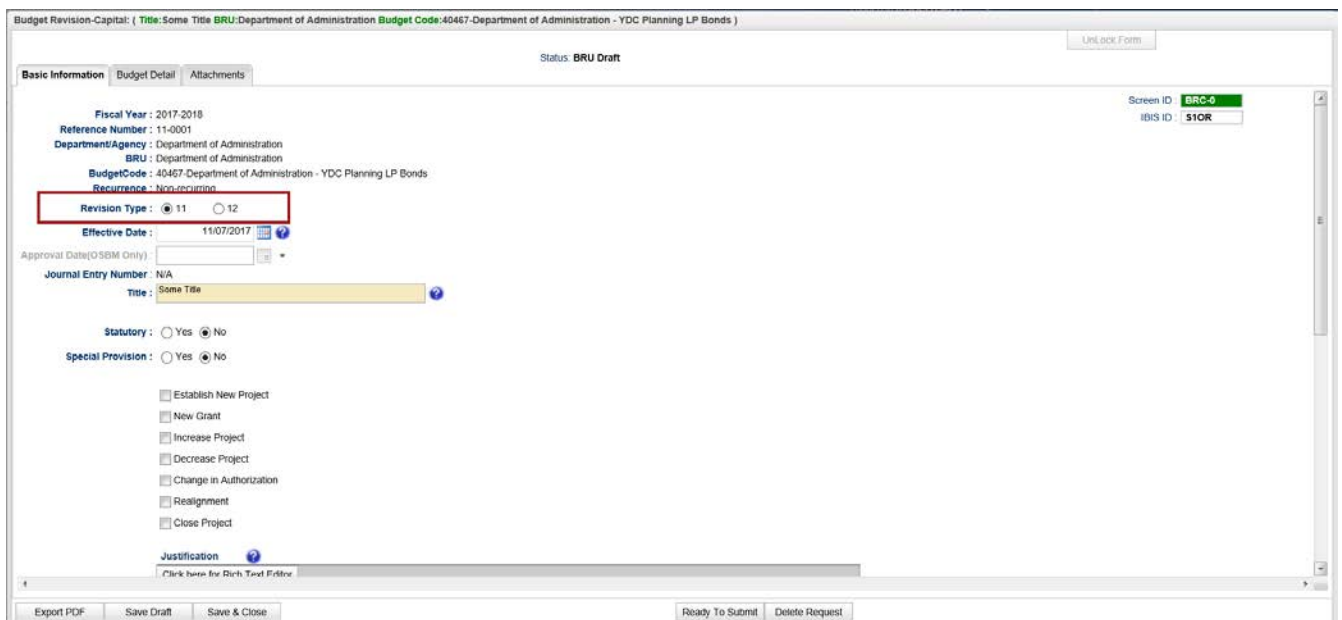
Statutory : Yes No
Special Provision : Yes No

Establish New Project
 New Grant
 Increase Project
 Decrease Project
 Change in Authorization
 Realignment
 Close Project

Justification [?]
Click here for Rich Text Editor

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

Review the selection for the revision type field as highlighted below. The form should show the revision type selected when the form was created. The revision type may be changed between an 11 and 12 when either of those types is created. A type 14 cannot be changed to a different type.



Budget Revision-Capital: (Title: Some Title BRU: Department of Administration Budget Code: 40467- Department of Administration - YDC Planning LP Bonds)

Unlock Form

Status: BRU Draft

Screen ID: BRC-0
IBIS ID: 510R

Basic Information Budget Detail Attachments

Fiscal Year : 2017-2018
Reference Number : 11-0001
Department/Agency : Department of Administration
BRU : Department of Administration
Budget Code : 40467- Department of Administration - YDC Planning LP Bonds
Recurrence : Non-recurring

Revision Type : 11 12

Effective Date : 11/07/2017

Approval Date(OSBM Only) : []

Journal Entry Number : N/A
Title : Some Title

Statutory : Yes No
Special Provision : Yes No

Establish New Project
 New Grant
 Increase Project
 Decrease Project
 Change in Authorization
 Realignment
 Close Project



Justification [?]
Click here for Rich Text Editor



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


View the Effective and Approval Date fields, which are highlighted below. The Effective Date can be changed by typing in a new date into the field or by selecting a date from calendar after the icon is clicked. The Effective Date defaults to July 1.

The Approval Date will be inactive for type 11s and 12s at the BRU and Agency levels and active for OSBM because approval authority resides at that level. For type 14 budget revisions, this will be an active field for BRUs and Agencies and an approval date is required to be selected prior to approval.

Fiscal Year : 2017-2018
Reference Number : 11-0001
Department/Agency : Department of Administration
BRU : Department of Administration
BudgetCode : 40467-Department of Administration - YDC Planning LP Bonds
Recurrence : Non-recurring
Revision Type : 11 12


Effective Date :  

Approval Date(OSBM Only) :  

Journal Entry Number : N/A
Title : 

Statutory : Yes No
Special Provision : Yes No

If necessary, the title can be changed by clicking in the title field and altering the text.

Title : 

The form defaults to a “no” answer to the question, “Statutory?”

Statutory : Yes No

If appropriate, select “Yes.” If yes is selected, the form creates a required text field where the General Statute reference will be entered.

Statutory : Yes No
General Statute Reference :

The form defaults to a “No” answer to the question, “Special Provision?”

Special Provision : Yes No

If appropriate, select “Yes.” If yes is selected, the form creates a required text field where the Session Law reference will be entered.

Special Provision : Yes No

Session Law Reference :



Review the budget revision categories, which are shown below.

- Establish New Project
- New Grant
- Increase Project
- Decrease Project
- Change in Authorization
- Realignment
- Close Project

Check the category that pertains to your budget revision. (Increase Project was selected in the example below.)

- New Grant
- Increase Project
- Decrease Project
- Change in Authorization
- Realignment
- Close Project

Note: Checking “Establish New Project” will display additional dropdowns to collect additional information as shown below.

Establish New Project

Please provide information in the following required fields.
Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.

Budget Funding Type :

Budget Adjustment Type : Expansion

Project Type :

Original Allocation :

Clicking the dropdown for Budget Funding Type will display four options: General Fund, Non-General Fund, Self-Liquidating, and Special Indebtedness. Select the appropriate option.

Establish New Project

Please provide information in the following required fields.

Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.

Budget Funding Type :

Budget Adjustment Type :

Project Type :

Original Allocation :

Clicking the dropdown for Budget Adjustment Type will display one option. Select the Expansion option.

Establish New Project

Please provide information in the following required fields.

Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.

Budget Funding Type :

Budget Adjustment Type :

Project Type :

Original Allocation :

Clicking the dropdown for Project Type will display three options: New Project, Existing, Repair and Renovation Reserve. Select the appropriate option.

Establish New Project

Please provide information in the following required fields.

Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.

Budget Funding Type :

Budget Adjustment Type :

Project Type :

Original Allocation :

Clicking in the Original Allocation field will turn the background of the field to white, which indicates text can be entered. Type the appropriate amount in the field.

Establish New Project


*Please provide information in the following required fields.
Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.*

Budget Funding Type :

Budget Adjustment Type :

Project Type :

Original Allocation :



If Establishing New Project is not the correct choice, uncheck the box and these additional fields will disappear.

Click in the Justification box and enter an explanation of the budget revision within the field. This is a required field on the budget revision form.

Justification 

[Click here for Rich Text Editor](#) SpellCheck 

Enter a budget revision justification here.

The Rich Text Editor can be clicked to format the text or to enter text.

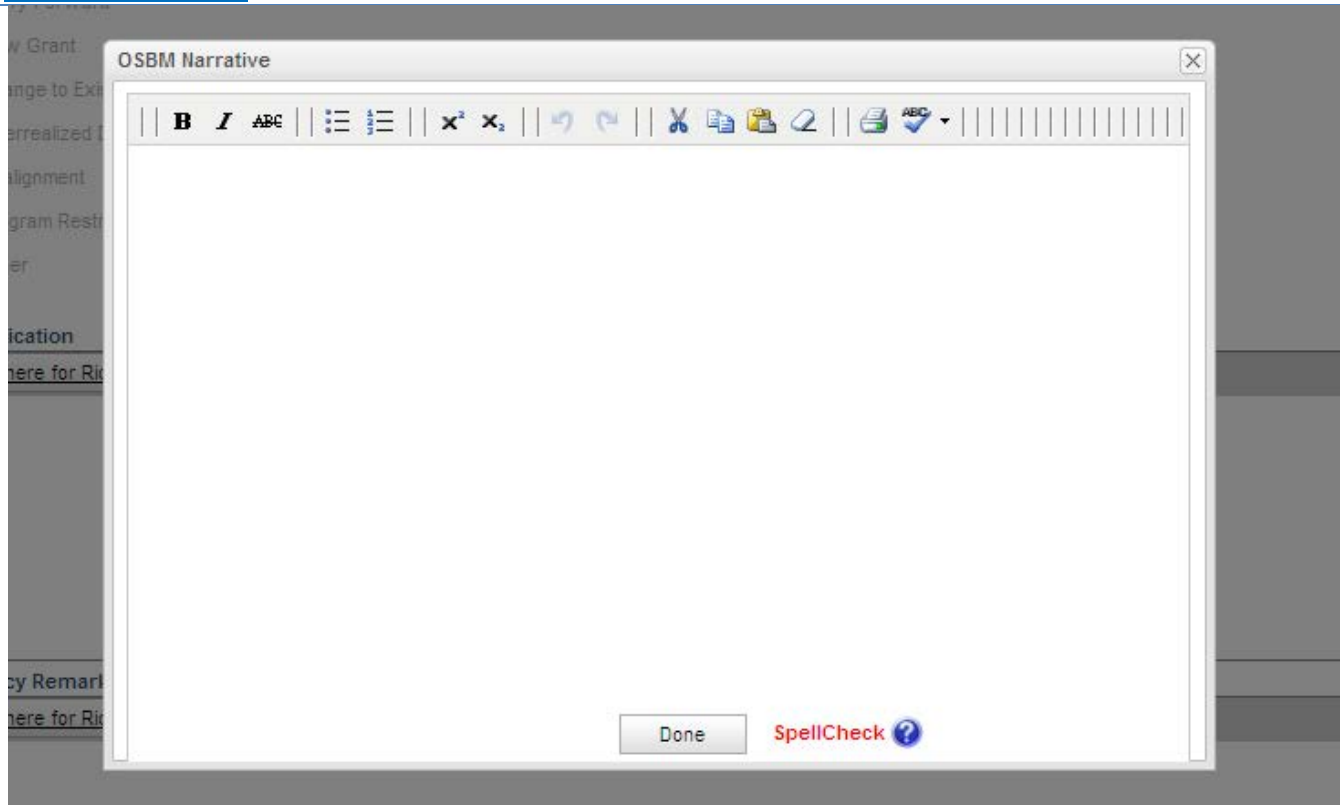
Justification 

[Click here for Rich Text Editor](#) SpellCheck 

Enter a budget revision justification here.




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".





















































Click in the Agency Remarks box and enter text if desired. This is an optional field on the budget revision form. Agency remarks is only editable and seen by BRU or Agency users.



OSBM Remarks is enabled only for OSBM users and is an optional field. Once text is entered by OSBM, it can be viewed but not edited by Agency and BRU users.

OSBM Remarks 


Requirements 

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund#	CC#	Account#	Y1 Amt	Add	
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2017-18)	Authorized Budget (2017-18)
No items to show.					

Page 1 of 1 Displaying Items 0 - 0 of 0


The Fund field contains a dropdown list that displays fund codes available for the budget code associated with the budget revision being created.

Requirements 

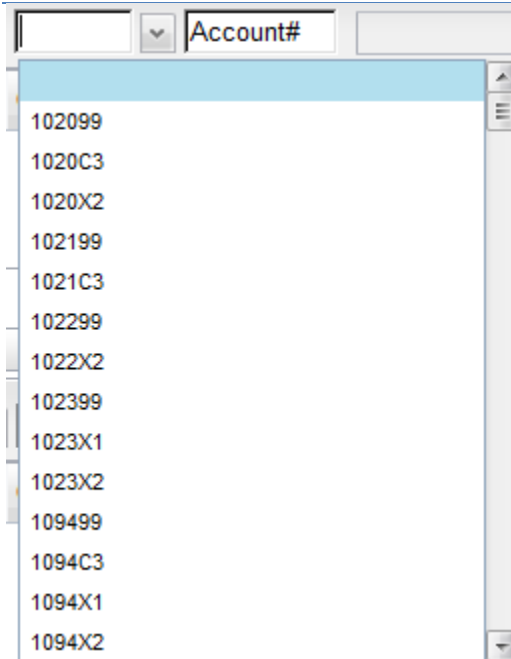
Edit Row Remove Row(s) Sort Rows

Fund#	CC#	Account#
4401	CAPITOL SQ ELECTRICAL	
4402	ARCHIVES & HISTORY BLDG	
4403	SALISBURY ST PED BRIDGE	
4404	NEW EDUC HVAC COMPUTER	
4405	COOPER BLDG ELEVATOR REP	
4406	REPAIRS & WATERPROOFING	
4407	HALIFAX MALL R&R	
4408	SIDEWALK REPAIRS - GOV'T	
4409	SEABOARD BLDG EXTERIOR	
4410	OCRACOKE ISLAND PHASE 2	
4411	LABOR - 2004 R&R FUNDS	
4412	DPI - 2004 R&R FUNDS	
4413	REV - 2004 R&R FUNDS	
4414	STATE LAND FUND	
4415	VET CEMETERY JACKSONVILL	

Select the fund from the list for the budget revision form being created. The selected fund will populate the field and the dropdown list will disappear. The fund code can also be typed in manually.

4414	
------	---

Cost Center is an optional field and the Cost Center dropdown list will only display values if the Department/Agency uses Cost Centers. This field can be bypassed if desired because the form defaults to a blank cost center as highlighted below.



A screenshot of a software interface showing a dropdown menu for the 'Account#' field. The menu is open, displaying a list of account numbers. The first item, '102099', is highlighted in light blue. The list includes the following items: 102099, 1020C3, 1020X2, 102199, 1021C3, 102299, 1022X2, 102399, 1023X1, 1023X2, 109499, 1094C3, 1094X1, and 1094X2. The dropdown menu has a scroll bar on the right side.

If necessary, select the desired Cost Center from the dropdown list. It will populate the field and the dropdown list will disappear. The Cost Center can also be typed in manually.

The Account field will present a list of accounts once the user has entered three digits into the field as shown below. Accounts are numerous so the system allows you to narrow the list down by entering the first few digits, or the full account code can be entered manually in the field.

Requirements ?

Edit Row Remove Row(s) Sort Rows Cancel Edit ! Validation Messages

4414 CC# 537 Y1 Amt

Fund Code ^ 1	Cost Center ^ 2	
537010		RESERVE-CI PROJECTS
537011		RESV-SALARY & F. B.
537012		RESERVES
537013		RESV AQUARIUM SUPPORT
537014		RESV FAC COND ASSESS TEAM
537015		RESV MLK COMMISSION
537016		RESV DISPARITY STUDY
537017		RESV DISPLACED HOMEMAKERS
537018		RESV-CENTRAL MAIL CENTER
537019		RES GPAC PERSONNEL REFORM
537110		RESV SHP PUR ALLIANCE BD
537111		RESV-HURRICANE FLOYD
537112		RESV-E-COMMERCE INITIATIV
537113		RESERVE MGMT FLEX REDUCTI
537114		RESERVE ETHICS FLEX REDUC

Receipts ?

Edit Row Remove Row(s) So

Fund# CC#

Fund Code ^ 1 Cost Center ^ 2

Select the desired account from the list or type in the account number manually. It will populate the field and the dropdown list will disappear. By selecting/entering the Account number, the associated Account description will also populate the adjacent field.

4414 CC# 537010 RESERVE-CI PRO

The next field in the Add/Edit Row area is the Year 1 amount field (Y1 Amt). Year 1 and Year 2 amount fields.

Y1 Amt

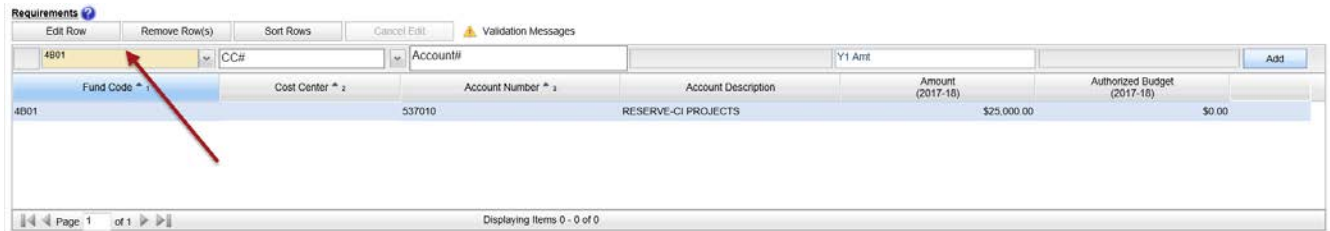
Enter an amount in the field as appropriate. The value will reformat to dollars when you click Add to finish the row entry. Be aware that amounts may be entered as either positive or negative amounts.

Once amounts are entered, the current authorized budget will be displayed for the fund, cost center, and account combination as highlighted below.

4414 CC# 537010 RESERVE-CI PRO... 23 \$0

When all data has been entered for a 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.

Add as many rows of requirements as appropriate to complete the budget revision form. Once the first row is added, the fund code 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.



The screenshot shows the 'Requirements' table interface. At the top, there are buttons for 'Edit Row', 'Remove Row(s)', 'Sort Rows', and 'Cancel Edit', along with a 'Validation Messages' icon. Below these are input fields for 'Fund#', 'CC#', and 'Account#', followed by a 'Y1 Amt' field and an 'Add' button. The table header includes columns for 'Fund Code ^ 1', 'Cost Center ^ 2', 'Account Number ^ 3', 'Account Description', 'Amount (2017-18)', and 'Authorized Budget (2017-18)'. A single row is displayed with the following data: Fund Code: 4B01, Cost Center: 537010, Account Number: 537010, Account Description: RESERVE-CI PROJECTS, Amount: \$25,000.00, and Authorized Budget: \$0.00. A red arrow points to the 'Fund Code' field in the first row. The footer shows 'Page 1 of 1' and 'Displaying Items 0 - 0 of 0'.

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



The screenshot shows the 'Receipts' table interface. It has the same top navigation and input fields as the Requirements table. The table header is identical. The main area of the table is empty, displaying the text 'No items to show'. The footer shows 'Page 1 of 1' and 'Displaying Items 0 - 0 of 0'.

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



The screenshot shows the 'Requirements' table interface. A red box highlights the 'Edit Row' button at the top. A red arrow points to the first row of the table, which is highlighted in blue. The data in the row is: Fund Code: 4B01, Cost Center: 537010, Account Number: 537010, Account Description: RESERVE-CI PROJECTS, Amount: \$25,000.00, and Authorized Budget: \$0.00. The footer shows 'Page 1 of 1' and 'Displaying Items 0 - 0 of 0'.

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.



Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2017-18)	Authorized Budget (2017-18)
4801	537010		RESERVE-CI PRO..	25000	\$0
4801	537010		RESERVE-CI PROJECTS	\$25,000.00	\$0.00

Page 1 of 1 Displaying Items 0 - 0 of 0

When a row has been selected for edit, the previously entered data may be changed. The Update button at the end of the row must be clicked to save changes.



Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2017-18)	Authorized Budget (2017-18)
4801	537010		RESERVE-CI PRO..	25000	\$0
4801	537010		RESERVE-CI PROJECTS	\$25,000.00	\$0.00

Page 1 of 1 Displaying Items 0 - 0 of 0

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 data entry row.

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



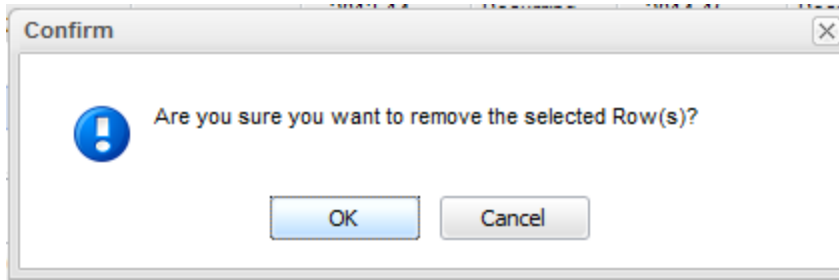
Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Y1 Amt	Amount (2017-18)	Authorized Budget (2017-18)
4801	537010		RESERVE-CI PROJECTS		\$25,000.00	\$0.00

Page 1 of 1 Displaying Items 0 - 0 of 0

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



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

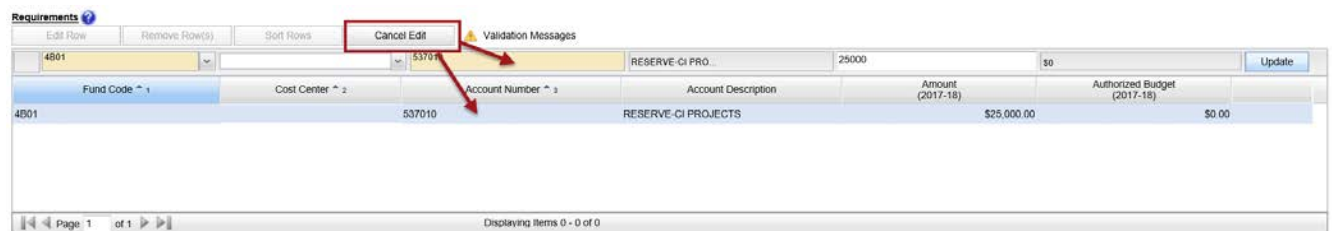
To Sort the rows that you have entered, click the Sort Rows button.



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

Note: There is also a built-in sort for Fund Code, Cost Center, Account Number, Account Description, Position Number, and Classification that will sort ascending or descending when the column header is clicked.

If a row has been selected for edit by highlighting and clicking the Edit Row but then no edit is necessary, click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid without changes.





When Requirements and/or Receipts entries are entered into the budget revision form, the data populates the Summary table at the bottom of the Budget Detail tab. The Summary table will add all Requirements and Receipts entered in this form and calculate the Appropriation amount.

Summary 

	2017-18
Total Requirements	\$25,000.00
Total Receipts	\$0.00
Appropriation	\$25,000.00

The transfer to/from section of a budget revision is required for any revision that increases or decreases appropriation. If appropriate for a budget revision, click the dropdown arrow for the budget code field under the Transfer to/from section.

Transfer to/from: 

Edit Row	Remove Row(s)	Cancel Edit			
Budget Code	Y1 Amt	11 -	Reference#		Add
Budget Code	Amount (2017-18)	Revision Type	Revision Number		
No items to show.					
Total Appropriation Transfer:		\$0.00			

Enter at least the first two digits of a budget code and a list of all budget codes that begin with those digits will appear. The budget code can also be typed in manually.

Budget Code	Name
40001	DEPT OF ADMIN CI 2000
40002	OSBPM CI 2000
40006	OSBPM-CI 2000-PROJ RESERVE
40007	CRIME CONTROL-CI 2000
40008	DOT-CI 2000
40009	WILDLIFE RESOURCES COMMISSION
40010	NC STATE PORTS AUTH.-CI 2000
40011	GENERAL ASSEMBLY-CI 2000
40012	UNC - GA, C.I. 2000
40013	CORRECTION-CI 2000
40014	CULT.RES.-CI 2000
40015	JUSTICE-CI 2000
40016	DENR -CI 2000
40017	DACS-CI 2000
40018	COMMERCE-CI 2000
40019	NCSSM CAPITAL IMPROV. 2000
40020	COMM. COLLEGE - CI 2000

Select the appropriate budget from the list. Alternatively, a budget code can be manually entered in the field.

Transfer to/from: ?

Edit Row Remove Row(s) Cancel Edit

40001	Y1 Amt	11 -	Reference#	Add
Budget Code	Amount (2017-18)	Revision Type	Revision Number	
No items to show.				
Total Appropriation Transfer:		\$0.00		

Click in the Y1 Amt field and enter the amount being transferred to/from the selected/entered budget code.

Transfer to/from: ?

Edit Row Remove Row(s) Cancel Edit

40001	25000	11 -	Reference#	Add
Budget Code	Amount (2017-18)	Revision Type	Revision Number	
No items to show.				
Total Appropriation Transfer:		\$0.00		

Click on the dropdown arrow next to the Reference# field. You will see a list of current month budget revisions that are the same type as the budget revision form you are completing. The Transfer to/from is restricted to current month revisions and by type. An entry should be made for transfers involving statewide reserve budget codes (19xxx) but no revision number needs to be selected.

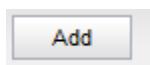
Transfer to/from: ?

Edit Row Remove Row(s) Cancel Edit

40001	25000	11 -	Reference#	Add
Budget Code	Amount (2017-18)	Revision Type	Revision Number	
No items to show.				
Total Appropriation Transfer:		\$0.00		

Select a revision from the list.

When you have completed the new row, click on the Add button. The row will move down to the grid below.



Add additional rows to the table if appropriation is being transferred from multiple budget codes and through multiple revisions.

The Edit Row, Remove Row(s), and Cancel Edit features work the same as the Requirement/Receipts table and will not be explained here. For assistance, refer to those functions described in previous sections of this document.

At the bottom of the 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 found on the [IBIS website](#).