

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS)

USER GUIDE

ALLOTMENT - CAPITAL



PREFACE

This training guide describes how to use IBIS to complete a Capital allotment form. For policy guidance regarding allotments, please consult the <u>State Budget Manual</u>.

ALLOTMENT – CAPITAL

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.

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12.0251 13700 Revision 15102/302/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.2030/314.20300/314.2030/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.20300/314.203		12-0271	13700	Revision	161042412014 42412015 Increase Operating	BRU Draft	dataseeder	2017-11-22 10.1	9 AM
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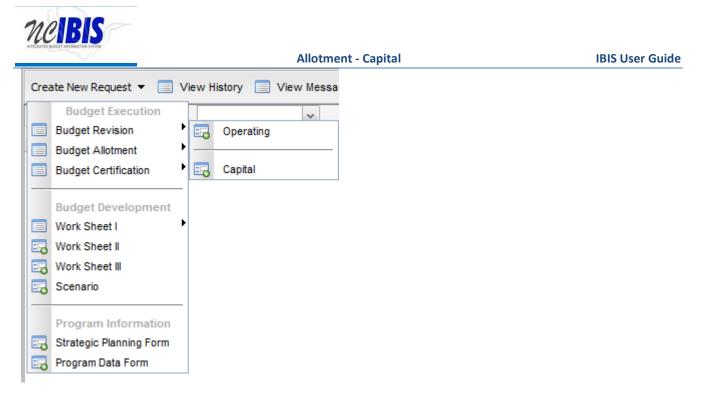
Find the View field in the upper left corner. The field should contain only your BRU, Agency or OSBM. If you have access to multiple departments and/or agencies, those you have access to will appear in a drop-down list in this field for you to select from. In the example below, the user is logged in as the Department of Agriculture and Consumer Services.

	-C			Allotment - Capita			IBIS User Gu
neiBis	5			STATE OF NORT	H CAROLINA	Logged in an IBIS Users LOSCUI	About
				OFFICE OF STATE BUDGET AND) MANAGEMENT		
View BRU - DEPARTMENT							
16	BRU Work Queue						
BRU Work Queue	Create New Reques	t 👻 🛄 View History 🛄	View Messages			Filter C	riteria From Date : 07/01/2017 To Date : 12/06/201
My Messages						v	
Reports	Ret#	Budget Code	Туре	Name	Status	Updated By	Lock Last Updated *
Salary Control	12-0275	13700	Revision	1610 Close Grants	BRU Draft	datasender	2017-11-27 4:36 PM
	14-0264	13700	Revision	NCFS	BRU Draft	dataseeder	2017-11-27 3:27 PM
	12-0242	13700	Revision	11003037 10202668 Budget Grants	BRU Draft	dataseeder	2017-11-27 2:42 PM
	12-0270	13700	Revision	161042062016 42062017 Budget Grants	BRU Draft	dataseeder	2017-11-27 1:29 PM
	12-0001	23702	Revision	29754701 Establish New Position	BRU Draft	datasender	2017-11-22 11:09 AM
	12-0271	13700	Revision	161042412014 42412015 Increase Operating	BRU Draft	dataseeder	2017-11-22 10:19 AM
	12-0265	13700	Revision	161042062014 42062015 Increase Operating	BRU Draft	dataseeder	2017-11-21 2:32 PM
	12-0261	13700	Revision	151042052013 42052014 42052016 Align Personnel	BRU Draft	dataseeder	2017-11-17 11:25 AM
	12-0254	13700	Revision	102026772016 Close Grant	BRU Draft	dataseeder	2017-11-08 3:36 PM
	12-0219	13700	Revision	15105030 5050 5100 52261016 5401 Reclass Temp to D	BRU Draft	dataseeder	2017-11-08 2:03 PM
	14-0227	13700	Revision	1510-5503 R3 Forestation West Align Operating	BRU Draft	dataseeder	2017-10-30 1:37 PM
	14-0180	13700	Revision	1510 Align Flex Appropriated	BRU Draft	dataseeder	2017-09-27 1:23 PM
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Click on the Create New Request dropdown list in the middle of the screen.

BRU Work Queue										
Create New Requ	est 🔹 🔄 View History 📋	View Messages			Filter Crite	ria From	Date: 07/01/2017	🛄 To Date :	12/06/2017	
					*					8
Ret#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated *			
12-0275	13700	Revision	1610 Close Grants	BRU Draft	dataseeder		2017-11-27 4:36 P	м		
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12-0242	13700	Revision	11003037 10202668 Budget Grants	BRU Draft	dataseeder		2017-11-27 2:42 P	M		
12-0270	13700	Revision	181042062016 42052017 Budget Grants	BRU Draft	datasender		2017-11-27 1 29 P	м		

When you click on 'Create New Request', the drop-down will display the following:



Click on the Budget Allotment – Capital option on the menu. You will see a New Capital Budget Allotment Form – Basic Information window.

Ves BRU DEPARTMEN	T OF AGRICULTURE							
me	BRD Work Opins							
BRU Work Currun	Create New Regi	iest + 🔟 View History 📋	View Messages				Filte	r Criteria Prom Date 07/01/2017 Te Date 12/06/201
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	12-0254	13700	Revision	BRU-	DEPARTMENT OF AGRICULTURE	14	datasender	2017-11-08 3 35 PM
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	14-0100	13700	Revision	Fund/Project Code	8		dataseedar	2017-09-27 1:23 PM
				Type of Allotment	L			
				Effective Date: :				
				Title				
					X Cancel A Proceed			



The first field allows you to select the Fiscal Year for the allotment request. Click on the radio button next to the appropriate Fiscal Year. Only one Fiscal Year may be selected at a time.

New Capital Budget Allotme	ent Form - Basic Inf	ormation	×
	Please enter the inf	ormation below and click Proceed	
Fiscal Year :	2017-2018	O 2018-2019	

Note the next two fields labeled Department/Agency and BRU.

New Capital Budget Allotm	ent Form - Basic Inf	ormation	×			
	Please enter the information below and click Proceed					
Fiscal Year :	2017-2018	2018-2019				
Department/Agency :	Department of Agricu	ulture and Consumer Services				
BRU :	DEPARTMENT OF A	AGRICULTURE				

In most cases, 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 dropdown for you to select from.

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

Capital Budget Allotm	ent Form	- Basic Information	
	Please ei	nter the information below and click Proceed	
Fiscal Year :	② 2017-	2018 2018-2019	
Department/Agency :	Departme	ent of Agriculture and Consumer Services	
BRU :	DEPART	MENT OF AGRICULTURE	
Budget Code :		J	
Fund/Project Code :	40368	Agriculture and Consumer Services - R&R COPs 2003	ŀ
Type of Allotment :	40417	Agriculture and Consumer Services - Capital Improvement 20	
	40517	Agriculture and Consumer Services - Capital Improvement 20	
Effective Date: :	40617	Agriculture and Consumer Services - Capital Improvement 20	
Title :	40717	Agriculture and Consumer Services - Capital Improvement 20	1
	40817	Agriculture and Consumer Services Apital Improvement 20	
	40873	Agriculture and Consumer Services अप्रेट्टcial Indebtedness	
	40917	Agriculture and Consumer Services - Capital Improvement 20	
	40968	Agriculture and Consumer Services - R&R Bonds	
	41017	Agriculture and Consumer Services - Capital Improvement 20	L
	41117	Agriculture and Consumer Services - Capital Improvement 20	
	41217	Agriculture and Consumer Services - Capital Improvement 20	
	41317	Department of Agriculture and Consumer Services CI 2013	
	41417	Department of Agriculture and Consumer Services CI 2014	
	41468	Dept. of Agriculture and Consumer Services 2014 CI Bonds	١,



Use the pointer to select the appropriate Budget Code from the list. Once selected, you will see that the field is populated with the Budget Code selected and the Budget Code list disappears.

New Capital Budget Allotm	ent Form - Basic Information	×
	Please enter the information below and click Proceed	
Fiscal Year :	2017-2018	
Department/Agency :	Department of Agriculture and Consumer Services	~
BRU :	DEPARTMENT OF AGRICULTURE	~
Budget Code :	40817	*

Click on the dropdown arrow for the Fund/Project Code field. You will see a list of valid Fund Project Codes for the selected Department/Agency, BRU and Budget Code

م المركمة Allotm	ent Form - Basic Information	×
195°	Please enter the information below and click Proceed	
Fiscal Year :	2017-2018 2018-2019	
Department/Agency :	Department of Agriculture and Consumer Services 🗸	
BRU :	DEPARTMENT OF AGRICULTURE	
Budget Code :	40817 🗸	
Fund/Project Code :	×	
Type of Allotment :	4N01 SWC - Deep Creed 5-D	
Effective Date: :	4N02 SWC - Swan Quarter Dike	
Title :		
	Cancel Proceed	

Use the pointer to select the appropriate Fund/Project Code from the list. Once selected, you will see that the field is populated with the Fund/Project Code selected and the Fund/Project Code list disappears.



Please enter the information below and click Proceed					
Fiscal Year :	2017-2018 2018-2019				
Department/Agency :	Department of Agriculture and Consumer Services	~			
BRU :	DEPARTMENT OF AGRICULTURE	V			
Budget Code :	40817	v			
Fund/Project Code :	4N01	~			
Type of Allotment :	~				
Effective Date: :					
Title :					
	Cancel				

Click on the dropdown arrow for the Type of Allotment field. Two choices will appear in the dropdown list: External and Internal.

w Capital Budget Allotm	ent Form - Basic Information	
	Please enter the information below and click Proceed	
Fiscal Year :	2017-2018 2018-2019	
Department/Agency :	Department of Agriculture and Consumer Services	~
BRU :	DEPARTMENT OF AGRICULTURE	~
Budget Code :	40817	~
Fund/Project Code :	4N01	~
Type of Allotment :	~	
Effective Date: :	External	
Title :		
	Cancel Proceed	



IBIS User Guide

Use the pointer to select the appropriate Type of Allotment from the list. Once selected, you will see that the field is populated with the Type of Allotment selected and the Type of Allotment list disappears.

N	Please enter the information below and click Proceed				
Fiscal Year :	2017-2018	0 2018-2019			
Department/Agency :	Department of Agriculture	and Consumer Services	~		
BRU :	DEPARTMENT OF AGRI	CULTURE	~		
Budget Code :	40817		~		
Fund/Project Code :	4N01		~		
Type of Allotment :	Internal	*			
Effective Date: :					
Title :					
	X Cancel	Proceed			

In the Effective Date field, you may type in the effective date for the allotment being created (format: MM/DD/YYYY) or you may select the date by clicking on the small calendar icon next to the field.

Please enter the information below and click Proceed						
Fiscal Year :	2017-2018 2018-20	019				
epartment/Agency :	Department of Agriculture and Consul	mer Services				
BRU :	DEPARTMENT OF AGRICULTURE	~				
Budget Code :	40817					
Fund/Project Code :	4N01	×				
Type of Allotment :	Internal 👻 🖌					
Effective Date: :						
Title :						

Once the calendar icon is clicked, the following will show.



IBIS User Guide

New	New Capital Budget Allotment Form - Basic Information										
	Please enter the information below and click Proceed										
N	Fiscal Year : 2017-2018 2018-2019										
	Department/Agency :	Department of	Department of Agriculture and Consumer Services								
	BRU :	DEPARTMEN	DEPARTMENT OF AGRICULTURE								
	Budget Code :	40817 ← Dec 2017 ► ► ✓									
	Fund/Project Code :	4N01	Su	Мо	Tu	We	Th	Fr	Sa	¥	
	Type of Allotment :										
	Effective Date: :		3 10	4 11	5 12			8 15	9 16		
	Title :		17	18	19	20	21	22	23		
			24	25	26	27	28	29	30		
		× (31	1	2	3	4	5	6	:d	
Today							C	anc	el		

Once complete, the date appears in the field as entered.

New Capital Budget Allotm	ent Form - Basic Information	×						
Please enter the information below and click Proceed								
Fiscal Year :	2017-2018 2018-2019							
Department/Agency :	Department of Agriculture and Consumer Services							
BRU :	DEPARTMENT OF AGRICULTURE							
Budget Code :	Budget Code : 40817 v							
Fund/Project Code :	4N01 🗸							
Type of Allotment :	Internal 🗸							
Effective Date: :	12/08/2017 ×							
Title :								
	Cancel Proceed							

The Title field is a free form entry field. Type a title for the allotment request.



New Capital Budget Allotm	ent Form - Basic Information		×					
	Please enter the information below and click Proceed							
Fiscal Year :	2017-2018 2018-2019							
Department/Agency :	Department of Agriculture and Consumer Services	~						
BRU :	DEPARTMENT OF AGRICULTURE	~						
Budget Code :	40817	~						
Fund/Project Code :	4N01	~						
Type of Allotment :	Internal 🗸							
Effective Date: :	12/08/2017							
Title :	Capital Allotment KC_2017_12_08	×						
	Cancel Proceed							

The final action to take on the New Capital Budget Allotment Form – Basic Information window is to click on the Cancel or Proceed button. If you click on the Cancel button, the window closes, nothing is saved, and you return to the Work Queue. If you are satisfied with your entries and want to continue on, click on the Proceed button.

Capital Budget Allotment Form - Basic Information Please enter the information below and click Proceed					
Fiscal Year :	2017-2018 2018-2019				
Department/Agency :	Department of Agriculture and Consumer Services	~			
BRU :	DEPARTMENT OF AGRICULTURE				
Budget Code: 40817					
Fund/Project Code :	4N01	*			
Type of Allotment :	Internal 🗸				
Effective Date: :	12/08/2017				
Title :	Capital Allotment KC_2_17_12_08	×			
	Cancel Proceed				



IBIS User Guide

If you clicked Proceed, you will see a Budget Allotment form open. Note: The form's three tabs (Basic Information, Budget Detail, and Attachments) will appear in the upper left corner of the screen as highlighted below.

		Looged in an IBIS Dearth LODING ALCON
apital Budget Allotment Form 'Capital Allotment KC_2017_12_03'		
Beek: Information Budget Detail Altachments	Status BRU Deaft BODGET ALLOTMENT FORM ("Inte: Capital Allotment KC, 2017, 12, 00)	-, Unit of k Form
Final Year . 2017-2016 Bio: CEPARTMONT OF AGRICUL TUBE Budget Code: 40017 Agricother and Consumer Services - Capital Improvement 2008 With Project Code: 4000-1870. Cleap Cred Cole Type of Adhement. Immat Effective Date: 1208/2017		Somenio Alanos IBISTIO: SKISK
Request Type : Capital Allotment		
Reference Number AR-SH2K		
Title : Capital Allotment KC, 2017_12_08		
Justification		
Click here for Rich Text Editor		
	\sim	
t.		
Export POF Save Braft Save & Close	Validate Delete Request	
colonia con a cons	vadate Develo Hequela	

This user guide will only address the first two tabs: Basic Information and Budget Detail. The third tab, the Attachments tab, is addressed in a different user guide that can be found <u>here</u>.

Upon opening a form, the Basic Information screen comes to the forefront as shown below. It is the default position when creating a new or opening an existing form.

	Allotment - Capital	IBIS User Guid
Badget Allotnent Form 'Capital Allotnent KC_2017_12_08'	Linux - Linux	nA Fame
	Slatus BRU Gast BUDGET ALLOTMENT FORM (Title: Capital Allotment KC, 2017, 12, 08)	
Information Budget Detail Attachments		town the second second
Fixed Year: 2017-2013 Biol: Gord Analysian Consume Services - Capital Improvement 2000 Biol: Biol: Consume Services - Capital Improvement 2000 Provide: Capital Analysian Biol: Consumer Capital Analysian Biol: Consumer Capital Analysian Tota: Surger Analysian Capital Capital Capital Improvement Capital Improvement Capital Analysian Tota: Surger Analysian Capital Analysian Disc: Surger Analysian Capital Capital Capital Improvement Capital Improvement Capital Analysian Tota: Surger Analysian Capital Capital Capital Improvement Capital Improvement Capital Capital Analysian Tota: Surger Analysian Capital Capital Capital Improvement Capital Improv		Screet OF ARGE

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.

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

BRU: The Department/Agency that is associated with your IBIS ID and shown/elected in the initiation window

Budget Code: The Budget Code selected in the initiation window

Fund/Project Code: The Fund/Project Code selected in the initiation window

Type of Allotment: Indicates that this is an Internal Allotment (as opposed to a Capital Allotment)

Effective Date: The date you entered in the initiation window

Request Type: Indicates that this is a Capital Allotment (as opposed to an Operating Allotment)

Reference Number: Displays a system generated reference number unique to this allotment request

Title: Displays the title you entered in the initiation window



IBIS User Guide

Click in the Justification field to enter text or you may click on the underscored link to the Rich Text Editor, where it says "Click here for Rich Text Editor."

Justification		
Click here for Rich Text Editor		

If you click on the underscored link for Rich Text Editor, a window will come up as shown below where you enter a justification. Advantages to entering a justification in the Rich Text Editor field is that you can apply a spell checker plus formatting options.

Capital Budget Allotneant Form 'Capital Allotneant KC_2017_O_0P		
	Status SRU Draft BUDGET ALLOTMENT FORM (78tr: Capital Altometric KC, 2017, 12, 00)	
Rask Information Budget Detail Attachments		
		County Party and
Fiscal Year : 2017-2018		Screen ID 2023
BRU: DEPARTMENT OF AGRICULTURE		IEIS IU
Bodget Code: 40817-Agriculture and Consumer Services - Capital Improvement 2008		
FundiProject Code : 4N01-SWC - Deep Creed 5-D Type of Allotment : Internal		
Effective Date : 1200/2917		
Request Type Capital Allotment	QSBM Narradive ×	
Reference Number: AR-SH3K	B / 44 Ξ Ξ x' x, ク № X 💩 🙇 2 🚽 🗇 •	
Title ; Classi Altometric 2017_12_08		
The part of the second se		
Justification		
Click here for Rich Test Editor		
	Done	
		i i i i i i i i i i i i i i i i i i i
2		Y
Expost PDF Save Dealt Save & Occar	Validate Dotels Request	

Enter the appropriate information in the Justification field and click on the Budget Detail tab at the top of the form to continue filling out the form.



		/ London Lin million Lineard	MINL SIME 7
Capital Budget Allot	ment Form 'Capital All devent KC_2017_12_00'		And and Farm
		Status: BRU Deeft BUDGET ALLOTMENT FORM (Title: Capital Allotment KC_2017_12_03)	
Basic Information	Dudget Detail Allachments		
Budget Code Fund Project Code Type of Allotment Effective Date Request Type Reference Number	DEPARTMENT OF ACIDICULTURE 4041 Syst Composition Consumer Services - Capital Insprovement 2008 4041 Syst Comp Crede 5.D Islanda 2006/2017 T Capital Abloiment		Screen D: Afters
			×
Export PDF	Save Draft Save & Close	Validate Delete Request	

After clicking the tab, the Budget Detail tab will appear as shown below.

ital Budget A	Rotnewi Logit 'Capital Allobrium KC_2017_12_08'						
			Status, BRU Draft BUDGET ALLOTMENT FORM (1	de: Capital Allotment KC_2017_12_68}		Arricock Parm	
c informatic	an Budget Detail Attachments					0.0101	
						Screen ID : All IBIS ID : SKI	
uirementa							
Edit Row		Caroli Ittit					
C#	Account#					Cash Requested Ad	£1.
	Cost Center	Account Number	Account Description	Budget	Unalloled to Date	Cash Requested	
			No items	to show.			
			Total	3	0.00	\$0.00	\$0.00
eiste							
Edit Row	Remove Row(s) Sort Rows	Carrosi Eatt					
24	Account#					Cash Requested Ad	1
	Cost Center	Account Number	Account Description	Budget	Unalisted to Date	Cash Requested	
			No items	to show			
			Total		0.00	\$0.00	\$0.00
			Totai		0.00	\$0.00	\$0.00
minary				Cash Requested			
	Total Requirements			S0.00			
	Total Receipts			50.00			
	Appropriation			50.00			
Export PDF	Save Draft Save & Close			Validate Delete Request			

The Budget Detail tab displays three sections: Requirements, Receipts and Summary.

The Requirements section displays four buttons: Edit Row, Remove Row(s), Sort Rows and Cancel Edit:

Requirements

Edit Row	Remove Row(s)	Sort Rows	Cancel Edit
----------	---------------	-----------	-------------



IBIS User Guide

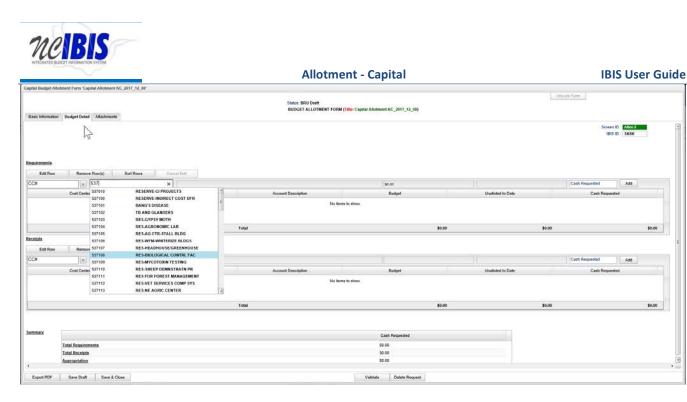
The above buttons can only be utilized once rows have been created. Since we are developing a new Capital Allotment form, we will look first at adding rows then return to describe the functionality associated with these buttons.

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

			Status BRU Draft			Arthock Farm	
Basic Informatic	on Budget Detail Attachments		BUDGET ALLOTMENT FORM (T	de: Capital Allotment KC_2017_12_08)			
lequirementa	000 No. 22 7		/				n ID: Alisto S ID: SK6K
Edit Row	Remove Row(s) Sort Rows	Carol Ital				Cash Requested	Add
GG#	Cost Center	Account Number	Account Description	Budget	Unalloted to Date	Cash Regue	The start week of the start of
	1.0.8.9010		No items t				
			Total	\$0.00		\$0.00	\$0.00
harring.							
		14 COLUMN					
Edit Row		Ganori Eitt		- 11	10	Cash Recorded	
	Account#					Cash Requested	Add
Edit Row		Cancel Call Account Number	Account Description	Budget	Unalisted to Date	Cash Requested Cash Reque	Add
Edit Row	Account#		Account Description		Unalisted to Date		Add
Edit Row	Account#						Add
Edit Row	Account#		No Berns 1	s show		Cash Reque	Add
Edit Reer	Account#		No Berns 1	s show		Cash Reque	Add
Edit Row	Account#		No Berns 1	s show		Cash Reque	Add
Edit Row	Cost Conter		No Berns 1	s show 50.00 Cash Reported 50.00		Cash Reque	Add
Edit Row	Cost Conter		No Berns 1	50.30 Cash Reported 50.00		Cash Reque	Add
	Cost Conter		No Berns 1	s show 50.00 Cash Reported 50.00		Cash Reque	Add

The Account Number and Cash Requested fields are required when entering requirements in a Capital allotment form. 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 established for the selected Fund/Project code.

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



Once selected or typed in, the account code will populate the form. If choosing from the dropdown list, the list will disappear upon selection. Selection of an account code will also cause the adjacent account description field to populate.

uirements VP	2						
Edit Row	Remove Row(s) Sort	Rows Cancel Edit					
#	537100	RESERVE-NCIRE		\$0.00		Cash Requested Add	Add
	Cost Center	Account Number	Account Description	Budget	Unalioted to Date	Cash Reque	and

Click in the Cash Request field and enter an amount for the account.

Edil Row	Remove Row(s)	Sort Rours	Carnet Eith					
C#	M 537100		RESERVE-INDIRE		\$0.00		Cash Requested	Add
	Cost Center		Account Number	Account Description	Budget	Unalloted to Date	Cash Reque	sled

Click the Add button and the row will populate the Requirements grid, clearing the fields for entry of another row.

Requirements	Sourcements								
Edit Row	Remove Row(s)	Scel Rows Carroel Edit							
CC#						Cash Requested Add			
	Cost Center	Account Number	Account Description	Budget	Unalloted to Date	Cash Requested			
		537100	RESERVE-INDIRECT COST DFR	\$0.00	\$0.00	\$9.00			
		5341XX	LAND	SU.90	50.00	\$50,000.00			
			Total	\$0.00	\$0.00	\$60,000.00			



IBIS User Guide

Repeat the above process to add all the Requirements rows necessary for the Capital Allotment form you are creating.

To edit a row that has been entered, click on a row to highlight it and click the Edit Row Button:

smenta 📈										
Edit Row	Remove Row(s)	Sort Rows	Cancel Edit							
	w 534130X		LAND						50000	Update
2	Cost Center		Account Number		Account Description	Budget		Unalighted to Date	Cash Reques	ned
		\$37100		RESERVE-INDI	RECT COST OFR		\$0.00	\$0.00		\$0.0
		\$341XX		LAND	-		50.00	59.00		\$50,000.0
				Total			\$0.00	\$0.00		\$50,000.0

Once the edit button is clicked, the data in the selected row will populate the Edit/Add row line at the top of the grid. 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.

quirements					
Edit Row Remove Row(s)	Sort Rows Cancel Edit				
× 8341XX	LAND				50000 Update
Cost Center	Account Number	Account Description	Budget	Unalicited to Date	Cash Requested
	\$37100	RESERVE-INDIRECT COST DFR	\$0.00	\$0.00	\$0.0
	5341XX		\$0.00	\$0.00	\$50,000.0
		Total	\$0.00	\$0.00	\$50,000.0

Once Update has been clicked, the add/update row will clear 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	uuremenis									
Edit Row Remove R	Edit Row Remove Row(s) Sort Rows Cancel Edit									
Account#					Cash Requested Add					
Cost Center	Account Number	Account Description	Budget	Unalloted to Date	Cash Requested					
	5341XX	LAND	\$0	\$0	\$50,000					
	537100	RESERVE-INDIRECT COST DFR	\$0	\$0	\$0					
		Total	\$0	\$0	\$50,000					

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

irements						
Edit Row	Remove Row(s)	Sort Rows Cancel Edit				
	* 6341XX	LAND				50000 Update
	Cost Center	Account Number	Account Description	Duriget	Unalicited to Date	Cash Requested
		537100	RESERVE-INDIRECT COST DFR	\$0.00	\$0.00	50
		5341XX		\$0.00	\$0.00	\$50,000
			Total	\$0.00	\$0.00	\$50,000

D -----



	Allotment - Capital	IBIS User Guide
Confirm	X	
Are you sure you want to remov	e the selected Row(s)?	
ок	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.

.....

uirementa							
Edit Row	Remove Row(s)	Soft Rovis	Cancel Edit				
	S341XX		LAND				50000 Update
	Cost Center		Account Number	Account Description	Budget	Unalloted to Date	Cash Requested
		537100		RESERVE INDIRECT COST DFR	\$0.00	\$0.00	\$0.
		5341XX		LAND	\$0.00	\$0.00	\$50,000
				Total	\$0.00	\$0.00	\$50,000

The rows will sort in 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, click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid, unchanged.

Edit Row	Remove Row(s)	Sort Rows	Cancel Edit				
	w N34100K		LAND				S0000 Update
	Cost Center		Account Number	Account Description	Budget	Unalisted to Date	Cash Requested
		537100		RESERVE-INDIRECT COST OFR	\$0.00	\$0.00	
		\$341XX		LAND	\$0.00	\$0.00	\$50

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

Add as many rows of receipts as appropriate to complete the Capital Allotment form.

The Summary table at the bottom of the Budget Tab displays three lines: Total Requirements, Total Receipts and Appropriation.

Summary		Cash Requested
	Total Requirements	\$50,000
	Total Receipts	\$12,000
	Appropriation	\$38,000



IBIS User Guide

The Summary table will add all Requirements entered in this form and display them on one row. The Summary table will also add and Receipts entered in this form and display them in a second row. The Appropriation row will then calculate Requirements minus Receipts and display that amount in the final row.

At the bottom of the Allotment 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 <u>IBIS website.</u>