Internet Budgeting Solution

Georgia Institute of Technology

Internet Budgeting Solution Training Guide
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Introduction

Budgeting at Georgia Tech

The Georgia Tech budget expresses the intentions (plans) of the Institute in terms of dollars. These intentions include a fiscal year plan for the Institute, which is reflected in the Annual (Original) Operating and Capital Budget. Any changes made during the fiscal year must be reflected through the amendment process.

The President of the Institute is held responsible by the Board of Regents for the University System of Georgia for planning and administering all budgets of the Institute. The President delegates to the Provost, Senior Vice President for Administration and Finance, and Vice Presidents, the administrative and planning responsibility for the budgetary units of Georgia Tech.

The Institute is required to follow an established set of guidelines and policies set forth by the State of Georgia, the Board of Regents and the Institute. The official policy is as follows:

…No official of the Board or any official of the Institutions of the University System is authorized to expend any current funds on hand, which may have accrued from balances from previous periods or from income for any subsequent period unless the Board has approved the expenditure. The Board must approve all expenditures of institutions before they are made unless otherwise specified by the Board.

The official budget policy for the Institute can be found on the web at www.budgets.gatech.edu/policy. Policy number 5 governs the budget amendment process addressed by this training session.

Overview of Application

In order to make the preparation and amendment of the budget an easier process, the Georgia Tech Budget Office has developed an application that allows users to create and amend their budgets directly through the web. The application is called the "Internet Budgeting Solution" (IBS). The application is tied into PeopleSoft’s Financials and Human Resources applications. There also is an interface to the Georgia Tech developed Salary Planning and Distribution (SPD) application. IBS utilizes “point and click” logic and makes full use of the advantages of Internet technology.

Overview of Course

This class is designed is introduce you to Georgia Tech’s "Internet Budgeting Solution" (IBS). You will learn how to perform the following:

- make changes to personal and non-personal services;
- add new project IDs;
- prepare totals;
- review changes;
- create reports; and
- perform other functions of the application.
Chapter 1

Getting Started

Objectives

By the end of this chapter, you will have an understanding of:

- How to login to IBS
- Basic menu navigation
- How to navigate to your “Department Home Page”

Overview

IBS is a web-based system; therefore, all you need is access to the Internet and Microsoft’s Internet Explorer web browser (IE) to complete your budgeting efforts.
Navigating to IBS

NOTE: The IBS application was designed to run on IE 5.0 or higher.

Launch Internet Explorer Web Browser and navigate to the IBS web site:
http://www.budgets.gatech.edu/IBS

Click on “Click Here to Enter IBS”

NOTE: The “IBS Authorization Form” bullet link will open a form for your department to complete to receive access into IBS.

NOTE: The “Budget System Replacement Project Information” bullet links to IBS Project information related to the development of the system.
System Login

A new window is opened that can be resized or moved as needed. Closing this window will end your IBS session and log you off the system.

Enter Operator ID

Enter Password

Click the Login button

NOTE: If IBS does not detect any activity for 30 minutes, you will automatically be logged off the system.
IBS Home Page

You are now on the “IBS Home Page”. Every successful login will bring you to this page. From this page you will be able to navigate to your departments, see new features added to IBS or update your user account information.

The IBS Menu Bar has three options Print, Help and Logout. These menu items are found on all pages inside IBS.

**IBS Menu Bar**
- **Print** – click here to print the current page
- **Help** – click here to see help on this particular page
- **Logout** – click here to log out of the IBS application

**Dept Shortcut** – Enter the department org number in this box and click “Go” to navigate directly to that departments IBS home page. Note: you must have authorization for the department before IBS will allow you access.

**New Features** – click here to see recently added features in IBS

**User Account Maintenance** - Click on this link to make changes to your IBS account including changing your IBS password
Department Home Page

Select “Department List” from the Welcome page. IBS will display all departments to which the user has access.
Click on department name

IBS will display the Department Home page for the selected department. The major functions that may be performed are listed in the side menu box and are active links. The actions are discussed in Chapter 7.
Objectives

By the end of this chapter, you will have an understanding of:

- What is “Personal Services”
- Relationship to other PeopleSoft modules
- How to call up a position
- Re-ordering the listing on the screen
- Entering Personal Services redistributions
- Adding a new PeopleSoft Project ID
- FTE calculation
- Entering a comment and/or description
- Clearing your changes
- Resetting your positions to SPD
- Showing and hiding certain columns
- How to calculate and save your changes

Overview

This chapter includes the following terminology:

- **Personal Services** is the budget of your salary by project distribution.
- The **PeopleSoft Project ID** is the code used by the application to show this distribution.
- The **Salary Planning Distribution (SPD) module** contains your expenditure and encumbrance information.
- The **PeopleSoft Human Resources Management System (HRMS)** contains your personnel information.

IBS merges all this information into this module so you do not have to re-key any information for budgeting purposes.

The pointer (locator) into IBS for each faculty and staff person is the **PeopleSoft position number**. This number displays a position on the screen even if the position is funded from different areas (departments). However, you are only able to change a position in each department that you are authorized to update.
Personal Services

- **Click on the “Personal” link**

**NOTE:** This link can be selected at any time during your IBS session. You do not need to be on the Department Home Page.
Personal Services List

IBS displays a list of all positions in the selected department.

The Column headings on the page are:

1. **Position Number** - This is the PeopleSoft position number
2. **Effective Date** - Budget Office effective date for status changes from the HR system
3. **Job** - PeopleSoft job description
4. **Name** - Employee name
5. **Employee ID** - PeopleSoft Employee ID (EMPLID)

**NOTE:** By clicking on any of the **Column Headings** you can sort the data in the respective heading order. (Ascending only)

**NOTE:** All data items on this page are active links.

**NOTE:** The positions listed with no job description at the bottom of this example are considered "group positions".
Personal Services Detail

IBS displays the Personal Services Detail page. This page is comprised of two sections. The upper section is the current Position/Job information for the employee or group position. The lower section is the transaction data for the position. All blanks may be modified by the user.

Column headings for the transaction section are:

- **Project ID** - The PeopleSoft Project ID
- **Actual** - Data from SPD load (once a month load)
- **Original Budget** - July 1 Budget
- **Approved Budget** - Original Budget with YTD changes
- **Requested Change** - Desired changes to Approved Budget; amount shown above loaded from SPD system.
- **Amended Budget** - Approved Budget with current Requested Changes
- **Amendment Notes** - Described on following page

**NOTE:** Shared Funding information is displayed but may not be altered. Changes to the other department’s data must be initiated by that department.

**NOTE:** IBS does not send information back to the SPD system.
Amendment Notes

NOTE: The Amendment Notes are optional.

* (SPD Icon) - The presence of the "*" icon before the description indicates that the Requested Change came from the SPD system.

Description - The pull down list offers a choice of predefined values for the most common transaction types.

One-time - You may designate an amendment as one-time (non-permanent). This will indicate your intention to reverse the amount for the following year.

Comments - You may enter your own description or note in the comment field.

NOTE: Always remember to click the Save button to retain any changes in the IBS system. Saving the changes does not "load" the budget amendment. This is accomplished on another screen.
Adding a Project ID (Action Menu)

IBS allows you to add Project ID(s) to any Position.

The pull-down list includes all active Project IDs from the Chart of Accounts available to this department.
- Enter a Project ID in the box on the left of page or double-click a Project ID in the list
- Click Add button.
Resetting Position (Action Menu)

On the Personal Services detail screen you may reset the Requested Change Amounts to the month's beginning load amounts if you change your mind about changes you have saved.

- Select Reset from the Action menu.

IBS will reset changes back to original load.
Clearing Position Requests (Action Menu)

On the Personal Services detail screen you may clear all Requested Change Amounts for this position, if you wish to “start fresh” on a position. This feature simply saves you some key strokes.

- Select Clear Pos Requests from the Action menu.
Show/Hide Columns (Options Menu)

You may show or hide the Actual and Original Budget columns by selecting the column name from the “Show/Hide” menu.

NOTE: Both columns can be hidden or they can be hidden individually.
Non-Personal Services

Objectives

By the end of this chapter, you will have an understanding of:

- What is “Non-Personal Services”
- How to list your Non-Personal Services
- Entering Non-Personal Services redistributions
- Adding a new PeopleSoft Project ID and account
- Entering a comment and/or description
- Clearing your changes
- How to calculate and save your changes

Overview

“Non-Personal Services” is the budget for operating expenses, namely your travel, operating supplies and equipment by project distribution. The PeopleSoft Project ID, together with the Account Code, together serve as the pointer (locator) used by this application to show this distribution.

As with Personal Services, you are only able to change a distribution in each department that you are authorized to update.
Non-Personal Services

- **Click on the “Non-Personal” link**

---

**NOTE:** All Project ID and Account combinations will be displayed for current department in ascending order.
Adding a Project ID (Action Menu)

- Select Add Project from the Action Menu option
- Enter a Project ID in the box on the left of page or double-click a Project ID in the list
- Enter an Account in the box on the left of page or double-click an Account in the list
- Click Add button.

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Account</th>
<th>Original Budget</th>
<th>Approved Budget</th>
<th>Requested Change</th>
<th>Amended Budget</th>
<th>Amendment Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1010386</td>
<td>754100</td>
<td></td>
<td>76,412</td>
<td></td>
<td>76,412</td>
<td>None</td>
</tr>
<tr>
<td>1010900</td>
<td>843200</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>1011154</td>
<td>843200</td>
<td></td>
<td>50,000</td>
<td></td>
<td>50,000</td>
<td>None</td>
</tr>
<tr>
<td>1011200</td>
<td>640000</td>
<td>9,553</td>
<td>9,553</td>
<td></td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>1011200</td>
<td>754000</td>
<td>145,000</td>
<td>185,252</td>
<td></td>
<td>185,252</td>
<td>None</td>
</tr>
<tr>
<td>1011200</td>
<td>725000</td>
<td>20,500</td>
<td>20,500</td>
<td></td>
<td>20,500</td>
<td>None</td>
</tr>
<tr>
<td>1011200</td>
<td>773000</td>
<td>40,000</td>
<td>40,000</td>
<td></td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>1011211</td>
<td>737300</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>1011400</td>
<td>714000</td>
<td>12,000</td>
<td>12,000</td>
<td></td>
<td>12,000</td>
<td>None</td>
</tr>
</tbody>
</table>

**NOTE:** When you make any changes, always click the Save button to retain edits.
Clear NPS Requests (Action Menu)

**NOTE:** These functions are similar to those in the Personal Services screens.
Show/Hide Column (Options Menu)

**NOTE:** These functions are similar to those in the Personal Services screens.
Objectives

By the end of this chapter, you will have an understanding of:

- What the totals represent
- Totals by Class (Fund Source)
- Totals by Program (Function)
- How to drill down for detailed totals

Overview

The Totals reflect your total budgeted funds by summary Class code, such as General and Departmental Operations, Lottery, etc. These Totals can also be “drilled-down” or expanded to show totals by Program and summarized by budget account group. Totals are useful for keeping your budget in balance.
Department Totals

- **Click on the “Totals” link**

IBS displays the totals by Fund Source.
Click on General Operations

NOTE: “Total Expenditures” is also an active link and will display the total department detail by Program (Function).
IBS will display General Operations Detail by Program (Function).

<table>
<thead>
<tr>
<th>Description</th>
<th>Original Budget</th>
<th>Approved Budget</th>
<th>Requested Change</th>
<th>Amended Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FTE</td>
<td>Amount</td>
<td>FTE</td>
<td>Amount</td>
</tr>
<tr>
<td><strong>General Academic Instruction</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Services</td>
<td>14.34</td>
<td>1,405,775</td>
<td>11.66</td>
<td>981,109</td>
</tr>
<tr>
<td>Non-Personal Srvs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>9.653</td>
<td>9,653</td>
<td>9.653</td>
<td>9,653</td>
</tr>
<tr>
<td>Operating Supplies</td>
<td>205,500</td>
<td>245,752</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>50,000</td>
<td>77,400</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total NPS</td>
<td>265,503</td>
<td>322,805</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total General Academic Instruction</strong></td>
<td>14.34</td>
<td>1,405,929</td>
<td>11.66</td>
<td>1,313,914</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Original Budget</th>
<th>Approved Budget</th>
<th>Requested Change</th>
<th>Amended Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FTE</td>
<td>Amount</td>
<td>FTE</td>
<td>Amount</td>
</tr>
<tr>
<td><strong>Individual or Project Research</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Services</td>
<td>5.97</td>
<td>492,099</td>
<td>3.97</td>
<td>301,089</td>
</tr>
<tr>
<td>Non-Personal Srvs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Supplies</td>
<td>42,000</td>
<td>42,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total NPS</td>
<td>46,000</td>
<td>42,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Individual or Project Research</strong></td>
<td>5.07</td>
<td>534,899</td>
<td>3.97</td>
<td>423,889</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Original Budget</th>
<th>Approved Budget</th>
<th>Requested Change</th>
<th>Amended Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FTE</td>
<td>Amount</td>
<td>FTE</td>
<td>Amount</td>
</tr>
<tr>
<td><strong>Total General Operations</strong></td>
<td>20.01</td>
<td>1,633,675</td>
<td>15.63</td>
<td>1,362,990</td>
</tr>
<tr>
<td>Personal Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Personal Srvs</td>
<td>307,153</td>
<td>374,805</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total General Operations</strong></td>
<td>20.31</td>
<td>1,940,828</td>
<td>15.63</td>
<td>1,737,803</td>
</tr>
</tbody>
</table>
Chapter 5

Department Reports

Objectives

By the end of this chapter, you will have an understanding of:

- How to retrieve and print reports from IBS
- The reports available
- The different report formats

Overview

The Reports page allows you to retrieve and print budget reports. The reports are available in XLS the MS Excel spreadsheet format.
Department Reports

- **Click on the “Reports” link**

IBS displays list of reports currently available.

**NOTE:** These are currently the same standard reports available from the Local Budget Information page on the Budget Office website.
Chapter 6

Review & Submit

Objectives

By the end of this chapter, you will have an understanding of:

- What the “Review” screen is used for
- Changing the screen order
- Show and Hide Totals by Position
- How to “go back” and make changes
- Print your changes, “Printer Version”
- Submitting your changes for processing

Overview

The “Review/Submit” page is for you to review all Personal and Non-Personal Services changes that you entered and also changes that were added by the automated feed. After reviewing your changes, you can continue to make additional changes or when finished, “Submit” the changes for processing by the Budget Office.
Review / Submit

- Click on the "Rvw/Submit" link
**NOTE:** Before submitting, check Total Department balance.

**NOTE:** Click on column headings to sort by Name or Position Number.
Submitting Budget Amendment

After verifying totals and balances, click Submit

IBS will display a confirmation box with department totals listed. Make sure the totals are correct before clicking the OK button.

After submitting changes:
- Department is locked from further changes
- An email notification is sent to user
- Reports BUD802 & BUD805 are generated and can be viewed/downloaded from the “Reports” section of IBS
Review/Submit Page Options

- Show/Hide Position Totals
- Order By Position Number or Name/Description

**NOTE:** You may also click on column headings to sort by Name or Position Number.
Chapter 7

Department Level Features

Objectives

By the end of this chapter, you will have an understanding of:

- How comments and justifications are used
- How to enter comments
- How to reset (restore) all Personal Services to SPD
- Clear the changes from selected positions
- Clear all requested changes for your department
- Recalculate all the FTEs

Overview

IBS has several features that affect the entire department. The “Comments / Justification” page is for you to enter a department level description of your budget changes. This page differs from the detail level comments on the Personal Services and Non-Personal Services pages in that here you can include any high-level description to document why you made budget adjustments. The description can be as detailed or as summarized, as you desire.

The other features allow you to make global changes to your department without having to display each request. These changes affect all the entries in your entire department except, “Clear Selected Request Info”. For this item, you are given an entire list for your department and you can choose which entry to clear. You are given a dialog box to verify your selection.
Add Dept. Level Comments/Justification

IBS will display a dialog box to enter comments or justification for the department.

Enter any comments that apply and click the “Save” button.
Reset Dept. Personal Services to SPD

IBS allows you to reset all Personal Services to match SPD for the entire department.

**NOTE:** This feature is also available under the "Action" menu item.
Clear Selected Request Information

IBS allows you to select the requested changes you want to delete.

Click here
Selected request information has been deleted.

Clear Selected requests

<table>
<thead>
<tr>
<th>Name/Desc</th>
<th>Position Number</th>
<th>Effective Date</th>
<th>FTE</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>White, Nicole</td>
<td>1005</td>
<td>7/1/05</td>
<td>0.02</td>
<td>3,492</td>
</tr>
<tr>
<td></td>
<td>1011300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1016X61</td>
<td>*6.09</td>
<td>14,547</td>
<td></td>
</tr>
</tbody>
</table>
Clear All Dept. Request Information

IBS allows you to clear all requested changes (including SPD amounts) for the entire department.
Clear IBS Suggested Request Information

IBS allows you to clear all IBS suggested request information.

You are about to clear ALL IBS suggested requests from this department. This will affect only personal services and will not remove any requests you have entered.

Do you want to continue?

OK  Cancel

All IBS suggested request information has been deleted.

Close
Recalculate Dept. FTE

IBS allows you to recalculate all FTE’s for all positions in the entire department (including SPD amounts).

Recalculating Dept. FTEs will replace all FTEs in department with the calculated value.

NOTE: Recalculating Dept. FTEs will replace all FTEs in department with the calculated value.
Frequently Asked Questions (FAQ)

Q: Who do I contact with questions?
A: Contact the Budget Office by email at budget.ibs@business.gatech.edu, or contact your Budget Analyst.

Q: I've entered personal services changes other than the SPD changes. I want to remove my changes and go back to just the Salary Planning and Distribution (SPD) entries. How do I do that?
A: For specific position: Navigate to that position and under the "Action" menu select "Reset." For entire department: Navigate to the "Department Home" page and click on "Reset Dept PS to Initial." For multiple positions: Navigate to the "Department."

Q: Can I access IBS from home?
A: The IBS application can be accessed from any computer, from any location that has access to the Internet. This could be your office, your home, your PDA. The only requirement (at this time) is the application must be started using Microsoft’s Internet Explorer (IE) version 5.0 and above.

Q: When is the application updated with information from SPD?
A: The load occurs after SPD has reopened from the fiscal gray-out period, usually at the end of month.

Q: When does the printed version of my amendment show up on the web?
A: After you submitted your changes, an email is sent to the Budget Office notifying them that your changes have been submitted. The Budget Office will then “update” your changes and create the web version of your printout. This process should not take more than a couple of minutes following action by the Budget Office.

Q: When looking at the record for an individual position where do the numbers in the requested amendment come from?
A: These are the numbers generated from the SPD load. The FTE is computed at the time of the load.

Q: What is "FTE," and how is it computed?
A: FTE stands for “Full Time Equivalent.” It is a way of expressing the amount of effort for a person for a fiscal year (see glossary). It is computed by dividing the budgeted funds by the full-time rate. If the person is academic, the result is multiplied by .75. Note that the application will compute the FTE for you if you leave the field blank and select the “Calc” button.

Q: Do I have to enter a description for each transaction?
A: A description or comment on each transaction is not required but may be used for recording transaction details.

Q: May I enter just one justification that covers all my changes for my department?
A: Yes, navigate to the “Department Home” page, click on “Add Dept Level Comments/Justification.”

Q: Can I make changes after I click on the “Save” button?
A: Yes. By clicking the “Save” button, you are just “saving” your changes to the system. You may continue to make more changes until you click the “Submit” button on the Review/Submit screen (see next question).

Q: Why can’t I make changes after I click on the “Submit” button?
A: After you have clicked on the “Submit” button, your changes are sent to the system for processing. We need to “lock” your department so the Budget Analyst can process your changes. Notice that a “lock” icon appears by your department name following submission.
Q: What is the “One-Time” button?
A: The “One-Time” check box is an indicator (a flag) to the application meaning the increase or decrease you entered is not a permanent change to your budget. Notice, that if the “One-Time” button is not checked, all changes will be considered permanent.

Q: I want to “get out” and not save any of my changes. What do I do?
A: If you have not “saved” your work, then simply select "Logout/Exit" or close web-browser and all changes will be lost. (see next question)

Q: I want to “throw away” all my changes but I already saved them. What do I do?
A: Navigate to the “Department Home” page and click on “Clear All Dept Request Information.” If you click “OK” in the dialog box, ALL changes will be cleared. Remember that this will clear ALL changes in the department.

Q: I went to lunch and came back and all my changes were gone. What happened?
A: As with all applications, there is a built in time-out after 30 minutes. BE SURE TO SAVE YOUR WORK PERIODICALLY!

Q: What is the red asterisk (*) by the FTE on the "Review/Submit" page?
A: The red asterisk (*) indicates that the calculated FTE differs from the FTE shown. Move your mouse over the asterisk (*) to see the calculated amount. You may leave it as is or select that position and change the FTE. Remember you are able to delete the FTE, and the system will calculate it for you.

Q: Can I see my descriptions/comments on the "Review/Submit" page?
A: To see the information you entered, move your mouse over the icons in the "Amendment Notes" column. This text will be printed completely on the "Printer Version."

Q: How do I enter the FTE?
A: When entering FTE amounts on IBS, you must include the decimal in the number. Remember, you may also leave the FTE field blank, and IBS will calculate the FTE for you.
Appendix

Glossary

- **Account** (was Object Code) - A detailed identifier for classifying expenditures. For example, supplies, equipment, health insurance, wages, etc.

- **Allocation** - The process of distributing funds to the campus. Separate processes are used to allocate the funds from the different sources. Resident Instruction funding is usually placed in a unit's budget and forms the base budget for the new year. Additional funds added to the base are called "new workload" funds. Generally, the base budget plus new workload form the budget for the next year.

- **Auxiliary Enterprises** - Operations that support the mission of the institute by providing essential services to students, faculty and staff, including food service, housing, and parking. Fees support these operations. Auxiliary Enterprises are considered self-supporting and therefore do not receive an allocation from the State.

- **B Units** - Other organized activities at Georgia Tech with separate appropriations in the State of Georgia budget. These are: Georgia Tech Research Institute (GTRI), Advanced Technology Development Center (ATDC), Economic Development Institute (EDI), and the Center for Rehabilitation Technology (CRT).

- **Budget** - The annual financial plan of the Institute. With the approval of the Board of Regents, the Institute adopts the Original Budget in July of each fiscal year and subsequently approves an amended budget each month. The amended budget must be approved quarterly by the Board of Regents.

- **Budget Amendment** - The process that campus units use to update their Original Budgets. The process involves, but is not limited to, the re-distribution of funds between objects, function and sources of funds, additions or reductions of funds, or changes in personal services status, such as position changes, title changes, and resignations. According to Board of Regents policy, "any expansion in operations that would necessitate an increase in the budget shall be submitted to the Board for approval before any obligation is incurred."

- **Capital Budget** - Budget established to account for funds used in the acquisition, construction, renewal or replacement of new or existing physical properties or land.

- **Departmental Sales and Services** - Revenues collected on behalf of a specific program to be used solely for that program, such as a copy fee charged by the Library.

- **Education and General** - All of the Institute's operating budget with the exception of Auxiliary Enterprises; excludes major capital expenditures.

- **Expenditure Budget** - That part of the budget where the funds will be spent.

- **Fiscal Year** - Twelve-month period that is the basis for the budget and financial statements: July 1 through June 30 for State of Georgia entities.

- **FTE** (Full Time Equivalent) - The effort a person works in a fiscal year expressed in a percent. "FTE" is used to equalize effort expended for personal services by the Institute. For example, a person who works fulltime for twelve months is 1.00 FTE; a person working half time for twelve is .50 FTE. An academic faculty member who works full-time for the fall and spring semesters is .75 FTE.

- **Fund** - Accounting and budgeting entity with its own set of self-balancing accounts. The funds are established on the basis of Generally Accepted Accounting Practices and state law. Operating budgets are included as "current funds." The Institute's core functions are included in the major fund category "Resident Instruction."
• **Group Position** - Personal services budget line that contain more than one non-permanent position, such as graduate students, student assistants, and summer faculty.

• **Internal Revenue** - Revenue derived primarily from tuition and fee income and recoveries of indirect costs from research conducted at Georgia Tech. (Other revenues included in this category are miscellaneous student fees, gifts and grants, sales and services of departments, and any other sources.

• **Lottery** - Special allocations from the State that are funded from the State lottery. These funds are designated and limited in use and must be separately identifiable.

• **Non-Personal Services** - A grouping of accounts (Objects of Expenditure) not related to salaries and fringe benefits. These categories include travel, supplies, and books/equipment.

• **Operating Budget** - The "Resident Instruction Budget," together with the “B” Unit Budgets and the Auxiliary Enterprises, are referred to as the “Operating Budget.” It includes all the financial resources available to Georgia Tech for educational, general, research, and auxiliary activities during a given fiscal year. The operating budget, also known as “total current funds,” excludes major capital expenditures.

• **Original Budget** - The budget beginning July 1st of the fiscal year, which must be approved by the Board of Regents.

• **Personal Services** - A grouping of Objects of Expenditure directly related to salaries, wages and fringe benefits.

• **Program** (previously “Function”) - A classification of expenditures specifying a major service or program. The program categories as defined by U.S. Department of Education, Instruction, Research, Institutional Support, Public Service, Facilities Operations and Maintenance, Student Services, Academic Support, and Fellowships and Scholarships.

• **Project ID** - For Georgia Tech accounting, the lowest level identifier where funds are budgeted or expended.

• **Research Consortium** - Special allocations from the Board of Regents. These funds are designated for a specific program, such as Georgia’s Traditional Industries, and must be separately identifiable.

• **Resident Instruction Budget** - The budget for the academic core of the Institute that includes academic units plus executive management and all general Institute support activities. The “B” Units, Auxiliary Enterprises, and Student Activities are excluded from Resident Instruction.

• **Revenue Budgets** (Sources of Funding) - There are several sources of revenue for the Institute’s operating budget: 1) State Appropriations; 2) Internal Revenue; 3) Sponsored Operations; 4) Departmental Sales and Services; 5) Georgia Tech Research Corporation (GTRC) and Georgia Tech Foundation (GTF); 6) Lottery; 7) Special Initiative; and 8) Research Consortium.

• **Special Funding Initiative (SFI)** - Special allocations from the Chancellor’s Office. These funds are designated for a specific program and also must be separately identifiable. An example is the Graduate Initiatives Program.

• **Sponsored Operations** - Revenue from sponsor reimbursement of direct and indirect costs of sponsored research, instruction, and other institutional activities funded through Grants and Contracts.

• **State Appropriation** - An authorization by the Legislature to a state entity to spend from public funds, a special some of money for a fiscal year. For higher education appropriations are made to the Board of Regents for allocation to institutions.