

# IT Agency Summary Instructions

## Purpose

- Automatically calculates and displays the amount of IT expenditures identified by the agency in the system during the preparation of the budget request. IT expenditures are defined as:
  1. Specific Job Codes and Objects Codes identified by the Office of the Chief Information Officer as being IT related.
  2. Specific Programs / Subprograms identified by the agency on the Agency IT Set-up screen as being exclusively IT related expenses.
  3. All job codes and object codes included in any IT Issues entered by the Agency.
 The agency can then enter additional expenditures that do not meet the above criteria at a Major Account level. Finally, agencies should enter a breakdown of what fund types are utilized to fund the agency's IT related activities.

## Getting Started

In the left-margin menu, under **Information Technology**, click "IT Agency Summary".

- **Budget Cycle** defaults to the current cycle.
- Select **Agency** and **Version** from the options that have been assigned to you (see Time-Saver Tip)
- There are two tabs, **Request** and **Narrative**.
- The Request tab has four sections on the screen:
  1. **Designated Exclusive IT**
  2. **System Identified IT Expenditures**
  3. **Agency Identified IT Expenditures**
  4. **IT Related Funding**.
- Each section can be expanded or collapsed by clicking on the blue or white triangle next to the section header.

### Time-Saver TIP

Set default options to avoid repetitive selections of **Agency** and **Version**.

Go to **User Options** in the upper right corner of any screen. Once your selections are made, press



## Request Tab

**IT Agency Summary** »View Only

Budget Cycle: 2017-2019      Agency: 065 - ADMINISTRATIVE SERVICES      Version: A1 - AGENCY VERSION

Request    Narrative

▼ Designate Exclusive IT

▼ System Identified IT Expenditures

Object Code	Description	Reappr.	Cur Appr.	FY18 Request	FY19 Request
543100	IT CONSULTING-APPLICATION	0	0	175,000	375,000
543200	IT CONSULTING-HW/SW SUPP	0	0	200,000	50,000
543300	IT CONSULTING-OTHER	0	0	5,000	5,000
<b>Total</b>		<b>\$0</b>	<b>\$0</b>	<b>\$380,000</b>	<b>\$430,000</b>

▼ Agency Identified IT Expenditures

Description	Reappr.	Cur Appr.	FY18 Request	FY19 Request
SALARIES	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BENEFITS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
OPERATING EXPENSES	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TRAVEL EXPENSES	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CAPITAL OUTLAY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
GOVERNMENT AID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

▼ IT Related Funding

	Reappr.	Cur Appr.	FY18 Request	FY19 Request
General Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cash Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Revolving Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
PSL Request	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

### Start-Up TIP

If any of the drop-down menus fail to show expected choices, you may need to have your **Security** settings adjusted.

Contact your NBRRS Agency Administrator or the State Budget Division for assistance.

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## Designated Exclusive IT

This section lists the Program and Subprograms designated by the agency as being exclusively IT.

- These are set on the “**Agency IT Set-Up**” screen.
- The designation must be defined for each budget cycle. Designations from a prior budget cycle cannot be copied forward.

## System Identified IT Expenditures

This section lists all IT expenditures determined by the system based on the Agency IT Setup screen and pre-defined IT-related job codes and object codes. The total in this section will be added to the **Agency Identified IT Expenditures** section to determine the amount of **IT Related Funding** needing to be identified by the agency.

## Agency Identified IT Expenditures

This section is used to enter additional IT expenditures that were not included in the **System Identified IT Expenditures** section. The additional IT expenditures are entered at a Major Account level. The total in this section will be added to the **System Identified IT Expenditures** section to determine the amount of **IT Related Funding** that is to be identified by the agency.

1. Click **Edit** to begin entering agency identified IT related expenditures at the Major Account level for each column, if necessary, along with the estimated funding amounts by fund type.

Edit					
Request		Narrative			
Designate Exclusive IT					
System Identified IT Expenditures					
Agency Identified IT Expenditures					
Description	Reappr.	Cur Appr.	FY18 Request	FY19 Request	
SALARIES					
BENEFITS					
OPERATING EXPENSES					
TRAVEL EXPENSES					
CAPITAL OUTLAY					
GOVERNMENT AID					
<b>Total</b>	\$0	\$0	\$0	\$0	

2. Click **Save** to commit the data entered to the database.

## IT Related Funding

This section is used to enter the fund types for IT related expenditures. The total expenditures identified in the **System Identified IT Expenditures** and **Agency Identified IT Expenditures** sections are included.

1. Click **Edit** to begin entering funding amounts by fund for each column.

IT Related Funding					
	Reappr.	Cur Appr.	FY18 Request	FY19 Request	
General Fund					
Cash Fund					
Federal Fund					
Revolving Fund					
Other Fund					
<b>Total</b>	\$0	\$0	\$0	\$0	
PSL Request	\$0	\$0	\$0	\$0	
Variance					
	Reappr.	Curr Appr.	FY18 Request	FY19 Request	
Total Expenditures	\$0	\$0	\$0	\$0	
Total Funding	\$0	\$0	\$0	\$0	
Variance	\$0	\$0	\$0	\$0	

2. Any variance in funding relative to the amount of expenditures will be shown in red. These should be corrected before the budget request is submitted.
3. Click **Save** to commit the data entered to the database. Click View Mode to leave Edit Mode before continuing on to the Narrative tab.

# IT Agency Summary Instructions

## **Narrative Tab**

In prior budget submissions the Narrative tab was used to attach the **Agency IT Plan**. The Office of the Chief Information Officer is developing new web-based form that agencies will use to submit their IT Plans. Therefore, there is no Narrative or attachment required to be included in the budget submission.