

# Core Integrator: Electronic Budget Amendment Form (eBA)

WALKTHROUGH & INSTRUCTIONS

# A Budget Amendment form is submitted to Budget Services whenever:

- Spending authority (budgeted amount) needs to be added to or reduced from a department.
- Spending authority is moved between account codes (e.g. 512000, 700000, etc.)
- Additional revenue has been earned.
- Prior year fund balances need to be spent.
- A new department is requested.
- Changes to coding in a chart string are needed (fund, account, program, or class codes) or changing funding for a position.
- An employee is hired in an account code not previously used in the department.

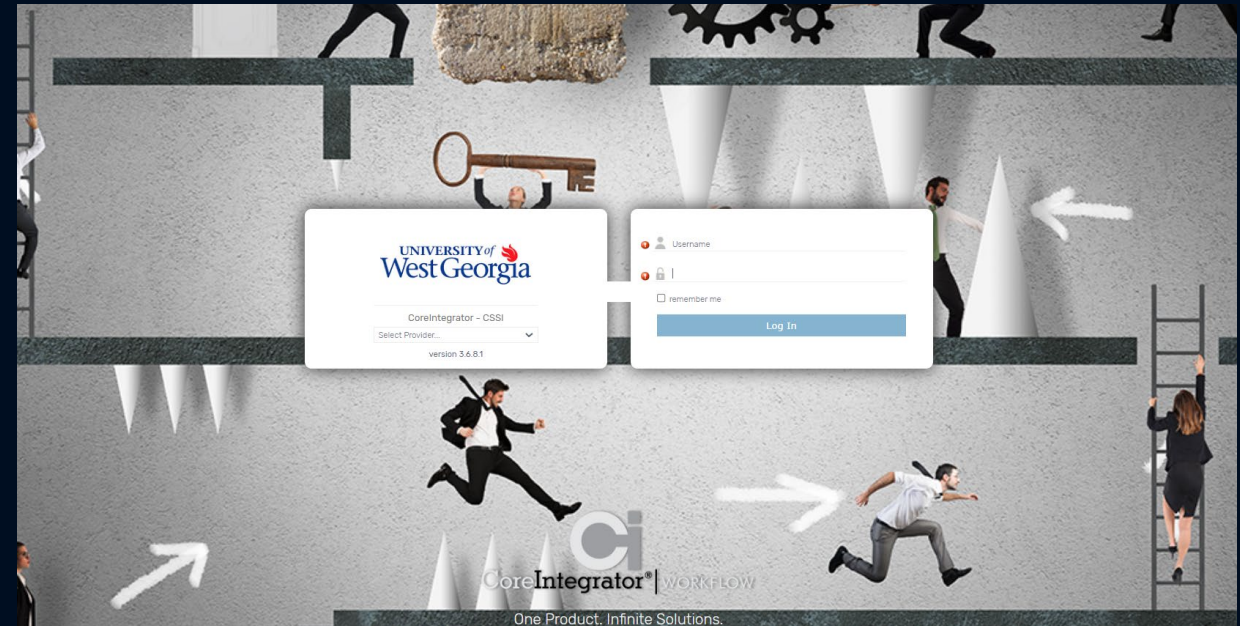
# Core Integrator

- The eBA form is hosted in Core Integrator (CI). A workflow automation solution that allows customized forms to flow through a designed workflow.
- Another CI form example is ePAR



# Getting Started

- <https://uwgforms.westga.edu/Login.aspx>
- Select Provider: UWG
- Login using UWG credentials



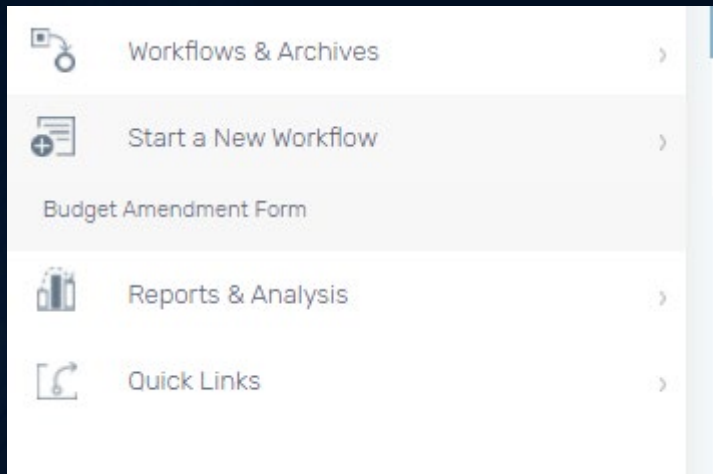
# eBA Home Page

- Start New Workflow
- View all eBA forms that are:
  - Assigned to You
  - In Progress
  - Finished

The screenshot displays the eBA Home Page interface. On the left, a navigation sidebar includes the CoreIntegrator WORKFLOW logo and menu items: 'Return to User Return to User UWGDev\mpaintin', 'Workflows & Archives', 'Budget Amendment Form', 'Start a New Workflow', 'Reports & Analysis', and 'Quick Links'. The main content area features a top navigation bar with 'Home', 'Search', 'Help', 'Administration', and 'Messages 1'. The user is identified as 'Shana Kinnard' with a 'Logout' link. Below the navigation, a 'Process Selected' dropdown is set to 'Budget Amendment Form'. A filter bar shows 'Assigned to You' selected, with 'In Progress' and 'Finished' options. A table with columns: ID, Action, Status, Activity Age (days), Workflow Age (days), Budget Analyst, Journal ID 2, Journal ID 1, Initiator, Funding Department Name, and Funding Dept ID (Required) is shown. The table contains no data, with the message 'No data available in table'. Below the table, it indicates 'Showing 0 to 0 of 0 entries' and 'Showing 0 to 0 of 0 entries'.

# Initiating a New eBA Workflow

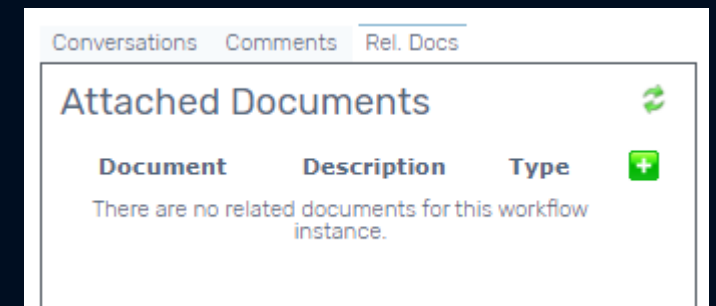
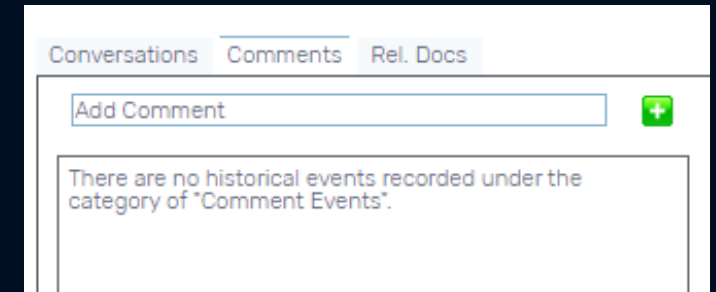
# Start a New Workflow



- Choose the “Start a New Workflow” dropdown in the pane to the left of the home page
- Select “Budget Amendment Form”
  - Note: there may be more form options under this section. Be sure to choose the correct option.

# Comments & Attachments

- The pane on the right side of the screen allows users to leave comments that will be visible throughout the workflow.
- Be sure to leave comments if anything needs to be known about the form.
- This pane also allows for documents to be attached. To do so, choose the Rel. Docs section and click on the green + icon. Be sure to upload all documents related to the amendment.





# Required Fields

- Funding Dept ID
  - This drives the workflow for the eBA form. This will determine which budget manager and authorized approver the form is routed to.
    - The Budget Manager, Funding Department Name, Authorized Approver, and Budget Analyst fields will automatically populate after form is submitted by the initiator.
- Type of Budget Amendment
  - One-Time – Temporary amendments to the budget for the current fiscal year
  - Permanent – Amendments to the budget that will carry over multiple fiscal years
  - Original – FOR BUDGET OFFICE USE ONLY

The screenshot shows a web application interface for a budget amendment request. The top navigation bar includes 'Home', 'Options', and 'Execution ID: 2,297 Details'. A 'MY ACTIONS' sidebar on the left contains an 'Initiator' section with 'Submit' and 'Cancel' buttons. The main form area is titled 'Requestor Information' and contains the following fields:

Initiator	Initiator Email	Initiator Phone Number		
Shana Kinnard	skinnard@westga.edu	678-839-		
Funding Dept ID (Required)	Budget Manager	Funding Department Name	Authorized Approver	Budget Analyst
Type of Budget Amendment (Required)				

At the bottom, a comment section shows 'Latest Comment: There are no comments for this workitem.' and navigation links for 'Conversations', 'Comments', and 'Rel. Docs'.

# Ad Hoc Approvers

- The Standard workflow for an electronic budget amendment is as follows: Initiator > Budget Manager > Authorized Approver > Budget Office.
  - The Budget Manager & Authorized Approver steps are driven by the Funding Dept ID chosen at the top of the form. (For AA, the Budget Manager is at the College Level)
- If the initiator is aware of other individuals that would need to approve the eBA, they can insert up to two additional, ad hoc approvers before the eBA reaches the Budget Manager. These Ad Hoc approvers can only opt to approve or return to the initiator.

**Initiator Ad Hoc Approvers**

Ad Hoc Approver 1      Action Taken  
     

Ad Hoc Approver 2      Action Taken  
     

2

**Questions**

Are there any payroll documents tied to this amendment?     

If amendment involves an increase to the Revest ledger, has a Revenue Summary Report already been pulled?     

3

**Summary (Required)**

# Processing Questions

- In the eBA, the initiator will need to address two questions with dropdown boxes.
  - The first question asks if any payroll documents are tied to the amendment. If so, please add comments to the comments pane as to where that document is in process currently.
  - The second question asks if a revenue summary report was pulled if the amendment is trying to increase the revenue ledger. That is not required to be attached; however, if the amount on the report is less than what is being requested on the amendment then the amendment may be rejected.

The screenshot shows a web form titled "Initiator Ad Hoc Approvers". It contains two rows for approvers, each with a dropdown menu for the approver's name and a text box for "Action Taken". Below this is a section labeled "2" and "Questions". It contains two questions, each with a dropdown menu: "Are there any payroll documents tied to this amendment?" and "If amendment involves an increase to the Revest ledger, has a Revenue Summary Report already been pulled?". Below the questions is a section labeled "3" and "Summary (Required)", which contains a large text area for entering a summary.

**Initiator Ad Hoc Approvers**

Ad Hoc Approver 1  Action Taken

Ad Hoc Approver 2  Action Taken

2

**Questions**

Are there any payroll documents tied to this amendment?

If amendment involves an increase to the Revest ledger, has a Revenue Summary Report already been pulled?

3

**Summary (Required)**

# Summary

- This will serve as the box to provide a brief explanation of the purpose of the amendment.
- Please provide all necessary details in this section.
- This box must be filled out before submitting.
- Any additional details can be added to the Comments pane.

**Initiator Ad Hoc Approvers**

Ad Hoc Approver 1	Action Taken
<input type="text"/>	<input type="text"/>
Ad Hoc Approver 2	Action Taken
<input type="text"/>	<input type="text"/>

2

**Questions**

Are there any payroll documents tied to this amendment?

If amendment involves an increase to the Revest ledger, has a Revenue Summary Report already been pulled?

3

**Summary (Required)**

# Ledgers

- Like the paper budget amendment, the ledger section of the eBA will be used to complete the chart string budget changes.
- The 4 Ledger groups are REVEST, ORG\_BD, APPROP\_BD, & PROJ\_GR\_BD
- The Chart String Fields will vary slightly for each ledger, but all will include the following:
  - Bud Yr – Account – Fund – Dept ID – Program – Class – Project
  - The ORG\_BD & PROJ\_GR\_BD ledgers will both include a Pos Num field in order to budget at the position level.

# Ledgers

- REVEST
  - For adjusting revenue spending authority
- ORG\_BD
  - For adjusting Personal Services budgets (Positions, Supp Pymts, etc.)
- APPROP\_BD
  - For adjusting Non-Personal Services budgets (Supplies, Travel, etc.)
- PROJ\_GR\_BD
  - For adjusting Grant budgets

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### Ledgers

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REVEST (Account Codes 4XXXXX)

Department Name	Bud Yr	Account	Fund	Dept ID	Program	Class	Project	Amount	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
									TOTAL
									<input type="text"/>

ORG\_BD (Account Codes 5xx000)

Department Name	Pos Num	Bud Yr	Account	Fund	Dept ID	Program	Class	Project	Amount	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
										TOTAL
										<input type="text"/>



APPROP\_BD (Account Codes 600000,700000, 800000)

Department Name	Year	Account	Fund	Dept ID	Program	Class	Project	Amount	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
									TOTAL
									<input type="text"/>

PROJ\_GR\_BD

Department Name	Pos Num	Year	Account	Fund	Dept ID	Program	Class	Project	Amount	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
										TOTAL
										<input type="text"/>

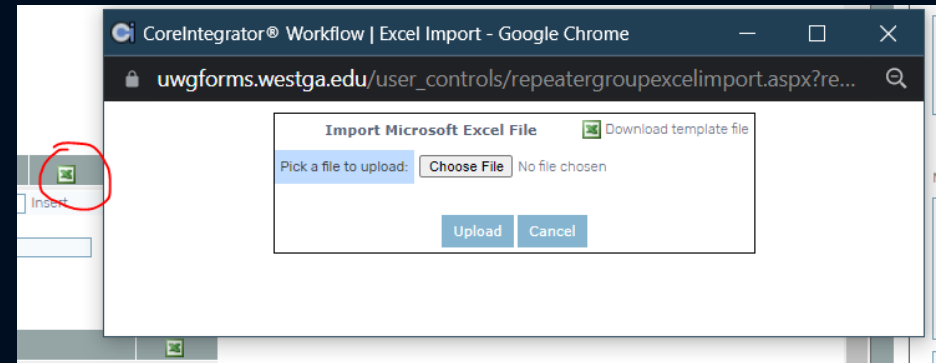
# Populating Ledger Fields

Department Name	Pos Num	Bud Yr	Account	Fund	Dept ID	Program	Class	Project	Amount	
Vacancy Pool	11111111	2022	511000	10500	1007105	11100	11000		1000.00	 
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert
									TOTAL	<input type="text"/>

- Enter the chart string details for the budget lines being adjusted
- The fields with the downward arrow will provide a drop-down list of options. When typing the codes for these fields the cursor will shift to the next field once an acceptable value is entered.
- In the “Amount” field, enter a negative number if decreasing the budget and a positive number if increasing.
- **MOST IMPORTANT**: Click the “Insert” link when finished entering the chart string fields and adjustment amount in order to insert the line into the ledger. If this is not done the line will not carry on to the next step of the workflow.
- To edit ledgers that have already been inserted, click on the pencil icon.
- The red X will remove the line from the ledger.

# Import to Ledgers

- Initiators can import budget lines in mass for larger amendments.
- To do so, click on the green Excel logo for the ledger being adjusted.
- In the pop-up window, choose the “Download template file” link.
- Save the template file and open it.
- The template file will have ledger specific headers for all the ledger fields. DO NOT delete or adjust these headers or it will not upload properly.
- Enter the the lines that need to be added under the corresponding header



appropbddepartment	appropbdyear	appropbdaccount	appropbdfund	appropbddept	appropbdprogram	appropbdclass	appropbdproject	appropbdamount
Vacancy Pool	2022	700000	10500	1007105	11100	11000		-1000
Vacancy Pool	2022	700000	10000	1007105	11100	11000		-10000
Fusion Center	2022	700000	10000	1022105	11100	11000		1000
Leadrsip Reserch &	2022	700000	10000	1022108	11100	11000		1000
A. Dean of Resrch &	2022	700000	10000	1022109	11100	11000		1000
COE Innovations	2022	700000	10000	1022110	11100	11000		1000
COE Office of Gradu	2022	700000	10000	1022123	11100	11000		1000
UTeach Matching Fur	2022	700000	10000	1022160	11100	11000		1000
iCARE Grant Match F	2022	700000	10000	1022161	11100	11000		1000
iCare Match FY20	2022	700000	10000	1022162	11100	11000		1000
Mother/Child Vocal In	2022	700000	10000	1022163	11100	11000		1000
University College De	2022	700000	10000	1024101	11100	11000		1000

- Note: The system requires that the headers not have spaces, so each header begins with the ledger name and then the field name



# Importing to Ledgers (Cont.)

- Once the import file has all the lines needed, save the file.
- On the pop-up window, select the “Choose File” link and locate the saved import file.
- Once the file is chosen, click “Upload”.
- Verify that all the lines populated into the ledger correctly.

The screenshot shows the 'Import Microsoft Excel File' dialog box in a web browser. The 'Choose File' button is highlighted, and the file 'newrepeatergroup3.xlsx' is selected. Below the dialog is a table with columns: appropbddepartment, appropbdyear, appropbdaccount, appropbdfund, appropbddept, appropbdprogram, appropbdclass, appropbdproject, and appropbdamount. The table contains 15 rows of data. Below the table is a detailed ledger view for 'APPROP\_BD (Account Codes 600000,700000,800000)' with columns: Department Name, Year, Account, Fund, Dept ID, Program, Class, Project, and Amount. The ledger view shows the same 15 rows of data with additional columns for Project and Amount, and a 'TOTAL' row at the bottom.

appropbddepartment	appropbdyear	appropbdaccount	appropbdfund	appropbddept	appropbdprogram	appropbdclass	appropbdproject	appropbdamount
Vacancy Pool	2022	700000	10500	1007105	11100	11000		-1000
Vacancy Pool	2022	700000	10000	1007105	11100	11000		-10000
Fusion Center	2022	700000	10000	1022105	11100	11000		1000
Leadrsip Reserch & A. Dean of Resrch & Assessment	2022	700000	10000	1022108	11100	11000		1000
COE Innovations	2022	700000	10000	1022110	11100	11000		1000
COE Office of Graduate Studies	2022	700000	10000	1022123	11100	11000		1000
UTeach Matching Funds	2022	700000	10000	1022160	11100	11000		1000
iCARE Grant Match FY20	2022	700000	10000	1022161	11100	11000		1000
iCare Match FY20	2022	700000	10000	1022162	11100	11000		1000
Mother/Child Vocal Int. Match	2022	700000	10000	1022163	11100	11000		1000
University College Dean's Offi	2022	700000	10000	1024101	11100	11000		1000

# Additional Information

- The Budget Office currently allows departments to create SA or Temp positions outside of MSS using a budget amendment.
  - When creating these positions, it is necessary to identify a reports to supervisor for each position.
- Departments can also adjust funding for a position, such as splitting the funding for a position between up to 3 sources.
  - To do so, identify the Starting (and ending) effective dates, the chart string for each source, and the % each source will make up of the total salary budget.
    - Note: if the percentages do not total 100% an error message will occur, and the form will not be submitted.

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### Additional Information

**For New Positions:** \* Please specify which position number(s) the new position will report to

New Position Number	Reports-To Position Number	Reports-To Manager Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
New Position Number	Reports-To Position Number	Reports-To Manager Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
New Position Number	Reports-To Position Number	Reports-To Manager Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

**For Funding Changes:** \* For Split Funding, only one position per amendment

Starting Eff Date:  Ending Eff Date (if necessary):

<b>Funding Source 1:</b>	Fund	Dept ID	Program	Class	Project	Combo Code	% from Source 1:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Funding Source 2:</b>	Fund	Dept ID	Program	Class	Project	Combo Code	% from Source 2:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Funding Source 3:</b>	Fund	Dept ID	Program	Class	Project	Combo Code	% from Source 3:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
							TOTAL PERCENT
							<input type="text"/>

**\*Must total 100%**

# Submitting the Form – Error Messages

- To submit the form, all required fields must be filled out properly.
- If not, an error message will appear at the top of the window stating what is missing and will not allow you to continue.
- Click OK and correct the issue.

uwgforms.westga.edu says

'Funding Dept ID' is a required field! Please select a value and click Submit.

OK

uwgforms.westga.edu says

'Type of Budget Amendment' is a required field! Please select a value and click Submit.

OK

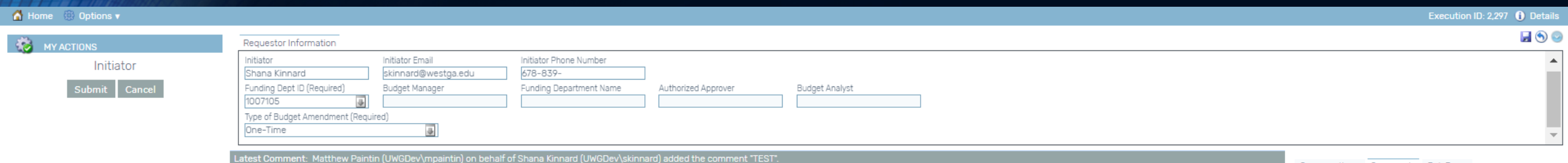
uwgforms.westga.edu says

'Summary' is a required field! Please enter the summary information and click Submit.

OK

# Submitting the Form

- Once ready, click on the Submit button under the “MY ACTIONS” section.
  - If you wish to abandon the amendment, click on the Cancel button.
- If at any time you need to leave the page without submitting, click on the blue save icon at the top right of the page.
- It is important to note the Execution ID at the top right of the page as it will help in locating the form later.



Home Options

Execution ID: 2.297 Details

MY ACTIONS

Initiator

Submit Cancel

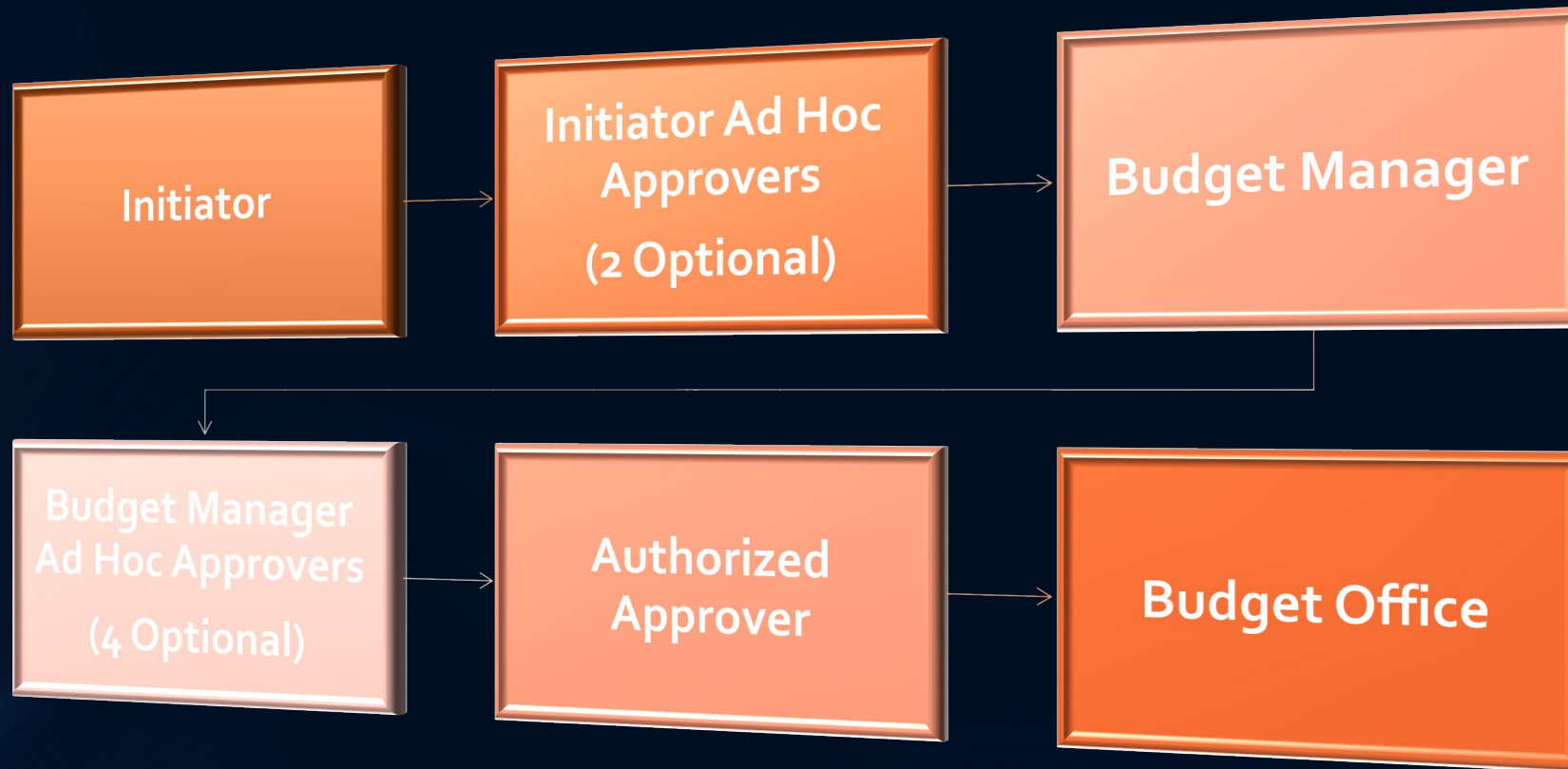
Requestor Information

Initiator: Shana Kinnard  
Initiator Email: skinnard@westga.edu  
Initiator Phone Number: 678-839-  
Funding Dept ID (Required): 1007105  
Budget Manager:   
Funding Department Name:   
Authorized Approver:   
Budget Analyst:   
Type of Budget Amendment (Required): One-Time

Latest Comment: Matthew Paintin (UWGDev\mpaintin) on behalf of Shana Kinnard (UWGDev\skinnard) added the comment "TEST".

Approving the eBA

# eBA Workflow Steps



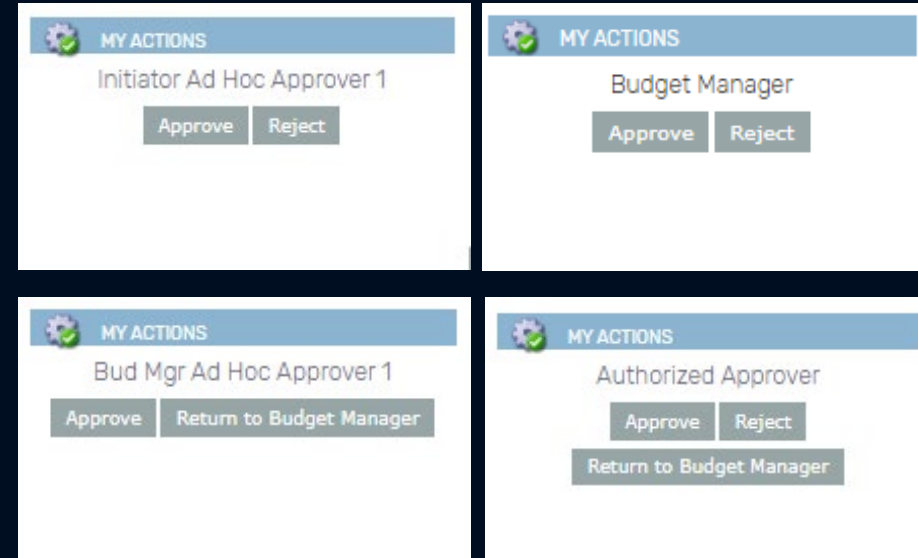
# Selecting from the Home Page

ID	Action	Status	Activity Age (days)	Workflow Age (days)	Budget Analyst	Journal ID 2	Journal ID 1	Initiator	Funding Department Name	Funding Dept ID (Required)
2,297	Process	Budget Manager	0.0	0.7	kristins			Shana Kinnari	AA - Faculty and Staff	1007105

- From the home page, under the “Assigned to You” Section, users will see all forms currently in their step of the workflow.
  - Note: Only from the “Assigned to You” section will users be able to process forms. The “In Progress” & “Finished” sections will open forms as Read-Only.
- Important Home Page Fields:
  - ID – Unique ID number of the form
  - Status – The step of the workflow the form is in.
  - Activity Age – Number of days the form has been in the current status.
  - Workflow Age – Number of days since the form was initiated.

# Approver Actions

- At each step of the workflow, approvers will have actions specific to that step.
- Approvers after the Budget Manager step have the ability to Return to Budget Manager.
- Budget Managers are able to edit the form and resubmit.
- Authorized Approvers and Ad Hoc Approvers will not be able to edit the document however they will be able to make comments in the comments pane or attach related documents.





Questions?