

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS)

USER GUIDE

FORM WORKFLOW AND PDF OVERVIEW

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FORM MANAGEMENT BUTTONS

Across the bottom of most IBIS forms are several form management buttons. These buttons are Export PDF, Save Draft, Save & Close, Ready to Submit and Delete Request.

**** STATUS: BRU_DRAFT ****
 WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information
Positions
Budget Detail
Other
Attachments/References

Screen ID : WSII-5
 BIS ID : 7LJN

Attachments

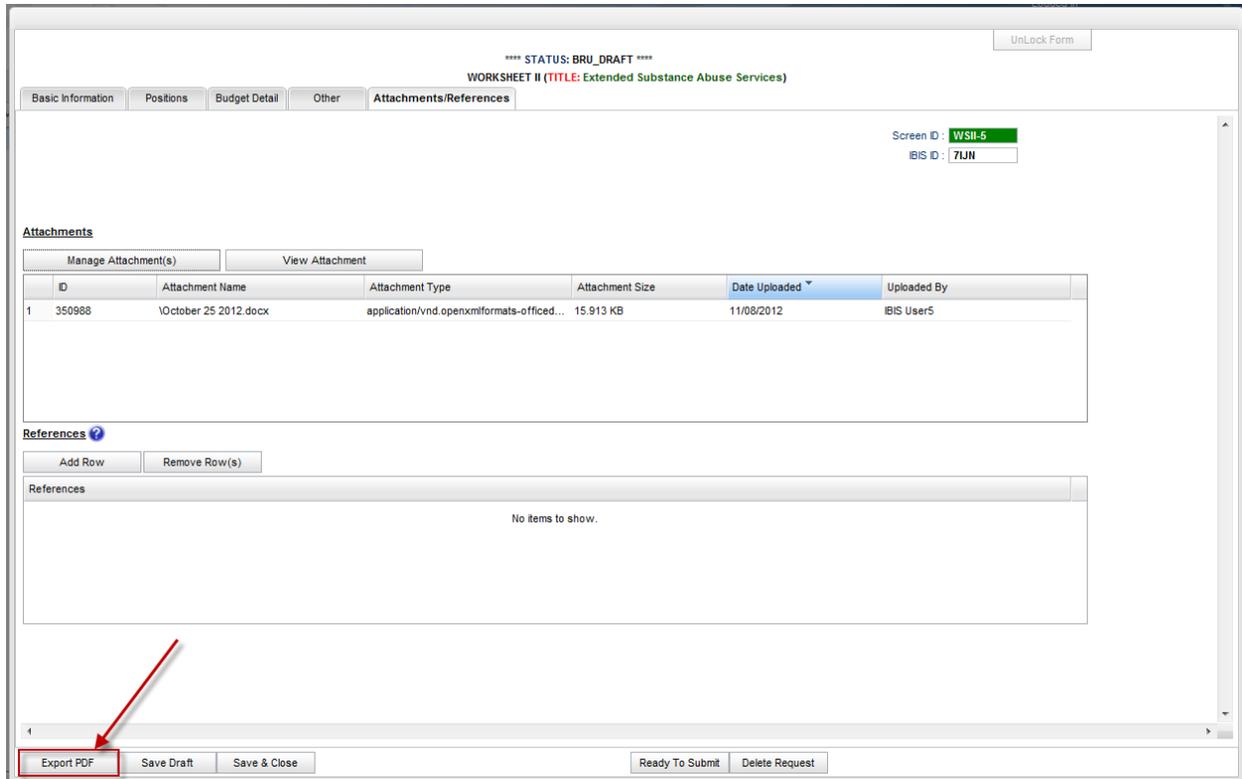
ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	350988 \October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References ?

No items to show.

GENERATING PDF

In order to generate a PDF file of a form, click on the Export PDF button as highlighted below.



**** STATUS: BRU_DRAFT ****

WORKSHEET II (TITLE: Extended Substance Abuse Services)

Screen ID : WSII-5
IBIS ID : 7LJN

Attachments

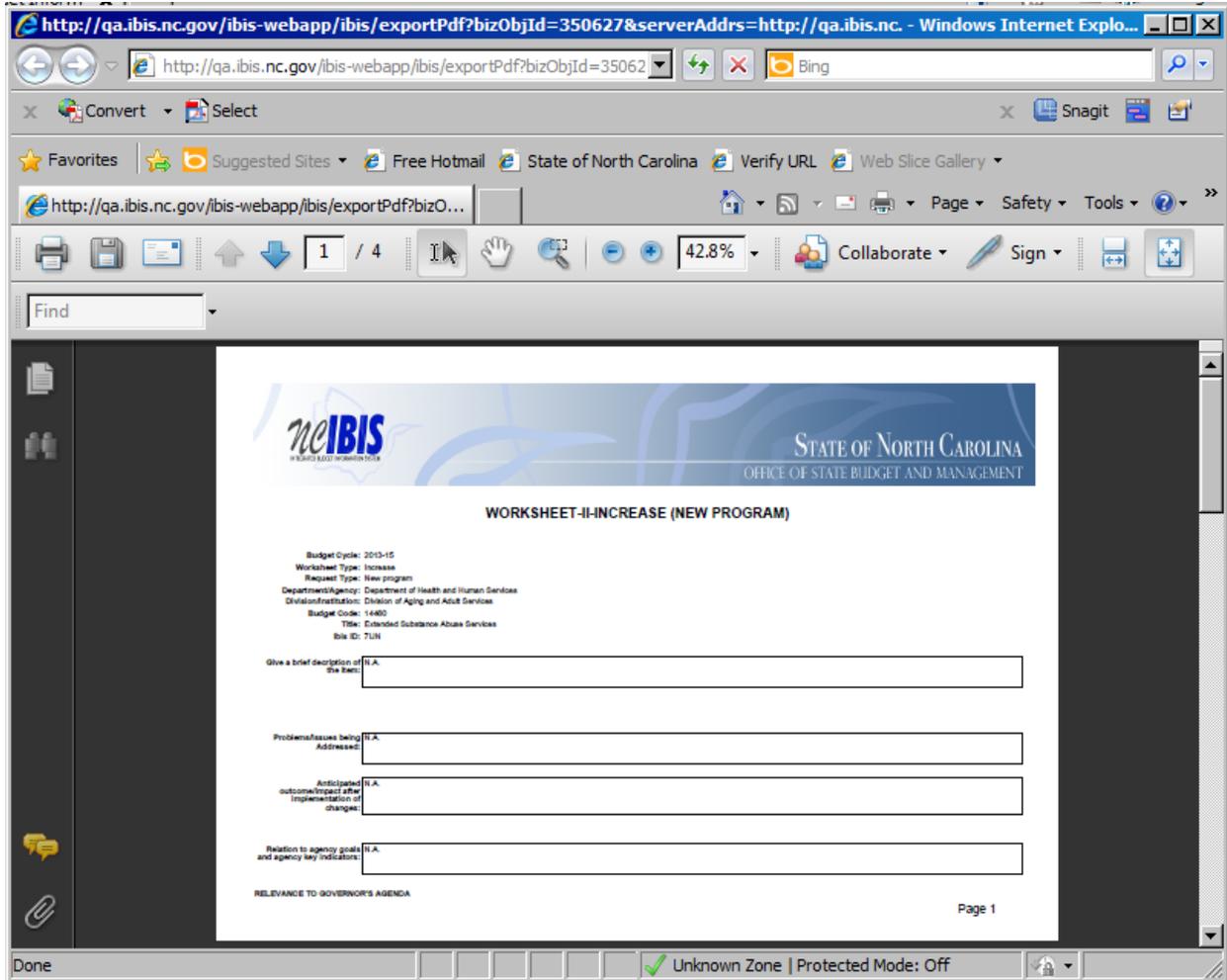
ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	350988 \October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

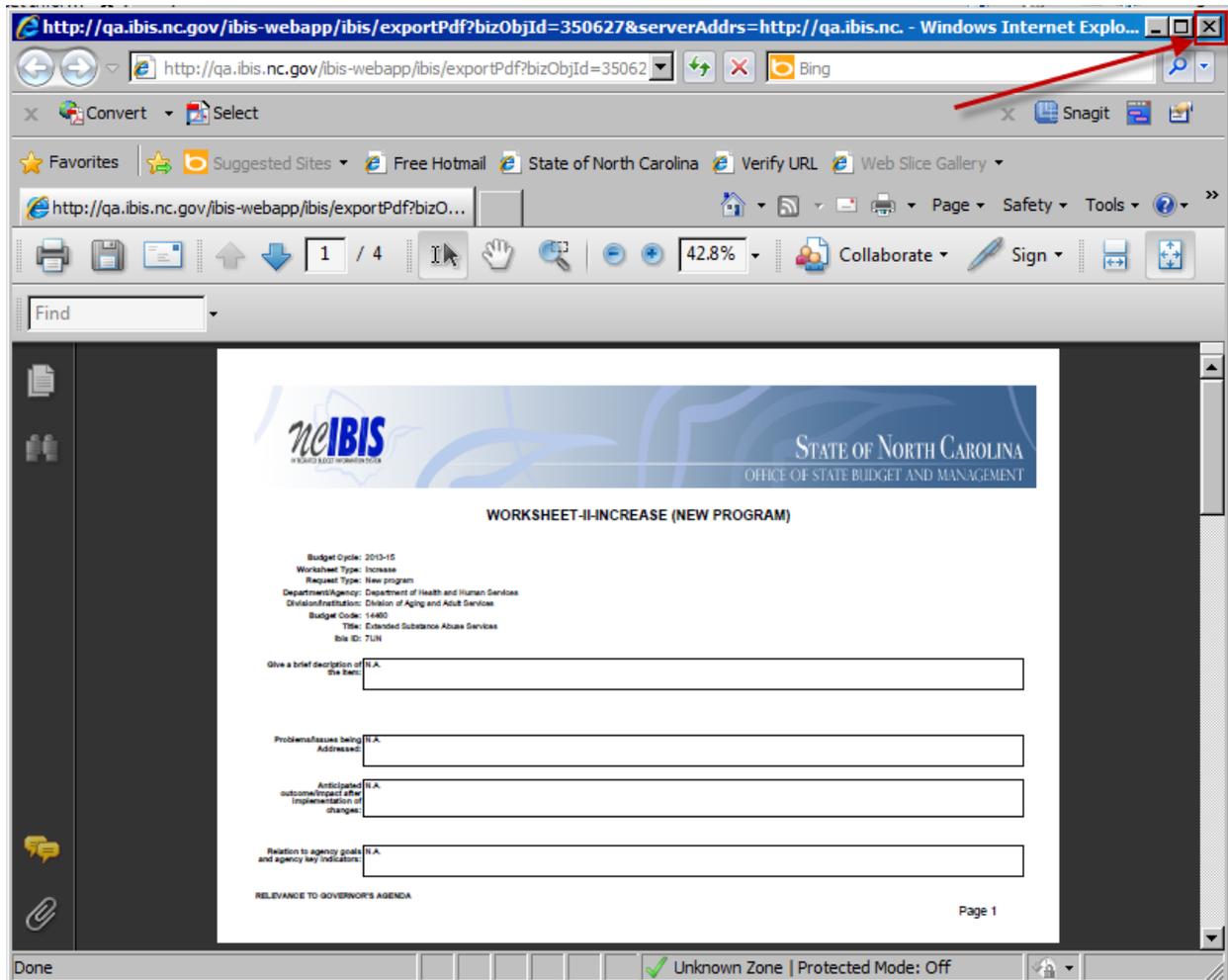
No items to show.

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

A PDF view of the form will open in a separate window where you can Save, Print, or otherwise utilize the PDF version of the form.



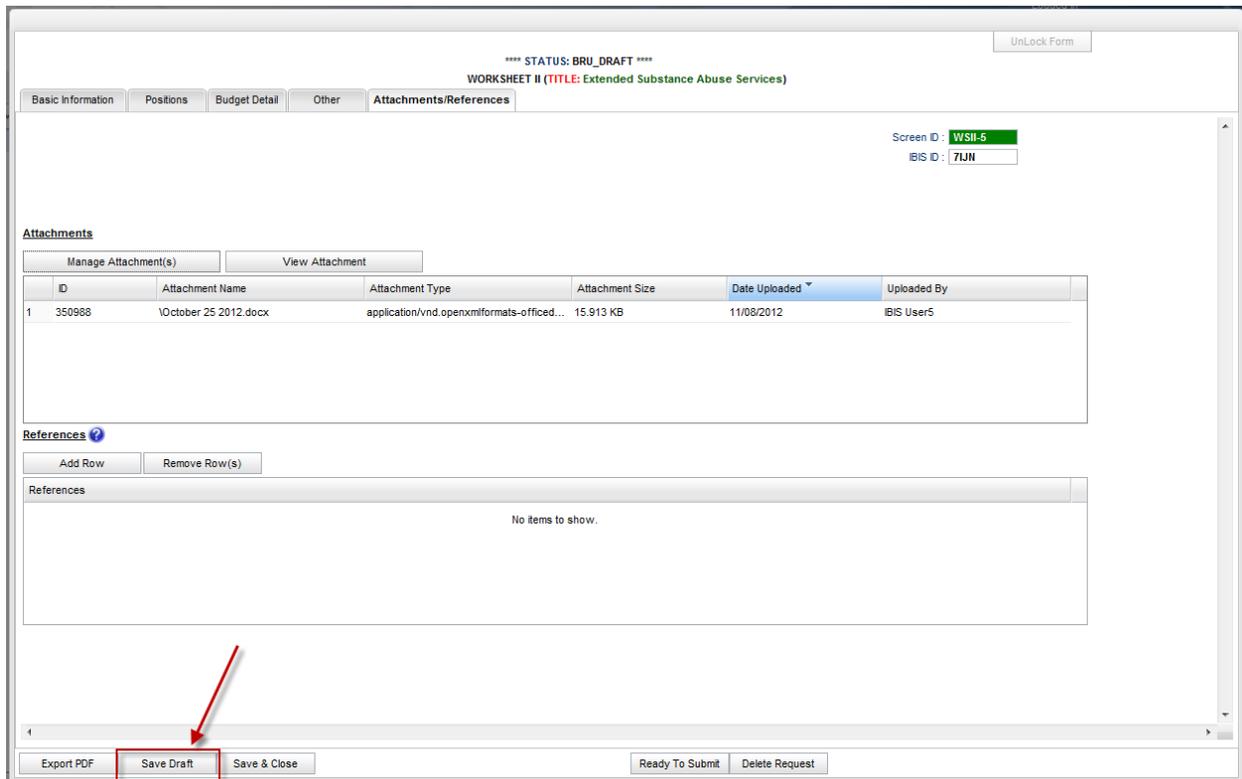
Use the browser control “x” in the upper right corner to close the PDF view.



SAVING A DRAFT

In order to save a draft of the form you are editing without closing the form, click the Save Draft button that is highlighted below. When the button is clicked, a message will appear briefly in the upper right area of the form stating that the form is saving followed by a “Draft Saved Successfully” message. The form will remain open.

Note: IBIS is designed to save data frequently. For example, every time a requirement or receipt is added to each respective table, the form saves. The system was designed in this manner to minimize the potential loss of data.



**** STATUS: BRU_DRAFT ****
WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information | Positions | Budget Detail | Other | Attachments/References

Screen ID : WSI-5
IBIS ID : 7LJN

UnLock Form

Attachments

Manage Attachment(s) | View Attachment

ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

Add Row | Remove Row(s)

References

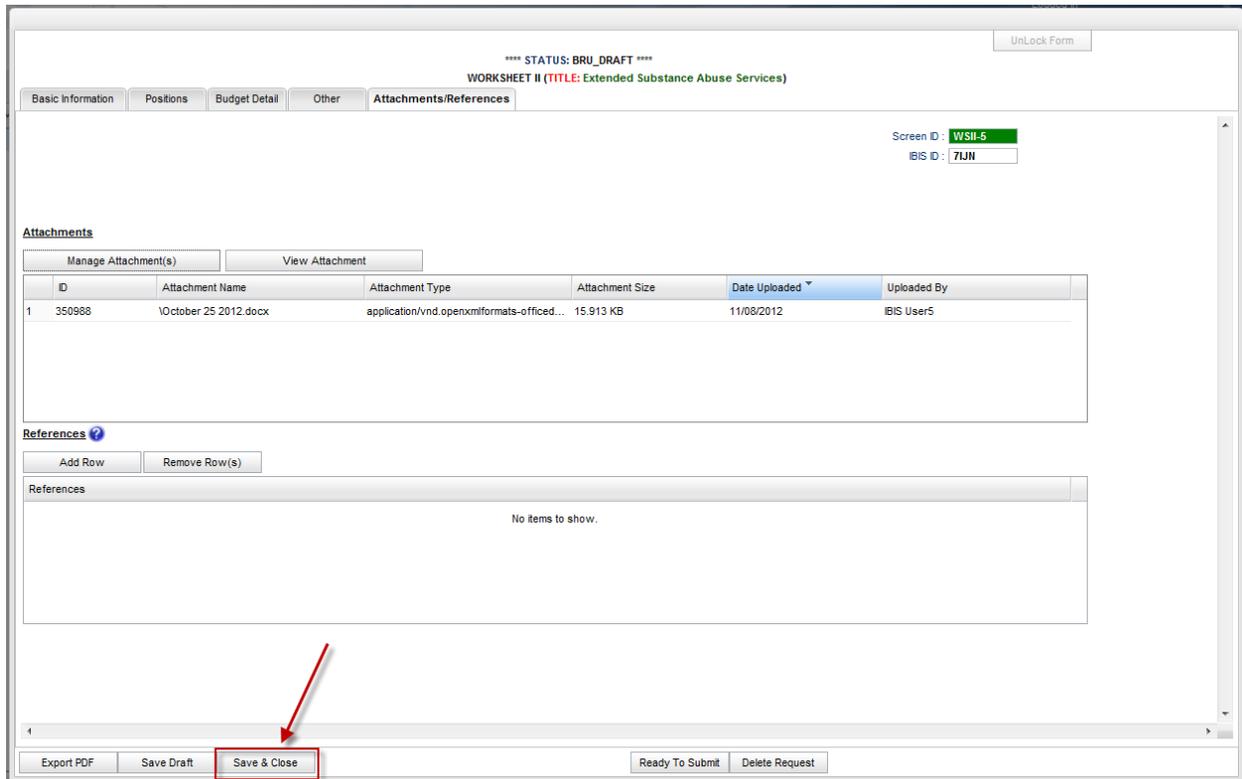
No items to show.

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

Draft Saved Successfully..

SAVING AND CLOSING A FORM

In order to save a draft of the form you are editing *and* close the form, click the Save & Close button highlighted below. When this button is clicked, the form will close and return you to the Work Queue.



**** STATUS: BRU_DRAFT ****

WORKSHEET II (TITLE: Extended Substance Abuse Services)

UnLock Form

Basic Information | Positions | Budget Detail | Other | Attachments/References

Screen ID : WSII-5
IBIS ID : 7LJN

Attachments

Manage Attachment(s) | View Attachment

ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	350988 \October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

Add Row | Remove Row(s)

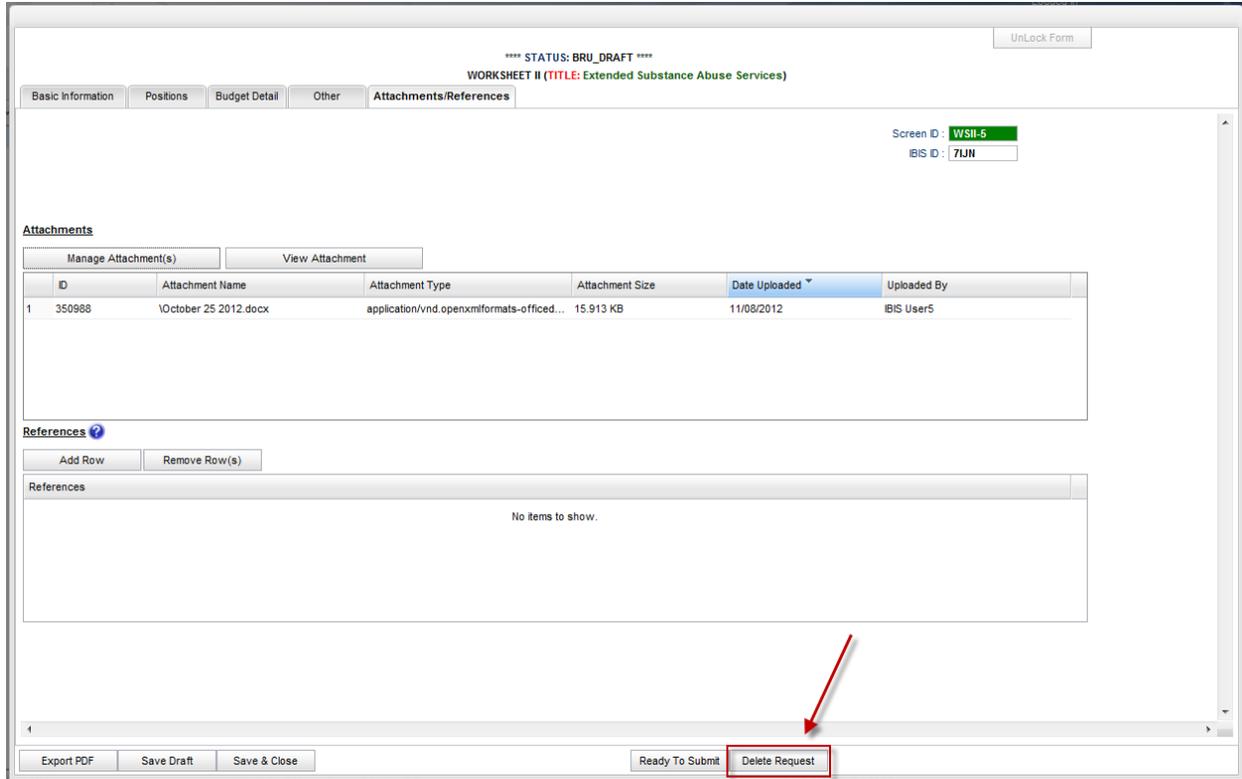
References

No items to show.

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

DELETING A REQUEST

In order to delete a form, click on the Delete Request button as shown below.



**** STATUS: BRU_DRAFT ****

WORKSHEET II (TITLE: Extended Substance Abuse Services)

Screen ID : WSIH-5
IBIS ID : 7LJN

Attachments

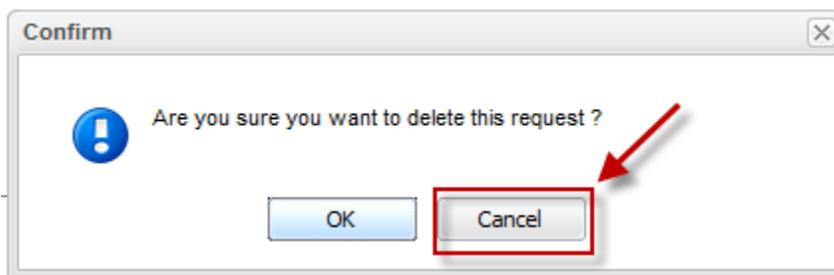
ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

No items to show.

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

When the button is clicked, a Confirm delete window will appear. If you do not wish to delete the form, click the cancel button. The Confirm window will close and you will be returned to the form.

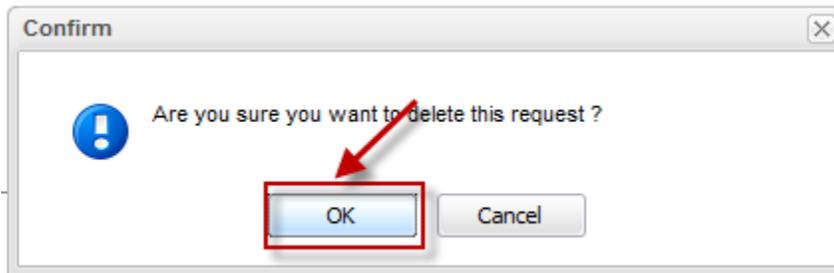


Confirm

Are you sure you want to delete this request ?

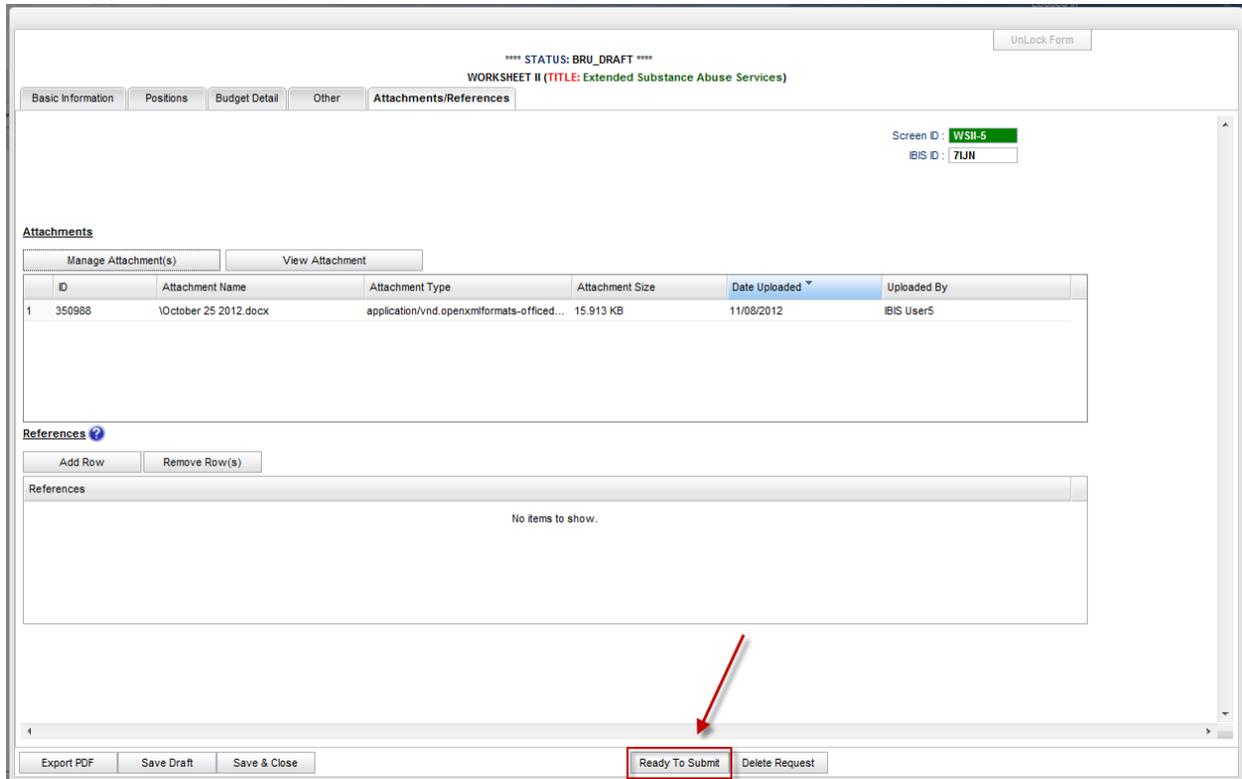
OK Cancel

If you wish to complete the deletion, click on the OK button. The Confirm delete window will close, and the form will be deleted. You will be returned to your work queue.



SUBMITTING A FORM

If you are ready to submit a form, click on the Ready to Submit button as shown below.



**** STATUS: BRU_DRAFT ****

UnLock Form

WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information | Positions | Budget Detail | Other | Attachments/References

Screen ID : WSII-5
IBIS ID : 7LJN

Attachments

Manage Attachment(s) | View Attachment

ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

Add Row | Remove Row(s)

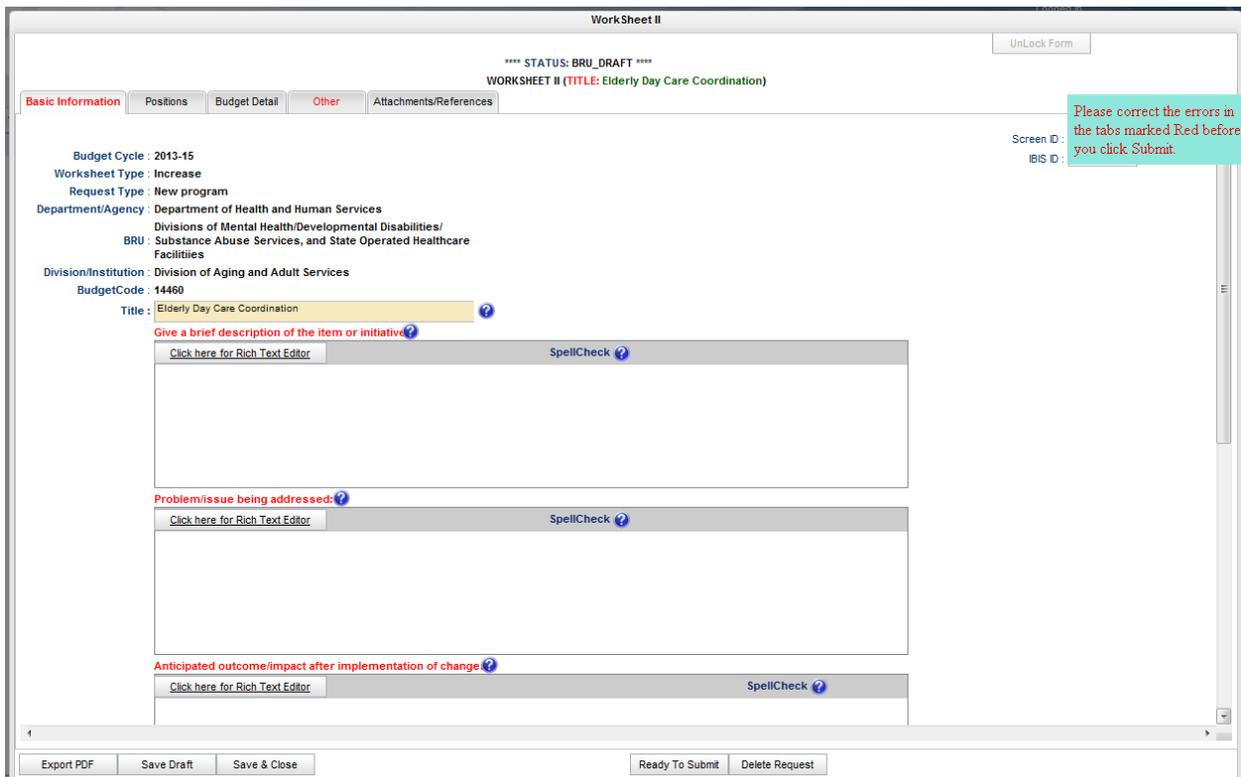
References

No items to show.

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

Selecting the Ready to Submit begins the form validation action. The form validation will examine the form to ensure all required fields are completed and any required fields not addressed will be identified (in red). Prior to successful submittal, required fields must be filled.

Please correct the errors in the tabs marked Red before you click Submit.



The screenshot shows the 'WorkSheet II' form with the following details:

- Status: BRU_DRAFT
- Title: Elderly Day Care Coordination
- Budget Cycle: 2013-15
- Worksheet Type: Increase
- Request Type: New program
- Department/Agency: Department of Health and Human Services
- BRU: Substance Abuse Services, and State Operated Healthcare Facilities
- Division/Institution: Division of Aging and Adult Services
- BudgetCode: 14460
- Title: Elderly Day Care Coordination

Three text input fields are highlighted with red error messages:

- Give a brief description of the item or initiative:** This field is empty and has a red error message.
- Problem/issue being addressed:** This field is empty and has a red error message.
- Anticipated outcome/impact after implementation of change:** This field is empty and has a red error message.

Each text field includes a 'Click here for Rich Text Editor' link and a 'SpellCheck' button. At the bottom of the form, there are buttons for 'Export PDF', 'Save Draft', 'Save & Close', 'Ready To Submit', and 'Delete Request'. A 'UnLock Form' button is located in the top right corner.

Please correct the errors in the tabs marked Red before you click Submit.

After correcting required field validation errors, click the Ready to Submit button. A message will briefly flash by that the form has changed state. The active form will close and a read-only version will appear.

UnLock Form

**** STATUS: BRU_READY_TO_SUBMIT ****

Screen ID : WSII-Read Only
 IBIS ID : 7ILK
 Budget Cycle : 2013-15
 Worksheet Type : Increase
 Request Type : New program

Department/Agency : Department of Health and Human Services
 BRU : Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities
 Division/Institution : Division of Aging and Adult Services
 BudgetCode : 14460
 Title : Elderly Day Care Coordination

Give a brief description of the item or initiative:

Problem/issue being addressed:

Anticipated outcome/impact after implementation of changes:

Relation to agency goals and agency key indicators:

Agenda : Do more with less
 Impact on Governor's Agenda:

2. POSITIONS

Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

Export PDF Close Edit Submit To Agency Submit To OSBM Delete Request

Above is the read only version of a Worksheet II form in Ready to Submit status, which presents several buttons across the bottom of the form. These buttons are Export PDF, Close, Edit, Submit to Agency (for the University System and DHHS), Submit to OSBM, and Delete Request.

The [Export PDF button](#) functions as described above. Select the Close button to close this read only version of a form and return to the work queue.

UnLock Form

**** STATUS: BRU_READY_TO_SUBMIT ****

Screen ID : WSII-Read Only
 IBIS ID : 7ILK
 Budget Cycle : 2013-15
 Worksheet Type : Increase
 Request Type : New program
 Department/Agency : Department of Health and Human Services
 BRU : Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities
 Division/Institution : Division of Aging and Adult Services
 BudgetCode : 14460
 Title : Elderly Day Care Coordination

Give a brief description of the item or initiative:

Problem/issue being addressed:

Anticipated outcome/impact after implementation of changes:

Anticipated outcome/impact after implementation of change:

Relation to agency goals and agency key indicators:

Relation to agency goals and agency key indicators:

Agenda : Do more with less
 Impact on Governor's Agenda:

Impact on Governor's Agenda:

2. POSITIONS

Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

Export PDF Close Edit Submit To Agency Submit To OSBM Delete Request

A Confirm window will appear when the Close button is clicked. Click the Cancel button to cancel the close action and return to the read only form. Click the OK button to close the form and return to the work queue where you can see the form request listed with a status of Ready to Submit.

Confirm ✕


Are you sure you want to Close this window?

View: BRU - Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities

BRU Work Queue

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BA-7TG	14411	Worksheet-I	Test #3	BRU Draft	ibisuser20		2012-11-08 9:50 AM
BA-7IS	14411	Worksheet-I	Test #2	BRU Draft	ibisuser20		2012-11-08 9:48 AM
BA-7ISG	14411	Worksheet-I	Test	BRU Draft	ibisuser20		2012-11-08 9:48 AM
14460		Worksheet-II	Elderly Day Care Coordination	BRU Ready To Submit	ibisuser5		2012-11-08 11:56 AM
BA-7HH	24465	Worksheet-I	Add service	BRU Ready To Submit	ibisuser5		2012-11-07 3:38 PM
BA-7IF	14460	Worksheet-I	test edit after return to bru	Returned To BRU	ibisuser6		2012-11-07 2:50 PM
BB-7HU	24465	Worksheet-I	Added new service for Umstead Hospital	BRU Draft	ibisuser5		2012-11-07 2:25 PM
BB-7IOC	14460	Worksheet-I	test 7	Returned To BRU	ibisuser6		2012-11-07 11:24 AM
BB-7INQ	14460	Worksheet-I	test view messages open form	Returned To BRU	ibisuser5		2012-11-07 10:51 AM
BA-7NB	14470	Worksheet-I	Test	BRU Draft	ibisuser21		2012-11-06 8:13 PM
BA-7M6	14460	Worksheet-I	pdf two windows	BRU Draft	ibisuser5		2012-11-06 3:46 PM
BA-7LI	14460	Worksheet-I	test two window error	BRU Ready To Submit	ibisuser5		2012-11-06 11:50 AM
BA-7KA	24401	Worksheet-I	sdfsdf	BRU Draft	ibisuser5		2012-11-05 3:20 PM

To re-open the form, double-click on it in the work queue. The form will re-appear in a Ready to Submit status. To edit the read only form, click on the Edit button.

**** STATUS: BRU_READY_TO_SUBMIT ****

Screen ID : WSII-Read Only
IBIS ID : 71LK
Budget Cycle : 2013-15
Worksheet Type : Increase
Request Type : New program
Department/Agency : Department of Health and Human Services
BRU : Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities
Division/Institution : Division of Aging and Adult Services
BudgetCode : 14460
Title : Elderly Day Care Coordination

Give a brief description of the item or initiatives:
Brief Description

Problem/issue being addressed:
Problem/issue being addressed

Anticipated outcome/impact after implementation of changes:
Anticipated outcome/impact after implementation of change

Relation to agency goals and agency key indicators:
Relation to agency goals and agency key indicators

Agenda : Do more with less
Impact on Governor's Agenda:
Impact on Governor's Agenda

2. POSITIONS

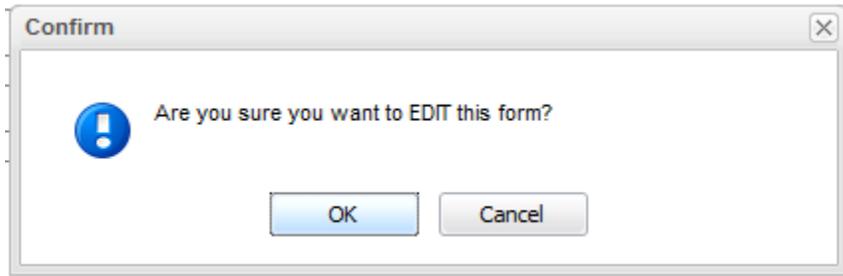
Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salar (2013-14)	Budgeted Salar (2014-15)	Retirement Program
No items to show.													

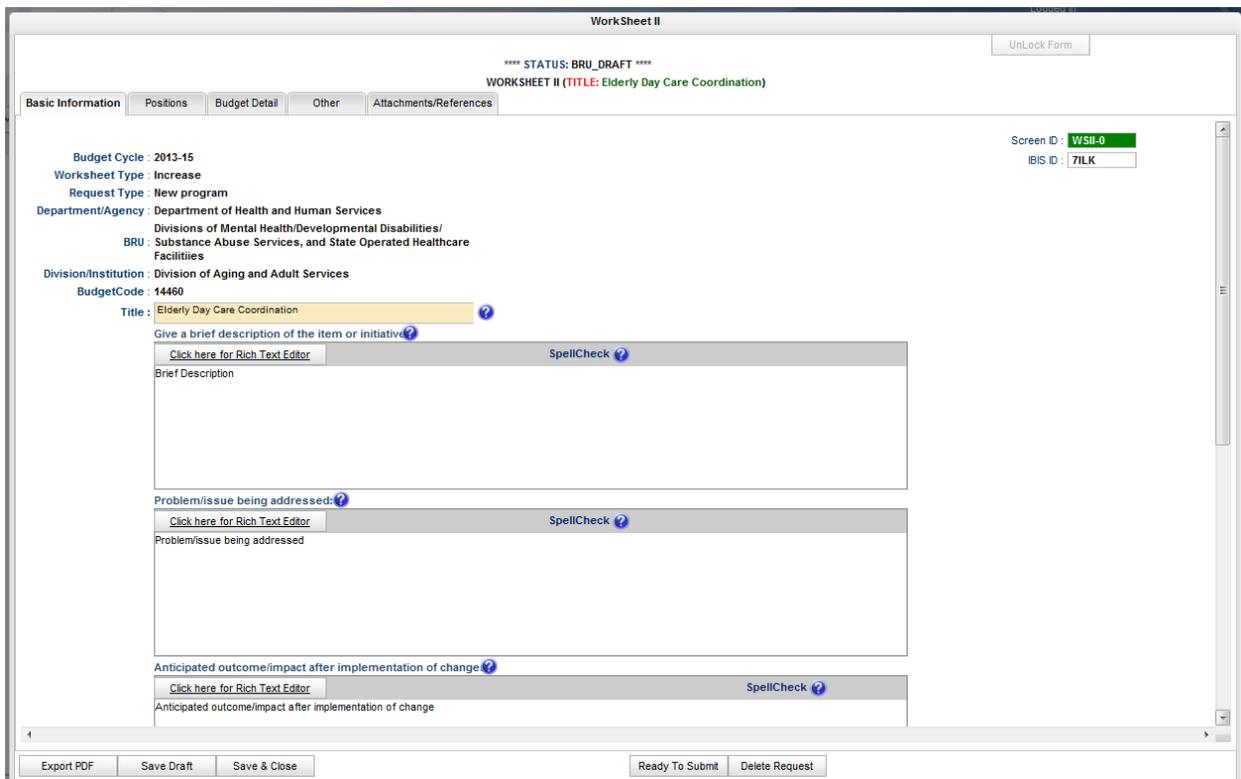
***Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

Export PDF Close Edit Submit To Agency Submit To OSBM Delete Request

A Confirm window will appear. Click the Cancel button to cancel the edit action and return to the read only form. Click the OK button to open the form in editable mode and make changes as appropriate.



From the Edit mode, the form will be an active form again with the standard buttons discussed above. Edits can be made and it can be returned back to a Ready Submit status by clicking on Ready to Submit.



In the ready to submit, read-only view, the form can be deleted by clicking the Delete Request button. When Delete Request is clicked, a confirm window will appear asking if you wish to delete. If you click yes, the form will be deleted. If you click no, the window will disappear and the form will remain.

Worksheet II

UnLock Form

**** STATUS: BRU_READY_TO_SUBMIT ****

Screen ID : WSII-Read Only
 IBIS ID : 7ILK
 Budget Cycle : 2013-15
 Worksheet Type : Increase
 Request Type : New program
 Department/Agency : Department of Health and Human Services
 BRU : Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities
 Division/Institution : Division of Aging and Adult Services
 BudgetCode : 14460
 Title : Elderly Day Care Coordination

Give a brief description of the item or initiative:

Problem/issue being addressed:

Anticipated outcome/impact after implementation of changes:

Anticipated outcome/impact after implementation of change:

Relation to agency goals and agency key indicators:

Relation to agency goals and agency key indicators:

Agenda : Do more with less
 Impact on Governor's Agenda:

Impact on Governor's Agenda:

2. POSITIONS

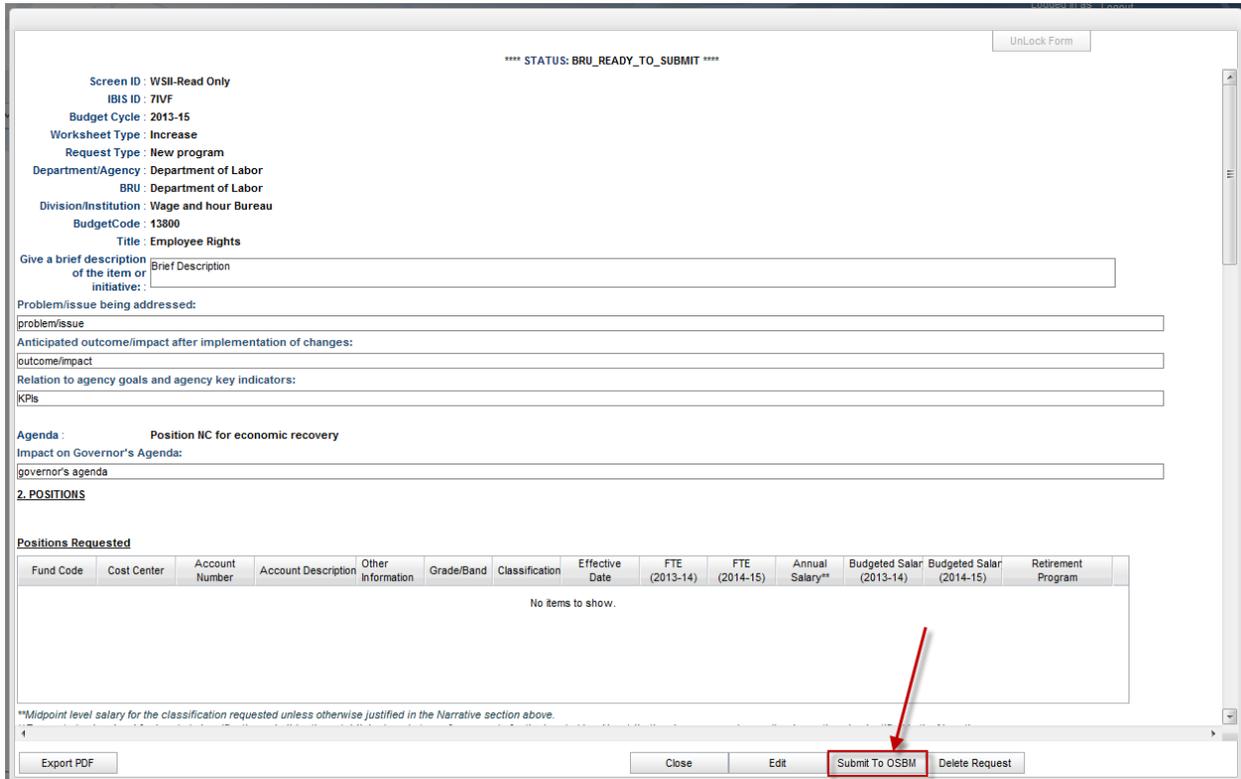
Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

Export PDF Close Edit Submit To Agency Submit To OSBM **Delete Request**

From the Ready to Submit state, the form can be forwarded in the workflow by clicking the Submit to OSBM button.



**** STATUS: BRU_READY_TO_SUBMIT ****

UnLock Form

Screen ID : WSII-Read Only
 IBIS ID : 71VF
 Budget Cycle : 2013-15
 Worksheet Type : Increase
 Request Type : New program
 Department/Agency : Department of Labor
 BRU : Department of Labor
 Division/Institution : Wage and hour Bureau
 BudgetCode : 13800
 Title : Employee Rights

Give a brief description of the item or initiative:

Problem/issue being addressed:

Anticipated outcome/impact after implementation of changes:

Relation to agency goals and agency key indicators:

KPIs

Agenda : Position NC for economic recovery
 Impact on Governor's Agenda:

governor's agenda

2. POSITIONS

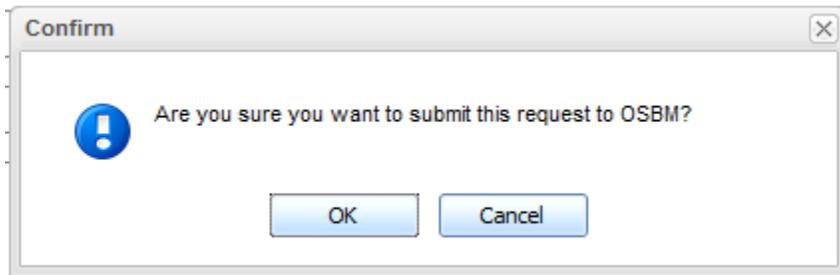
Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

Export PDF Close Edit **Submit To OSBM** Delete Request

When Submit to OSBM is selected, a Confirm window will appear. To continue the Submit to OSBM action, click OK. To cancel the Submit to OSBM action, click on Cancel.



Confirm

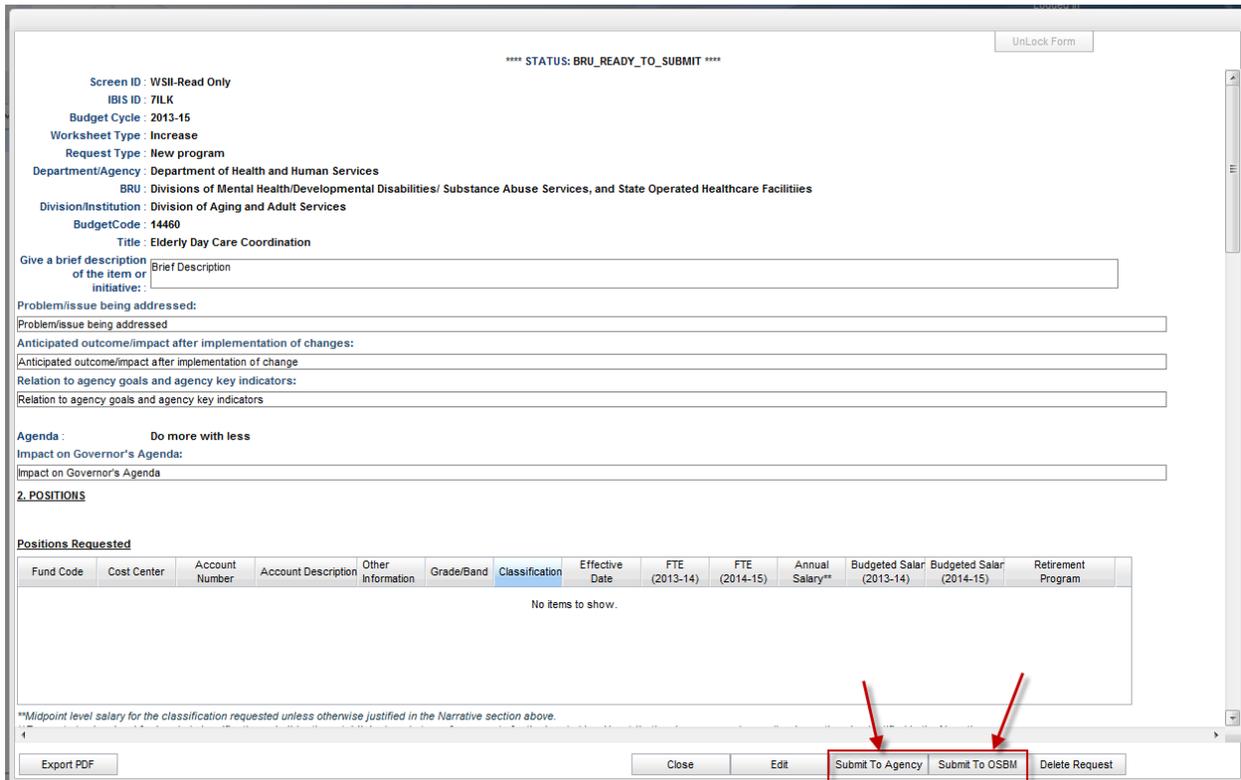
Are you sure you want to submit this request to OSBM?

OK Cancel

When OK is selected, a message will flash that the form is changing status from Ready to Submit to Submitted to OSBM, followed by a Status changed successfully message. The form will close and the user will be returned to the work queue. The form will no longer be displayed in the work queue since it has been moved to the OSBM work queue.

Changing status from
BRU_Ready_To_Submit to
Submitted_To_OSBM

Note: There is also a Submit to Agency option for the University System and the Department of Health and Human Services as shown below. This option only exists for these two departments.



**** STATUS: BRU_READY_TO_SUBMIT ****

Screen ID : WSII-Read Only
IBIS ID : 7ILK
Budget Cycle : 2013-15
Worksheet Type : Increase
Request Type : New program
Department/Agency : Department of Health and Human Services
BRU : Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities
Division/Institution : Division of Aging and Adult Services
BudgetCode : 14460
Title : Elderly Day Care Coordination

Give a brief description of the item or initiative:

Problem/issue being addressed:

Anticipated outcome/impact after implementation of changes:

Anticipated outcome/impact after implementation of change:

Relation to agency goals and agency key indicators:

Relation to agency goals and agency key indicators:

Agenda : Do more with less
Impact on Governor's Agenda:

Impact on Governor's Agenda:

2. POSITIONS

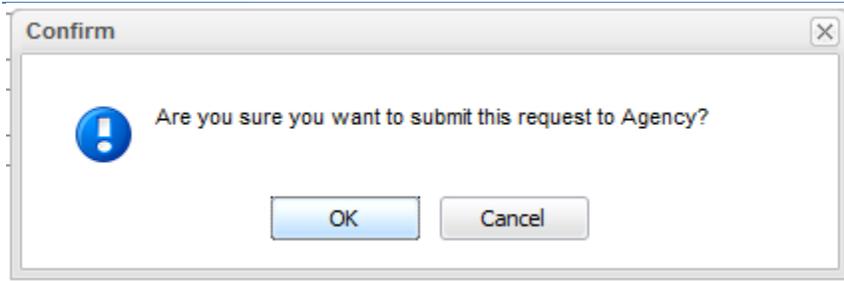
Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salar (2013-14)	Budgeted Salar (2014-15)	Retirement Program
No items to show.													

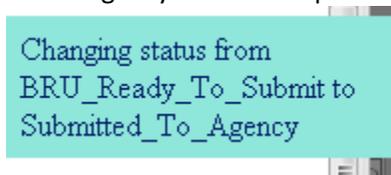
**Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

Export PDF Close Edit **Submit To Agency** **Submit To OSBM** Delete Request

When the Submit to Agency option is selected (DHHS and University system only), a Confirm window will appear. To continue the Submit to Agency action, click OK. To cancel the Submit to Agency action, click on Cancel.

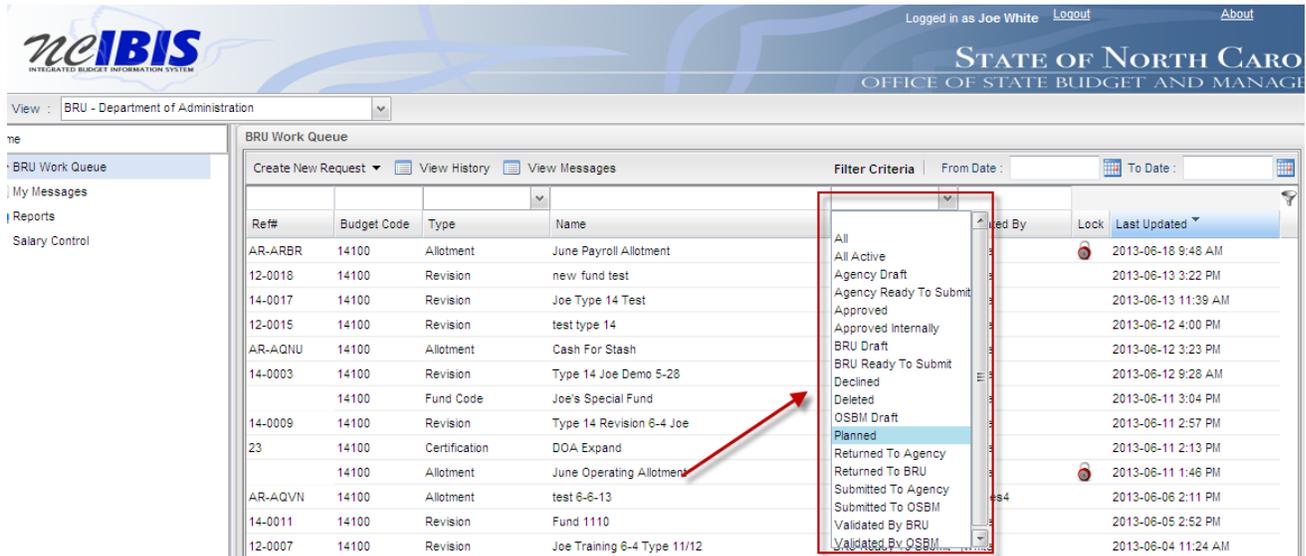


When OK is selected, a message will flash that the form is changing status from Ready to Submit to Submitted to Agency, followed by a Status changed successfully message. The form will close and the user will be returned to the work queue. The form will no longer be displayed in the work queue since it has been moved to the Agency level work queue.



GENERAL IBIS WORKFLOW OVERVIEW

There can be several statuses for a form within the system. The full list of available statuses can be shown by clicking the dropdown option above Status in the work queue as shown below. The list shown below is for a BRU; however, there will be slightly different options for agency and OSBM users.



The [Submitting a Form](#) section in this user guide details how to submit a specific form. There are other areas of the system that allow you to track all workflow changes, including the View History, My Messages, View Messages, and work queue filtering features. Each is designed to provide a user with information to track workflow changes for each form in the system. For example, if a form is submitted to OSBM then there will be a record created within View History. For more information on these functions, please consult the other user guides posted on the [IBIS training page](#).

The diagram on the next page describes the general workflow of the system and what actions can take place at various workflow stages. This diagram applies to all BRUs within IBIS except for the University of North Carolina and the Department of Health and Human Services. In those areas, there is also a option to submit to the agency, which would be an intermediate step between the BRU and OSBM. When a form resides at the agency, an agency user will have the same basic options available to BRU users but also has the ability to return a form to a BRU.

