INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

HOME MENU / WORK QUEUE

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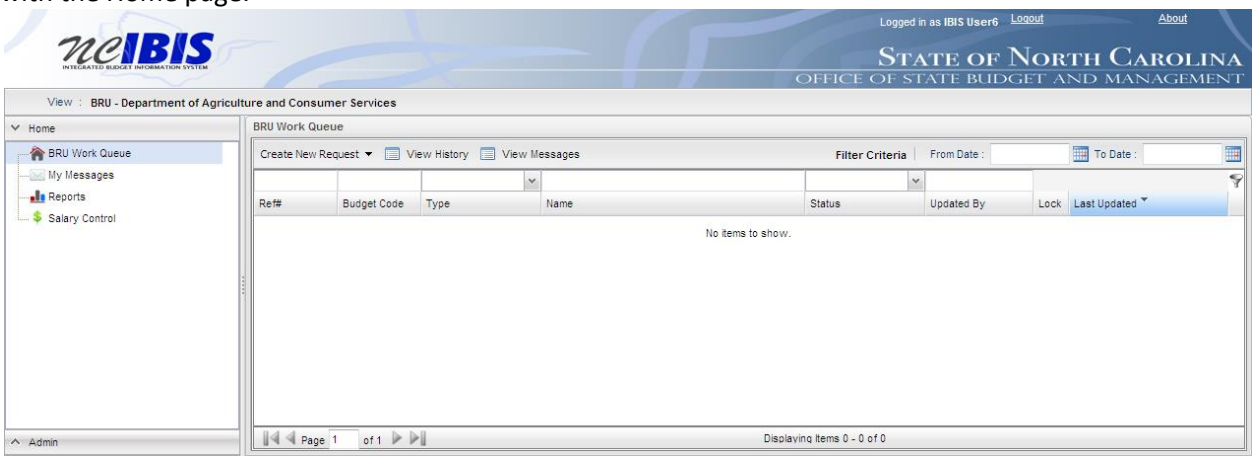
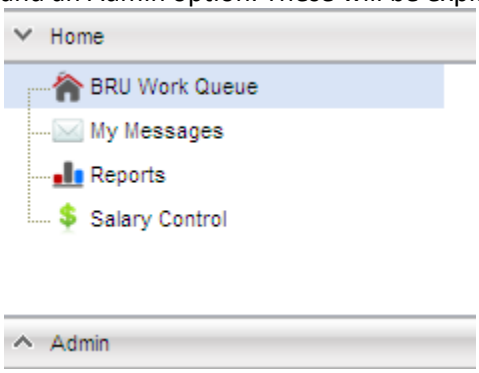
Home and Admin Menu

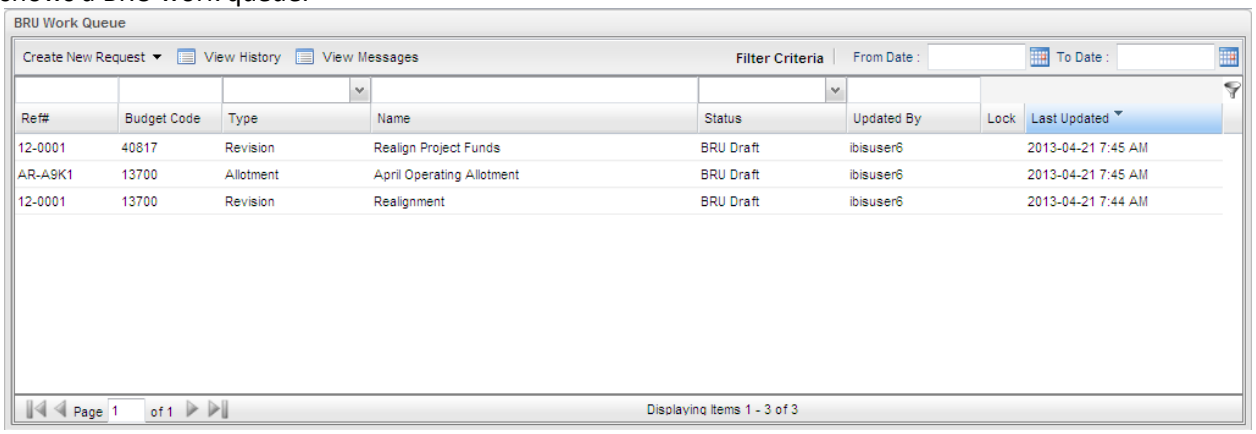
Log into IBIS using your NCID and NCID password. Once the login window has closed, you are presented with the Home page.



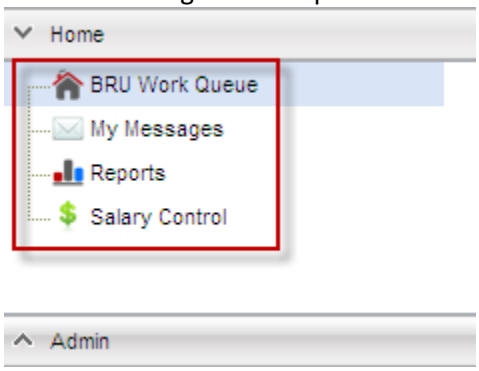
The Home page is divided into left and right pane viewing areas. The left side contains a Home option and an Admin option. These will be explained in the following sections of this user guide.



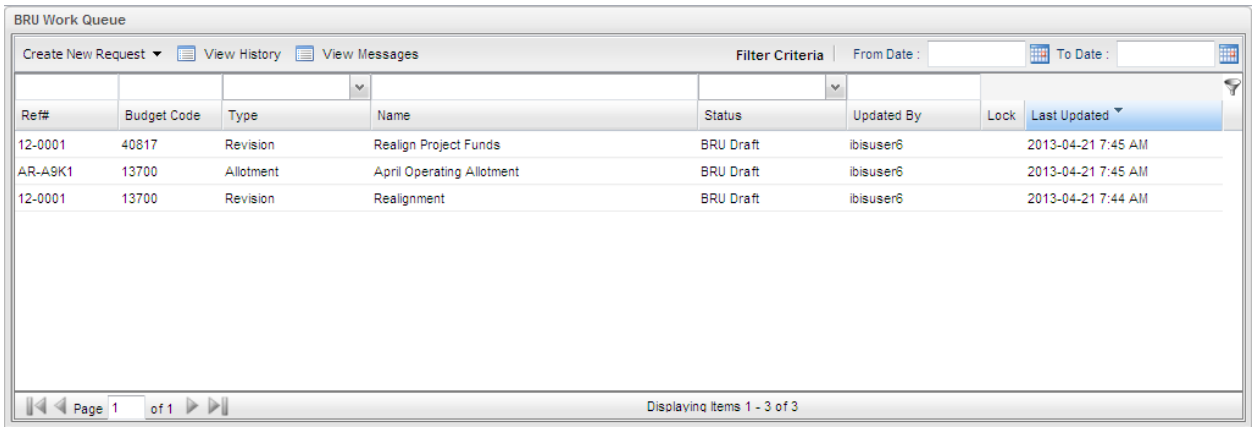
The right side defaults to a work queue. This will be a Budget Reporting Unit (BRU) work queue, an Agency work queue, or OSBM work queue depending on your login credentials. The example below shows a BRU work queue.



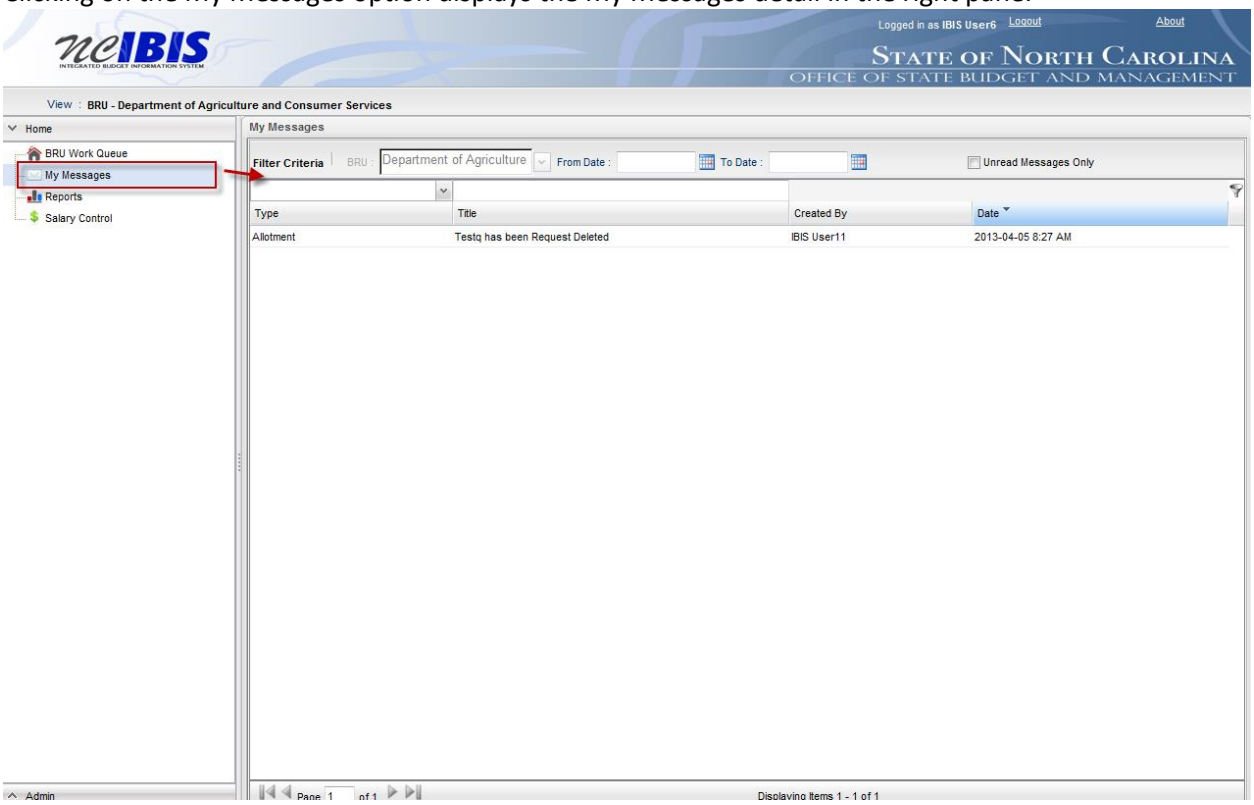
The left menu presents four navigation options under the Home header: BRU Work Queue, My Messages, Reports, Salary Control. Admin is another option located at the bottom of the screen. Clicking Admin will bring forth a separate set of options, which will be covered later in this user guide.



Clicking on the BRU Work Queue option will bring the user back to the default Home page view as shown below.

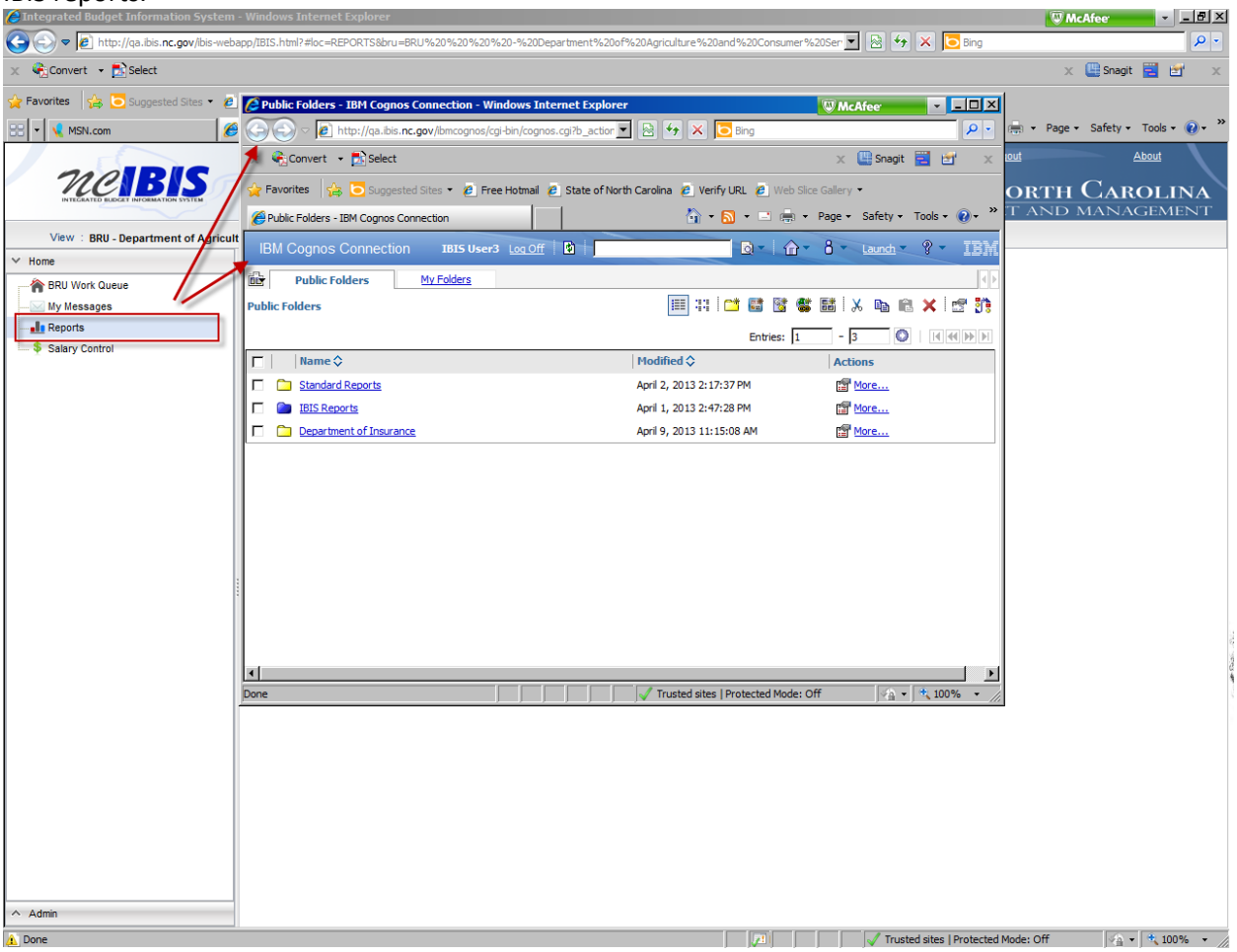


Clicking on the My Messages option displays the My Messages detail in the right pane.



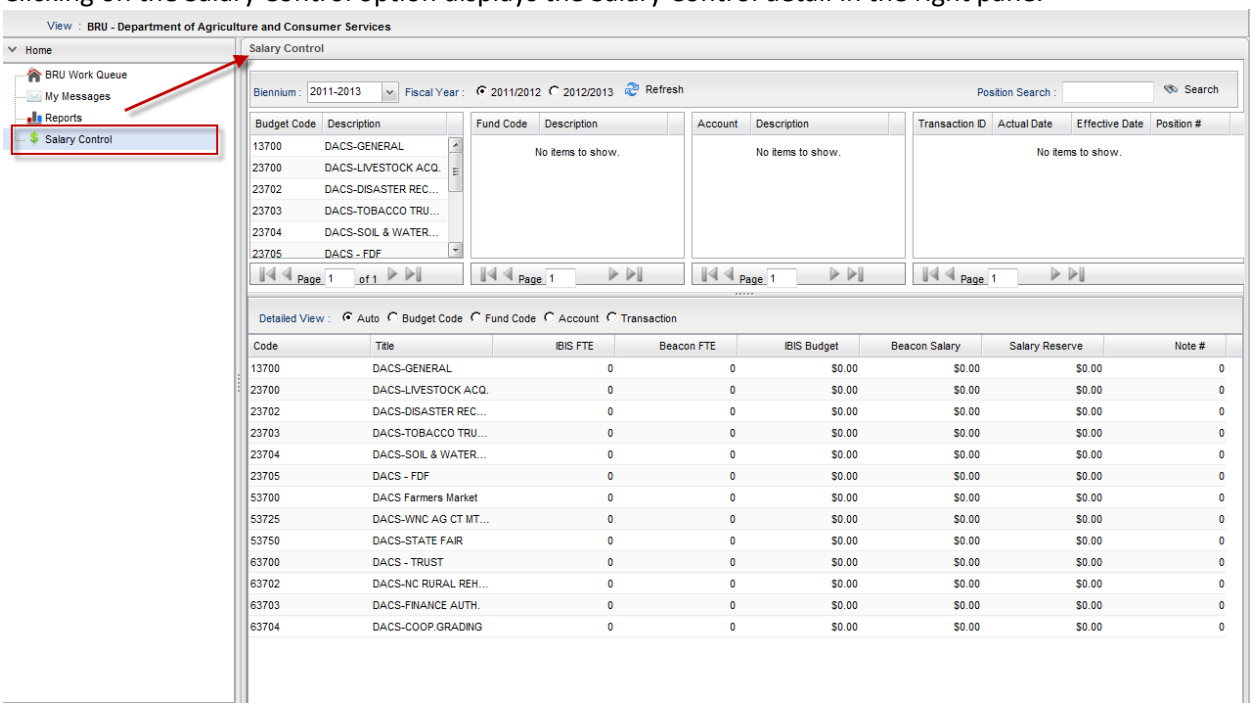
My Messages provides internal system communications and updates about each form within the system. Click here for detailed instructions about My Messages.

Clicking on the Reports option will cause a second window to open and allow the user to access and run IBIS reports.



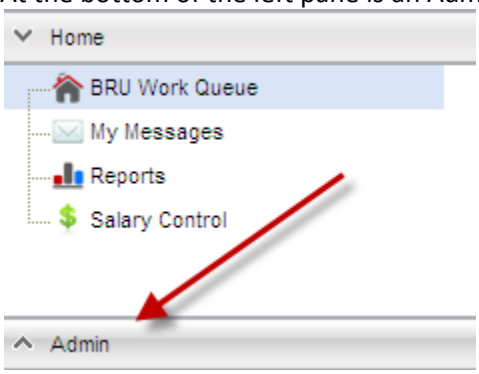
Detailed information on the Reporting functionality can be found in the report user guide [located on the IBIS website](#).

Clicking on the Salary Control option displays the Salary Control detail in the right pane.

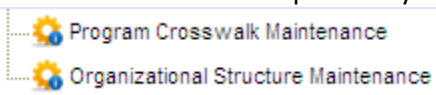


Detailed information on Salary Control can be found in the Salary Control user guide [located on the IBIS website](#).

At the bottom of the left pane is an Admin option.



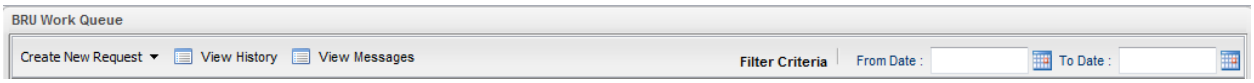
Clicking on the Admin option will display two sub-menu options: Program Crosswalk Maintenance and Organizational Structure Maintenance. Depending on budget development timing, the Program Crosswalk Maintenance option may or may not be displayed.



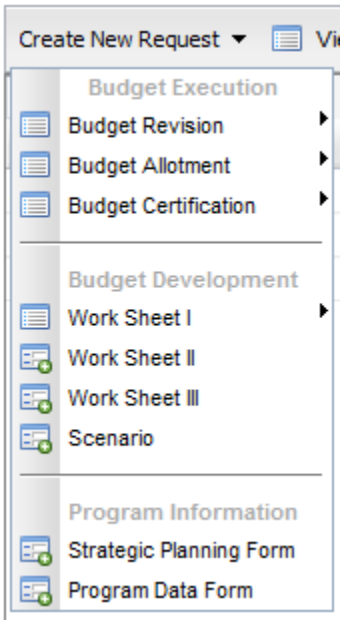
Detailed information regarding Admin functionality, such as creating new budget and fund codes, can be found in other user guides [located on the IBIS website](#). This document focuses on the Home menu and work queue and their features and functionality.

Create New Request

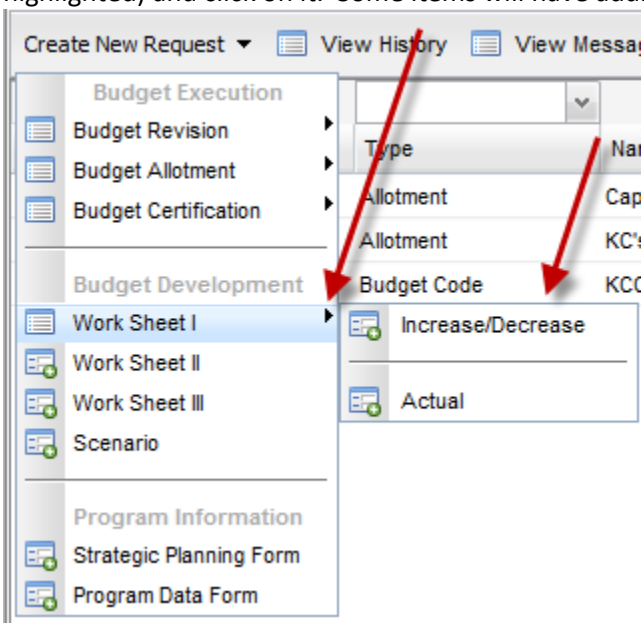
The BRU Work Queue presents several options across the top: Create New Request, View History, View Messages, Filter Criteria (header), From Date and To Date.



The Create New Request function presents a dropdown list where you can select from many forms and functions. Depending on budget development timing, the some options may or may not be active such as Worksheet I, II, and IIIs.



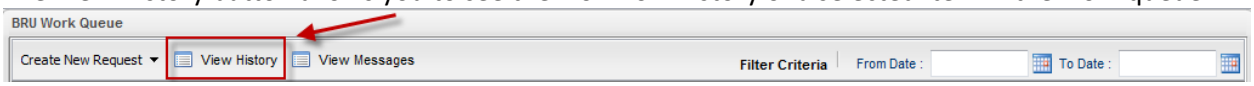
To make a selection from this list, move your cursor/pointer to the preferred option (which will become highlighted) and click on it. Some items will have additional sub-menus as shown below.



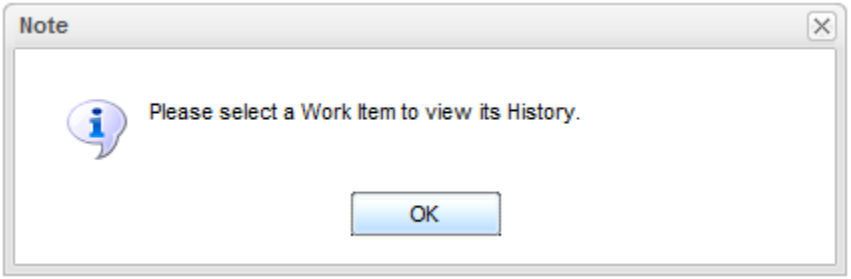
Selecting any of these options will open a "Basic Information" window. This window is discussed in depth in each of the form training documents and will not be addressed in this user guide. For specific form information, visit the other user guides located on the IBIS website

View History

The View History button allows you to see the workflow history of a selected item in the work queue.



Clicking on the View History button without having first selected an item in the work queue will result in the following message displaying:



Click on OK to close the message window and return to the work queue.

To property display a form's history, highlight an item in the work queue, click on the View History button and the work item history will be displayed as shown below.

Work Item History Window

Ref#	Budget Code	Type	Name		Previous Status	Status	Updated By	Date
AR-105K4	13700	Allotment	KC's 2212013 allotment	CURRENT	Not Available	Returned To BRU	ibisuser6	03/12/2013 14:51
AR-105K4	13700	Allotment	KC's 2212013 allotment	HISTORY	Submitted To O...	Returned To BRU	ibisuser11	03/12/2013 13:43
AR-105K4	13700	Allotment	KC's 2212013 allotment	HISTORY	BRU Ready To...	Submitted To O...	ibisuser6	03/12/2013 11:10

The Work Item History Window displays information regarding the workflow movements of the item selected from the work queue. The Work Item History Window replicates the display of the Ref #, Budget Code, (form) Type and Name (title) fields as displayed in the Work Queue, followed by the line indicator (Current or History version of the form), Previous Status, Status, Updated by and Date information.

Forms can be opened from the Work Item History Window by double clicking on a form. The form will be displayed in read-only mode and it can be exported to a PDF from this view.

Budget Allotment-Operating: (Title: KC's 2212013 allotment , BRU: 100-Department of Agriculture and Consumer Services , Budget Code:13700-Agriculture and Consumer Services - General Fund)

UnLock Form

**** STATUS: RETURNED_TO_BRU ****

Basic Information

Biennium : 2011-13
Quarter : 3
Budget Code : 13700-Agriculture and Consumer Services - General Fund
Reference Number : AR-105K4
Title : KC's 2212013 allotment

Fiscal Year : 2012-2013
BRU : Department of Agriculture and Consumer Services
Effective Date : 02/21/2013
Request Type : Operating Allotment
IBIS ID : 10645

Justification : SpellCheck
This is a justification for KC's 2212013 allotment

Requirements

Account	Allotment Amount
1XXX-Personal Services	$0
2XXX-Purchased Services	$0
3XXX-Personal Services	$50,000
4XXX-Property, Plant and Equipment	$0
5XXX-Other Expenses and Adjustments	$2,500
6XXX-Aid and Public Assistance	$0
7XXX-Agency Reserve	$0
8XXX-Intergovernmental Transactions	$0
Planned Requirements	**$52,500**

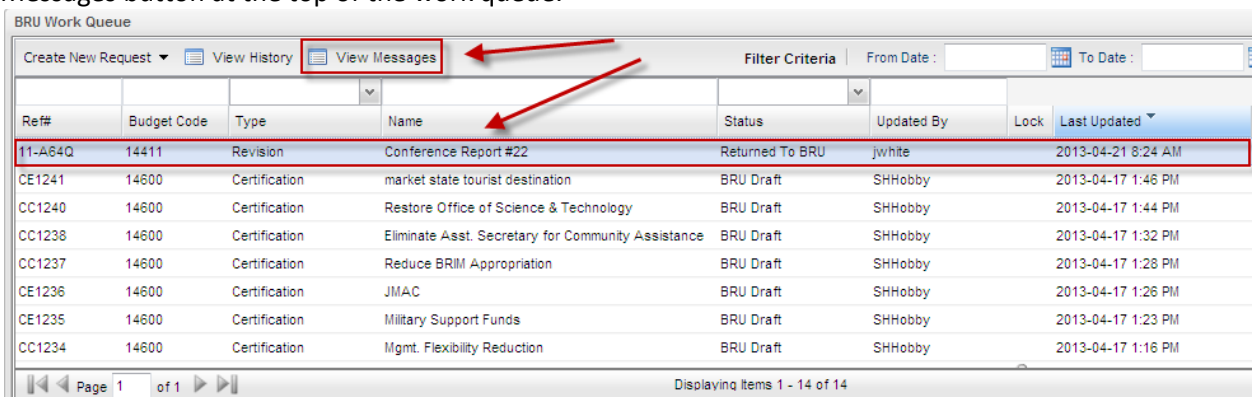
Receipts

Account	Allotment Amount
Federal Receipts	$0

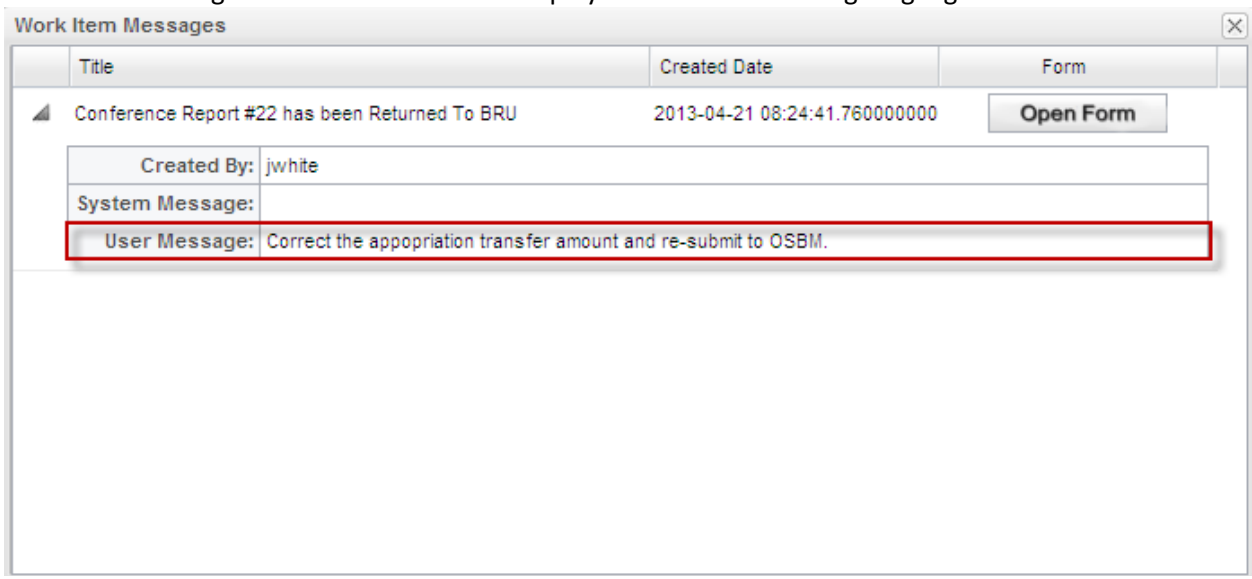
Export PDF Close

My Messages

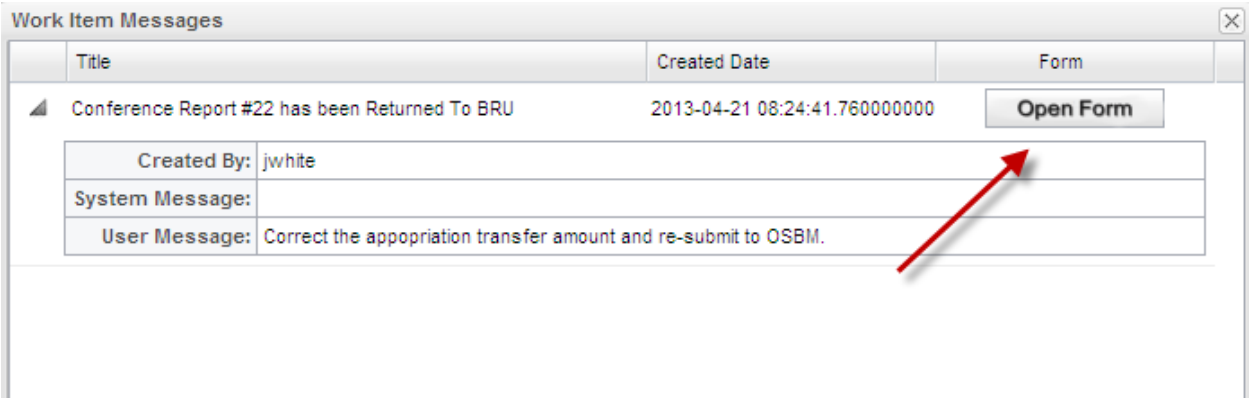
To view messages attached to a form, highlight the form in the work queue and click on the View Messages button at the top of the work queue.



The Work Item Messages Window will open and display all messages associated with the selected form. Messages are generated when a form moves through the IBIS workflow process. OSBM can also return forms with messages attached. This will be displayed in the user message highlighted below.

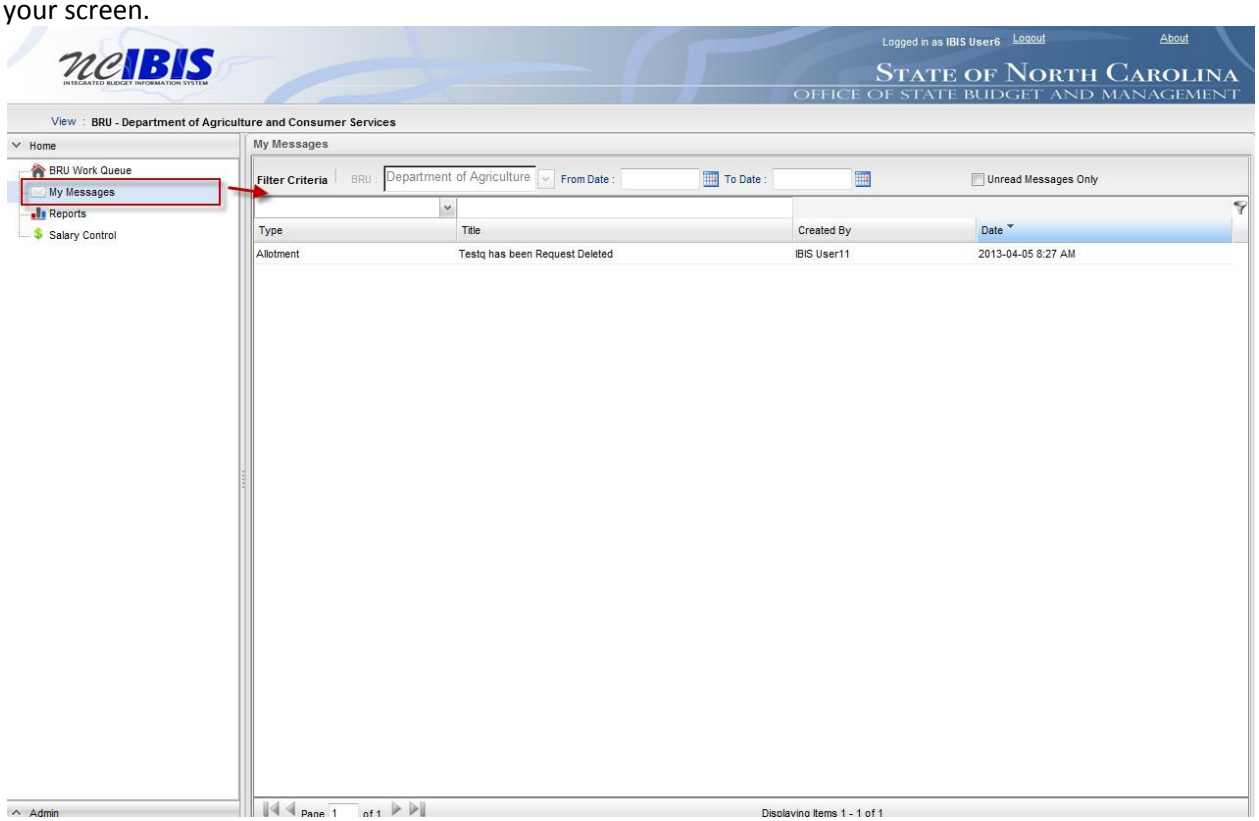


The Work Item Messages window displays any messages attached to the selected form, and the multiple workflow versions of that form. Next to each line appears an Open Form button which will open a form as it looked at that state in the workflow.

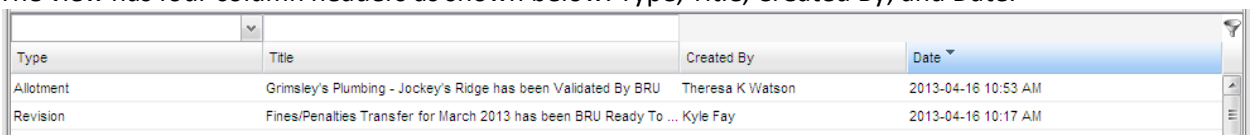


The Open Form button will open the form in read-only mode where the user can only Export the form as a PDF or close the form.

My Messages is also available through the left pane options displayed under the Home menu. This option is highlighted below. Clicking this option will show a My Messages window on the right side or your screen.

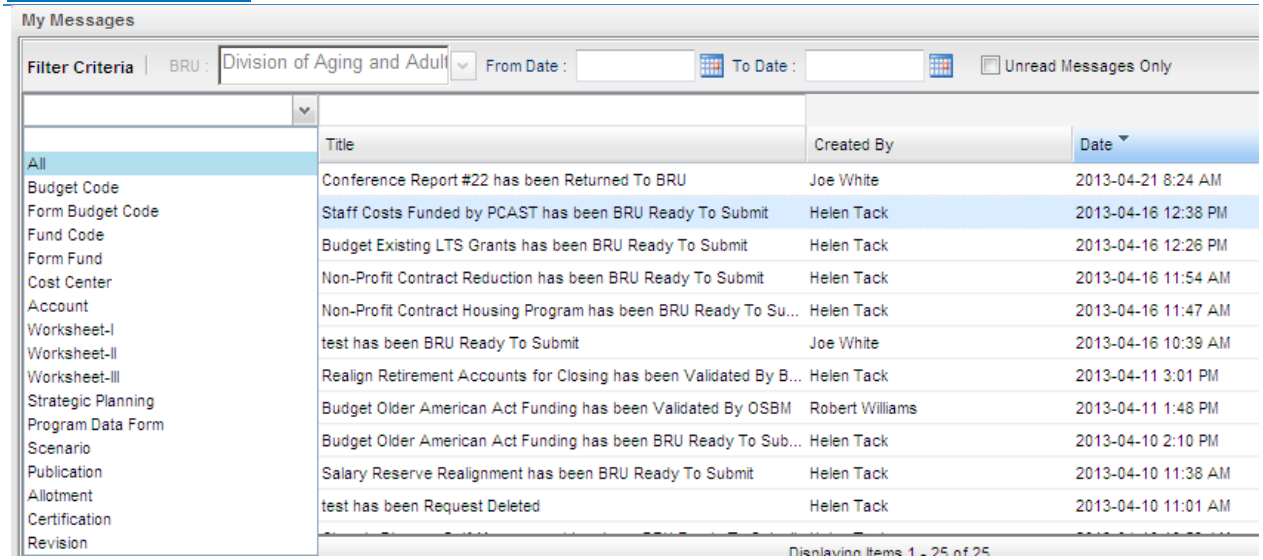


The view has four column headers as shown below: Type, Title, Created By, and Date.

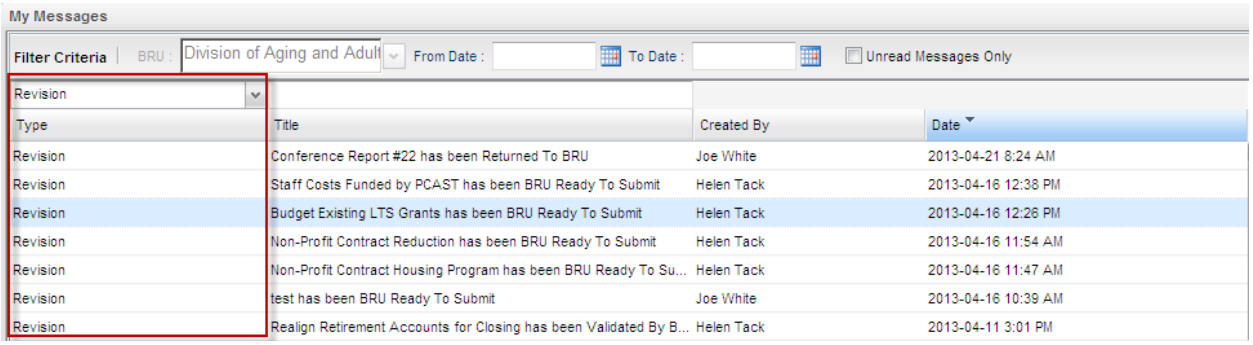


To view a message associated with a form, double click a displayed item. A Work Item Messages window will appear that displays information about the selected form.

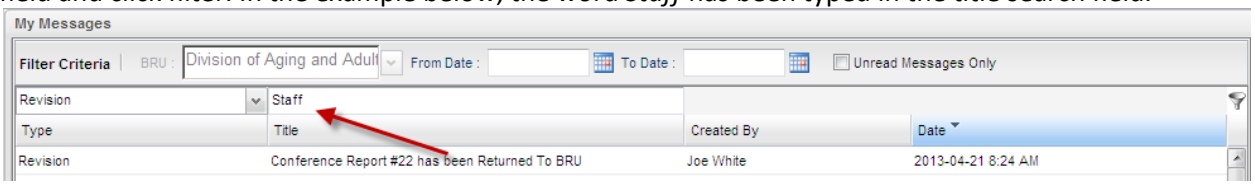
You may also sort the My Messages screen by clicking the dropdown arrow above type, selecting an option and clicking the filter button .



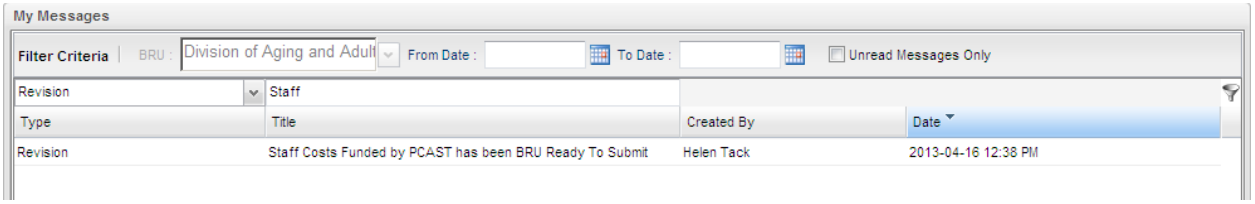
This will display messages associated with a particular type of form. In the example below, a revision filter was used.



My Messages can also be searched by title. To do so, type in a title, word, phrase, etc. above the Title field and click filter. In the example below, the word *Staff* has been typed in the title search field.

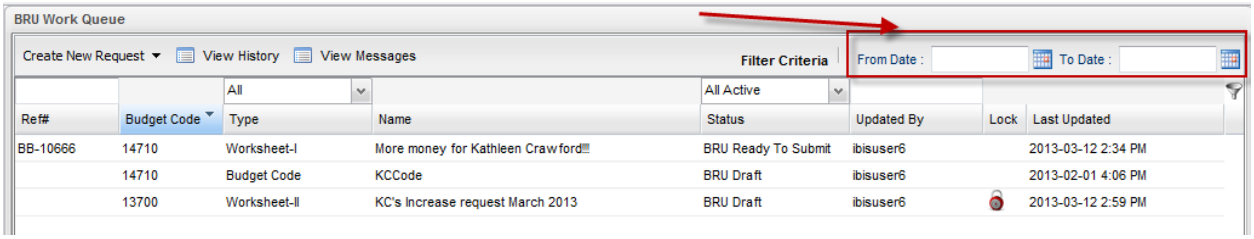


Click filter to return search results. In the example, one budget revision was returned based on the search criteria.

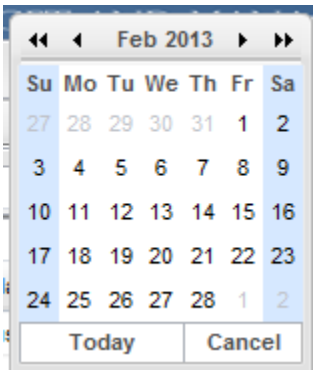


Filtering and Sorting

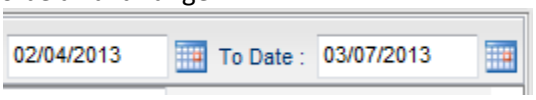
There are various options available for filtering and sorting what is shown in the work queue. One option is to filter by date. There are From Date and To Date fields, which, when utilized, will filter work queue items that do not fall within a specified date range.



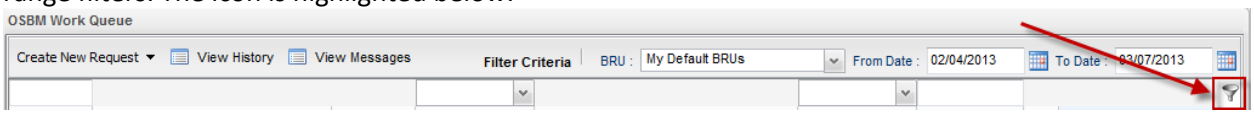
To use the date range filter, enter a start date in the From Date field either by keying it or by selecting the date from the calendar next to the field.



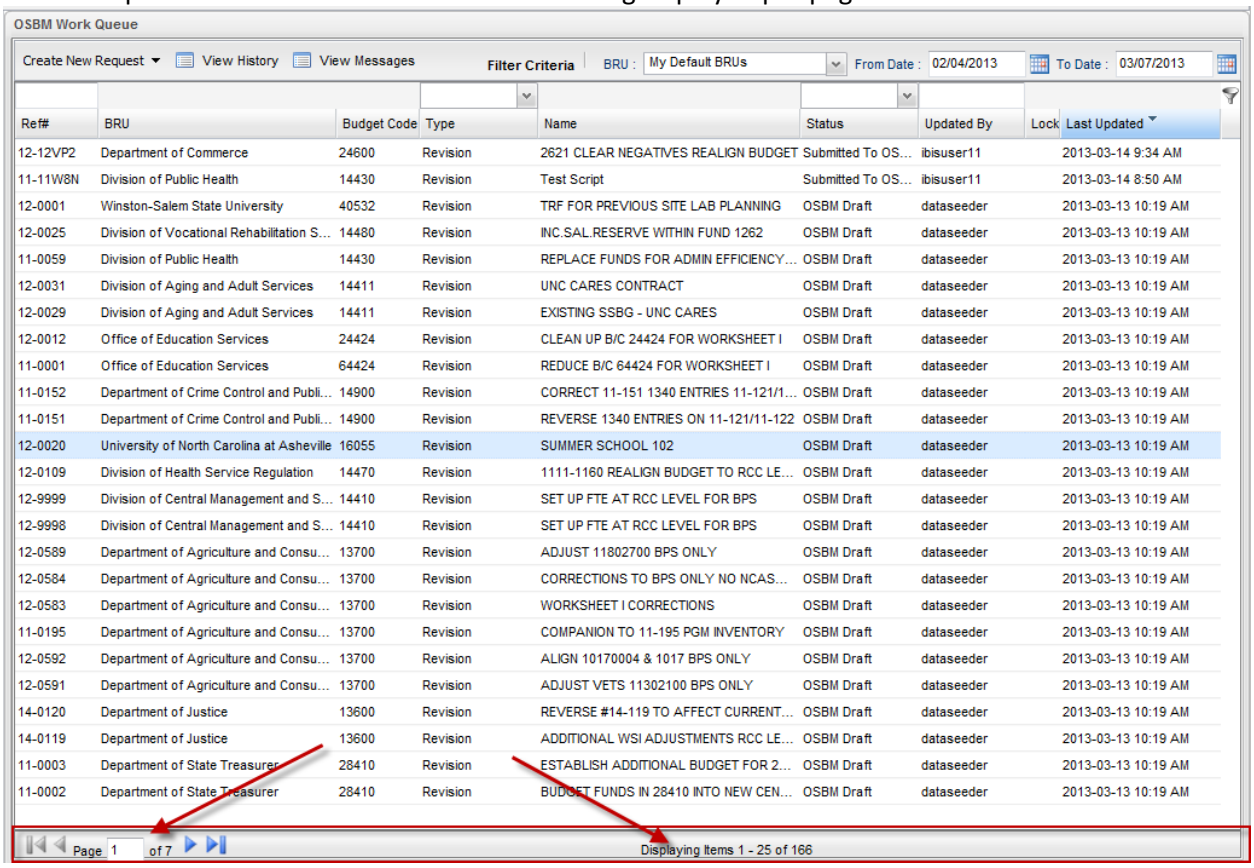
Repeat the same action in the To Date field. The From Date needs to occur prior to the To Date in order to be a valid range.



To complete the filtering process click on the Filter icon, which is a funnel on the line below the date range filters. The icon is highlighted below.

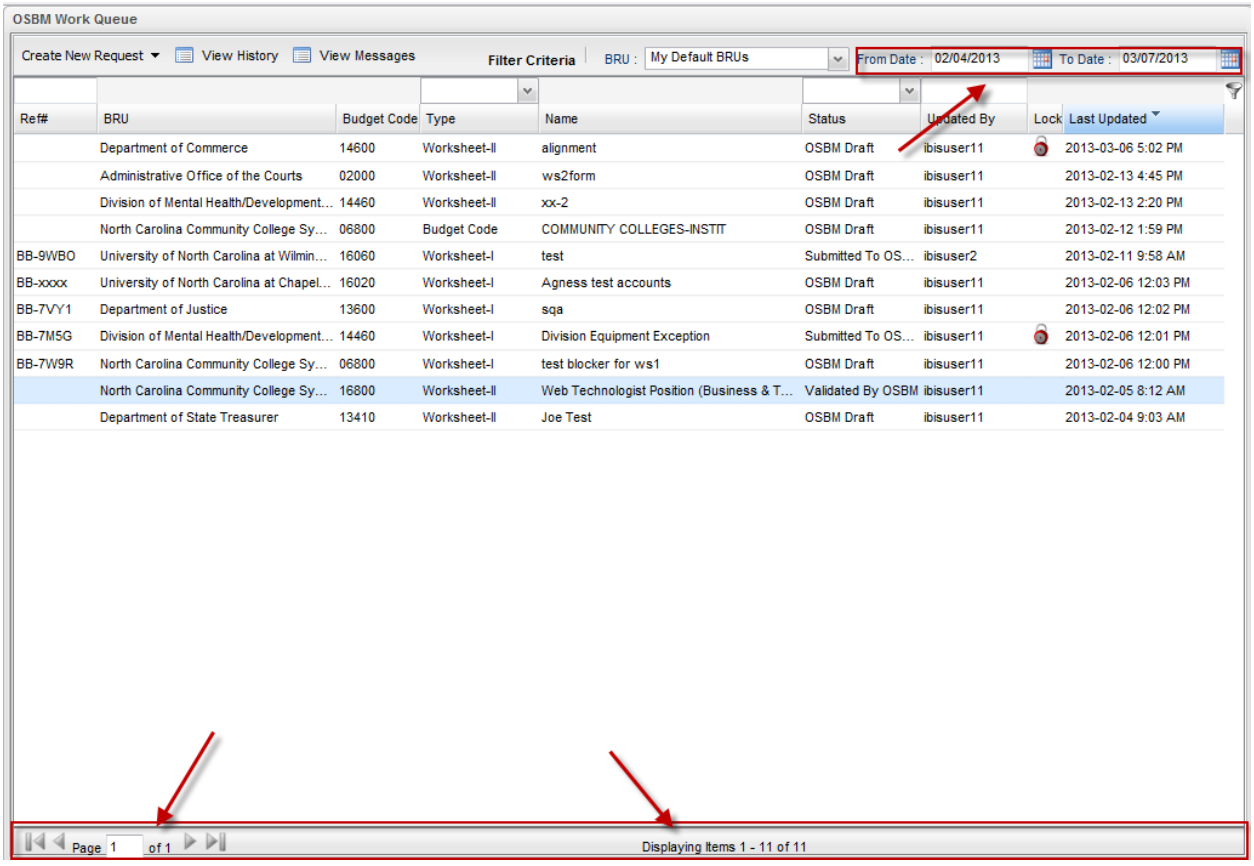


Prior to filtering, the work queue may contain many pages of items. After applying a filter, only the defined set will be displayed. The bottom of the screen displays indicators of the number of pages in the work queue as well as the number of items being displayed per page.



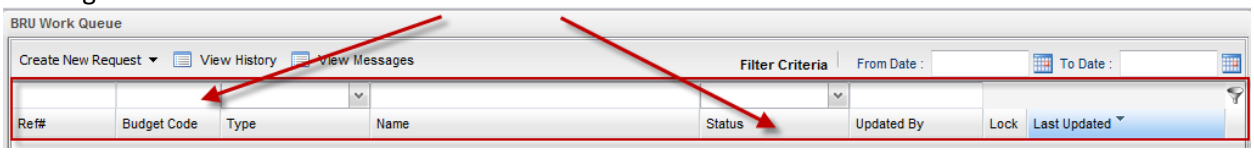
Ref#	BRU	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
12-12VP2	Department of Commerce	24600	Revision	2621 CLEAR NEGATIVES REALIGN BUDGET	Submitted To OS...	ibisuser11		2013-03-14 9:34 AM
11-11W8N	Division of Public Health	14430	Revision	Test Script	Submitted To OS...	ibisuser11		2013-03-14 8:50 AM
12-0001	Winston-Salem State University	40532	Revision	TRF FOR PREVIOUS SITE LAB PLANNING	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0025	Division of Vocational Rehabilitation S...	14480	Revision	INC.SAL.RESERVE WITHIN FUND 1262	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0059	Division of Public Health	14430	Revision	REPLACE FUNDS FOR ADMIN EFFICIENCY...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0031	Division of Aging and Adult Services	14411	Revision	UNC CARES CONTRACT	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0029	Division of Aging and Adult Services	14411	Revision	EXISTING SSBG - UNC CARES	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0012	Office of Education Services	24424	Revision	CLEAN UP B/C 24424 FOR WORKSHEET I	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0001	Office of Education Services	64424	Revision	REDUCE B/C 64424 FOR WORKSHEET I	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0152	Department of Crime Control and Publi...	14900	Revision	CORRECT 11-151 1340 ENTRIES 11-121/1...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0151	Department of Crime Control and Publi...	14900	Revision	REVERSE 1340 ENTRIES ON 11-121/11-122	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0020	University of North Carolina at Asheville	16055	Revision	SUMMER SCHOOL 102	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0109	Division of Health Service Regulation	14470	Revision	1111-1160 REALIGN BUDGET TO RCC LE...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-9999	Division of Central Management and S...	14410	Revision	SET UP FTE AT RCC LEVEL FOR BPS	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-9998	Division of Central Management and S...	14410	Revision	SET UP FTE AT RCC LEVEL FOR BPS	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0589	Department of Agriculture and Consu...	13700	Revision	ADJUST 11802700 BPS ONLY	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0584	Department of Agriculture and Consu...	13700	Revision	CORRECTIONS TO BPS ONLY NO NCAS...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0583	Department of Agriculture and Consu...	13700	Revision	WORKSHEET I CORRECTIONS	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0195	Department of Agriculture and Consu...	13700	Revision	COMPANION TO 11-195 PGM INVENTORY	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0592	Department of Agriculture and Consu...	13700	Revision	ALIGN 10170004 & 1017 BPS ONLY	OSBM Draft	dataseeder		2013-03-13 10:19 AM
12-0591	Department of Agriculture and Consu...	13700	Revision	ADJUST VETS 11302100 BPS ONLY	OSBM Draft	dataseeder		2013-03-13 10:19 AM
14-0120	Department of Justice	13600	Revision	REVERSE #14-119 TO AFFECT CURRENT...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
14-0119	Department of Justice	13600	Revision	ADDITIONAL WSI ADJUSTMENTS RCC LE...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0003	Department of State Treasurer	28410	Revision	ESTABLISH ADDITIONAL BUDGET FOR 2...	OSBM Draft	dataseeder		2013-03-13 10:19 AM
11-0002	Department of State Treasurer	28410	Revision	BUDGET FUNDS IN 28410 INTO NEW CEN...	OSBM Draft	dataseeder		2013-03-13 10:19 AM

After entering a date range and clicking on the filter icon, the number of work queue pages has been reduced as shown below. The date range remains displayed in the criteria boxes. The standard default view of the work queue is to display 25 active items starting with the most recently updated and going backward in time.

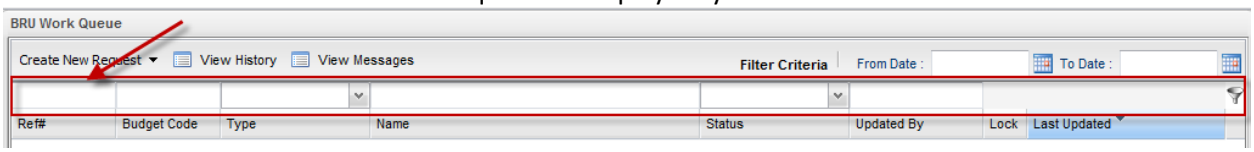


To remove the filter and restore the work queue display to its default appearance, clear the dates from the date range fields and click on the Filter icon again.

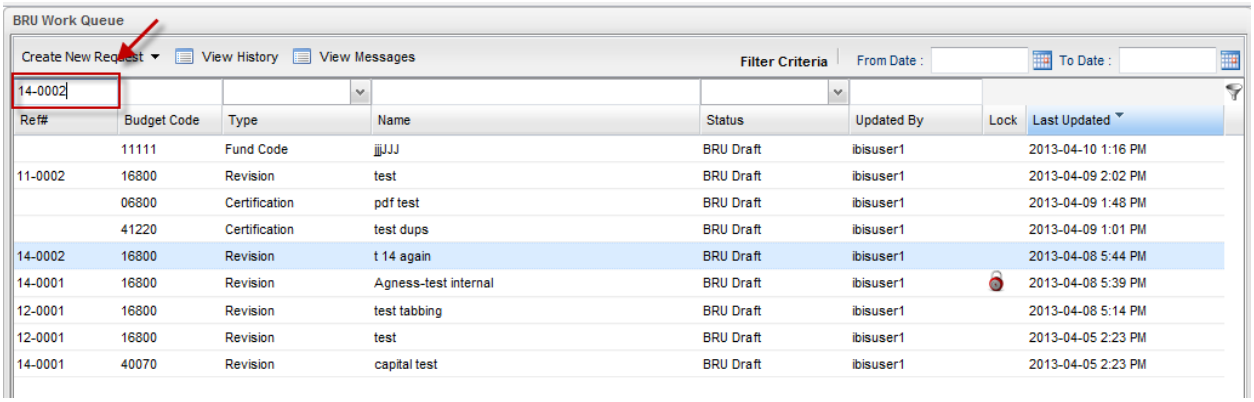
Another set of headers located directly above the work queue table perform more specific sorting and filtering.



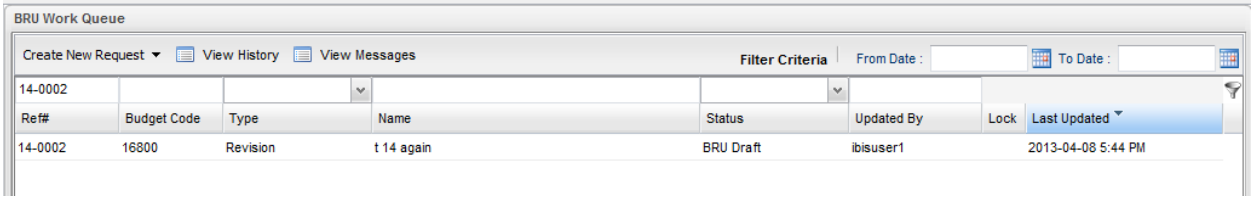
The first of these rows provides “search” functionality, meaning it allows the user to enter in specific search criteria and then filter the work queue to display only results that contain those criteria.



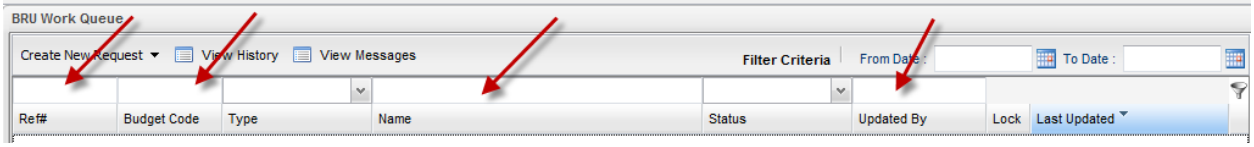
For example, in the space above the Ref# header, the user can type a reference number associated with the form. To complete the search, the user must click on the filter button.



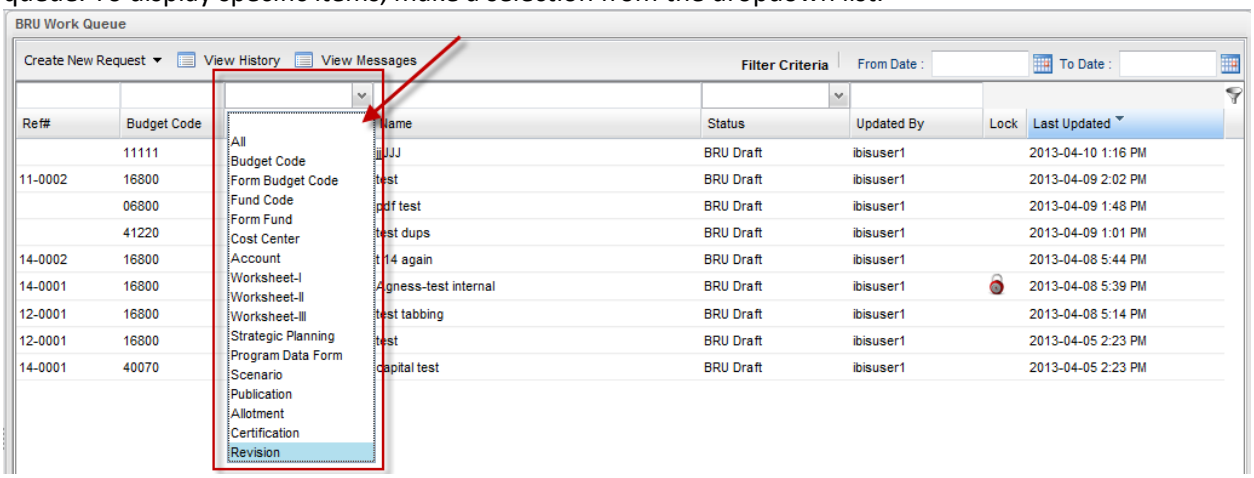
The list in the work queue will display filtered results based on the search as shown below. This type of filtered search can be completed for Ref#, Budget Code, Name, and the Updated By field.



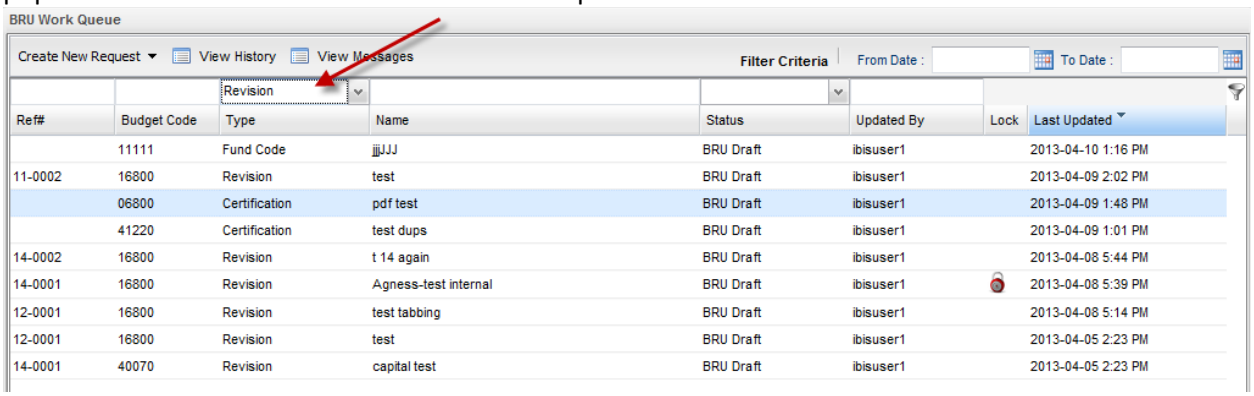
To return the work queue to its unfiltered state, the user should clear the entry from the search field and click the filter button.



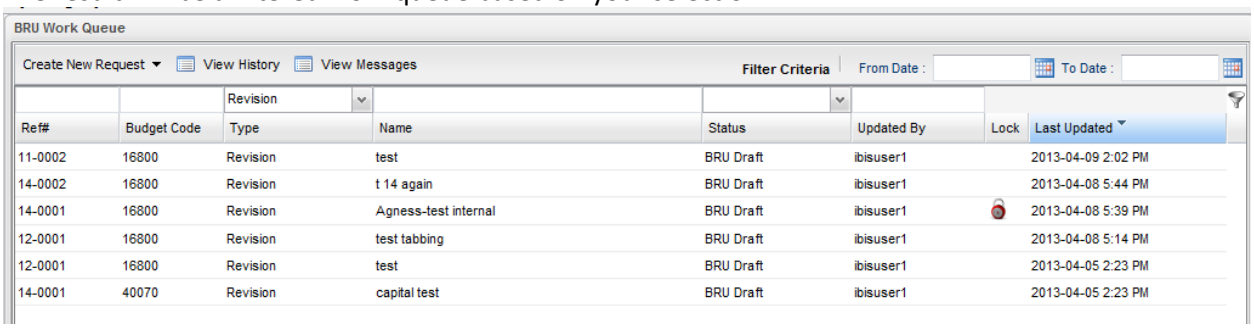
The Type Field and the Status Field have dropdown list which can be used to filter the items in the work queue. To display specific items, make a selection from the dropdown list.



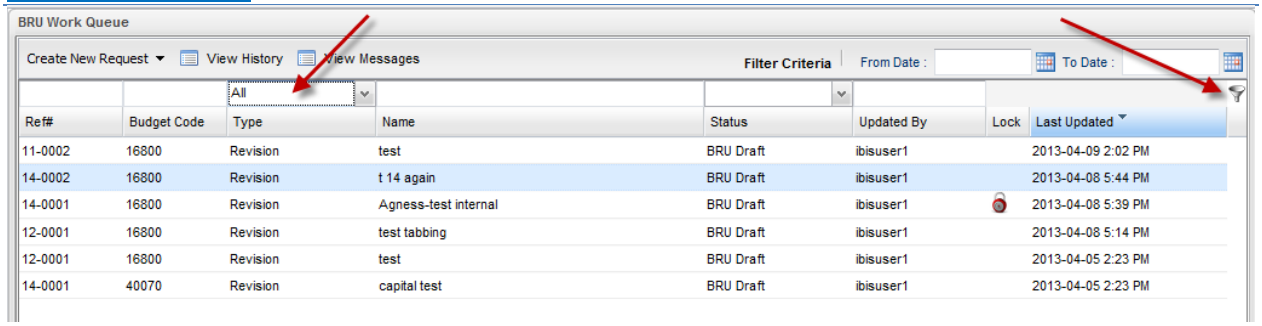
The Type Field dropdown (shown above) lists all of the types of forms that an IBIS user might have in his/her work queue. To filter on a Type, click on the desired type and the dropdown list will close and populate the field. Click the Filter button to complete the action.



The result will be a filtered work queue based on your selection.

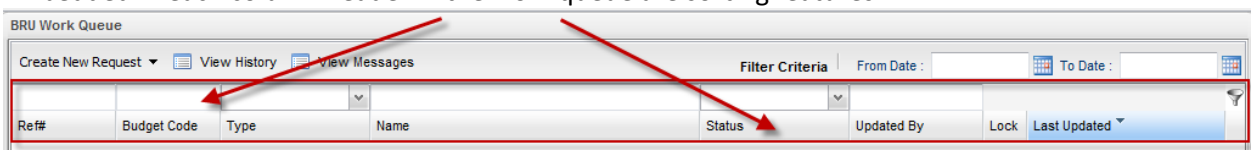


To clear the filter, return to the Type Field dropdown list and select the blank or the word “All” and click the filter button.

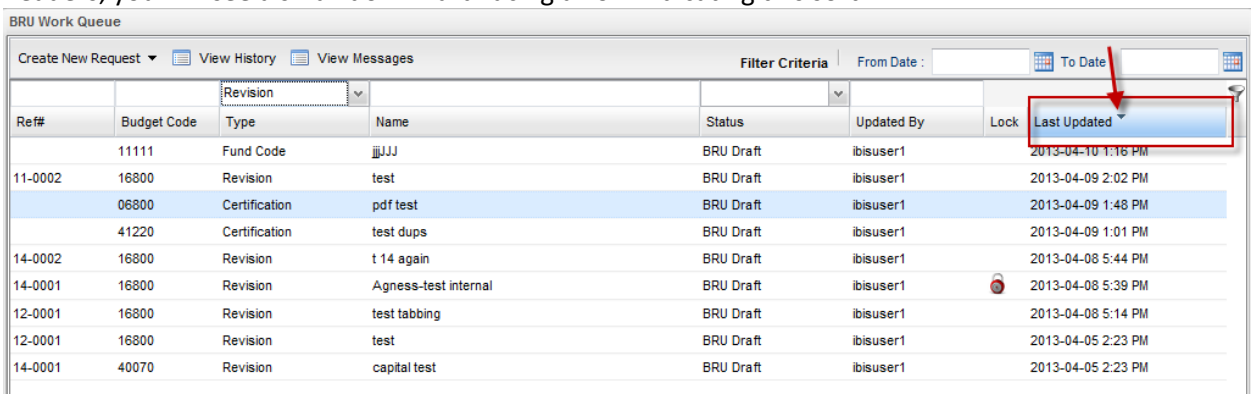


The Status filter works the same way as the Type Filter.

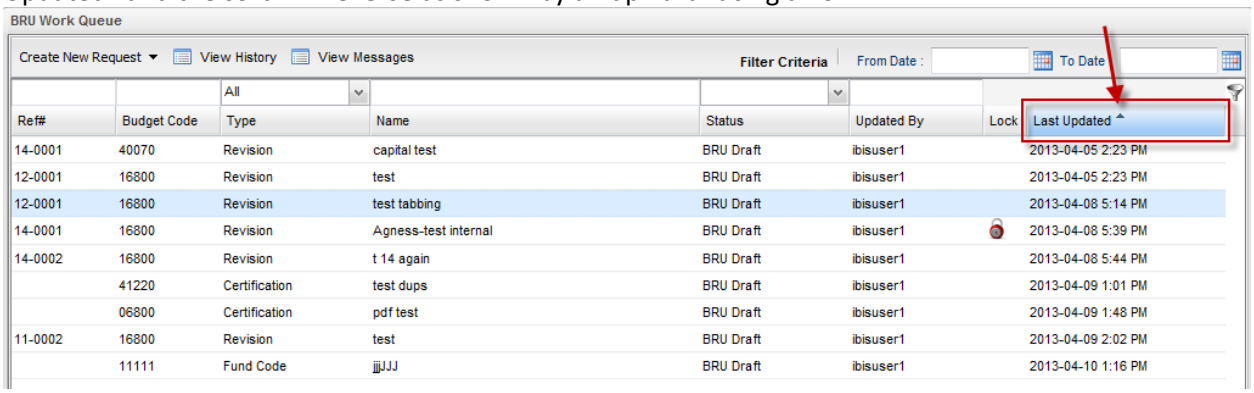
Embedded in each column header in the work queue are sorting features.



Each column header in this row performs an ascending/descending sort. To see this illustrated, the default view displays the work queue date by the most recently updated. When you look at the headers, you will see a small downward facing arrow indicating this sort.



To reverse the sort order and see the work queue results by the oldest update, click on the words “Last Updated” and the sort will reverse as shown by an upward facing arrow.



This ascending/descending sort can be performed on each of the headers, Ref#, Budget Code, Type, Name, Status, Updated By, Lock and Last Updated.

To open any item displayed in the list area of the BRU Work Queue, simply double click on the desired row, and that document will open.