# INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

# HOME MENU & WORK QUEUE OVERVIEW

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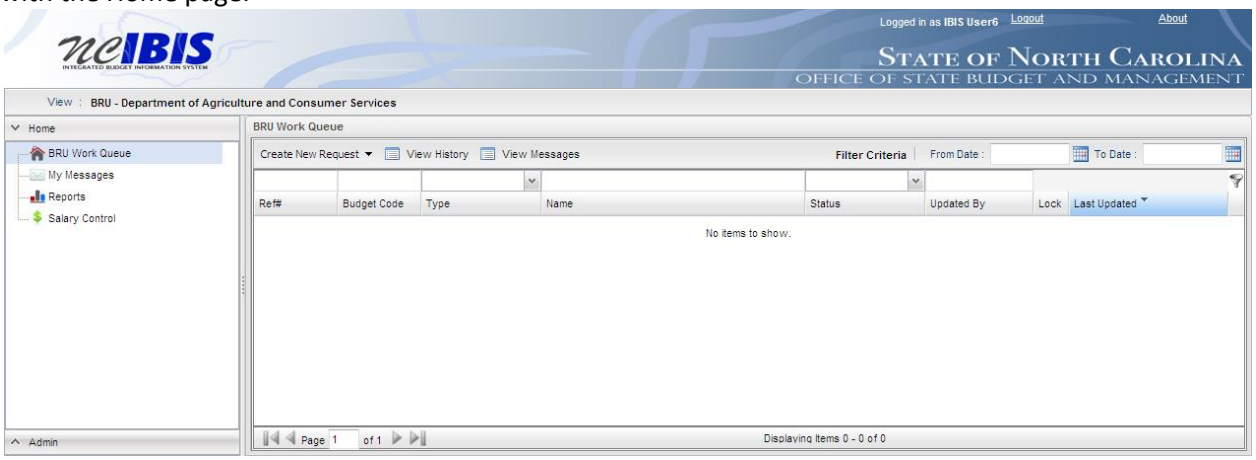
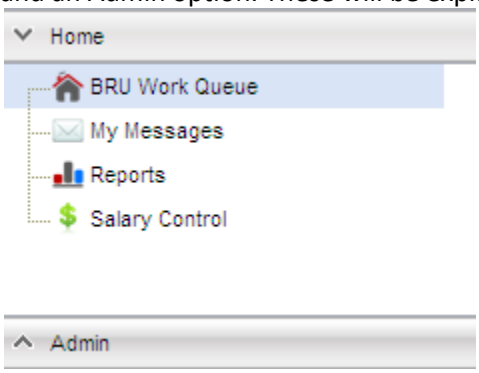
## Home and Admin Menu

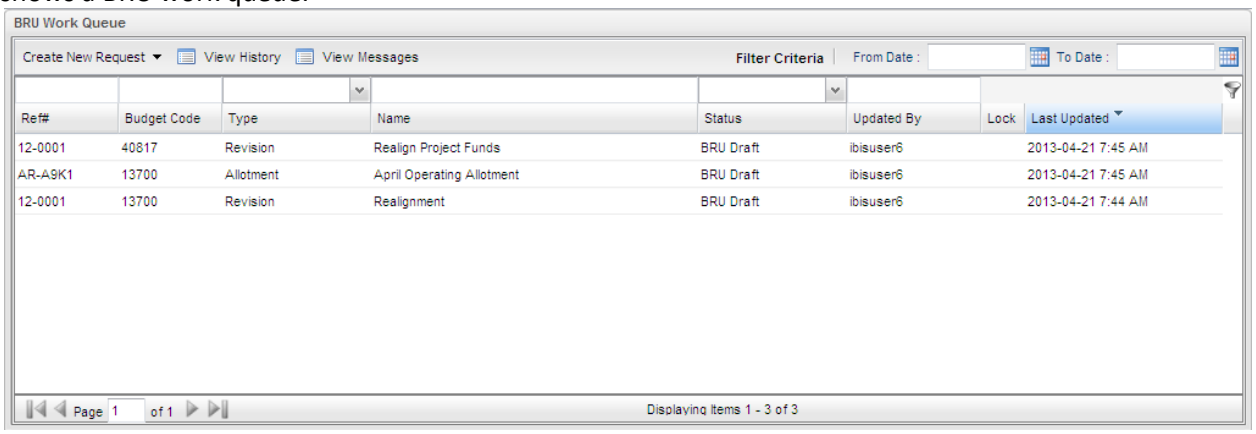
Log into IBIS using your NCID and NCID password. Once the login window has closed, you are presented with the Home page.



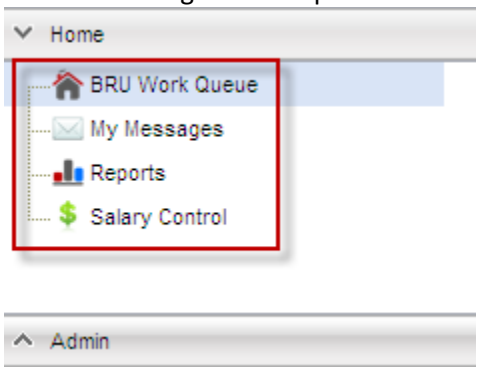

The Home page is divided into left and right pane viewing areas. The left side contains a Home option and an Admin option. These will be explained in the following sections of this user guide.



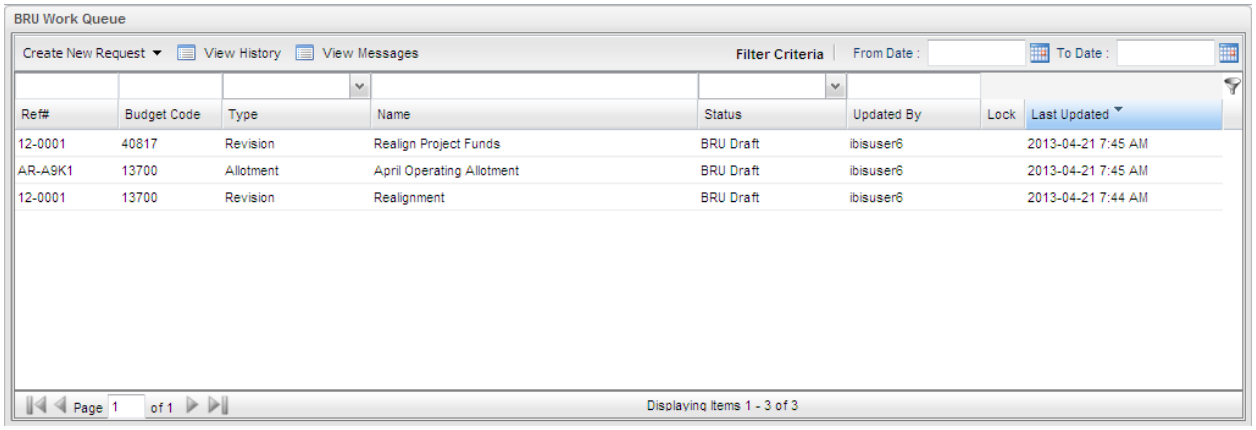
The right side defaults to a work queue. This will be a Budget Reporting Unit (BRU) work queue, an Agency work queue, or OSBM work queue depending on your login credentials. The example below shows a BRU work queue.



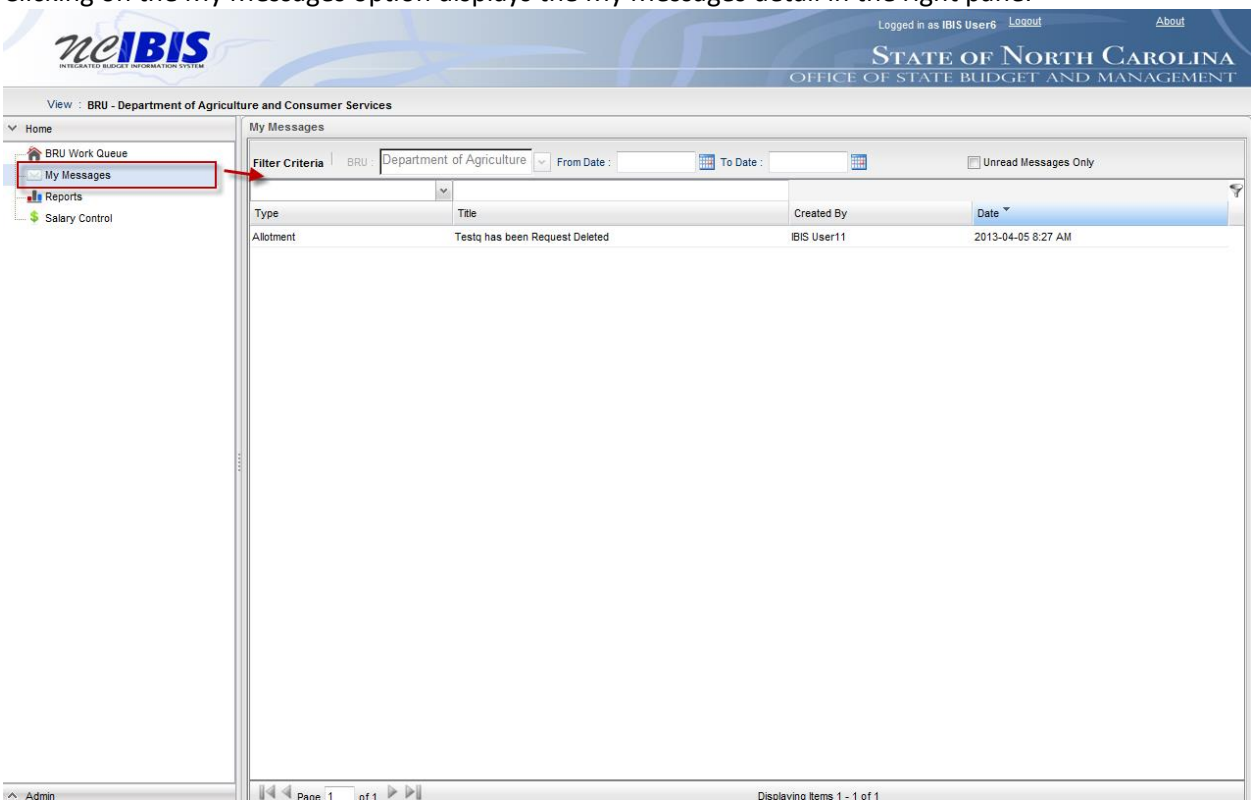

The left menu presents four navigation options under the Home header: BRU Work Queue, My Messages, Reports, Salary Control. Admin is another option located at the bottom of the screen. Clicking Admin will bring forth a separate set of options, which will be covered later in this user guide.




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

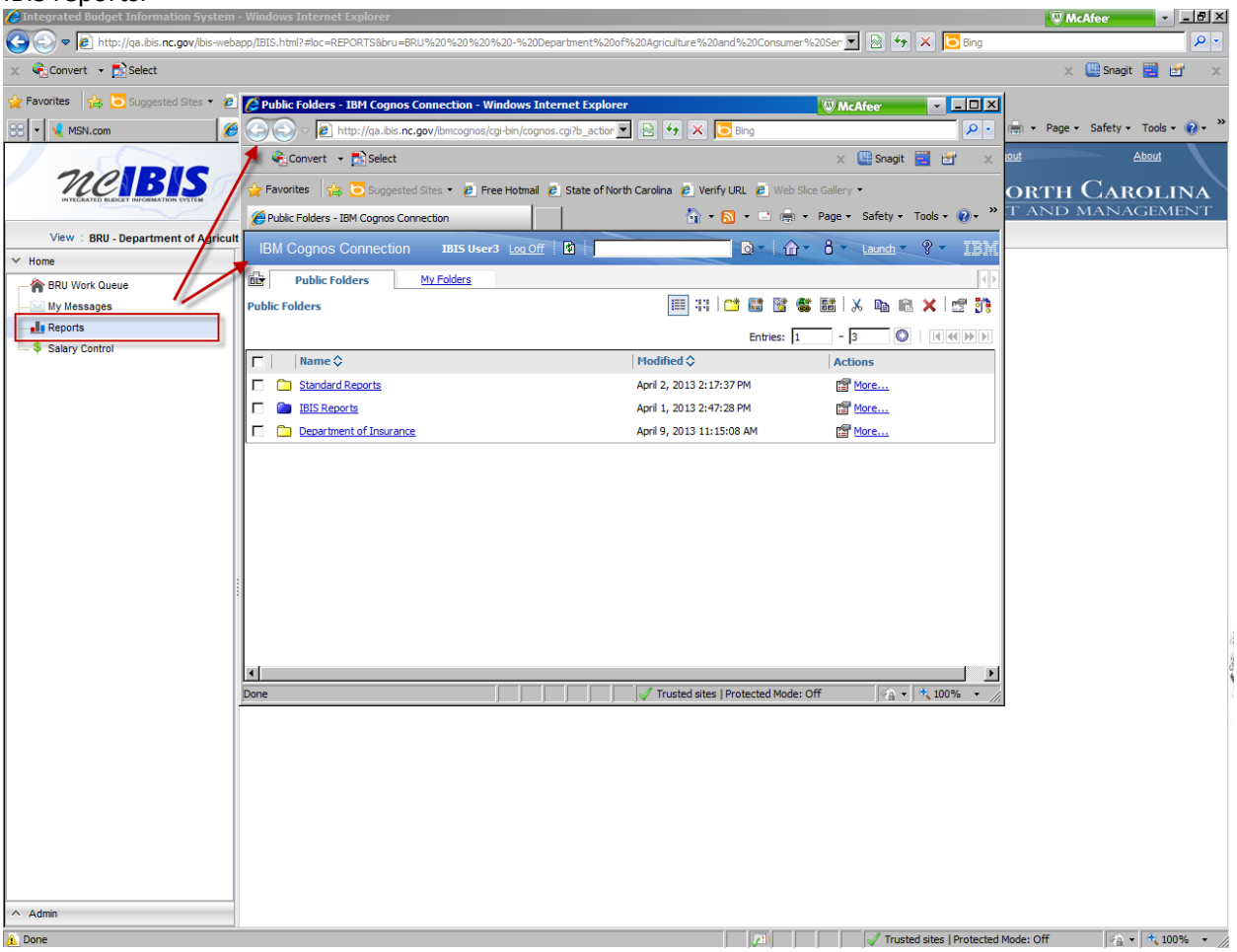


Clicking on the My Messages option displays the My Messages detail in the right pane.



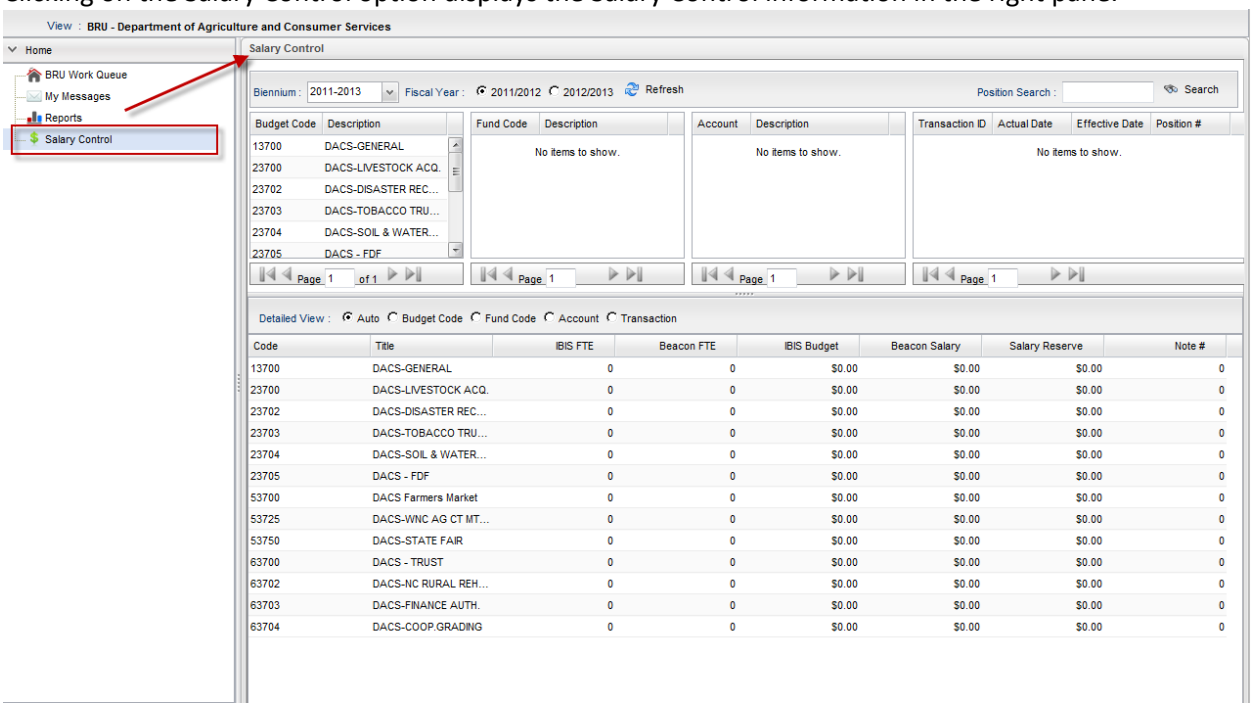

My Messages provides internal system communications and updates about each form within the system. Click here for detailed instructions about My Messages.

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



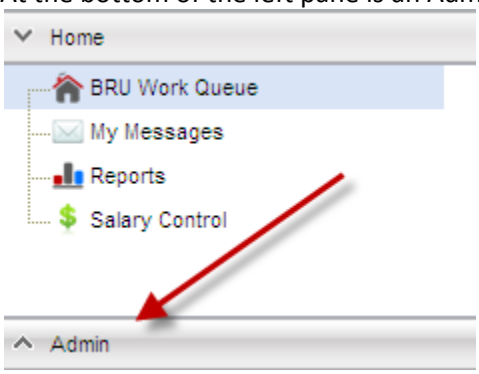

Detailed information on the Reporting functionality can be found in the report user guide [located on the IBIS website](#).

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

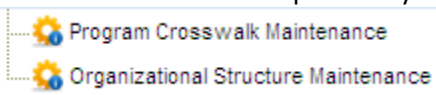



Detailed information on Salary Control can be found in the Salary Control user guide [located on the IBIS website](#).

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



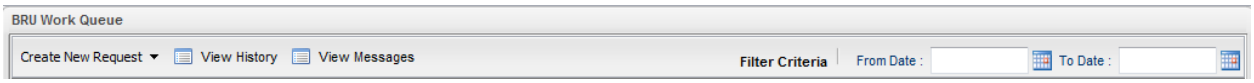

Clicking on the Admin option will display two sub-menu options: Program Crosswalk Maintenance and Organizational Structure Maintenance. Depending on budget development timing, the Program Crosswalk Maintenance option may or may not be displayed.



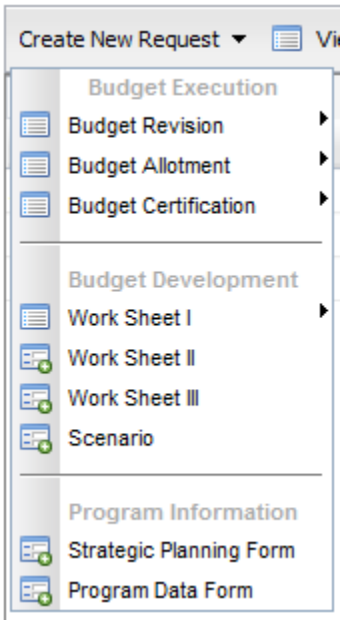

Detailed information regarding Admin functionality, such as creating new budget and fund codes, can be found in other user guides [located on the IBIS website](#). This document focuses on the Home menu and work queue and their features and functionality.

**Create New Request**

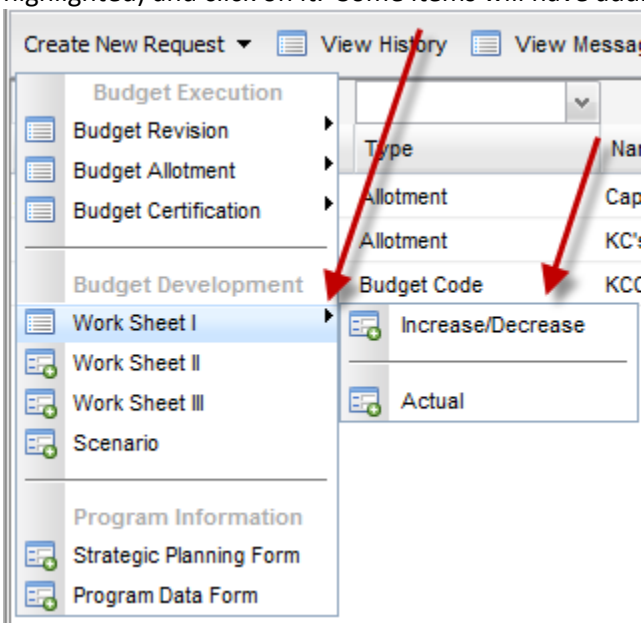
The BRU Work Queue presents several options across the top: Create New Request, View History, View Messages, Filter Criteria (header), From Date and To Date.




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



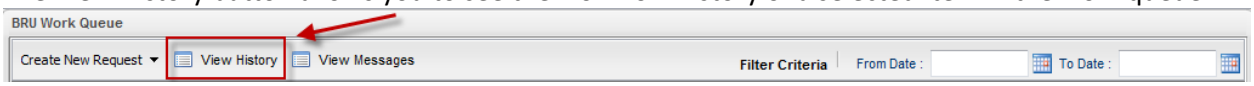
To make a selection from this list, move your cursor/pointer to the preferred option (which will become highlighted) and click on it. Some items will have additional sub-menus as shown below.



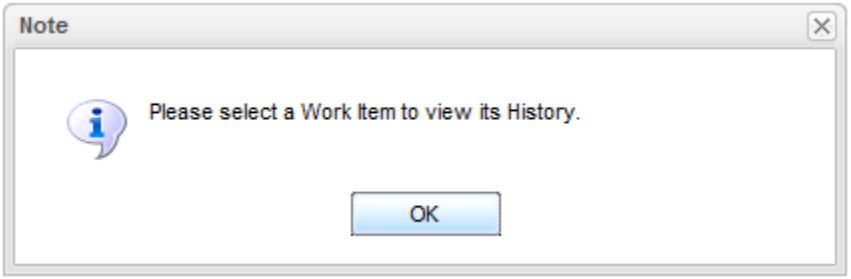

Selecting any of these options will open a "Basic Information" window. This window is discussed in depth in each of the form training documents and will not be addressed in this user guide. For specific form information, visit the other user guides [located on the IBIS website]

**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.

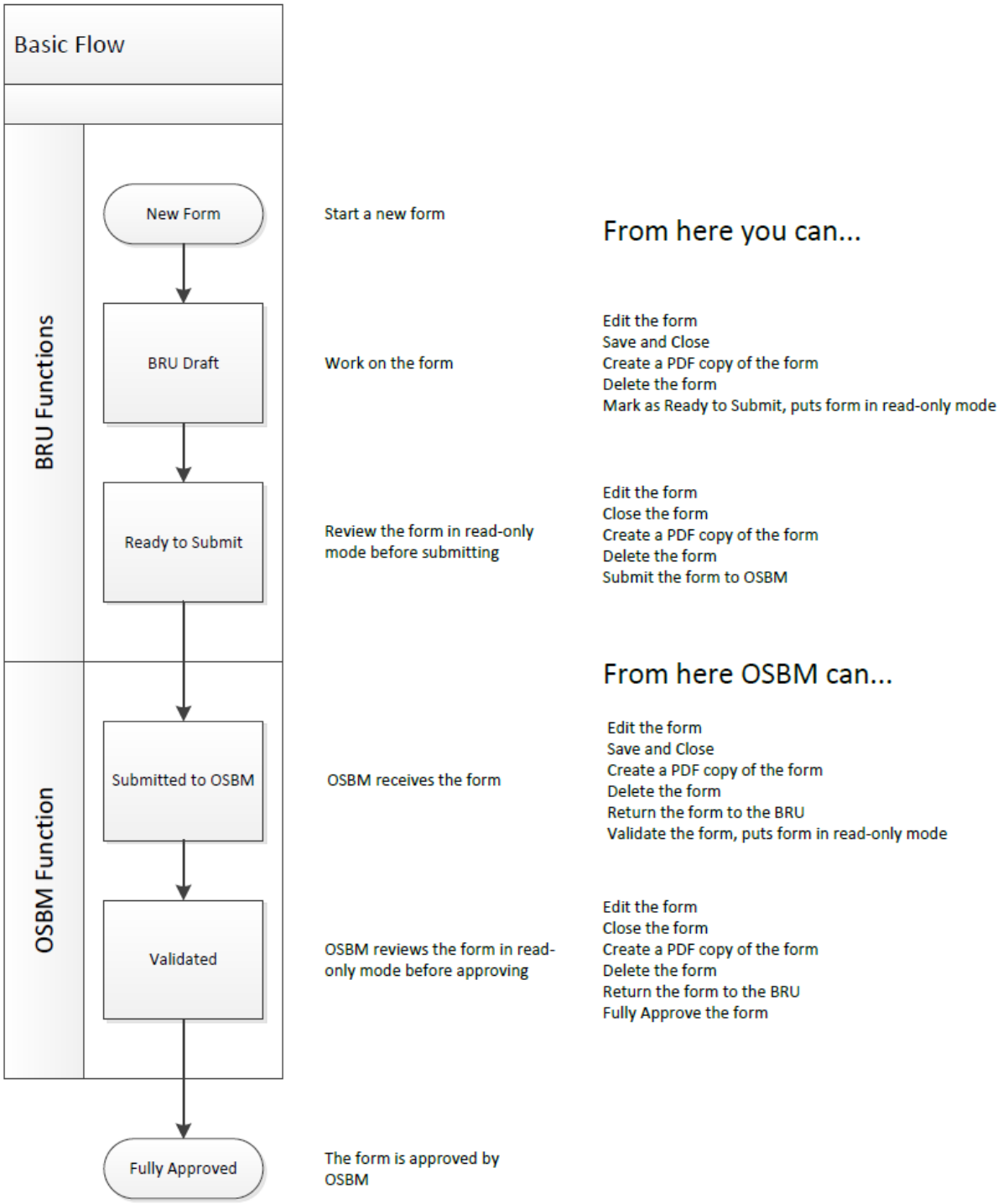
To properly display a form's history, highlight an item in the work queue, click on the View History button and the work item history will be displayed as shown below.

Work Item History Window

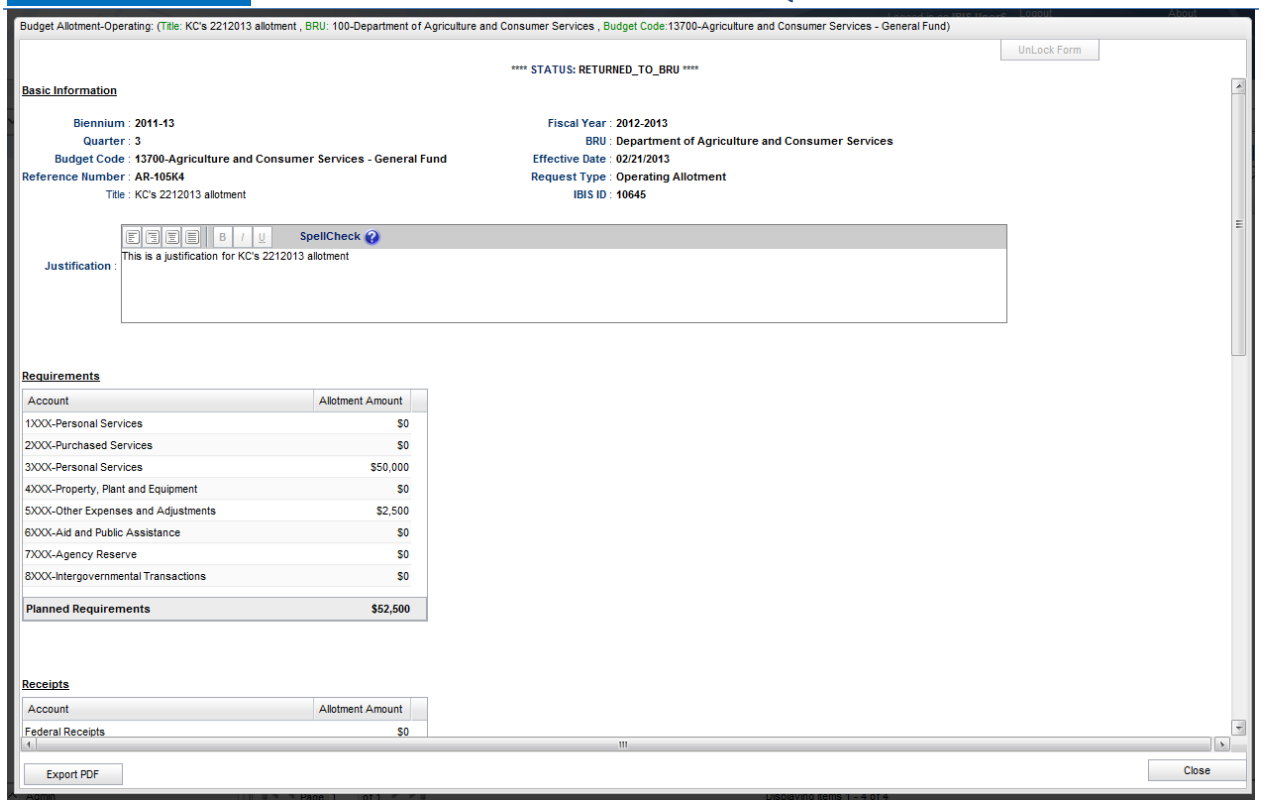
| Ref# | Budget Code | Type | Name | | Previous Status | Status | Updated By | Date |
|---|---|---|---|---|---|---|---|---|
| AR-105K4 | 13700 | Allotment | KC's 2212013 allotment | CURRENT | Not Available | Returned To BRU | ibisuser6 | 03/12/2013 14:51 |
| AR-105K4 | 13700 | Allotment | KC's 2212013 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.

There can be several different statuses displayed for a form. The View History feature is designed 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. 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.

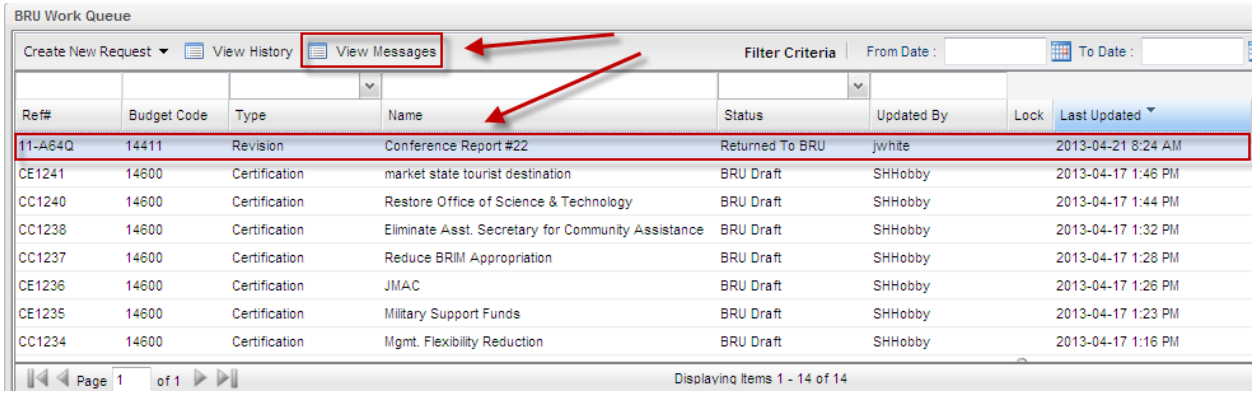



Forms can be opened from the Work Item History Window by double clicking on a form. The form will be displayed in read-only mode and it can be exported to a PDF from this view by clicking on the Export PDF button in the bottom left corner of the screen.

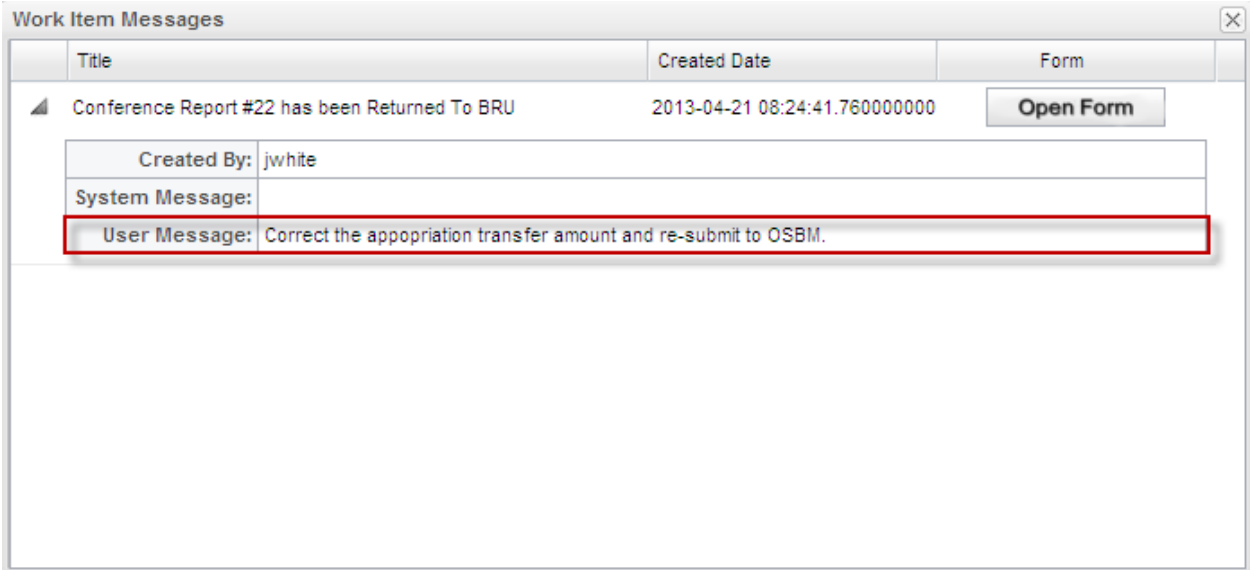



## My Messages

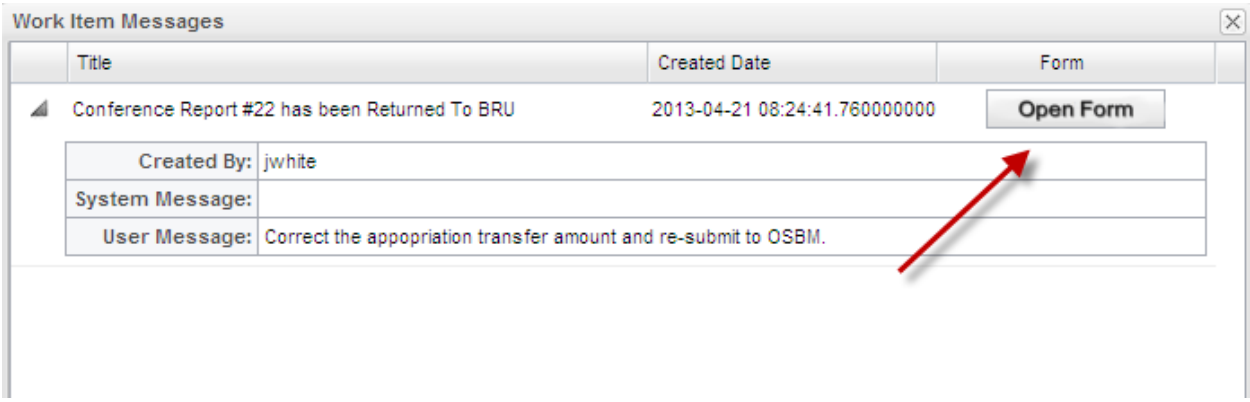
To view messages attached to a form, highlight the form in the work queue and click on the View Messages button at the top of the work queue.




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.

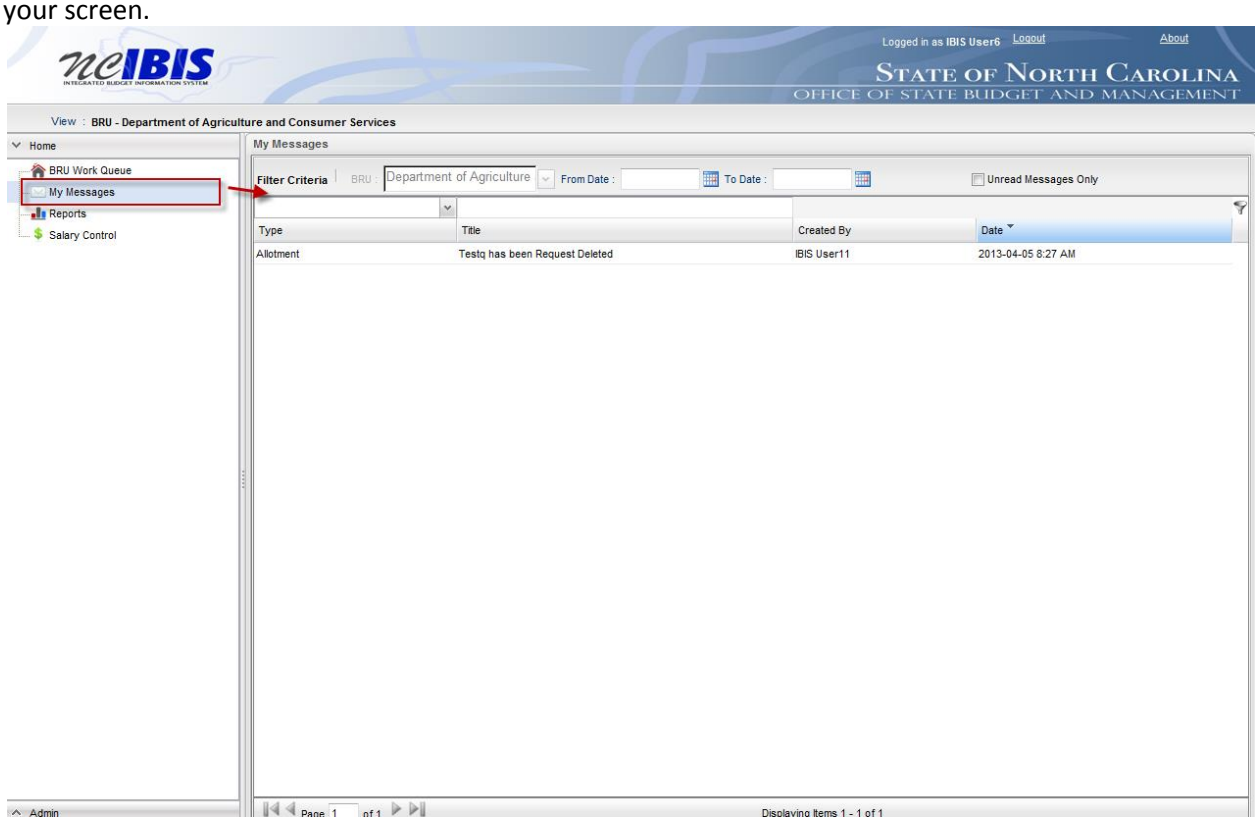



The Work Item Messages window displays any messages attached to the selected form, and the multiple workflow versions of that form. Next to each line appears an Open Form button which will open a form as it looked at that state in the workflow.

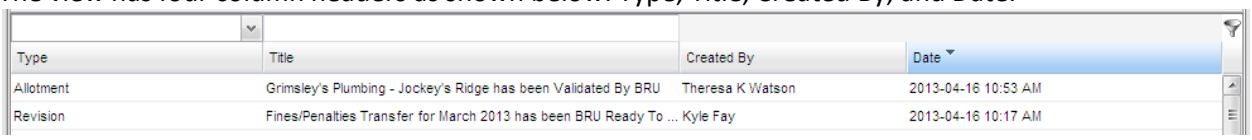



The Open Form button will open the form in read-only mode where the user can only Export the form as a PDF or close the form.

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 of your screen.

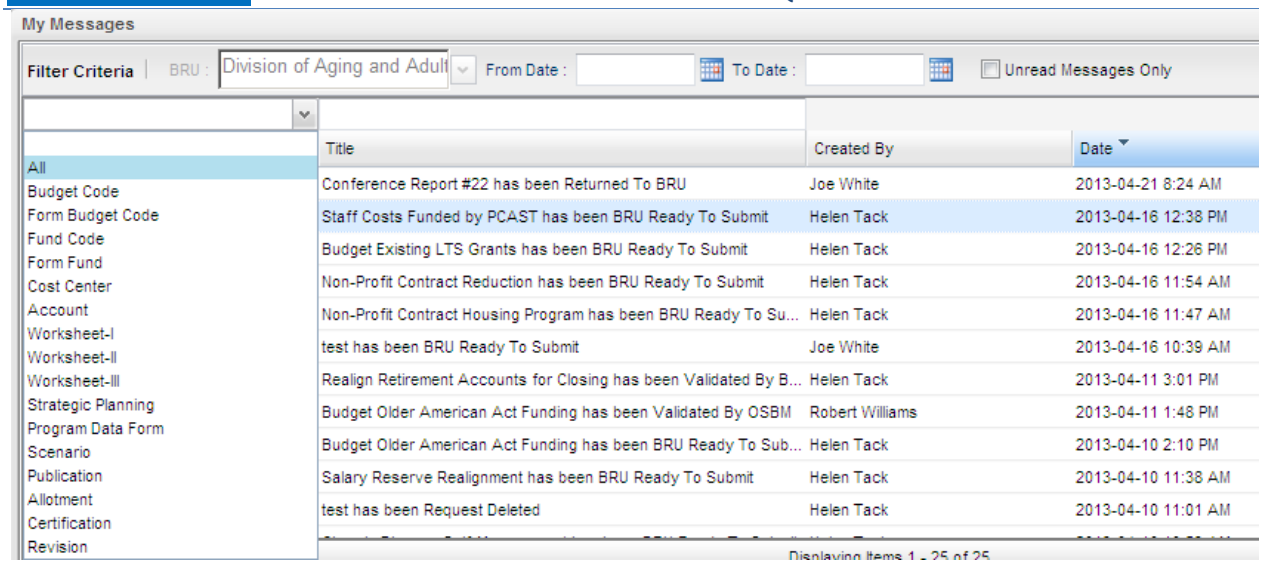



The view has four column headers as shown below: Type, Title, Created By, and Date.

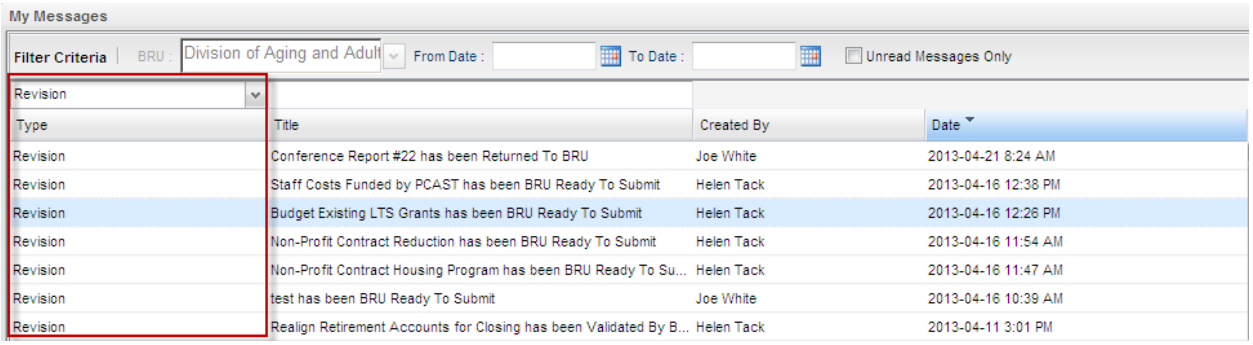



To view a message associated with a form, double click a displayed item. A Work Item Messages window will appear that displays information about the selected form.

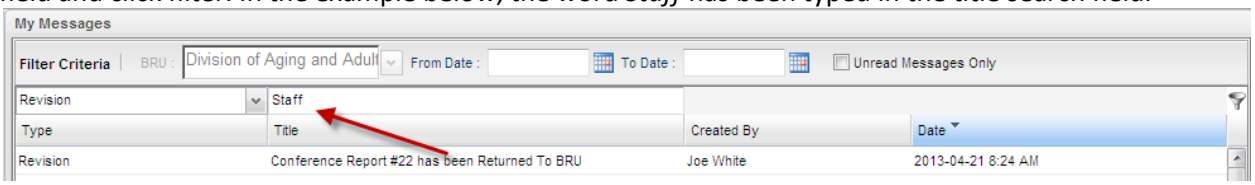
You may also sort the My Messages screen by clicking the dropdown arrow above type, selecting an option and clicking the filter button .



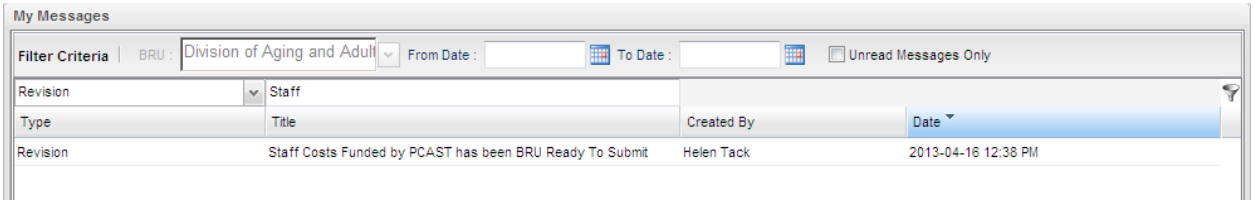

This will display messages associated with a particular type of form. In the example below, a revision filter was used.




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.

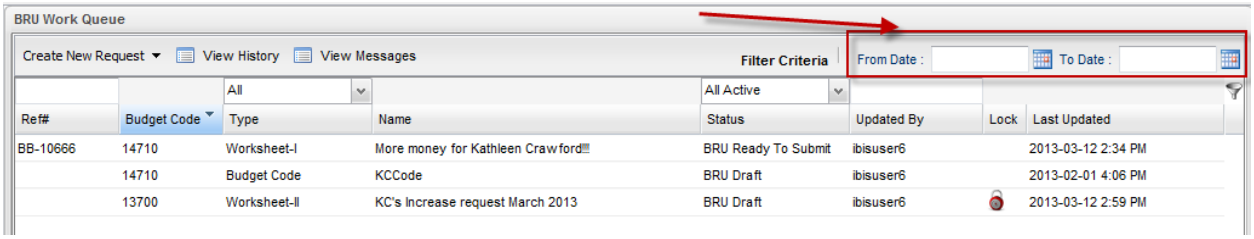



Click filter to return search results. In the example, one budget revision was returned based on the search criteria.

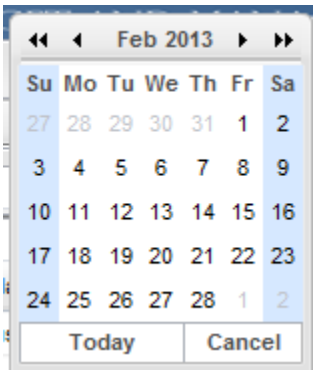


**Filtering and Sorting**

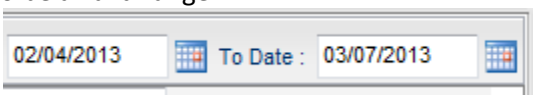
There are various options available for filtering and sorting what is shown in the work queue. One option is to filter by date. There are From Date and To Date fields, which, when utilized, will filter work queue items that do not fall within a specified date range.



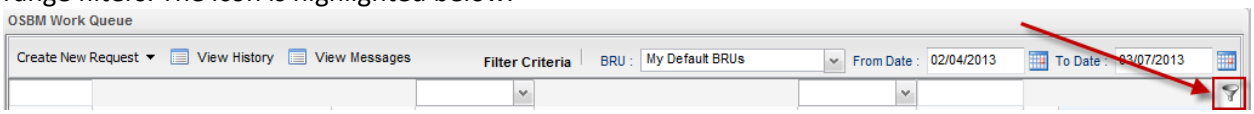

To use the date range filter, enter a start date in the From Date field either by keying it or by selecting the date from the calendar next to the field.



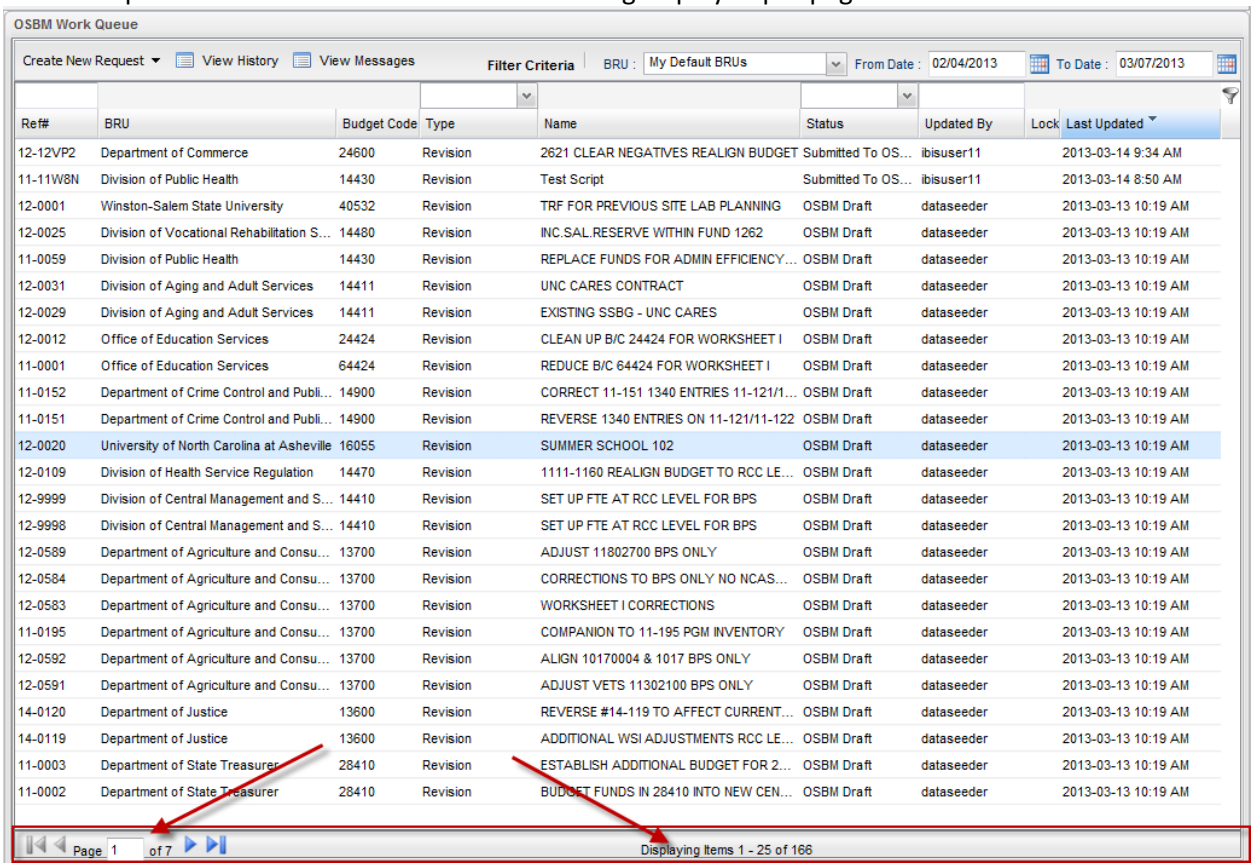

Repeat the same action in the To Date field. The From Date needs to occur prior to the To Date in order to be a valid range.




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.

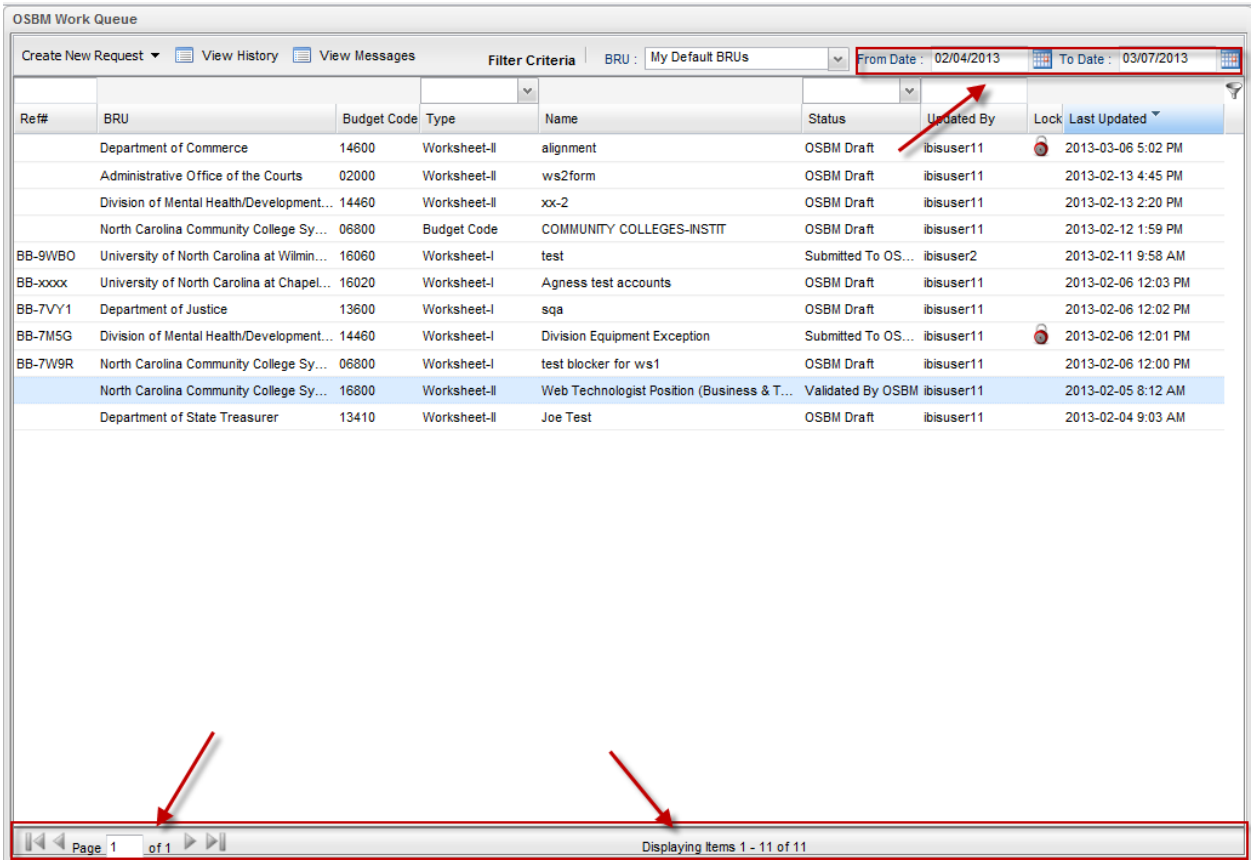


Prior to filtering, the work queue may contain many pages of items. After applying a filter, only the defined set will be displayed. The bottom of the screen displays indicators of the number of pages in the work queue as well as the number of items being displayed per page.



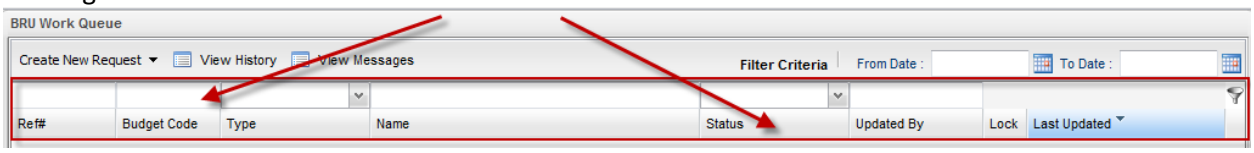

| Ref# | BRU | Budget Code | Type | Name | Status | Updated By | Lock | Last Updated |
|---|---|---|---|---|---|---|---|---|
| 12-12VP2 | Department of Commerce | 24600 | Revision | 2621 CLEAR NEGATIVES REALIGN BUDGET | Submitted To OS... | ibisuser11 | | 2013-03-14 9:34 AM |
| 11-11W8N | Division of 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.

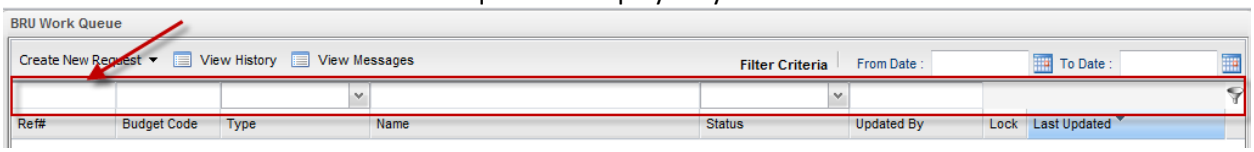



To remove the filter and restore the work queue display to its default appearance, clear the dates from the date range fields and click on the Filter icon again.

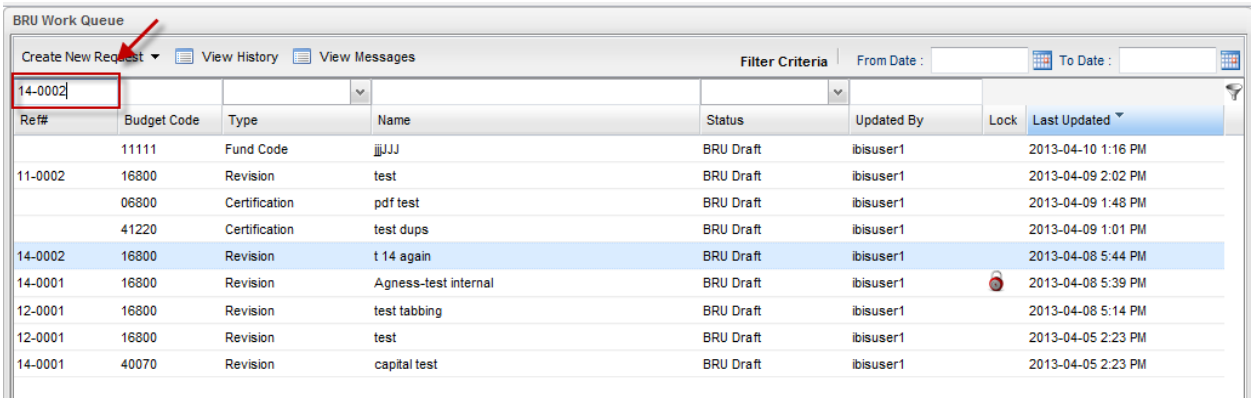
Another set of headers located directly above the work queue table perform more specific sorting and filtering.



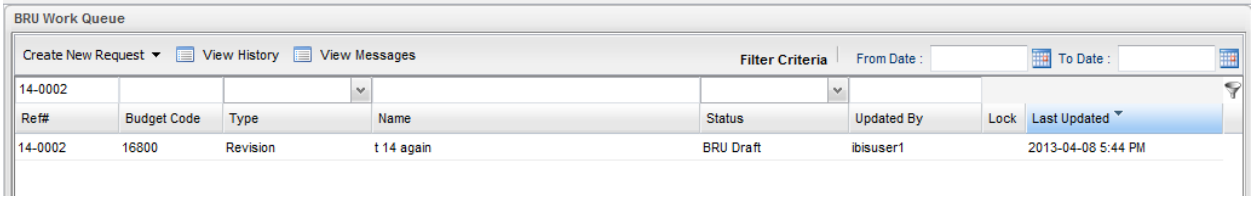
The first of these rows provides “search” functionality, meaning it allows the user to enter in specific search criteria and then filter the work queue to display only results that contain those criteria.



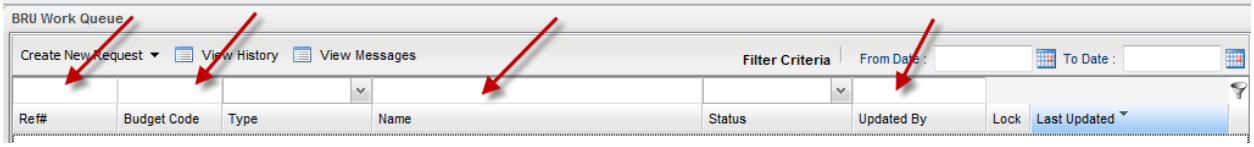

For example, in the space above the Ref# header, the user can type a reference number associated with the form. To complete the search, the user must click on the filter button.



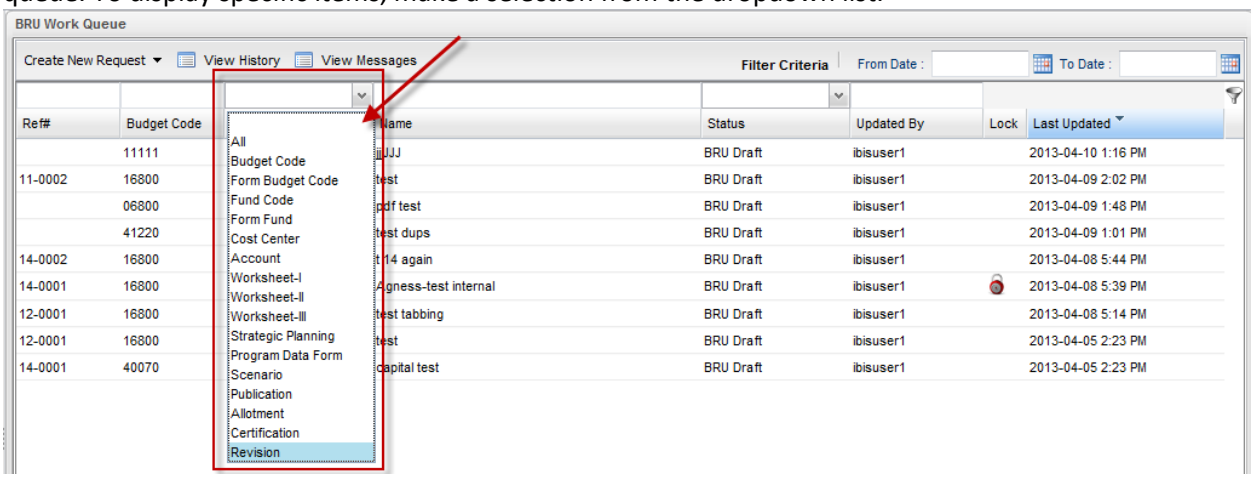

The list in the work queue will display filtered results based on the search as shown below. This type of filtered search can be completed for Ref#, Budget Code, Name, and the Updated By field.



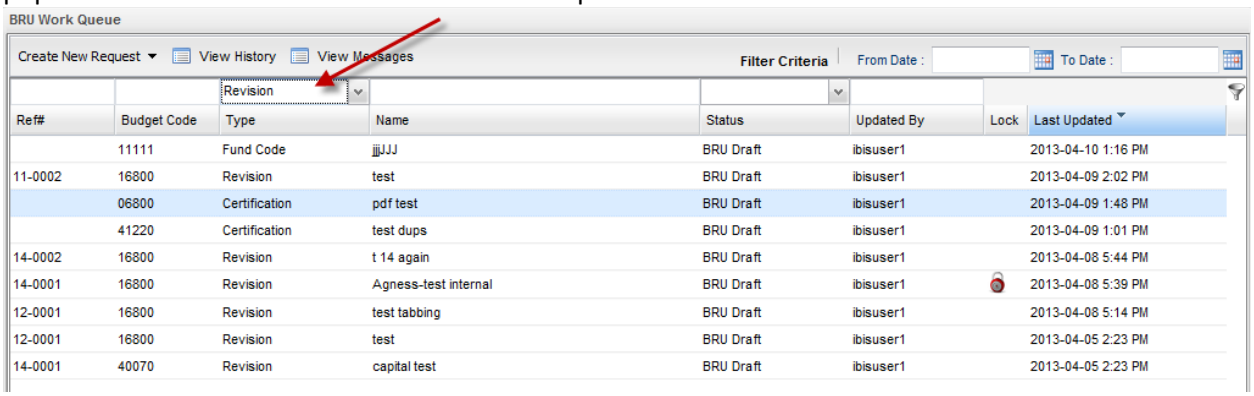

To return the work queue to its unfiltered state, the user should clear the entry from the search field and click the filter button.



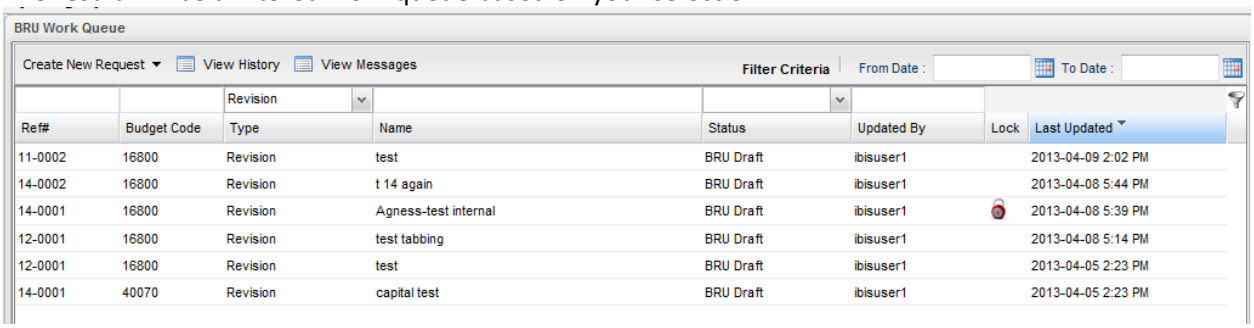
The Type Field and the Status Field have dropdown lists which can be used to filter the items in the work queue. To display specific items, make a selection from the dropdown list.



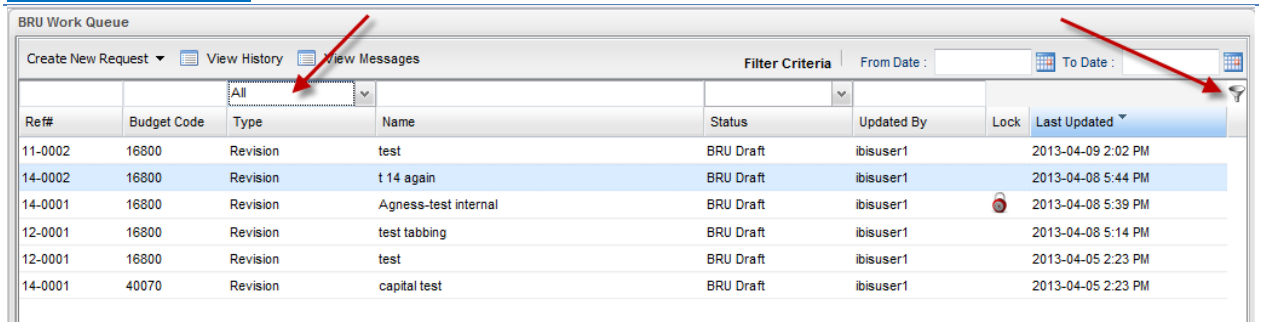

The Type Field dropdown (shown above) lists all of the types of forms that an IBIS user might have in his/her work queue. To filter on a Type, click on the desired type and the dropdown list will close and populate the field. Click the Filter button to complete the action.




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

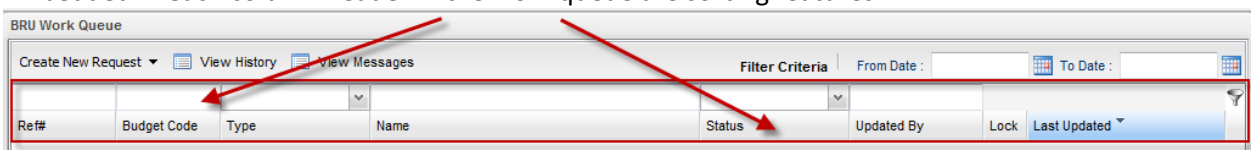



To clear the filter, return to the Type Field dropdown list and select the blank or the word “All” and click the filter button.

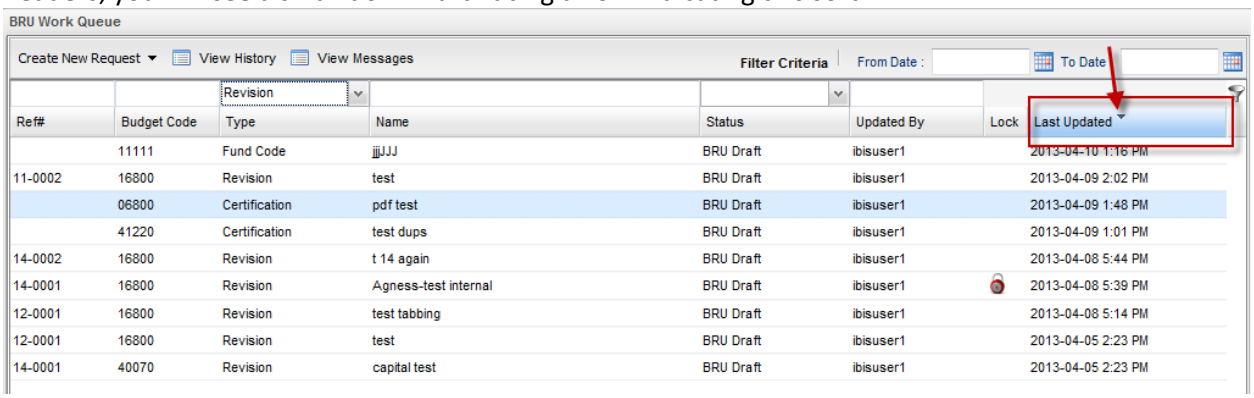



The Status filter works the same way as the Type Filter.

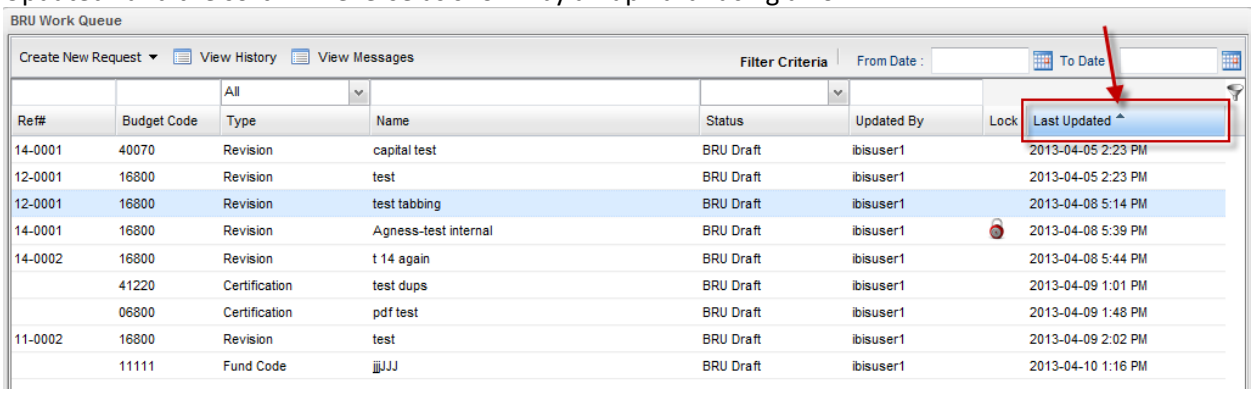
Embedded in each column header in the work queue are sorting features.




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.

**Locking Feature**

Forms that are in use or close improperly (without using the system buttons such as Save and Close) are displayed in work queues with a lock icon. This notification protects a form when it is in use. However, if a user desires, a locked form can be accessed (unlocked) by double-clicking on the form in the work queue, which will display the form. In the upper right corner of the form, there is an Unlock Form option (as shown below).

To access the form, click on the Unlock Form button. The system displays a screen stating that the form is in use. If you proceed and open the form, you will gain access to the form but jeopardize losing data entered by the IBIS user who was initially in the form.