



INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

Program Crosswalk Maintenance



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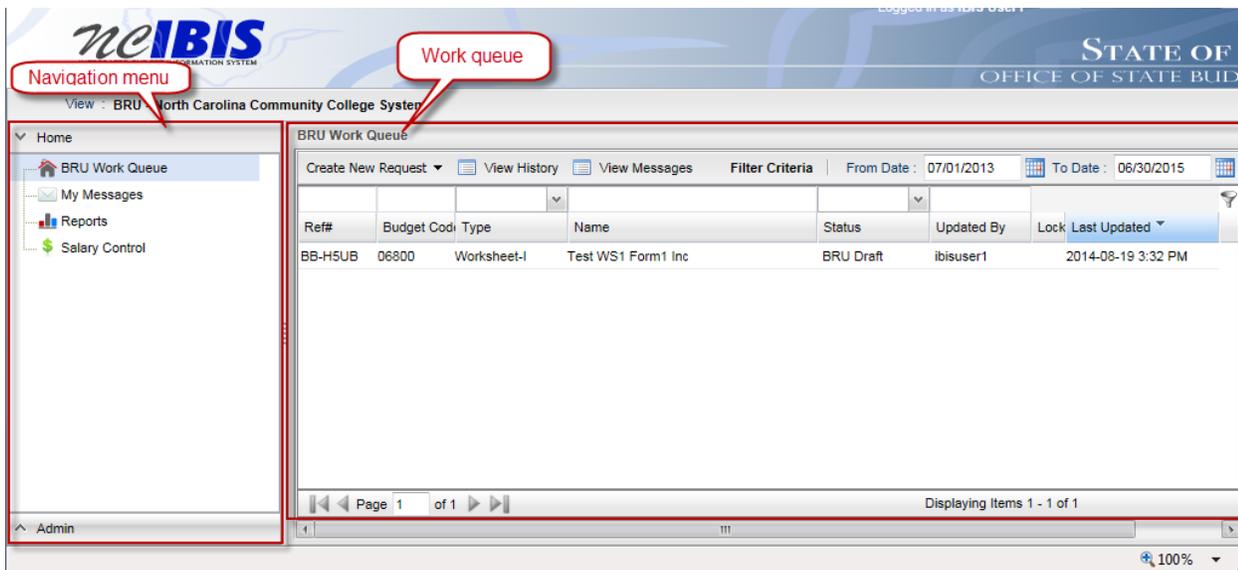
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PREFACE

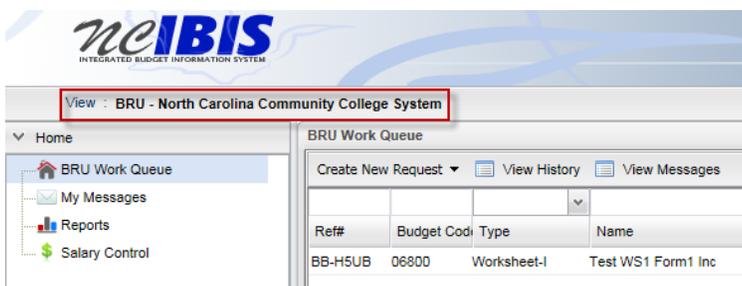
This training guide describes how to use IBIS to link program structure elements to budget structure elements (i.e., 'crosswalk'). Once Strategic Programming Areas (SPAs) and their programs are configured in IBIS, budget code cost centers must be assigned to programs via the Program Crosswalk Maintenance functionality in IBIS. Cost centers from one or more budget codes may be assigned to a single program. Different cost centers within a fund may be assigned to different programs. A cost center may be assigned to one and only one program.

Program Crosswalk Maintenance

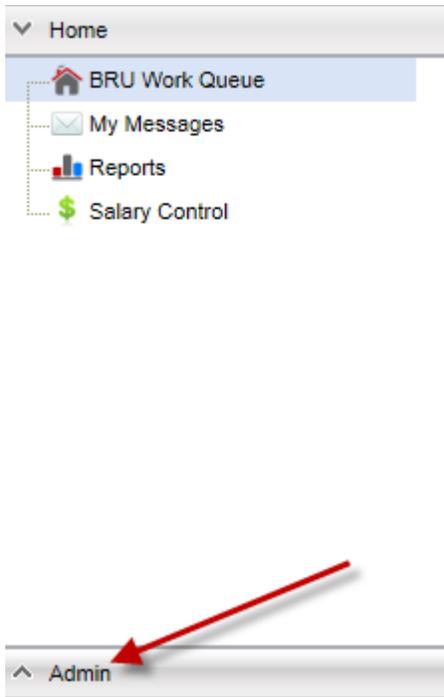
Once you have successfully logged into IBIS, you should see the Work Queue and a navigation menu similar to what is shown below.



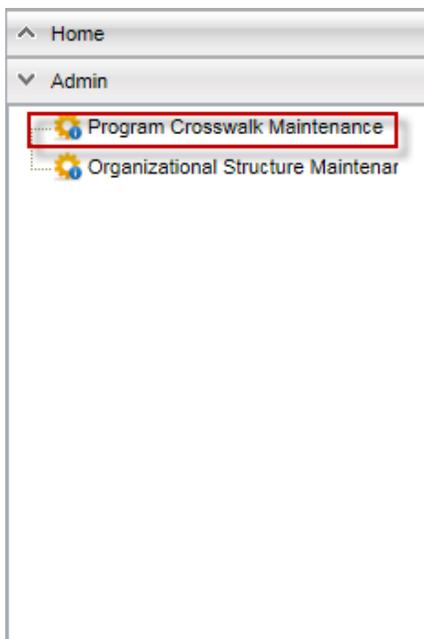
Find the View indicator in the upper left-hand corner of the page. The field should contain only your BRU, Agency or OSBM. If you have access to multiple departments and/or agencies, these will appear in a drop-down list in this field. In the example below, the user is logged in as the North Carolina Community College System.



The navigation menu presents several options. To access Program Crosswalk Maintenance, click on the **Admin** menu in the bottom left corner of the IBIS Home page.

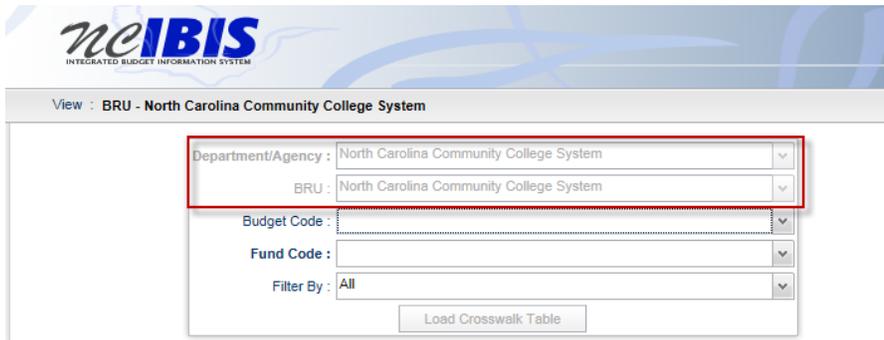


Clicking Admin reveals the administrative functions available to you. Select the **Program Crosswalk Maintenance** menu item at the left to open the administrative tool.



Assign a Budget Item to a Program

A new window will open up showing the Program Crosswalk Maintenance home page. The first two fields are labeled **Department/Agency** and **BRU**. In most cases, access is restricted to a single department/agency so it will default to your Department/Agency and BRU. If a user has access to multiple departments/agencies and BRUs, a dropdown option will appear for selection.



View : BRU - North Carolina Community College System

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

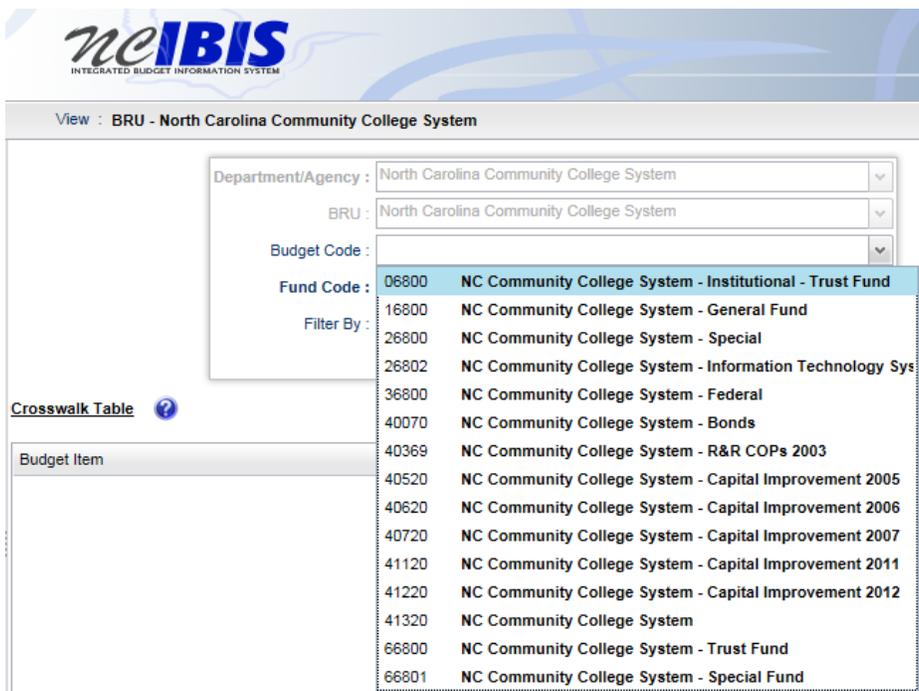
Budget Code :

Fund Code :

Filter By : All

Load Crosswalk Table

To identify the budget structure element for which you want to assign a program, select the **budget code** and **fund code** from the dropdown list.



View : BRU - North Carolina Community College System

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

Budget Code :

Fund Code : 06800 NC Community College System - Institutional - Trust Fund

Filter By :

16800 NC Community College System - General Fund

26800 NC Community College System - Special

26802 NC Community College System - Information Technology Sys

36800 NC Community College System - Federal

40070 NC Community College System - Bonds

40369 NC Community College System - R&R COPs 2003

40520 NC Community College System - Capital Improvement 2005

40620 NC Community College System - Capital Improvement 2006

40720 NC Community College System - Capital Improvement 2007

41120 NC Community College System - Capital Improvement 2011

41220 NC Community College System - Capital Improvement 2012

41320 NC Community College System

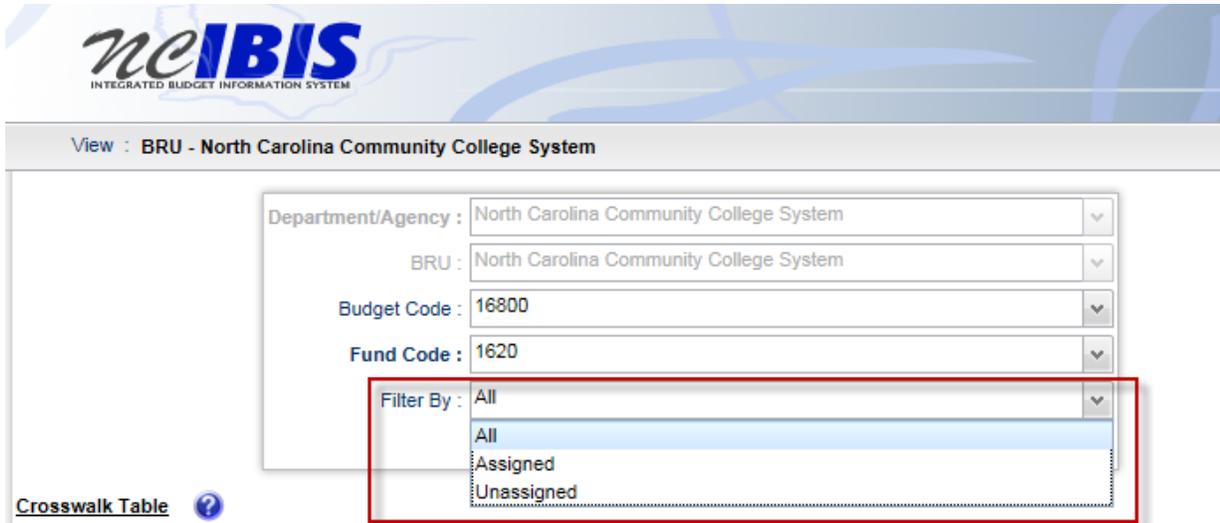
66800 NC Community College System - Trust Fund

66801 NC Community College System - Special Fund

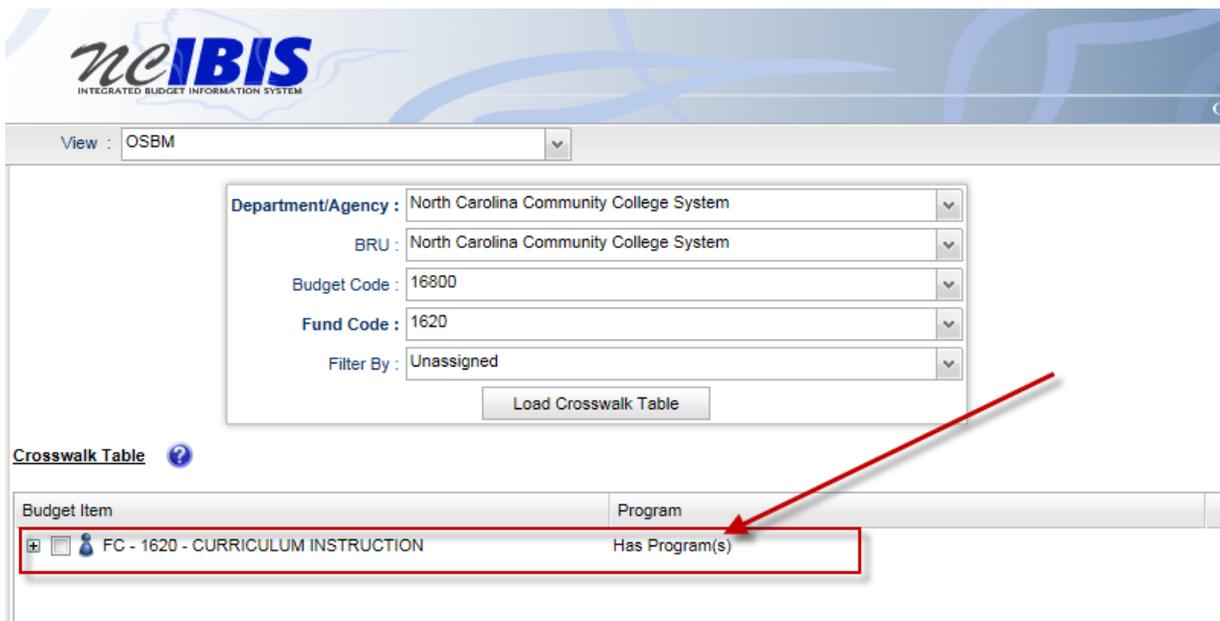
Crosswalk Table ?

Budget Item

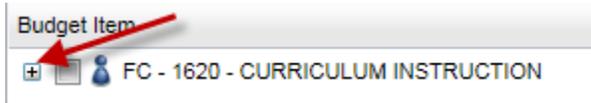
The last item allows you to filter budget items. You may filter to select All budget items, items that have already been assigned, or those that are unassigned. The “All” option is the default. Click the **Filter By** dropdownlist to make your selection.



To display a list of unassigned budget items, filter by Unassigned and click **Load Crosswalk Table**. You will only see unassigned budget item(s) listed in the crosswalk table as shown below. Notice the Program column listed below displays “Has Programs” to indicate there are cost centers associated with this fund code that have already been assigned to a program. To reveal those assigned cost centers, you will need to filter by Assigned budget items as will be demonstrated in the [Display Assigned Budget Items](#) section of this user guide.

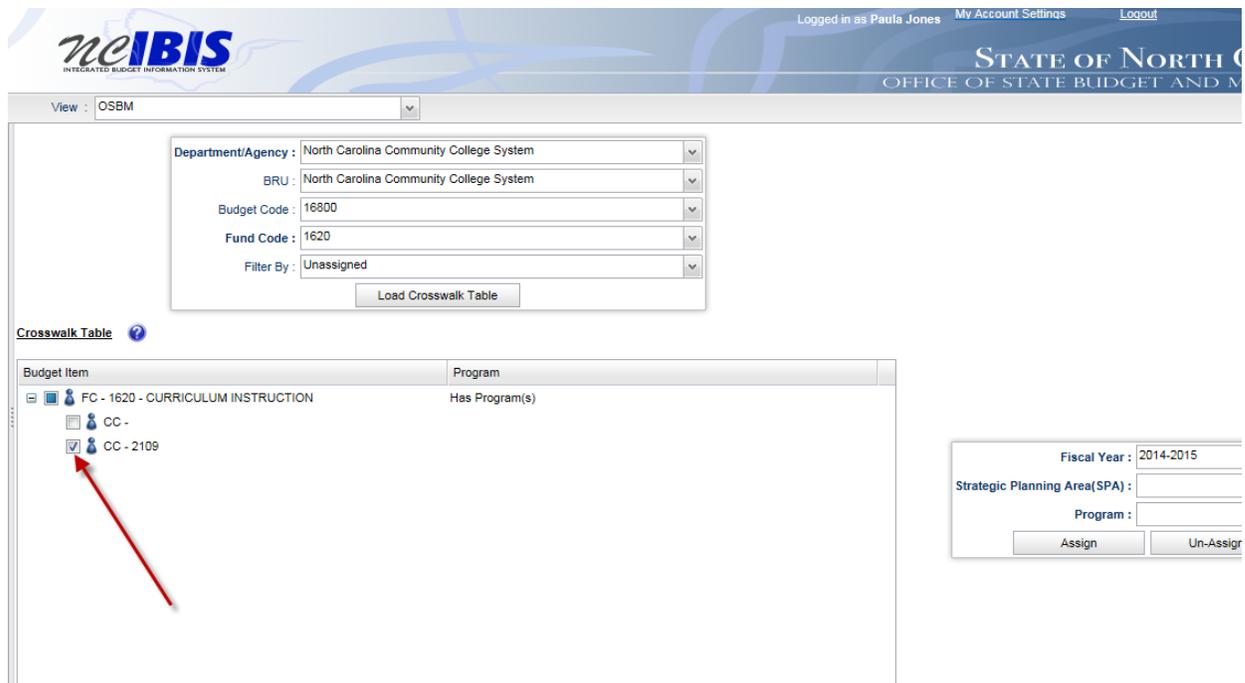


By default, a list of fund codes is displayed. To reveal the cost center(s) associated with a fund code, click the plus sign (+) to the left of the fund code as shown below.

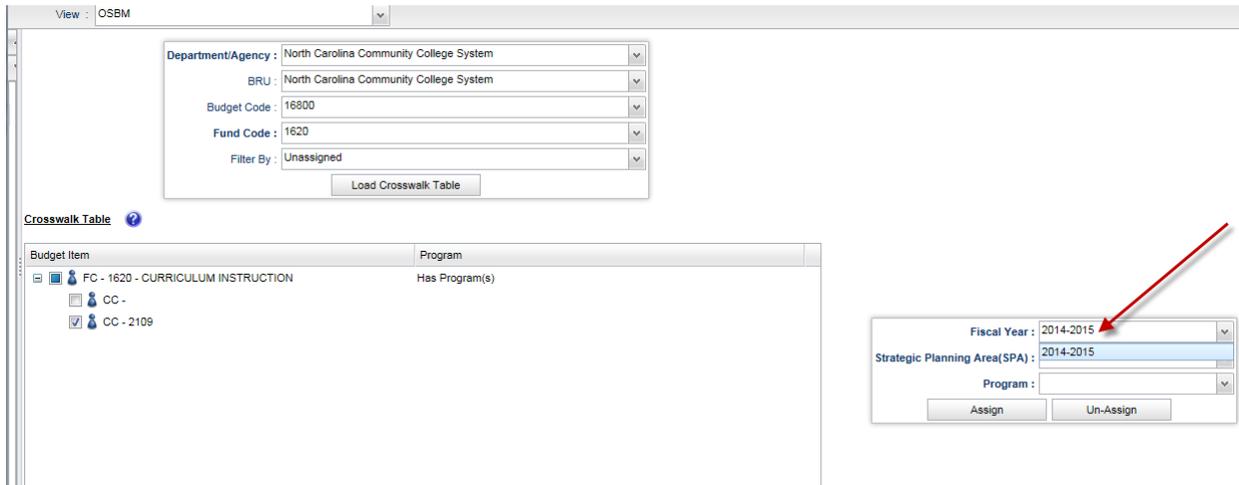


To assign a program to a budget item, select the checkbox next to the appropriate budget item and cost center(s). For this example, the following has been selected:

- Budget Code: **16800**
- Fund Code: **1620**
- Cost Center: **2109**



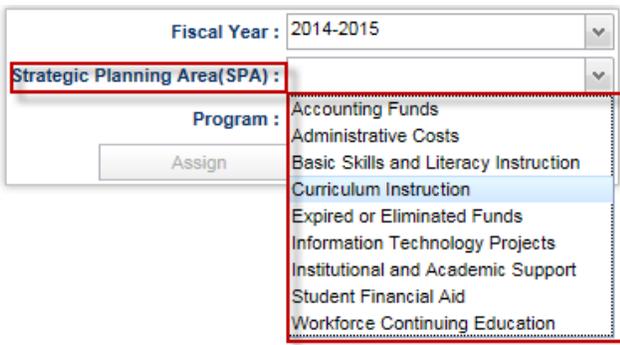
Next, to assign the budget item you just selected to a program, select the appropriate **fiscal year** from the drop-down field.



The screenshot shows the neIBIS interface with the following elements:

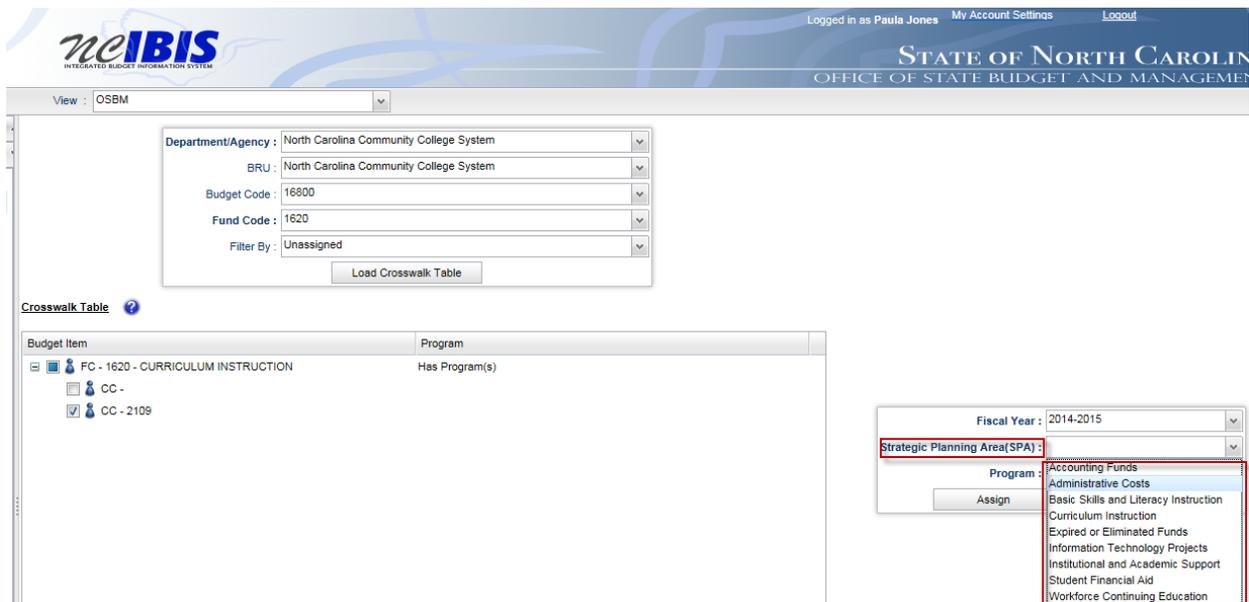
- Form Fields:** Department/Agency: North Carolina Community College System, BRU: North Carolina Community College System, Budget Code: 16800, Fund Code: 1620, Filter By: Unassigned. A "Load Crosswalk Table" button is present.
- Crosswalk Table:** A table with columns "Budget Item" and "Program". The "Budget Item" column contains "FC - 1620 - CURRICULUM INSTRUCTION" (expanded to show "CC -" and "CC - 2109"). The "Program" column contains "Has Program(s)".
- Modal Window:** A small window with "Fiscal Year" (2014-2015), "Strategic Planning Area(SPA)" (2014-2015), and "Program" dropdown menus. "Assign" and "Un-Assign" buttons are at the bottom. A red arrow points to the "Fiscal Year" dropdown.

Next, select the **Strategic Programming Area (SPA)**.



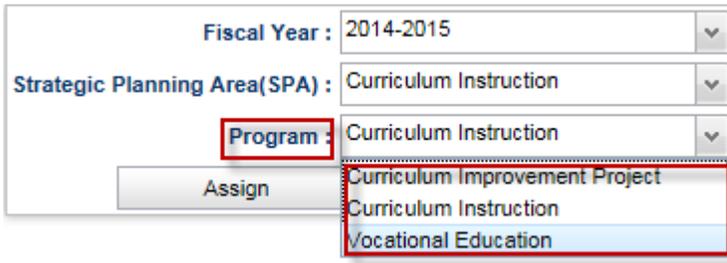
This close-up shows the "Strategic Planning Area(SPA)" dropdown menu. The "Fiscal Year" is set to "2014-2015". The dropdown list includes the following options:

- Accounting Funds
- Administrative Costs
- Basic Skills and Literacy Instruction
- Curriculum Instruction
- Expired or Eliminated Funds
- Information Technology Projects
- Institutional and Academic Support
- Student Financial Aid
- Workforce Continuing Education

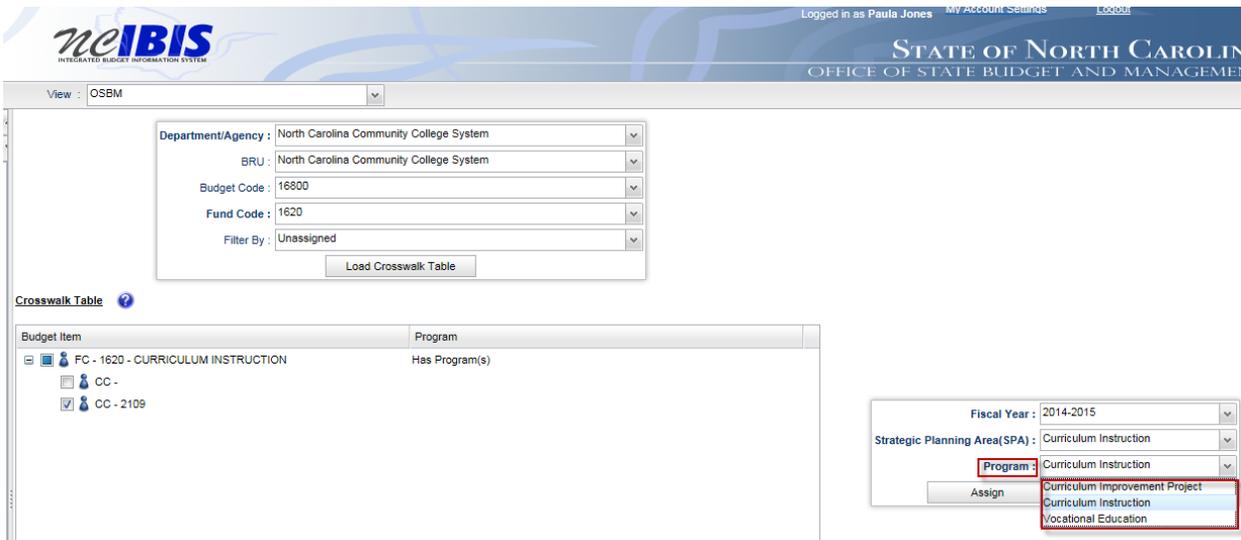


This screenshot shows the full neIBIS interface with the "Strategic Planning Area(SPA)" dropdown menu open. The interface includes the same form fields and table as the previous screenshot. The modal window now shows the "Strategic Planning Area(SPA)" dropdown menu with the same list of options as shown in the previous close-up. The "Fiscal Year" is still "2014-2015".

Once a SPA has been selected, select a Program.



Fiscal Year : 2014-2015
Strategic Planning Area(SPA) : Curriculum Instruction
Program : Curriculum Instruction
Assign
Curriculum Improvement Project
Curriculum Instruction
Vocational Education



neIBIS STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT
View : OSBM
Department/Agency : North Carolina Community College System
BRU : North Carolina Community College System
Budget Code : 16800
Fund Code : 1620
Filter By : Unassigned
Load Crosswalk Table
Crosswalk Table
Budget Item Program
FC - 1620 - CURRICULUM INSTRUCTION Has Program(s)
CC -
CC - 2109
Fiscal Year : 2014-2015
Strategic Planning Area(SPA) : Curriculum Instruction
Program : Curriculum Instruction
Assign
Curriculum Improvement Project
Curriculum Instruction
Vocational Education

To finish, click the **Assign** button to assign the budget item to the program.



Fiscal Year : 2014-2015
Strategic Planning Area(SPA) : Curriculum Instruction
Program : Curriculum Instruction
Assign Un-Assign

You will see a message, as shown below, that informs you this is a bulk operation that may take several minutes to complete.

Fiscal Year : 2014-2015

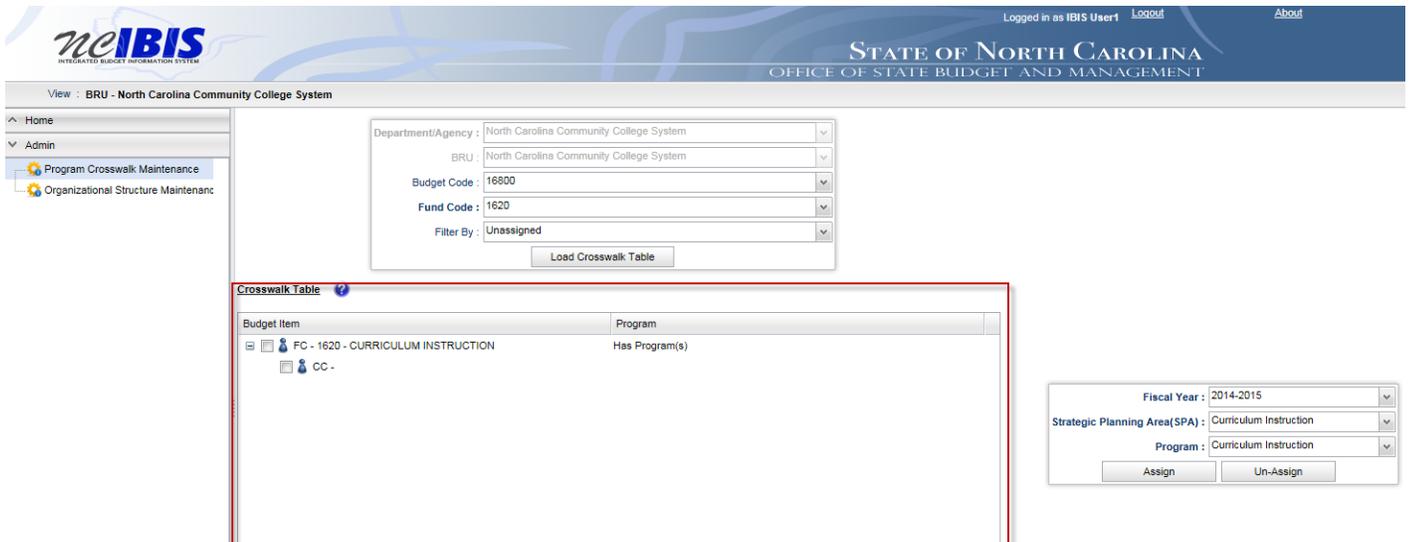
Strategic Planning Area(SPA) : Curriculum Instruction

Program : Curriculum Instruction

Assign Un-Assign

This is a bulk operation that may take some time to finish. Please refrain from using the back button until completed.

Once the assignment process is complete, you will see the Crosswalk Table displayed again on the screen. If you expand the fund code budget item, you will see that the cost center for which you just assigned a program is no longer displayed in the unassigned list. To confirm you've successfully assigned the program, you will need to change the filter to display assigned budget items for the fund code.



View : BRU - North Carolina Community College System

Department/Agency : North Carolina Community College System

BRU : North Carolina Community College System

Budget Code : 16800

Fund Code : 1620

Filter By : Unassigned

Load Crosswalk Table

Budget Item	Program
FC - 1620 - CURRICULUM INSTRUCTION	Has Program(s)
CC -	

Fiscal Year : 2014-2015

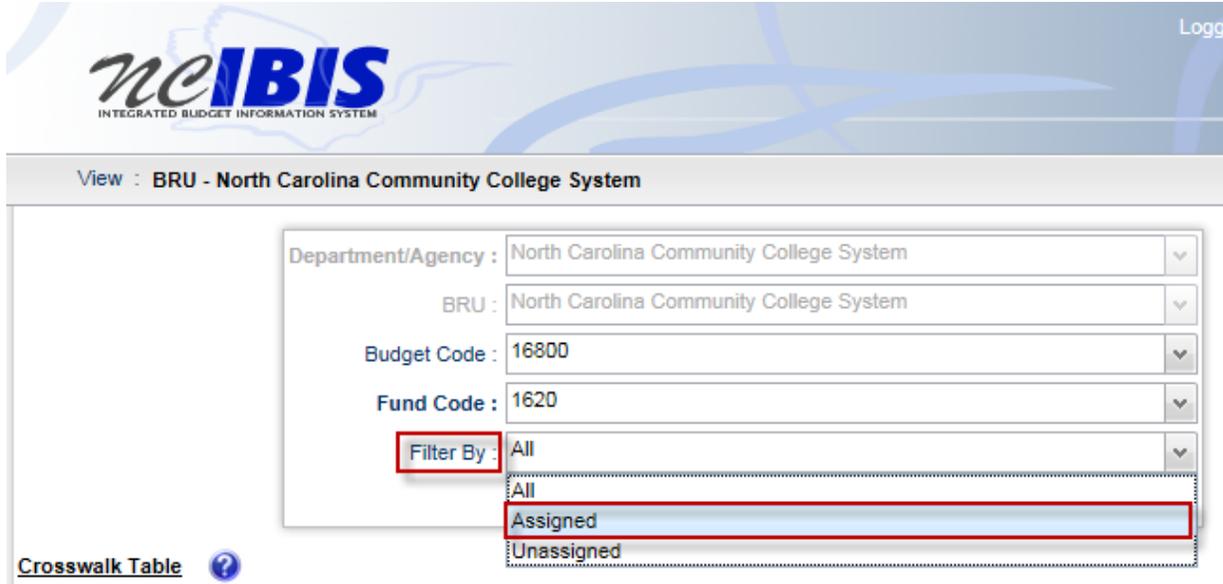
Strategic Planning Area(SPA) : Curriculum Instruction

Program : Curriculum Instruction

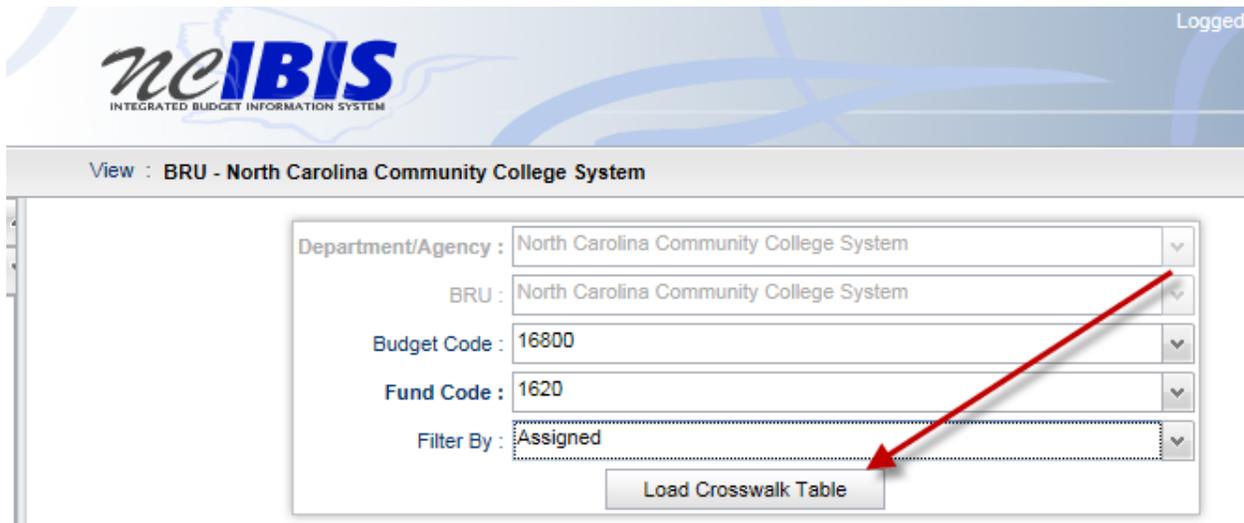
Assign Un-Assign

Display Assigned Budget Items

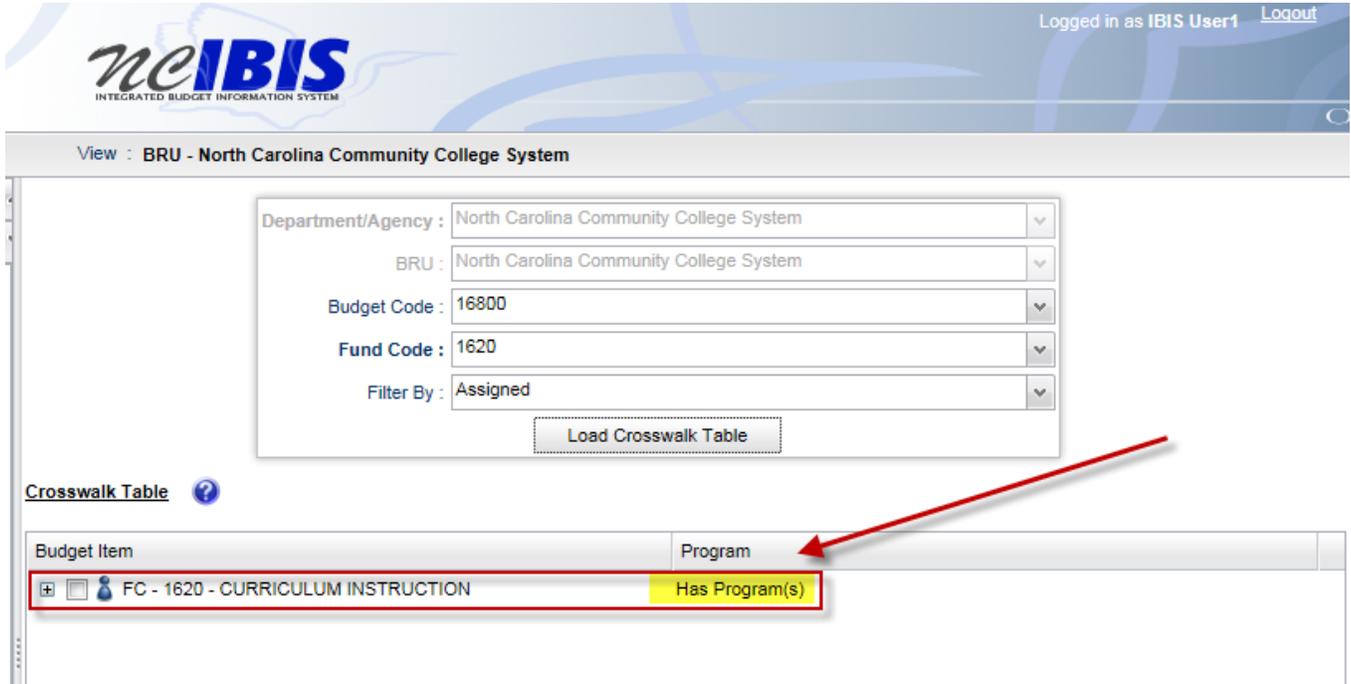
At the Program Crosswalk Maintenance home page, enter the appropriate budget code and fund code, and then filter by **Assigned** to see budget items that have been assigned to a program.



Click **Load Crosswalk Table** to display a list of assigned budget items for the select budget code and fund code.



Since the Assigned filter was selected to display assigned budget items, the result shows “Has Program(s)” in the Program column.



ncIBIS
INTEGRATED BUDGET INFORMATION SYSTEM

Logged in as IBIS User1 [Logout](#)

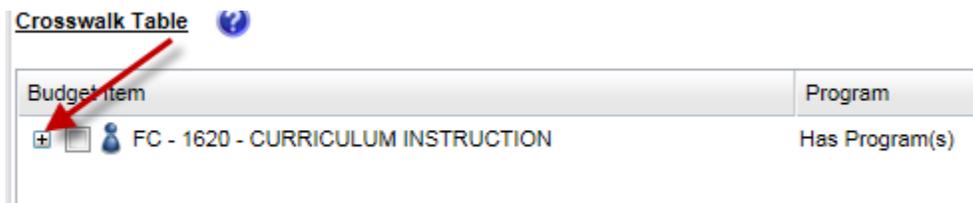
View : BRU - North Carolina Community College System

Department/Agency : North Carolina Community College System
BRU : North Carolina Community College System
Budget Code : 16800
Fund Code : 1620
Filter By : Assigned

Crosswalk Table ?

Budget Item	Program
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> FC - 1620 - CURRICULUM INSTRUCTION	Has Program(s)

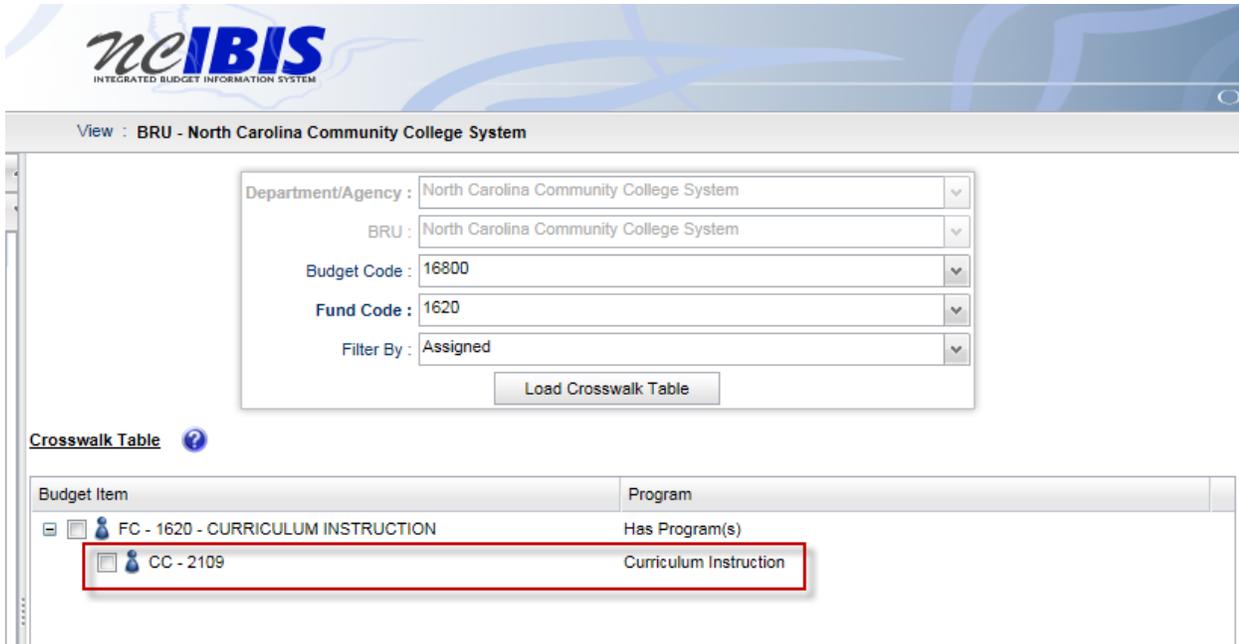
To expand on this budget item, click the plus sign (+) to the left of the fund code as shown below.



Crosswalk Table ?

Budget Item	Program
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> FC - 1620 - CURRICULUM INSTRUCTION	Has Program(s)

Notice the cost center displayed below is the budget item we assigned to a program earlier in the previous step.



The screenshot shows the neIBIS interface for Program Crosswalk Maintenance. At the top, the neIBIS logo and the text "INTEGRATED BUDGET INFORMATION SYSTEM" are visible. Below the logo, the view is set to "BRU - North Carolina Community College System".

The main area contains a form with the following fields:

- Department/Agency : North Carolina Community College System
- BRU : North Carolina Community College System
- Budget Code : 16800
- Fund Code : 1620
- Filter By : Assigned

A "Load Crosswalk Table" button is located below the form.

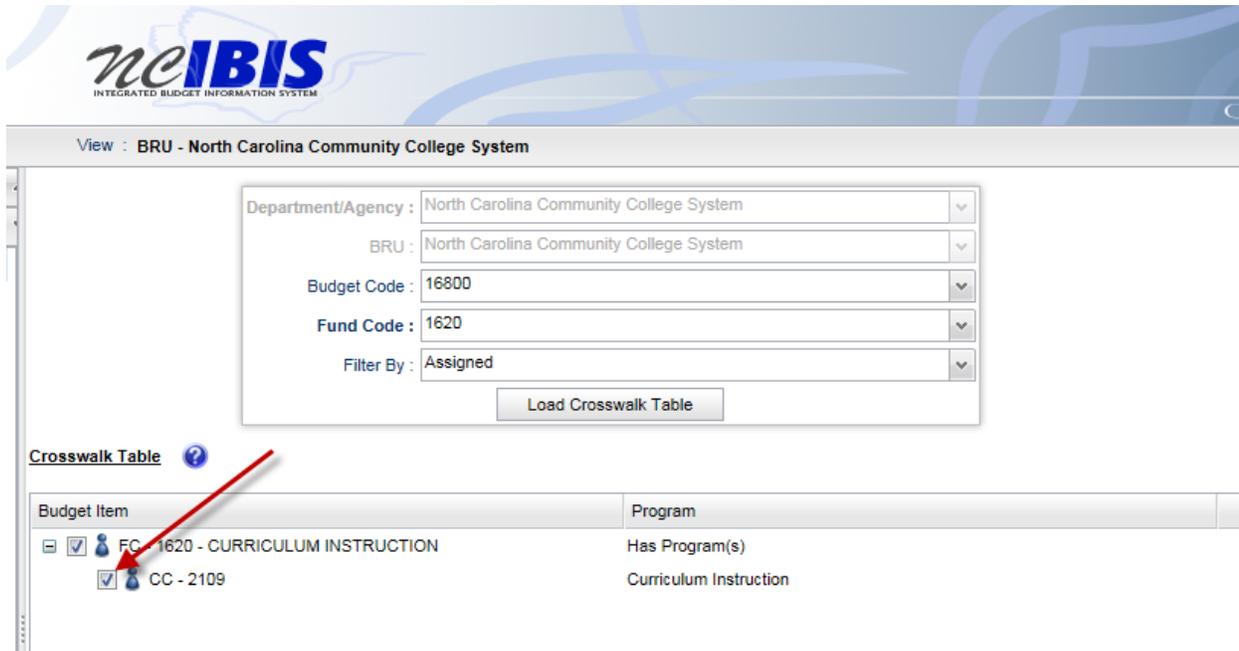
Below the form, the "Crosswalk Table" is displayed. It has a table with two columns: "Budget Item" and "Program".

Budget Item	Program
<input type="checkbox"/> FC - 1620 - CURRICULUM INSTRUCTION	Has Program(s)
<input type="checkbox"/> CC - 2109	Curriculum Instruction

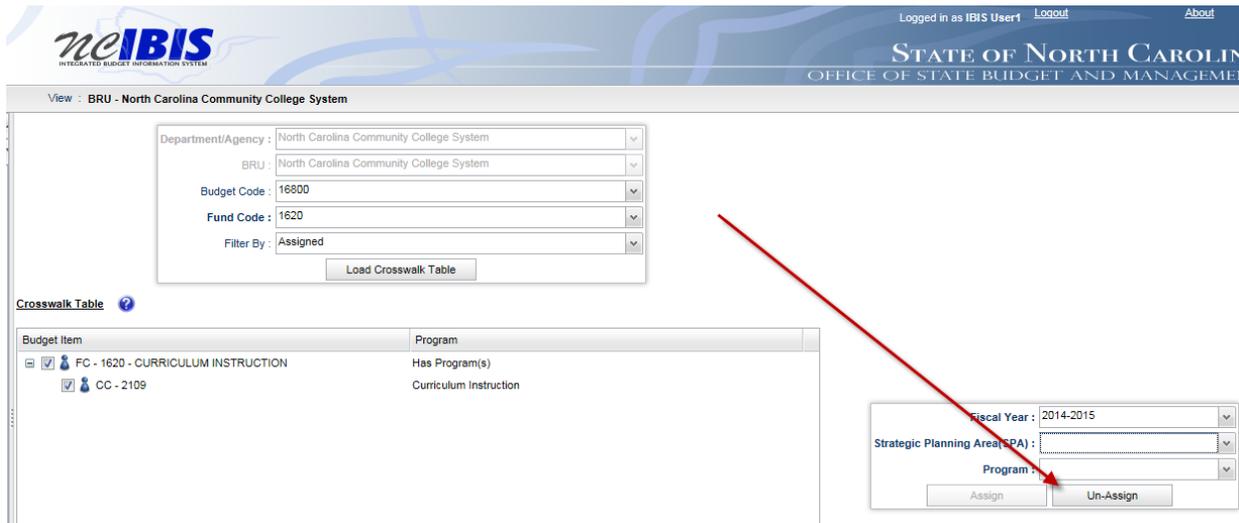
The row for "CC - 2109" is highlighted with a red border.

Un-Assign a Budget Item to a Program

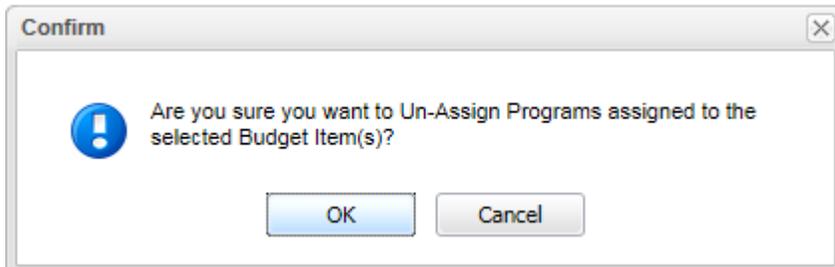
To un-assign a budget item to a program, click the checkbox to the left of the item(s) you want to un-assign.



Click the **Un-Assign** button to un-assign the selected budget items from their assigned programs.



You will see a confirm message asking you if you're sure you want to un-assign. Click Cancel if you want to cancel, or OK if you wish to proceed.



Once you've un-assigned the program from the budget item, you will no longer see those budget items listed in the crosswalk table for assigned budget items.

Notice the Program column in the crosswalk table listed below no longer displays "Has Program(s)" because this particular budget code no longer contains budget items that have been assigned a program.

Budget Item	Program
<input type="checkbox"/>  FC - 1620 - CURRICULUM INSTRUCTION	