

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS)

USER GUIDE

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.

UnLock Form

**** STATUS: BRU_DRAFT ****
 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	350988 \October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References ?

Add Row
Remove Row(s)

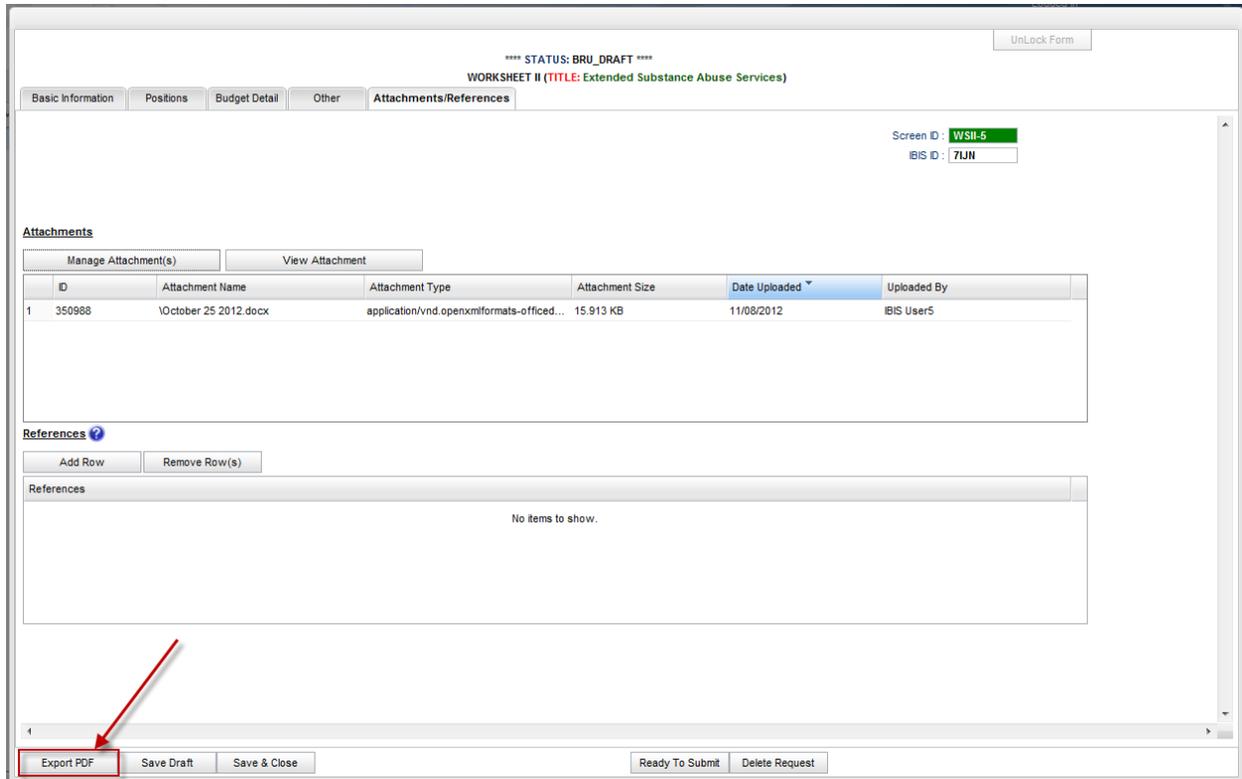
No items to show.

Export PDF
Save Draft
Save & Close

Ready To Submit
Delete Request

GENERATING PDF

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

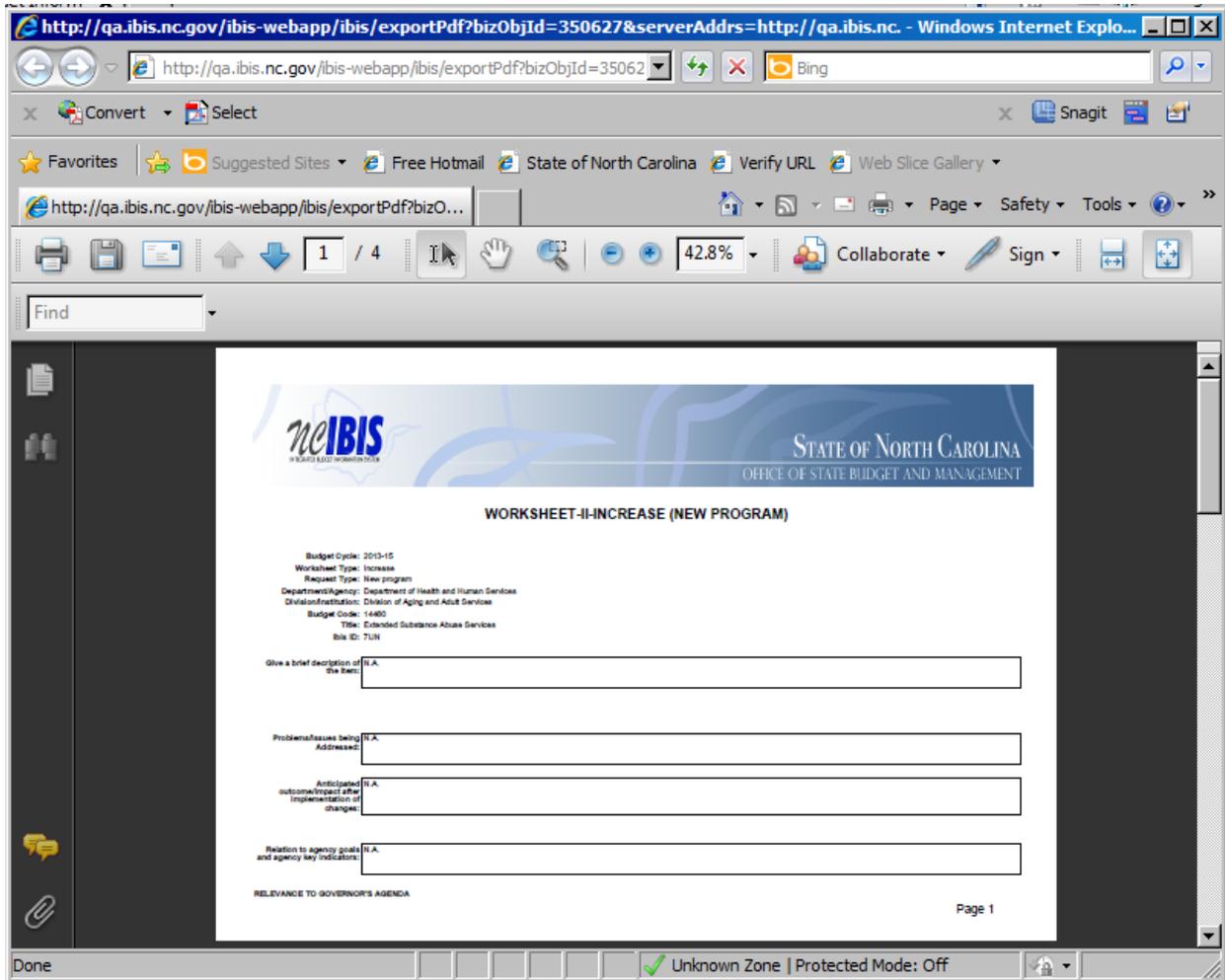
ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	350988 \October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

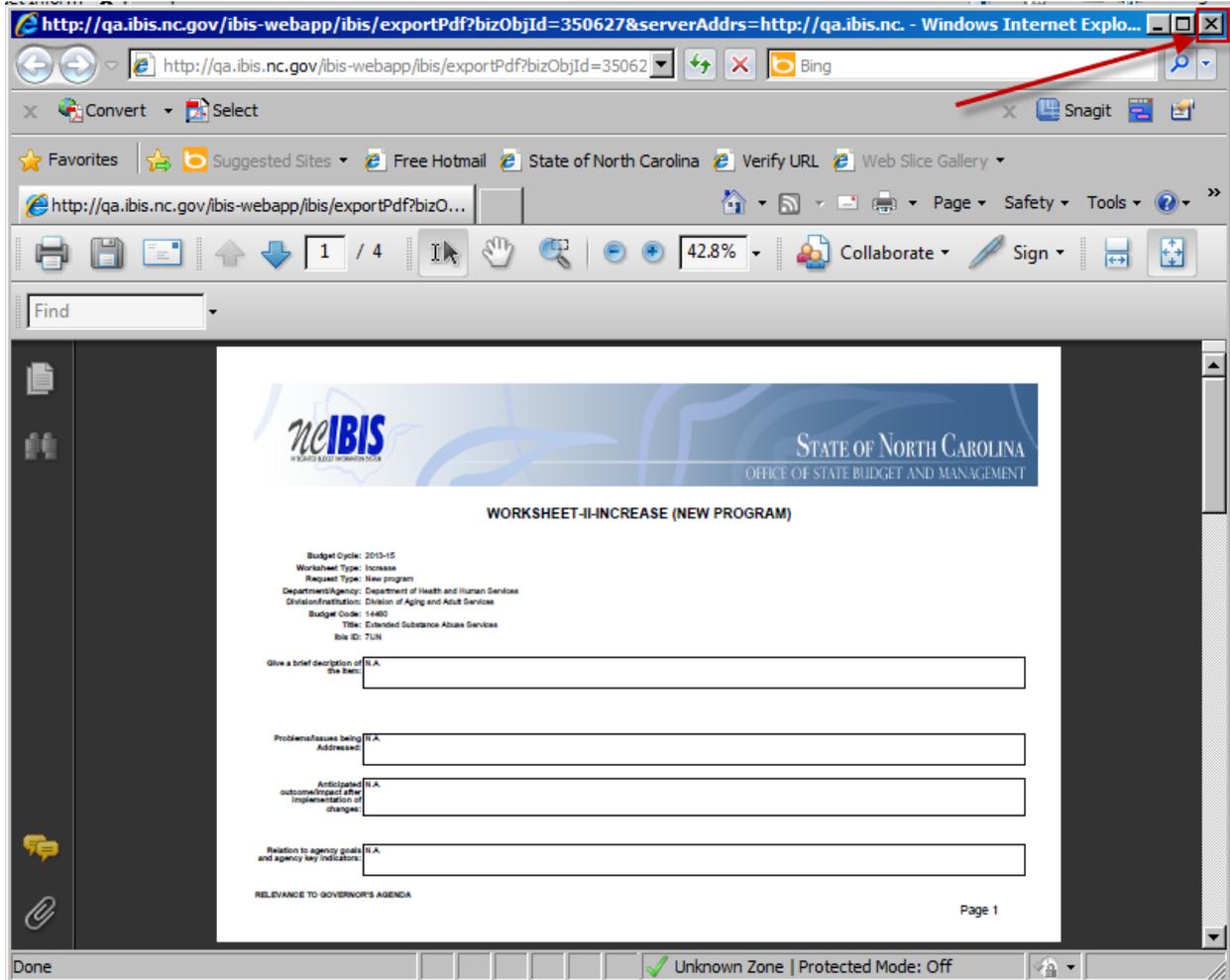
No items to show.

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.

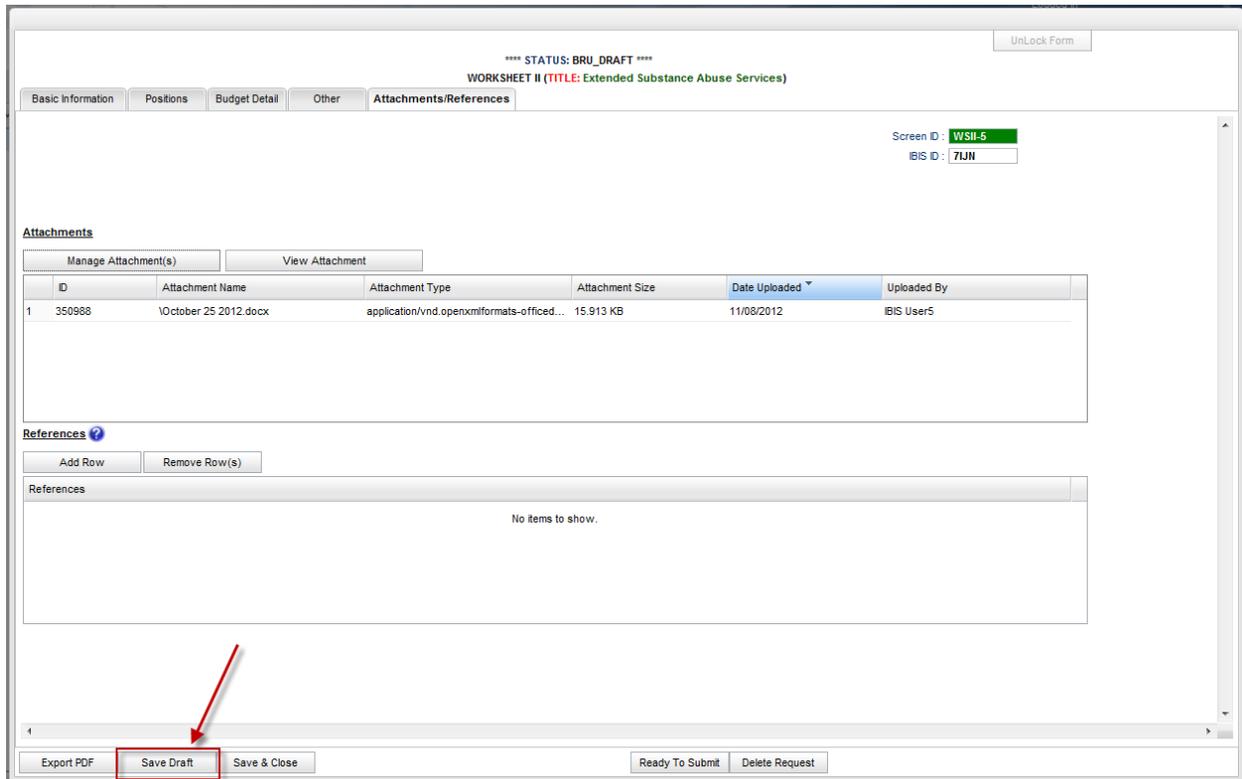


Use the browser control “x” in the upper right corner to close the PDF view.



SAVING A DRAFT

Click the Save Draft button and a Saving message will appear briefly in the upper right area of the form, followed by a Draft Save Successfully message. The form will remain open.



**** 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

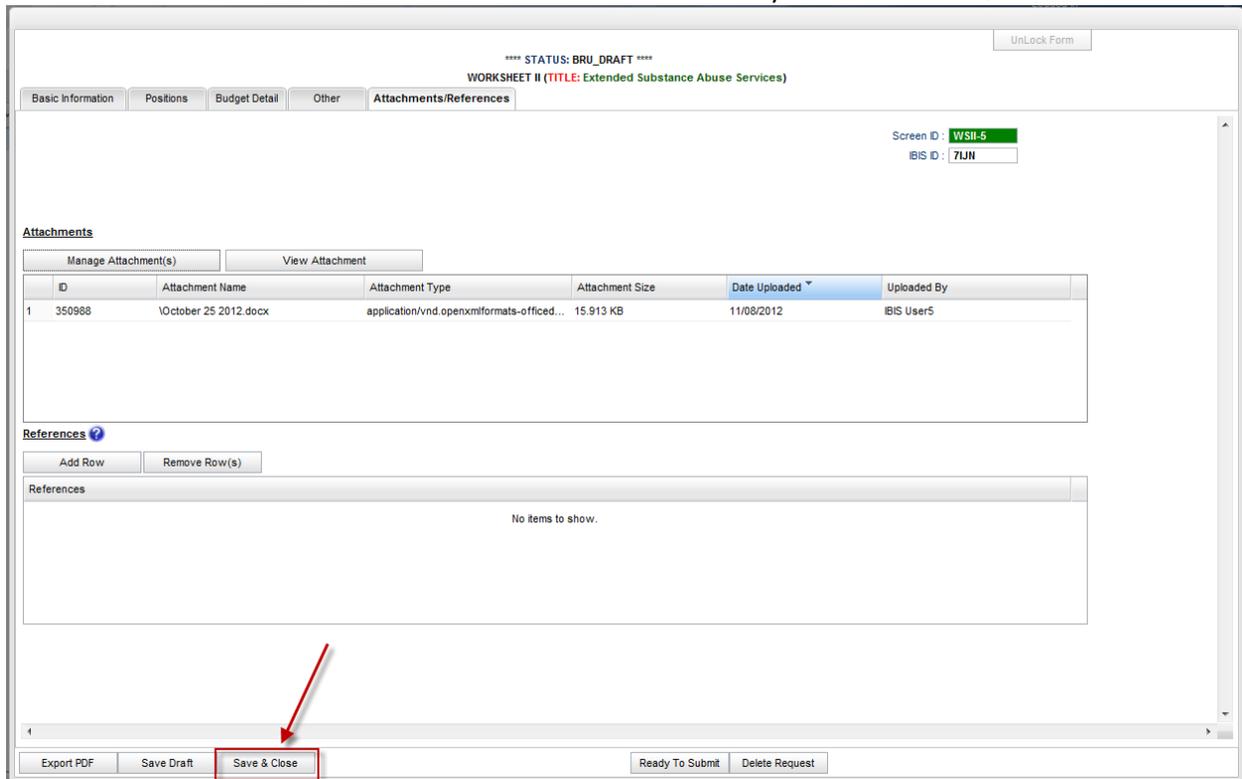
No items to show.

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

Draft Saved Successfully..

SAVING AND CLOSING A FORM

Click the Save & Close button and the form will close and return you to the Work Queue.



**** STATUS: BRU_DRAFT ****

WORKSHEET II (TITLE: Extended Substance Abuse Services)

Screen ID : WSHI-5
BIS 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

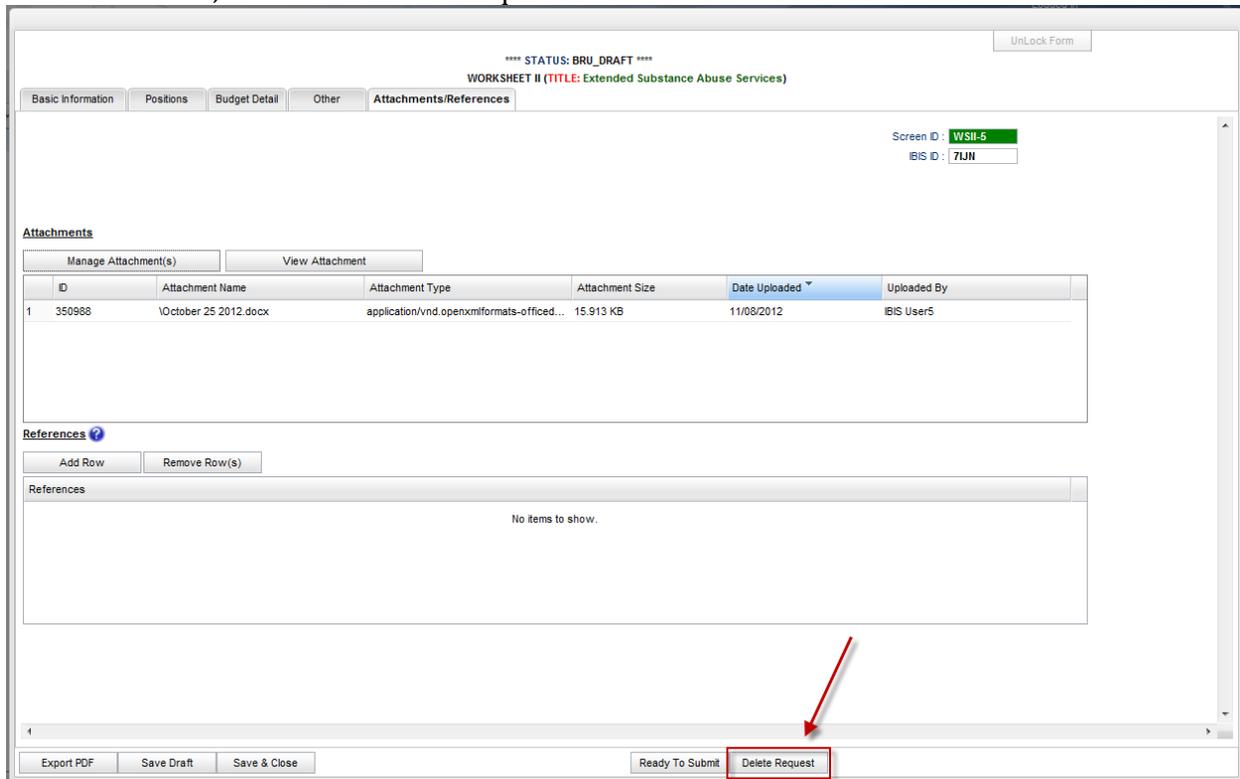
References

No items to show.

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

DELETE A REQUEST

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 : WSI-5
IBIS ID : 7LJN

Attachments

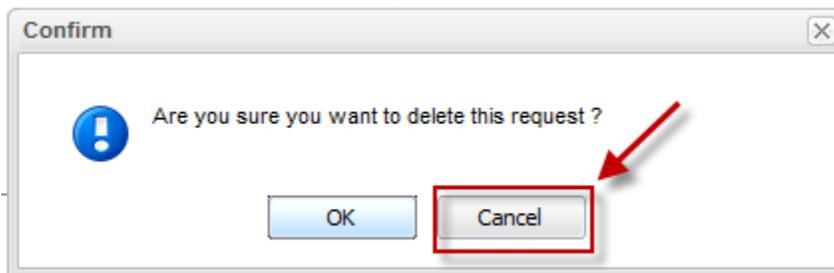
ID	Attachment Name	Attachment Type	Attachment Size	Date Uploaded	Uploaded By
1	October 25 2012.docx	application/vnd.openxmlformats-officed...	15.913 KB	11/08/2012	IBIS User5

References

No items to show.

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

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.

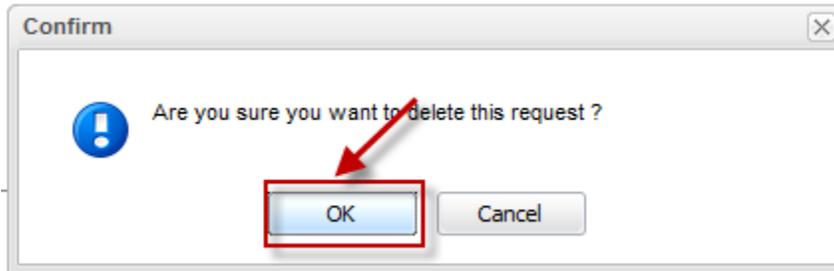


Confirm

Are you sure you want to delete this request ?

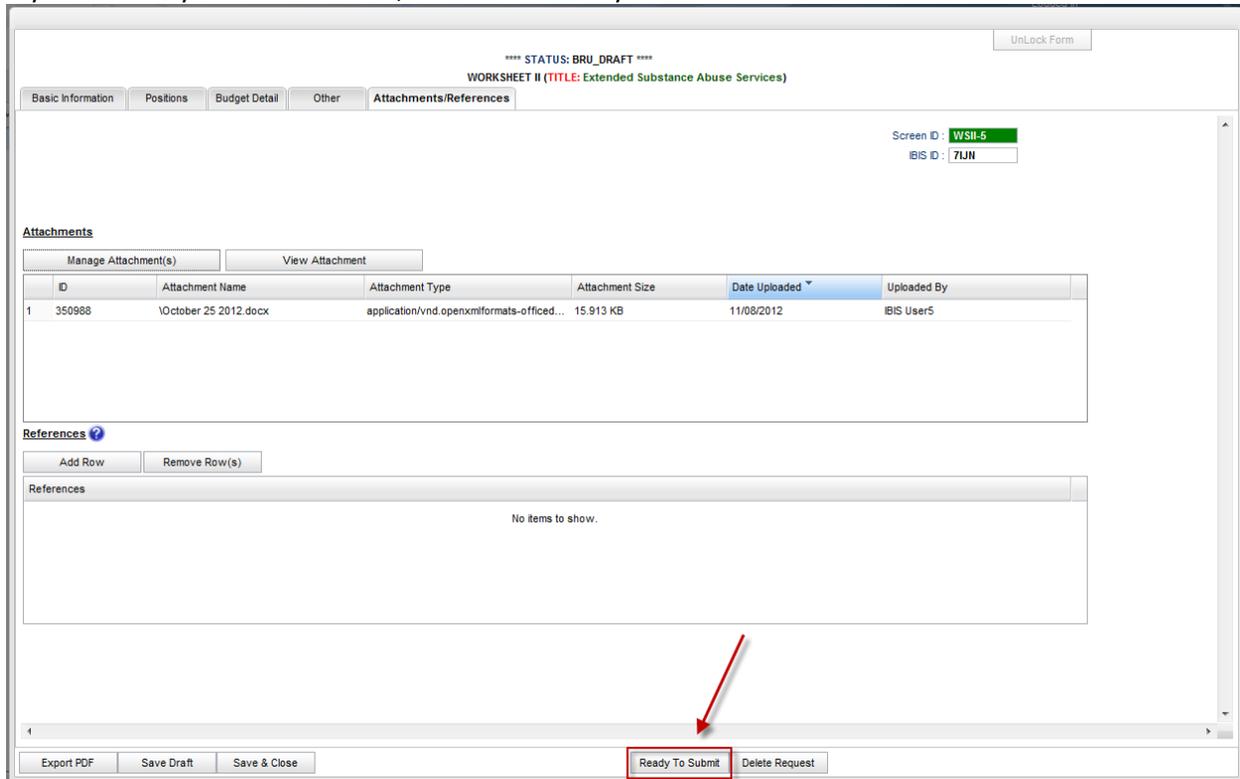
OK Cancel

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 ****

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.

Ready To Submit

Selecting the Ready to Submit begins the form validation action. The form validation will examine the form for completeness of required fields 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.

After correcting required field deficits, 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 view 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

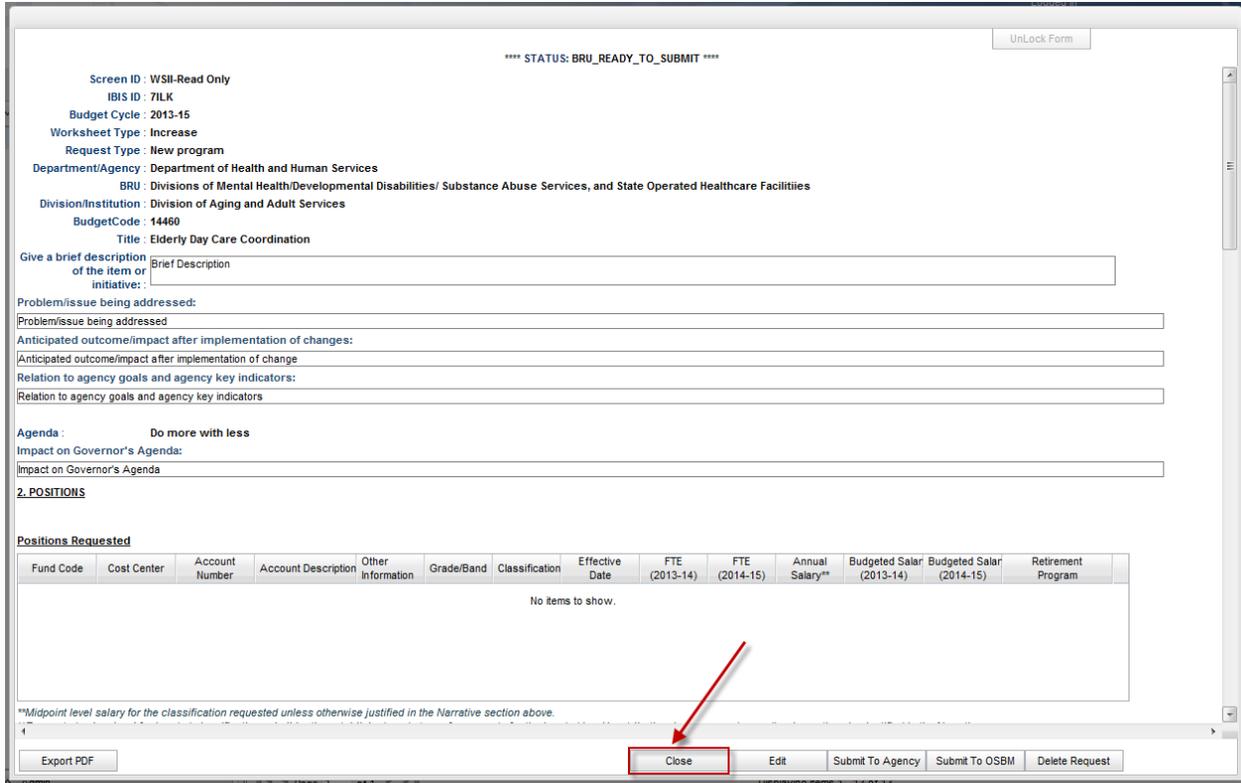
Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**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 from 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 buttons functions as described above. Select the Close button to close this read only version of a form and return to the Work Queue.



**** STATUS: BRU_READY_TO_SUBMIT ****

UnLock Form

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 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

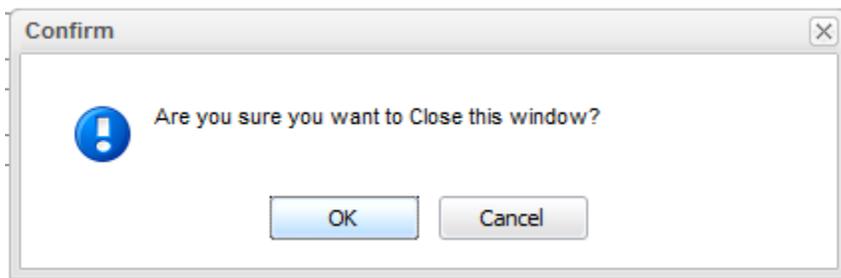
Positions Requested

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. 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 [X]

 Are you sure you want to Close this window?

OK Cancel

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 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:

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

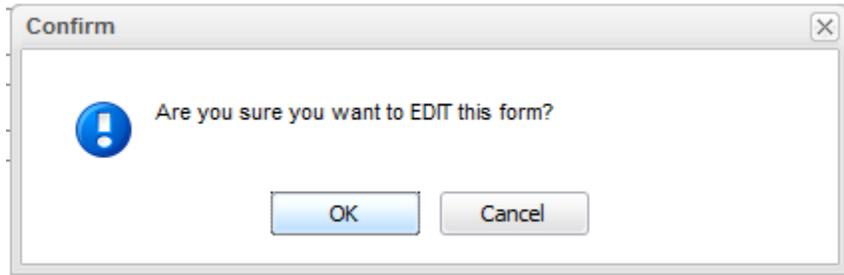
Positions Requested

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.													

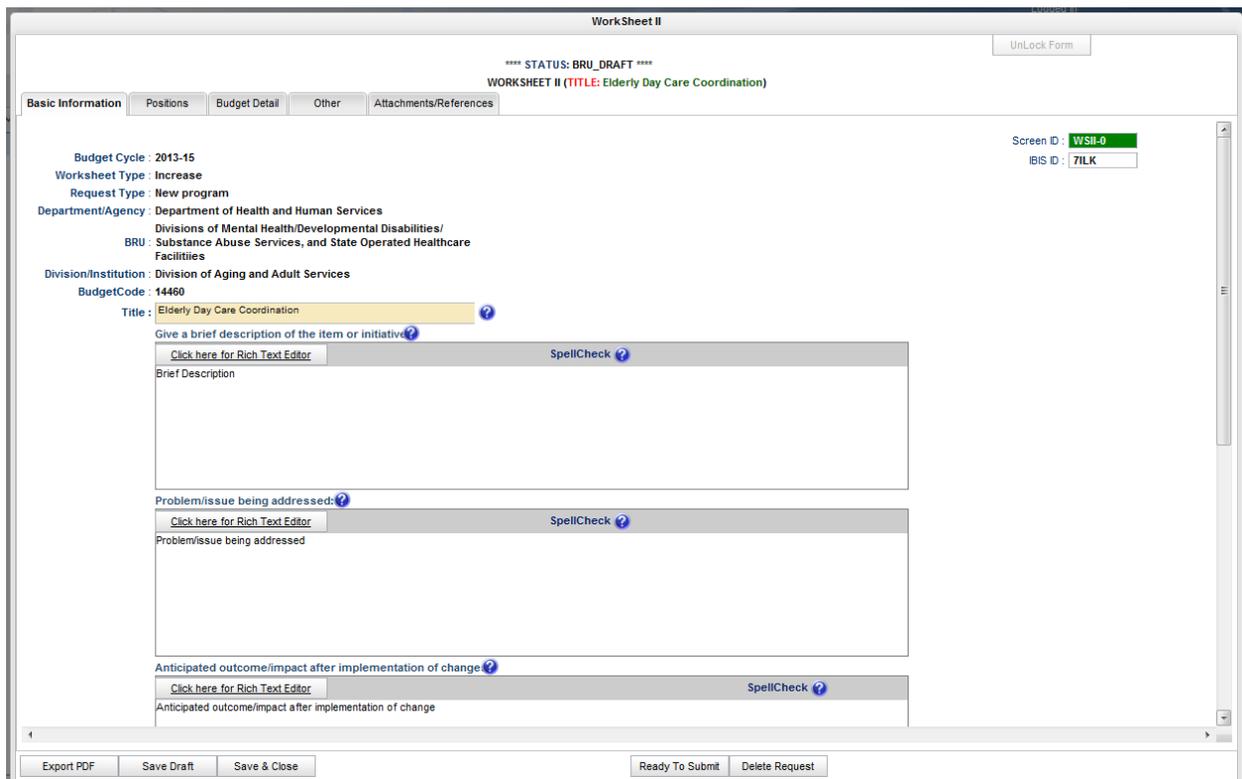
***Midpoint level salary for the classification requested unless otherwise justified in the Narrative section above.

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 clicked 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 work flow by clicking the Submit to Agency or Submit to OSBM buttons. Note: Submit to Agency is an option for the University System and the Department of Health and Human Services only.

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 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

**** 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:
 problem/issue

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

Relation to agency goals and agency key indicators:
 KPIs

Agenda : Position IC 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 Agency is selected, a Confirm window will appear. To continue the Submit to Agency action, click OK. To cancel the Submit to Agency action, click on Cancel.

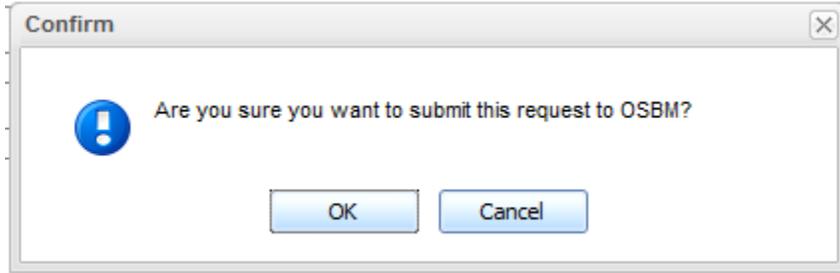
Confirm ✕


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

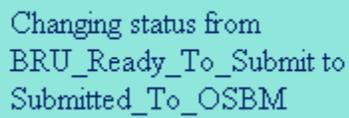
When OK is selected, a message will flash that the form is changing status from Ready to Submit to Submitted to Agency, followed by a Status changed successfully message. The form will close and the user will be returned to the work queue. The form will no longer be displayed in the work queue since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

Changing status from
BRU_Ready_To_Submit to
Submitted_To_Agency

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.



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