

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

HOME MENU & WORK QUEUE OVERVIEW



TABLE OF CONTENTS

- 1. Home and Admin Menu
- 2. <u>Create New Request</u>
- 3. <u>View History</u>
- 4. My Messages
- 5. Filtering and Sorting
- 6. Lock Feature

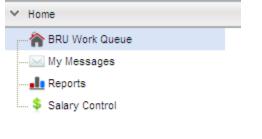


Home and Admin Menu

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

neiBi	S							Nor	TH Caro	LINA
View : BRU - Department of	of Agriculture and Con	sumer Services								
∨ Home	BRU Work	Queue								
RU Work Queue	Create Nev	w Request 👻 📃 🚺	/iew History 📃	View Messages		Filter Criteria	From Date :		To Date :	
	Ref#	Budget Code	Туре	v Name		Status	Updated By	Lock	Last Updated 🎽	٩
					No items to show.					
Admin	14 4 Pa	age 1 of 1 🕨			Displavi	ng items 0 - 0 of 0				

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.



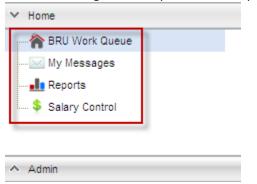
|--|



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.

AR-A9K1 13700 Allotment April Operating Allotment BRU Draft ibisuser6 2013-04-21 7:45 All	v		
12-0001 40817 Revision Realign Project Funds BRU Draft ibisuser6 2013-04-21 7:45 Ali AR-A9K1 13700 Allotment April Operating Allotment BRU Draft ibisuser6 2013-04-21 7:45 Ali		×	
AR-A9K1 13700 Allotment April Operating Allotment BRU Draft ibisuser6 2013-04-21 7:45 All	Budget Code Type Name	Status Updated By Lock Last Updated *	
	01 40817 Revision Realign Project Fund	s BRU Draft ibisuser6 2013-04-21 7:45 AM	
12-0001 13700 Revision Realignment BRU Draft ibisuser6 2013-04-21 7:44 Al	K1 13700 Allotment April Operating Allo	ment BRU Draft ibisuser6 2013-04-21 7:45 AM	
	01 13700 Revision Realignment	BRU Draft ibisuser6 2013-04-21 7:44 AM	

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.

BRU Work Queue									
Create New	Request 👻 📃 V	ïew History 🔲 View M	essages	Filter Criteria	From Date :		To Date :		
		~		~				9	
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated 🔻		
12-0001	40817	Revision	Realign Project Funds	BRU Draft	ibisuser6		2013-04-21 7:45 AM		
AR-A9K1	13700	Allotment	April Operating Allotment	BRU Draft	ibisuser6		2013-04-21 7:45 AM		
12-0001	13700	Revision	Realignment	BRU Draft	ibisuser6		2013-04-21 7:44 AM		
📲 🗐 Pag	ge 1 of 1 🕨 🖡	>	Displavi	ng Items 1 - 3 of 3					
un n Pag		- U	Displayi						



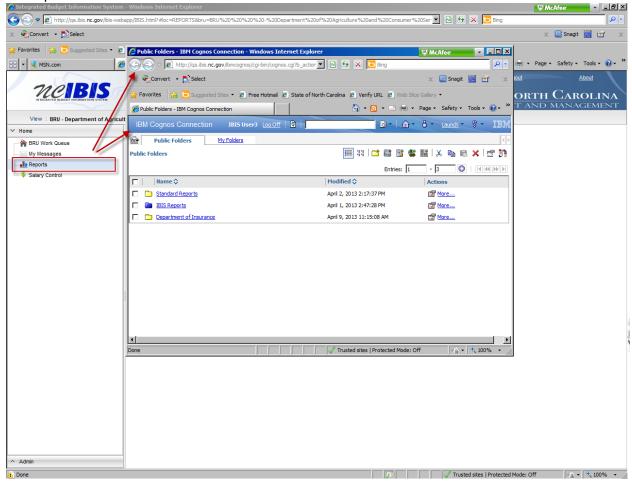
Clicking on the My Messages option displays the My Messages detail in the right pane.

neiBi	S			d in as IBIS User6 Logout A ATE OF NORTH CAR FATE BUDGET AND MANAG	olin
INTEGRATED BUDGET INFORMATION SY	STEM		OFFICE OF S	fate budget and manag	GEMEN
View : BRU - Department	of Agriculture and Consumer Services				
Home	My Messages				
RU Work Queue		partment of Agriculture V From Date :	To Date :		
🖂 My Messages	Filter Criteria BRU De	From Date :	To Date :	Unread Messages Only	
Reports		~			
\$ Salary Control	Туре	Title	Created By	Date *	
	Allotment	Testq has been Request Deleted	IBIS User11	2013-04-05 8:27 AM	

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



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 <u>located on the</u> <u>IBIS website</u>.

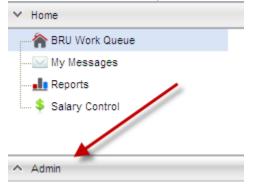


Clicking on the Salary Control option displays the Salary Control information in the right pane.

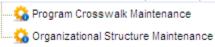
Home	Salary Control									
RU Work Queue	Biennium : 20	11-2013 V Fiscal Year : (• 2011/2012 C 2012/	2013 🍣 Refresh			Po	sition Search :		Search
Reports	Budget Code		Fund Code Descriptio			Deservatives	Transation ID	A stud Data	Effective Date	Dec North
\$ Salary Control			und Code Descriptio	n	Account	Description	Transaction ID	Actual Date	Effective Date	Position #
T,		DACS-GENERAL	No items to	show.		No items to show.		No item	ns to show.	
		DACS-LIVESTOCK ACQ.								
		DACS-DISASTER REC								
		DACS-TOBACCO TRU								
		DACS-SOIL & WATER								
			04.4	N N 8	84.4		84.4		N II	
	Page	1 of 1	4 4 Page 1		III I Pa	age 1 🕨 🕨	II A Page	1		
	Code	Title	IBIS FTI		on FTE	IBIS Budget	Beacon Salary	Salary Reser	rve	Note #
		·: • Auto C Budget Code C								
		-			on FTE	IBIS Budget	Beacon Salary	Salary Reser	rve	Note #
		-			on FTE	IBIS Budget \$0.00	Beacon Salary \$0.00	Salary Reser	rve \$0.00	Note #
	Code	Title	IBIS FT	Beac		-		Salary Reser		Note #
	Code 13700	Title DACS-GENERAL	IBIS FTI Q.	Beac 0	0	\$0.00	\$0.00	Salary Reser	\$0.00	Note #
	Code 13700 23700	Title DACS-GENERAL DACS-LIVESTOCK AC	IBIS FT	Beac 0 0	0 0	\$0.00 \$0.00	\$0.00 \$0.00	Salary Reser	\$0.00 \$0.00	Note #
	Code 13700 23700 23702	Title DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC.	IBIS FT1 Q. 	Beac 0 0 0	0 0 0	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23702 23703	Title DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC. DACS-TOBACCO TRU.	IBIS FT1 Q. 	Beac 0 0 0 0	0 0 0	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23702 23703 23704	Title DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC. DACS-TOBACCO TRU. DACS-SOIL & WATER.	IBIS FT1 Q. 	Beac 0 0 0 0 0	0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23702 23703 23704 23705	TELE DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC. DACS-TOBACCO TRU, DACS-SOIL & WATER. DACS - FDF	BIS FTI 0. 	Beac 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23702 23703 23704 23705 53700	Title DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC. DACS-TOBACCO TRU. DACS-SOL & WATER. DACS - FDF DACS Farmers Market	BIS FTI 0. 	Beac 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23702 23703 23704 23705 53700 53725	Title DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC. DACS-TOBACCO TRU DACS-SOL & WATER. DACS - FDF DACS Farmers Market DACS-WINC AG CT MT	BIS FTI 0. 	Beac 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23702 23703 23704 23705 53700 53725 53750 63700 63702	Title DACS-GENERAL DACS-LIVESTOCK AC DACS-DISASTER REC. DACS-DISASTER REC. DACS-SOLL & WATER. DACS - SOLL & WATER. DACS Farmers Market DACS - FIPF DACS - WINC AG CT MT DACS-STATE FAR	BIS FTI	Beac 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Note #
	Code 13700 23700 23703 23704 23704 23705 53750 53755 53750 63700	TELE DACS-GENERAL DACS-LIVESTOCK ACI DACS-DISASTER REC. DACS-TOBACCO TRU DACS-SOL & WATER. DACS - FDF DACS - FDF DACS - FMF DACS - STATE FAIR DACS - TRUST	BIS FTI 0. 	Beec 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Salary Reser	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Note #

Detailed information on Salary Control can be found in the Salary Control user guide <u>located on the IBIS</u> <u>website</u>.

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 <u>located on the IBIS website</u>. 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.

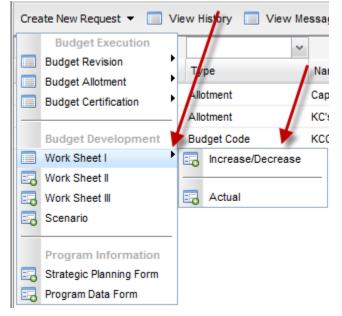
BRU Work Queue		
Create New Request 🔻 🗐 View History 🔲 View Messages	Filter Criteria From Date :	To Date :

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.

Crea	ate New Request 👻 📃 Vie
	Budget Execution
	Budget Revision
	Budget Allotment
	Budget Certification
_	
	Budget Development
	Work Sheet I
Ξ.	Work Sheet II
Ξ.	Work Sheet III
Ξ.	Scenario
	Program Information
Ξ.	Strategic Planning Form
Ξ.	Program Data Form



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 <u>located on the IBIS website</u>

View History

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

BRU Work Queue					
Create New Request 🔻 📃 View	v History 🔲 View Messages	Filter Criteria	From Date :	To Date :	

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

Note		×
i	Please select a Work Item to view its History.	
	ОК	

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.



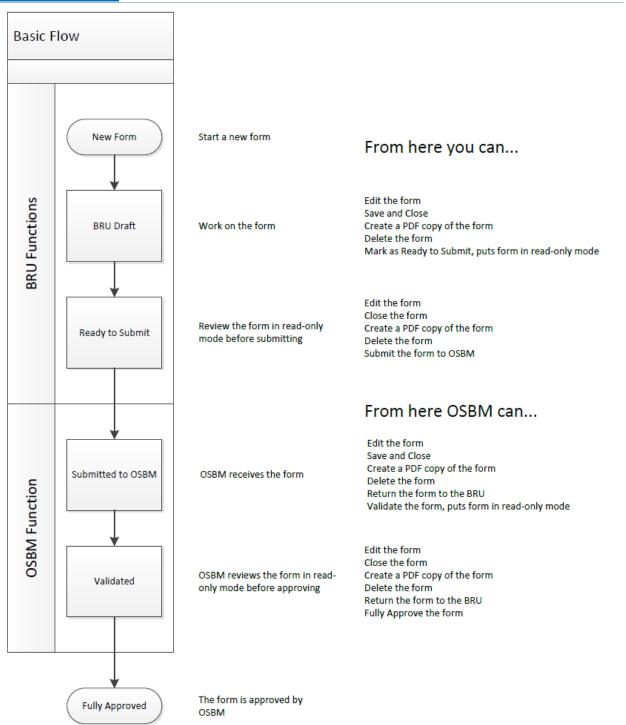
IBIS User Guide

Work Item His		ago: 0000 1	jpo numo			otatoo		aatoa by	\times
Ref#	Budget Code	Туре	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.



IBIS User Guide

Biennium: 2011-13 Fiscal Year: 2012-2013 Quarter: 3 BRU: Department of Agriculture and Consumer Services Budget Code: 13700-Agriculture and Consumer Services - General Fund Effective Date: 02/21/2013	Budget Allotment-Operating: (Title: KC's 2212013 allotment ,	BRU: 100-Department of Agricultu	ture and Consumer Services , Budget Code:13700-Agriculture and Consumer Services - General Fund)	
Basic Information Basic Inform			UnLock Form	
Benum Fiscal Verri 002-001 Budget Cold Strept Cold Strept Cold Budget Cold Strept Cold Strept Cold Bet Cold Strept Cold Strept Cold Strept Cold <th></th> <th></th> <th>**** STATUS: RETURNED_TO_BRU ****</th> <th>_</th>			**** STATUS: RETURNED_TO_BRU ****	_
Guarter: 3 BBU Department of Angine Uluro and Consumer Services Budget Code: VTX00. Apriculture and Consumer Services Department of Angine Uluro and Consumer Services Department of Angine Uluro and Consumer Services Budget Code: X C2212013 alotnent BIS ID: 10645 Securitients Account Alotnent Amount DOC-Parontal Services Southergo prevenential Transactions Southergo prevenential Tansactions Southergo prevene	Basic Information			-
Guarter: 3 BBU Department of Angine Uluro and Consumer Services Budget Code: VTX00. Apriculture and Consumer Services Department of Angine Uluro and Consumer Services Department of Angine Uluro and Consumer Services Budget Code: X C2212013 alotnent BIS ID: 10645 Securitients Account Alotnent Amount DOC-Parontal Services Southergo prevenential Transactions Southergo prevenential Tansactions Southergo prevene	Pionnium : 2011 12		Final Vors - 2042 2042	
Begier Code: 1370-4 And Consumer Services - General Fund Request Type Operating Alotment Begiers Part Mode The: Krs 2212013 alotment USIS ID: 10445				
Reference fumber: AR-0604 Request Type: Operating Allotment The: KCs 2212013 allotment UISS ID: 10645 UISS ID: 10645 Securitien: Requirements Account Allotment Amount 1000-Personal Services 500 2000-Personal Services		er Services - General Fund		
Justification Realizements Account Alboment Amount 1000-Personal Services 3000-Personal Services	Reference Number : AR-105K4		Request Type : Operating Allotment	
Justification: This is a justification for KC's 2212013 allotment Recuirements Account Allotment Amount JOXC-Personal Services 50 JOXC-Prochased Services 50 JOXC-Process and Adjustents 52,500 SOXC-Mergovernmental Transactors 50 Planned Requirements 552,500	Title : KC's 2212013 allotment		IBIS ID : 10645	
Justification: This is a justification for KC's 2212013 allotment Recuirements Account Allotment Amount JOXC-Personal Services 50 JOXC-Prochased Services 50 JOXC-Process and Adjustents 52,500 SOXC-Mergovernmental Transactors 50 Planned Requirements 552,500				=
Account Alotment Amount 1000/Personal Services 500 2000/Personal Services 500 2000/Personal Services 500 3000/Personal Services 500 Planned Requirements 552,500				
Account Altoment Amount 1X00C-Personal Services S0 200C-Personal Services S50,000 300C-Personal Services S50,000 400C-Personal Services S50,000 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S00 700C-Agency Reserve S0 800C-Intergovernmental Transactions S0 Planned Requirements S52,500	This is a justification for KC's 2212013	allotment		
Account Altoment Amount 1X00C-Personal Services S0 200C-Personal Services S50,000 300C-Personal Services S50,000 400C-Personal Services S50,000 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S00 700C-Agency Reserve S0 800C-Intergovernmental Transactions S0 Planned Requirements S52,500				
Account Altoment Amount 1X00C-Personal Services S0 200C-Personal Services S50,000 300C-Personal Services S50,000 400C-Personal Services S50,000 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S00 700C-Agency Reserve S0 800C-Intergovernmental Transactions S0 Planned Requirements S52,500				
Account Altoment Amount 1X00C-Personal Services S0 200C-Personal Services S50,000 300C-Personal Services S50,000 400C-Personal Services S50,000 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S00 700C-Agency Reserve S0 800C-Intergovernmental Transactions S0 Planned Requirements S52,500				
Account Altoment Amount 1X00C-Personal Services S0 200C-Personal Services S50,000 300C-Personal Services S50,000 400C-Personal Services S50,000 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S00 700C-Agency Reserve S0 800C-Intergovernmental Transactions S0 Planned Requirements S52,500				
Account Altoment Amount 1X00C-Personal Services S0 200C-Personal Services S50,000 300C-Personal Services S50,000 400C-Personal Services S50,000 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S00 700C-Agency Reserve S0 800C-Intergovernmental Transactions S0 Planned Requirements S52,500	Requirements			
1000-Personal Services S0 2000-Purchased Services S0 3000-Personal Services S50,000 4000-Property, Plant and Equipment S0 S000-Cher cynease and Adjustments S2,500 S000-Cher cynease and Adjustments S0 Panned Requirements S52,500		Allatmant Amount		
200C-Personal Services S50,000 400C-Personal Services S50,000 400C-Persones and Adjustments S2,500 500C-hetr Expenses and Adjustments S2,500 500C-Adjency Reserve S0 800C-hetrgovernmental Transactions S0 Planned Requirements S52,500				
300C-Personal Services S50,000 400C-Property, Plant and Equipment S0 500C-Other Expenses and Adjustments S2,500 600C-Aid and Public Assistance S0 600C-Intergovernmental Transactions S0 Planned Requirements S52,500 Receipts Account Allotment Amount Federal Receipts S0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				
4XOC-Property, Plant and Equipment S0 5XOC-Other Expanses and Adjustments S2,500 6XOC-Aid and Public Assistance S0 7XOC-Agency Reserve S0 8XOC-Intergovernmental Transactions S0 Planned Requirements S52,500 Receipts Account Altorment Amount Federal Receipts S0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				
SDOX-Other Expenses and Adjustments \$2,500 6007-Aid and Public Assistance \$0 7007-Agency Reserve \$0 80004-Intergovernmental Transactions \$0 Planned Requirements \$52,500 Receipts Account Allotment Amount Federal Receipts \$0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				
6000-Aid and Public Assistance S0 7000-Agency Reserve S0 8000-Intergovernmental Transactions S0 Planned Requirements S52,500 Receipts Account Allotment Amount Federal Receipts S0				
7X0CAgency Reserve S0 8X0C-Intergovernmental Transactions S0 Planned Requirements \$52,500 Receipts Account Altotment Amount Federal Receipts S0 t m				
800C-Intergovernmental Transactions S0 Planned Requirements S52,500 Receipts Account Allotment Amount Federal Receipts S0 1 m				
Planed Requirements \$52,500 Receipts Account Allotment Amount Federal Receipts \$0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				
Receipts Account Allotment Amount Federal Receipts 50 III III IIII IIIIIIIIIIIIIIIIIIIIII	8XXX-Intergovernmental Transactions	\$0		
Account Allotment Amount Federal Receipts 50 III III IIII IIII IIIIIIIIIIIIIIIII	Planned Requirements	\$52,500		
Account Allotment Amount Federal Receipts 50 III III IIII IIII IIIIIIIIIIIIIIIII				
Account Allotment Amount Federal Receipts 50 III III IIII IIII IIIIIIIIIIIIIIIII				
Account Allotment Amount Federal Receipts 50 III III IIII IIII IIIIIIIIIIIIIIIII				
Federal Receipts S0 III III III III III III III III III	Receipts			
	Account	Allotment Amount		
		\$0	11	
Export PDF Close				
	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.

BRU Work Qu	ueue					
Create New	Request 👻 📃 V	/iew History 📃 View	Messages	Filter Criteria	From Date :	To Date :
				~		
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock Last Updated *
11-A64Q	14411	Revision	Conference Report #22	Returned To BRU	jwhite	2013-04-21 8:24 AM
CE1241	14600	Certification	market state tourist destination	BRU Draft	SHHobby	2013-04-17 1:46 PM
CC1240	14600	Certification	Restore Office of Science & Technology	BRU Draft	SHHobby	2013-04-17 1:44 PM
CC1238	14600	Certification	Eliminate Asst. Secretary for Community Assistance	BRU Draft	SHHobby	2013-04-17 1:32 PM
CC1237	14600	Certification	Reduce BRIM Appropriation	BRU Draft	SHHobby	2013-04-17 1:28 PM
CE1236	14600	Certification	JMAC	BRU Draft	SHHobby	2013-04-17 1:26 PM
CE1235	14600	Certification	Military Support Funds	BRU Draft	SHHobby	2013-04-17 1:23 PM
CC1234	14600	Certification	Mgmt. Flexibility Reduction	BRU Draft	SHHobby	2013-04-17 1:16 PM
📲 🖣 Pag	e 1 of 1 🕨		Displa	iving Items 1 - 14 of 14		^

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 <u>IBIS workflow process</u>. OSBM can also return forms with messages attached. This will be displayed in the user message highlighted below.



IBIS User Guide

Work	Item Messages				×
	Title		Created Date	Form	
4	Conference Report #2	22 has been Returned To BRU	2013-04-21 08:24:41.760000000	Open Form	
	Created By:	jwhite			
	System Message:				
	User Message:	Correct the appopriation transfer amo	unt and re-submit to OSBM.		

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. X

Work Item Messages

	Title		Created Date	Form	
4	Conference Report #2	22 has been Returned To BRU	2013-04-21 08:24:41.760000000	Open Form	
	Created By:	jwhite		*	
	System Message:				
	User Message:	Correct the appopriation transfer am	ount and re-submit to OSBM.	· · · · · ·	

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. Budget Revision-Operating: (Title:Conference Report #22 BRU:210-Division of Aging and Adult Services Budget Code:14411-DHHS - Division of Aging and Adult Services)

	**** STATUS: OSBM DRAFT ****	UnLock Form	
			~
Biennium	2011-13		E
Fiscal Year	2012-2013		
Reference Number	: 11-A64Q		
Status	: Returned To BRU		
Department/Agency	Department of Health and Human Services		
BRU	: Division of Aging and Adult Services		
BudgetCode	: 14411-DHHS - Division of Aging and Adult Services		
Revision Type	: 11		
Effective Date			
Approval Date			
Recurrence			
End Date			
Title	: Conference Report #22		
Is this revision authorized by General Statute?			X
Is this revision authorized by Special Provision?	No		7
Export PDF			Close



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.

MCIBICATED REDCATE INFORMATION ST	S		STA	in as IBIS User6 Logout ATE OF NORTH CAR ATE BUDGET AND MANA	About OLIN2 GEMEN
View : BRU - Department of	of Agriculture and Consumer Service	s			
' Home	My Messages				
RU Work Queue	Filter Criteria BRU :	Department of Agriculture From Date :	To Date :	Unread Messages Only	
Wy Messages		×			
Reports	Туре	Title	Created By	Date *	
- · · Salary Control	Allotment	Testq has been Request Deleted	IBIS User11	2013-04-05 8:27 AM	

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

~				9
Туре	Title	Created By	Date 🍷	
Allotment	Grimsley's Plumbing - Jockey's Ridge has been Validated By BRU	Theresa K Watson	2013-04-16 10:53 AM	-
Revision	Fines/Penalties Transfer for March 2013 has been BRU Ready To	Kyle Fay	2013-04-16 10:17 AM	Ξ

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 \Im .



IBIS User Guide

My Messages			
Filter Criteria BRU : Di	vision of Aging and Adult From Date :	To Date :	Unread Messages Only
	×		
	Title	Created By	Date 🔻
All Budget Code	Conference Report #22 has been Returned To BRU	Joe White	2013-04-21 8:24 AM
Form Budget Code	Staff Costs Funded by PCAST has been BRU Ready	r To Submit Helen Tack	2013-04-16 12:38 PM
Fund Code Form Fund	Budget Existing LTS Grants has been BRU Ready To	Submit Helen Tack	2013-04-16 12:26 PM
Form Fund Cost Center	Non-Profit Contract Reduction has been BRU Ready	To Submit Helen Tack	2013-04-16 11:54 AM
Account	Non-Profit Contract Housing Program has been BRU	Ready To Su Helen Tack	2013-04-16 11:47 AM
Worksheet-I Worksheet-II	test has been BRU Ready To Submit	Joe White	2013-04-16 10:39 AM
Worksheet-III	Realign Retirement Accounts for Closing has been V	alidated By B Helen Tack	2013-04-11 3:01 PM
Strategic Planning	Budget Older American Act Funding has been Valida	ated By OSBM Robert Williams	2013-04-11 1:48 PM
Program Data Form Scenario	Budget Older American Act Funding has been BRU	Ready To Sub Helen Tack	2013-04-10 2:10 PM
Publication	Salary Reserve Realignment has been BRU Ready T	o Submit Helen Tack	2013-04-10 11:38 AM
Allotment Certification	test has been Request Deleted	Helen Tack	2013-04-10 11:01 AM
Revision		Displaying Items 1 - 25 of 25	

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

My Messages				
Filter Criteria BRU : Division of	Aging and Aduli 🗸 From Date : 📰 To Date :		Unread Messages Only	
Revision 🗸				
Туре	Title	Created By	Date 👻	
Revision	Conference Report #22 has been Returned To BRU	Joe White	2013-04-21 8:24 AM	
Revision	Staff Costs Funded by PCAST has been BRU Ready To Submit	Helen Tack	2013-04-16 12:38 PM	
Revision	Budget Existing LTS Grants has been BRU Ready To Submit	Helen Tack	2013-04-16 12:26 PM	
Revision	Non-Profit Contract Reduction has been BRU Ready To Submit	Helen Tack	2013-04-16 11:54 AM	
Revision	Non-Profit Contract Housing Program has been BRU Ready To Su	Helen Tack	2013-04-16 11:47 AM	
Revision	test has been BRU Ready To Submit	Joe White	2013-04-16 10:39 AM	
Revision	Realign Retirement Accounts for Closing has been Validated By B	Helen Tack	2013-04-11 3:01 PM	

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.

My Messages			
Filter Criteria BRU : Division of A	Aging and Adult 🗸 From Date : 📰 To Date :	🛄 🔲 Unread	Messages Only
Revision 🗸	Staff		8
Туре	Title	Created By	Date 👻
Revision	Conference Report #22 has been Returned To BRU	Joe White	2013-04-21 8:24 AM

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

My Messages							
Filter Criteria BRU :	Division of	Aging and Adult V From Date :	To Date :		🔲 Unread M	essages Only	
Revision	~	Staff					9
Туре		Title		Created By		Date 👻	
Revision		Staff Costs Funded by PCAST has been BRU	J Ready To Submit	Helen Tack		2013-04-16 12:38 PM	



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.

BRU Work Que	eue						
Create New R	equest 🔻 📃 Vi	ew History 📃 View M	essages	Filter Criteria	From Date :	To Date :	
		All		All Active 🗸			9
Ref#	Budget Code 👻	Туре	Name	Status	Updated By	Lock Last Updated	
BB-10666	14710	Worksheet-I	More money for Kathleen Crawford!!!	BRU Ready To Submit	ibisuser6	2013-03-12 2:34 PM	
	14710	Budget Code	KCCode	BRU Draft	ibisuser6	2013-02-01 4:06 PM	
	13700	Worksheet-II	KC's Increase request March 2013	BRU Draft	ibisuser6	2013-03-12 2:59 PM	

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.

ſ	44	•	Fe	b 20)13	•	₩
	Su	Мо	Tu	We	Th	Fr	Sa
	27	28	29	30	31	1	2
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	1	2
		То	day		С	anc	el

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 ^{So} on the line below the date range filters. The icon is highlighted below.

Create New Request 🔻 📃 View History 🔲 View Messages	Filter Criteria BRU : My Default BRUs	✓ From Date : 02/04/2013	To Date : 93/07/2013
	~	*	8



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	Туре	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.

rtment of Commerce nistrative Office of the Courts ion of Mental Health/Development a Carolina Community College Sy ersity of North Carolina at Wilmin ersity of North Carolina at Chapel rtment of Justice ion of Mental Health/Development a Carolina Community College Sy a Carolina Community College Sy rtment of State Treasurer	06800 16060 16020 13600 14460 06800	Type Worksheet-II Worksheet-II Budget Code Worksheet-I Worksheet-I Worksheet-I Worksheet-I Worksheet-I	Name alignment ws2form xx-2 COMMUNITY COLLEGES-INSTIT test Agness test accounts sqa Division Equipment Exception test blocker for ws1	Status OSBM Draft OSBM Draft OSBM Draft OSBM Draft OSBM Draft OSBM Draft Submitted To OS	ibisuser11 ibisuser11	Lock Last Updated ▼ ② 2013-03-06 5:02 PM 2013-02-13 4:45 PM 2013-02-13 2:20 PM 2013-02-13 2:20 PM 2013-02-13 1:59 PM 2013-02-11 9:58 AM 2013-02-01 19:58 AM 2013-02-06 12:03 PM 2013-02-06 12:03 PM
nistrative Office of the Courts ion of Mental Health/Development o Carolina Community College Sy ersity of North Carolina at Wilmin ersity of North Carolina at Chapel rtment of Justice ion of Mental Health/Development o Carolina Community College Sy o Carolina Community College Sy	02000 14460 06800 16060 16020 13600 14460 06800	Worksheet-II Worksheet-II Budget Code Worksheet-I Worksheet-I Worksheet-I Worksheet-I	ws2form xx-2 COMMUNITY COLLEGES-INSTIT test Agness test accounts sqa Division Equipment Exception	OSBM Draft OSBM Draft OSBM Draft Submitted To OS OSBM Draft OSBM Draft	ibisuser11 ibisuser11 ibisuser11 ibisuser2 ibisuser11 ibisuser11	2013-02-13 4:45 PM 2013-02-13 2:20 PM 2013-02-12 1:59 PM 2013-02-11 9:58 AM 2013-02-01 9:58 AM 2013-02-06 12:03 PM 2013-02-06 12:02 PM
ion of Mental Health/Development a Carolina Community College Sy ersity of North Carolina at Wilmin ersity of North Carolina at Chapel rtment of Justice ion of Mental Health/Development a Carolina Community College Sy a Carolina Community College Sy	14460 06800 16060 16020 13600 14460 06800	Worksheet-II Budget Code Worksheet-I Worksheet-I Worksheet-I Worksheet-I	xx-2 COMMUNITY COLLEGES-INSTIT test Agness test accounts sqa Division Equipment Exception	OSBM Draft OSBM Draft Submitted To OS OSBM Draft OSBM Draft	ibisuser11 ibisuser11 ibisuser2 ibisuser11 ibisuser11	2013-02-13 2:20 PM 2013-02-12 1:59 PM 2013-02-11 9:58 AM 2013-02-06 12:03 PM 2013-02-06 12:02 PM
Carolina Community College Sy ersity of North Carolina at Wilmin ersity of North Carolina at Chapel rtment of Justice ion of Mental Health/Development Carolina Community College Sy Carolina Community College Sy	06800 16060 16020 13600 14460 06800	Budget Code Worksheet-I Worksheet-I Worksheet-I Worksheet-I	COMMUNITY COLLEGES-INSTIT test Agness test accounts sqa Division Equipment Exception	OSBM Draft Submitted To OS OSBM Draft OSBM Draft	ibisuser11 ibisuser2 ibisuser11 ibisuser11	2013-02-12 1:59 PM 2013-02-11 9:58 AM 2013-02-06 12:03 PM 2013-02-06 12:02 PM
ersity of North Carolina at Wilmin ersity of North Carolina at Chapel rtment of Justice ion of Mental Health/Development Carolina Community College Sy Carolina Community College Sy	16060 16020 13600 14460 06800	Worksheet-I Worksheet-I Worksheet-I Worksheet-I	test Agness test accounts sqa Division Equipment Exception	Submitted To OS OSBM Draft OSBM Draft	ibisuser2 ibisuser11 ibisuser11	2013-02-11 9:58 AM 2013-02-06 12:03 PM 2013-02-06 12:02 PM
ersity of North Carolina at Chapel rtment of Justice ion of Mental Health/Development i Carolina Community College Sy carolina Community College Sy	16020 13600 14460 06800	Worksheet-I Worksheet-I Worksheet-I	Agness test accounts sqa Division Equipment Exception	OSBM Draft OSBM Draft	ibisuser11 ibisuser11	2013-02-06 12:03 PM 2013-02-06 12:02 PM
rtment of Justice ion of Mental Health/Development I Carolina Community College Sy I Carolina Community College Sy	13600 14460 06800	Worksheet-I Worksheet-I	sqa Division Equipment Exception	OSBM Draft	ibisuser11	2013-02-06 12:02 PM
ion of Mental Health/Development Carolina Community College Sy Carolina Community College Sy	14460 06800	Worksheet-I	Division Equipment Exception			0
Carolina Community College Sy Carolina Community College Sy	06800			Submitted To OS	ibisuser11	0
Carolina Community College Sy		Worksheet-I	test blocker for ws1			2013-02-06 12:01 PM
	16800			OSBM Draft	ibisuser11	2013-02-06 12:00 PM
rtment of State Treasurer		Worksheet-II	Web Technologist Position (Business & T	Validated By OSBM	ibisuser11	2013-02-05 8:12 AM
	13410	Worksheet-II	Joe Test	OSBM Draft	ibisuser11	2013-02-04 9:03 AM
			χ.			

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.

BRU Work G	Queue								
Create Nev	v Request 👻 📃 Vie	ew History	View Messages		Filter Criteria	From Date :		To Date :	
<u></u>	-		~		×				9
Ref#	Budget Code	Туре	Name	5	Status	Updated By	Lock	Last Updated 👻	



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.

BRU Work Que	ue							
Create New Re	ouest 🔻 📃 Vie	ew History 📃 View Me	essages	Filter Criteria	From Date :		To Date :	
		~		~				9
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated	

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.

Create New	Request 👻 📃 V	iew History 📃 View	messages	Filter Criteria	a From Date :		To Date :	
14-0002			*		~			
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated 👻	
	11111	Fund Code	ĨĨIJIJ	BRU Draft	ibisuser1		2013-04-10 1:16 PM	
11-0002	16800	Revision	test	BRU Draft	ibisuser1		2013-04-09 2:02 PM	
	06800	Certification	pdftest	BRU Draft	ibisuser1		2013-04-09 1:48 PM	
	41220	Certification	test dups	BRU Draft	ibisuser1		2013-04-09 1:01 PM	
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1		2013-04-08 5:44 PM	
14-0001	16800	Revision	Agness-test internal	BRU Draft	ibisuser1	0	2013-04-08 5:39 PM	
12-0001	16800	Revision	test tabbing	BRU Draft	ibisuser1		2013-04-08 5:14 PM	
12-0001	16800	Revision	test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	
14-0001	40070	Revision	capital test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	

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.

eue						
equest 🔻 📃 Vi	iew History 📃 View M	essages	Filter Criteria	From Date :	To Date :	1
	~		~			•
Budget Code	Туре	Name	Status	Updated By	Lock Last Updated 👻	
16800	Revision	t 14 again	BRU Draft	ibisuser1	2013-04-08 5:44 PM	
	equest 🔻 🔲 Vi Budget Code	Budget Code Type		Budget Code Type Name Status	Budget Code Type Name Status Updated By	Budget Code Type Name Status Updated By Lock Last Updated *

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

BRU Work Queu	e	1		10		1			
Create New Red	juest 👻 🔲 Vie	w History 📃 View Me	essages		Filter Criteria	From Date :		To Date :	
-		*			~				9
Ref#	Budget Code	Туре	Name		Status	Updated By	Lock	Last Updated 👻	

BBIL Work Queue



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.

					*			
Ref#	Budget Code		lame	Status	Updated By	Lock	Last Updated 👻	
	11111	All Budget Code	ĨIJIJ	BRU Draft	ibisuser1		2013-04-10 1:16 PM	
11-0002	16800	Form Budget Code	test	BRU Draft	ibisuser1		2013-04-09 2:02 PM	
	06800	Fund Code Form Fund	pdf test	BRU Draft	ibisuser1		2013-04-09 1:48 PM	
	41220	Cost Center	test dups	BRU Draft	ibisuser1		2013-04-09 1:01 PM	
14-0002	16800	Account	t 14 again	BRU Draft	ibisuser1		2013-04-08 5:44 PM	
14-0001	16800	Worksheet-I Worksheet-II	Agness-test internal	BRU Draft	ibisuser1	6	2013-04-08 5:39 PM	
12-0001	16800	Worksheet-III	test tabbing	BRU Draft	ibisuser1		2013-04-08 5:14 PM	
12-0001	16800	Strategic Planning	test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	
14-0001	40070	Program Data Form Scenario	capital test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	

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.

DRU WUTK Q	lueue							
Create New	Request 👻 🔲 V	ïew History 📃 View M	essages	Filter Criteria	From Date :		To Date :	
		Revision		~]		
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated 👻	
	11111	Fund Code	ພັກກ	BRU Draft	ibisuser1		2013-04-10 1:16 PM	
11-0002	16800	Revision	test	BRU Draft	ibisuser1		2013-04-09 2:02 PM	
	06800	Certification	pdftest	BRU Draft	ibisuser1		2013-04-09 1:48 PM	
	41220	Certification	test dups	BRU Draft	ibisuser1		2013-04-09 1:01 PM	
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1		2013-04-08 5:44 PM	
14-0001	16800	Revision	Agness-test internal	BRU Draft	ibisuser1	6	2013-04-08 5:39 PM	
12-0001	16800	Revision	test tabbing	BRU Draft	ibisuser1		2013-04-08 5:14 PM	
12-0001	16800	Revision	test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	
14-0001	40070	Revision	capital test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	

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

Create New	Request 👻 🥅 Vi	iew History 🔲 Viev	w Messages	Filter Criteria	From Date :	To Date :
		Revision	v.	v v		To bute .
Ref#	Budget Code	Туре	Name	Status	Updated By Lo	ock Last Updated 👻
11-0002	16800	Revision	test	BRU Draft	ibisuser1	2013-04-09 2:02 PM
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1	2013-04-08 5:44 PM
14-0001	16800	Revision	Agness-test internal	BRU Draft	ibisuser1 🧔	2013-04-08 5:39 PM
12-0001	16800	Revision	test tabbing	BRU Draft	ibisuser1	2013-04-08 5:14 PM
12-0001	16800	Revision	test	BRU Draft	ibisuser1	2013-04-05 2:23 PM
14-0001	40070	Revision	capital test	BRU Draft	ibisuser1	2013-04-05 2:23 PM

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



IBIS User Guide

BRU Work Q	ueue		1				
Create New	Request 👻 📃 Vi	iew History 🔲 Niew M	essages	Filter Criteria	From Date :		To Date :
		All 🔸 🗸		~			
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated 👻
11-0002	16800	Revision	test	BRU Draft	ibisuser1		2013-04-09 2:02 PM
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1		2013-04-08 5:44 PM
14-0001	16800	Revision	Agness-test internal	BRU Draft	ibisuser1	6	2013-04-08 5:39 PM
12-0001	16800	Revision	test tabbing	BRU Draft	ibisuser1		2013-04-08 5:14 PM
12-0001	16800	Revision	test	BRU Draft	ibisuser1		2013-04-05 2:23 PM
14-0001	40070	Revision	capital test	BRU Draft	ibisuser1		2013-04-05 2:23 PM

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

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

BRU Work Q	ueue							
Create New Request 🔻 📃 View History				Filter Criteria From Date : III To Date :			To Date :	
(- 4		*		~			9
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated 👻	_

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.

Create New	Request 🔻 📃 V	iew History 📃 View M	essages	Filter Criteria	From Date :	ate : To Date		
		Revision 🗸		×				
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock	Last Updated	
	11111	Fund Code	ພາມ	BRU Draft	ibisuser1		2013-04-10 1:16 PM	
11-0002	16800	Revision	test	BRU Draft	ibisuser1		2013-04-09 2:02 PM	
	06800	Certification	pdftest	BRU Draft	ibisuser1		2013-04-09 1:48 PM	
	41220	Certification	test dups	BRU Draft	ibisuser1		2013-04-09 1:01 PM	
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1		2013-04-08 5:44 PM	
14-0001	16800	Revision	Agness-test internal	BRU Draft	ibisuser1	6	2013-04-08 5:39 PM	
12-0001	16800	Revision	test tabbing	BRU Draft	ibisuser1		2013-04-08 5:14 PM	
12-0001	16800	Revision	test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	
14-0001	40070	Revision	capital test	BRU Draft	ibisuser1		2013-04-05 2:23 PM	

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.

create new r		ew History 📃 View M	1	Filter Criteria	From Date :	To Date
		All		~		
Ref#	Budget Code	Туре	Name	Status	Updated By	Lock Last Updated A
14-0001	40070	Revision	capital test	BRU Draft	ibisuser1	2013-04-05 2:23 PM
12-0001	16800	Revision	test	BRU Draft	ibisuser1	2013-04-05 2:23 PM
12-0001	16800	Revision	test tabbing	BRU Draft	ibisuser1	2013-04-08 5:14 PM
14-0001	16800	Revision	Agness-test internal	BRU Draft	ibisuser1	2013-04-08 5:39 PM
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1	2013-04-08 5:44 PM
	41220	Certification	test dups	BRU Draft	ibisuser1	2013-04-09 1:01 PM
	06800	Certification	pdftest	BRU Draft	ibisuser1	2013-04-09 1:48 PM
11-0002	16800	Revision	test	BRU Draft	ibisuser1	2013-04-09 2:02 PM
	11111	Fund Code	IIIII	BRU Draft	ibisuser1	2013-04-10 1:16 PM



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).

UnLock Form

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.