

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

ATTACHMENTS



ADDING & MANAGING ATTACHMENTS

Many IBIS forms have an Attachments tab as highlighted in the screenshot below. Click on the tab to bring it to the forefront.

	- 5								Logged in as IBIS User1	9 Loqout A	<u>\bout</u>
										UnLock Form	
				*		**** STATUS: BRU_C	RAFT ****		L.		
	ic Information	Positions	Budget Detail	Budget Overview	Attachment	S					•
Attaci	hments					Delite Allestand				Screen ID : BRO-4 IBIS ID : CXP0	
0.#20	Add Attach	iment	Attachment Ty	iew Attachment	Attacha	Delete Attachment	Date Uploaded *	lle	loaded By]	_
Allac	shment warne		Attachment Ty	pe			Date oploaded	Up	loaded by		
						No items to show.					
											-
4											>
Ex	ort PDF	Save Draft	Save & Clos	e			Ready To Submit	Delete Request			
Admin	_	_		Page 1 of 1	~ ~ I			uispiaying ite	ms u - u ui u		

In the Attachments section, click on the Add Attachment button highlighted below.

Add Attachment	View Attachment	Delete Attac	chment	
Attachment Name	Attachment Type	Attachment Size	Date Uploaded 👻	Uploaded By
	\mathbf{N}	No items to show.		
	\mathbf{X}			
	\mathbf{X}			



You will see an Attach a File window open. Click browse to select a file to be attached.

		**** STATUS: BRU_DRA	AFT ****		11. 11.
Basic Information Positions	Budget Detail Budget Overview Attac	hments			
Attachments					Screen ID : BRO-4
Add Attachment					IBIS ID : CXP0
Attachment Name	Attachment Type	Attachment Size	Date Uploaded 👻	Uploaded By	
		No items to show.			
7					
	Attach a file	e" to select an attachment			
	CICK DIOWSI	e to select an attachment			
		Browse			
				Close Window	
		.111			



You will see a file directory window open. Select a file to be attached and click Open.

Choose File to U	pload				? ×
Look <u>i</u> n:	🛅 IBIS Test Scr	ipts	•	G 🕫 🖻 🗄	-
My Recent Documents	Allotment - Ca	pital.xlsx			
My Documents					
My Computer					
- S					
My Network Places	File <u>n</u> ame:	Allotment - Capital xl	sx	-	<u>O</u> pen
	Files of type:	All Files (*.*)		•	Cancel

The file directory will close and an upload indicator will track the upload progress.

Attach a file	
Click "Browse" to select an attachment	
Allotment - Capital.xlsx 71%	
	Close Window



Once the upload is complete, you will see the file appear in the attachment list.

Attachments					
Add Attachment	View Attachment	Delete Attachment			
Attachment Name	Attachment Type	Attachment Size	Date Uploaded 🔻	Uploaded By	
\Allotment - Capital.xlsx	application/vnd.openxmlformats-office	21.146 KB	04/12/2013	IBIS User19	

To delete an attachment, select an attachment in the list, which will make the file become highlighted. Click the Delete button.

Attachments

Add Attachment	View Attachment	Delete Attac	hment	
Attachment Name	Attachment Type	Attachment Size	Date Uploaded 💙	Uploaded By
\Allotment - Capital.xlsx	application/vnd.openxmlformats-office	21.146 KB	04/12/2013	IBIS User19
			\backslash	

This will remove the attachment from the list.

Attachments						
Add Attachment	View Attachment	Delete Attachment				
Attachment Name Attachment Type Atta		Attachment Size	Date Uploaded 🔻	Uploaded By		
		No items to show.				



Attachmonte

Attachments

Attach as many files as needed to support the request.

To view attachments, select a file in the attachments list and click the View Attachment button (or double click on the selected file).

Add Attachment	View Attachment	Delete Attaci	iment	
Attachment Name	Attachment Type	Attachment Size	Date Uploaded 👻	Uploaded By
Allotment - Capital.xlsx	application/vnd.openxmlformate	s-office 21.146 KB	04/12/2013	IBIS User19

You will see the File Download window. Clicking the Open button will open the document. The save button will allow you to Save the document outside the IBIS system. Clicking the Cancel button will cancel the View Attachment request, close the File Download window and return you to the Attachments tab.

File Down	load I	×						
Do you	want to open or save this file?							
	Name: downloadAttachment.docx Type: Microsoft Word Document From: qa.ibis.nc.gov							
I Alwa	Open Save Cancel							
2	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?							



References

A References section exists on the Worksheet II form. It is a specific area of the Attachments/References tab that allows you to enter web links or file names that may contain supporting information for referral.

						WorkSheet II				Luqueu II	
										UnLock Form	
						ATUS: BRU_DRAFT ****					
Basic Information	Positions	Budget Detail	Other	Attachments/		KSHEET II (TITLE: Newer	program K	C)			
v Basic Information	Posicions	budget Detail	Other	Attachments/	References						
									Screen ID : WSII-5		•
									IBIS ID : 7IWF		
Attachments											
Manage Atta	chment(s)	V	iew Attachment								
D	Attachm	ent Name		Attachment Type	•	Attachment Size		Date Uploaded *	Uploaded By		
					No iter	ms to show.					
					No itel						
	1										
References 🕜											
Add Row	Remove	Row(s)									
References											
					No iter	ms to show.					
4											• •
Event DDE	Cours Day 2	0.000					To Cube ?	Dalata Damant			
Export PDF	Save Draft	Save & Clos	e			Ready	/ To Submit	Delete Request			

To add a reference, click on the Add Row button in the References section.

References 🕜	
Add Row	Remove Row(s)
References	
	No items to show.

A blank row will appear in the References list box where you may type in or paste in URLs, file names, or other references.

Add Row Remove Row(s)			
References			
http://www.nc.gov/			
See MS Word file: "Supporting Documents" on the Agency shared drive			



Add as many rows/references as appropriate to support the Worksheet II you are developing. To remove a row, highlight the row to be deleted and click the Remove Row(s) button.

	Confirm	
References 🕜		
Add Row Remove Row(s)	Are you sure you want to remove the selected Row(s)?	
References		
http://www.nc.gov/	OK Cancel	
See MS Word file: "Supporting Documents" on the Agency shared drive		

A Confirm message box will appear. To cancel the deletion, click the Cancel button. To remove the reference, click the OK button. The Confirm message box will disappear, and the line will be deleted. References ?

Add Row	Remove Row(s)	
References		
http://www.nc.gov/		