

INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

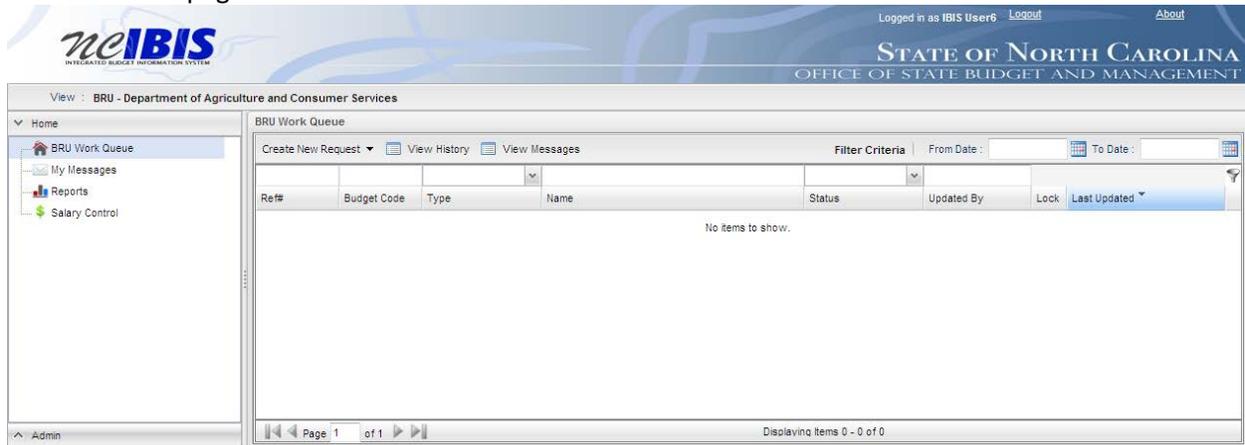
HOME MENU & WORK QUEUE OVERVIEW

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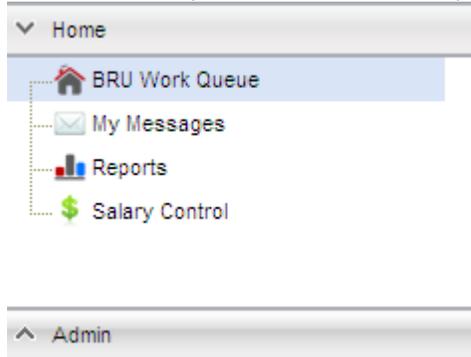
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Home and Admin Menu

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



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



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

BRU Work Queue

Create New Request View History View Messages

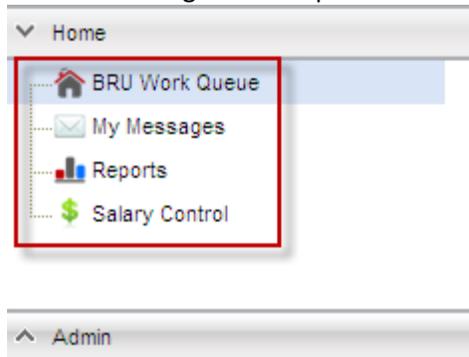
Filter Criteria From Date: 07/01/2017 To Date: 11/20/2017

Req#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
12-0016	14100	Revision	Some Title	BRU Draft	ibisuser11		2017-11-07 3:37 PM
11-0001	40467	Revision	Some Title	BRU Draft	ibisuser11		2017-11-07 2:01 PM
12-0015	14100	Revision	1121 to Correct BR12-0319	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0004	74100	Revision	7215/7310 Correct BR 12-0105	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0014	14100	Revision	1241 Correct Salary Control for MIS	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0009	24100	Revision	2665 To Correct Salary Control	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0003	24105	Revision	2668 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0001	24102	Revision	2248 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0013	14100	Revision	1861 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0008	24100	Revision	2693 Correct Salary Control	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0012	14100	Revision	1311 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0001	24104	Revision	To Budget Transfer from GF to SF for ATS	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0007	24100	Revision	2791 Realign revenues 438165 to 435900	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0011	14100	Revision	To Realign Salary Control	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0006	14100	Revision	1311 Reverse Alignment of Position 60013818	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0006	24100	Revision	2327 Increase Funding of Salary/Benefits	BRU Draft	dataseeder		2017-07-31 10:59 AM
14-0002	24105	Revision	2868 Realign Revenue Accts	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0003	74100	Revision	7511 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0005	24100	Revision	2327 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0003	14100	Revision	1111 Increase Bdgt for 60013849	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0001	24105	Revision	2868 Bdgt New Position 65024896	BRU Draft	dataseeder		2017-07-31 10:59 AM
14-0002	14100	Revision	1731 1734 1781 Mv Bud from 532440 to 532447	BRU Draft	dataseeder		2017-07-31 10:59 AM

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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

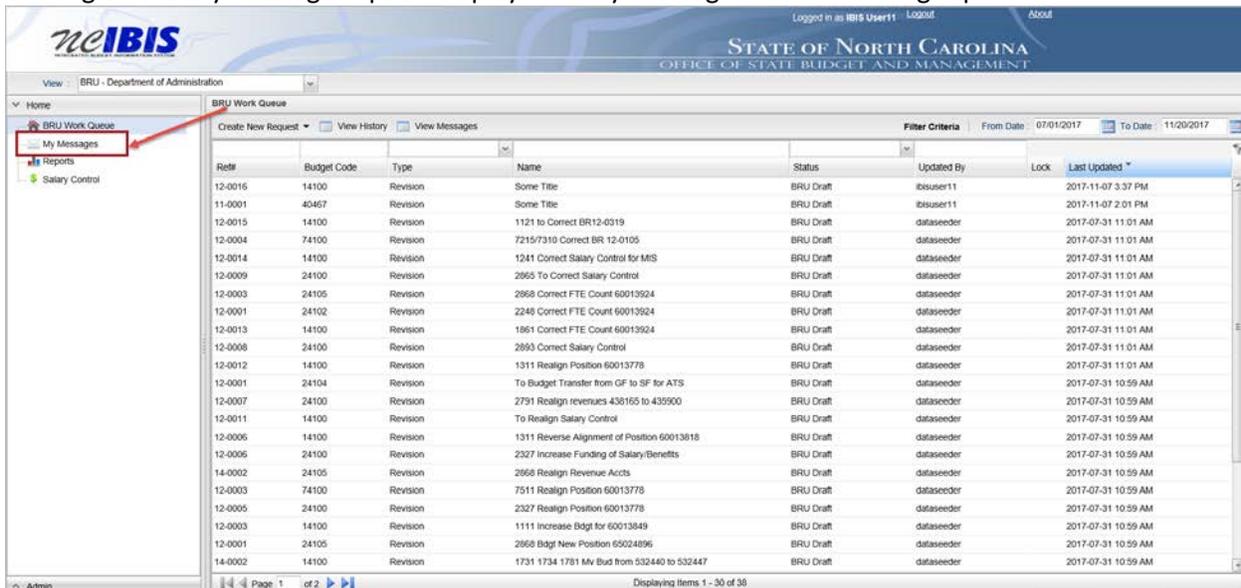
Create New Request View History View Messages

Filter Criteria From Date: 07/01/2017 To Date: 11/20/2017

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated *
12-0016	14100	Revision	Some Title	BRU Draft	ibisuser11		2017-11-07 3:37 PM
11-0001	40467	Revision	Some Title	BRU Draft	ibisuser11		2017-11-07 2:01 PM
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12-0004	74100	Revision	7215/7310 Correct BR 12-0105	BRU Draft	dataseeder		2017-07-31 11:01 AM
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12-0003	24105	Revision	2668 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0001	24102	Revision	2248 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
12-0013	14100	Revision	1861 Correct FTE Count 60013924	BRU Draft	dataseeder		2017-07-31 11:01 AM
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12-0011	14100	Revision	To Realign Salary Control	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0006	14100	Revision	1311 Reverse Alignment of Position 60013818	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0006	24100	Revision	2327 Increase Funding of Salary/Benefits	BRU Draft	dataseeder		2017-07-31 10:59 AM
14-0002	24105	Revision	2668 Realign Revenue Accts	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0003	74100	Revision	7511 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0005	24100	Revision	2327 Realign Position 60013778	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0003	14100	Revision	1111 Increase Bdgt for 60013849	BRU Draft	dataseeder		2017-07-31 10:59 AM
12-0001	24105	Revision	2668 Bdgt New Position 65024896	BRU Draft	dataseeder		2017-07-31 10:59 AM
14-0002	14100	Revision	1731 1734 1781 Mv Bud from 532440 to 532447	BRU Draft	dataseeder		2017-07-31 10:59 AM

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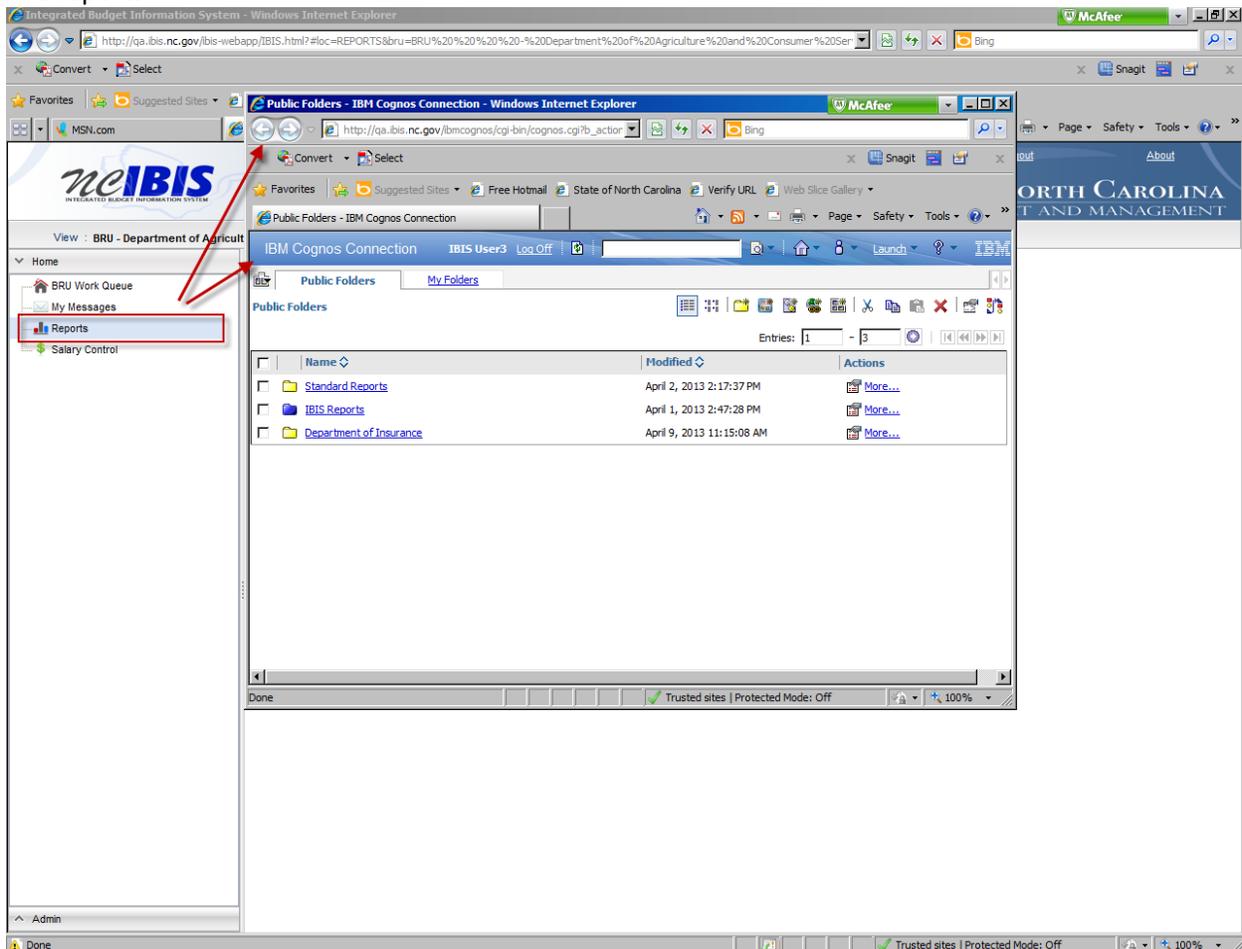
Clicking on the My Messages option displays the My Messages detail in the right pane.



The screenshot shows the neIBIS interface with the 'My Messages' option highlighted in the left navigation pane. The main content area displays the BRU Work Queue table, identical to the one in the previous image. The top navigation bar includes the neIBIS logo, the user name 'ibisuser11', and the text 'STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT'.

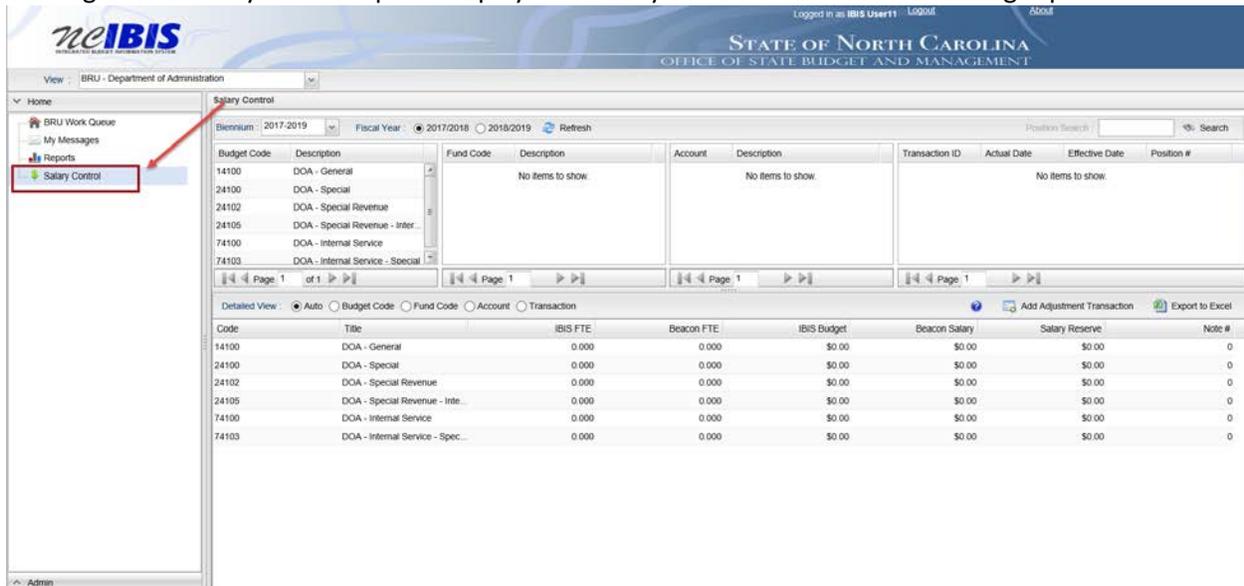
My Messages provides internal system communications and updates about each form within the system. [Click here for detailed instructions about My Messages.](#)

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



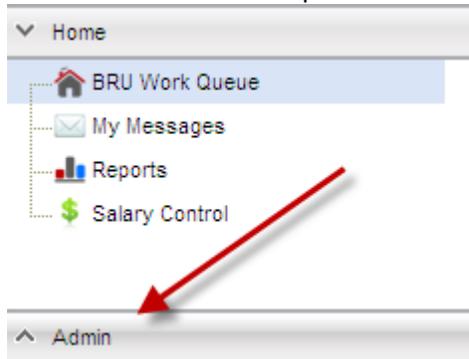
Detailed information on the Reporting functionality can be found in the report user guide [located on the IBIS website](#).

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

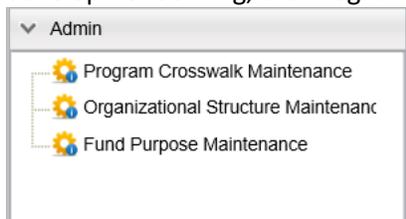


Detailed information on Salary Control can be found in the Salary Control user guide [located on the IBIS website](#).

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



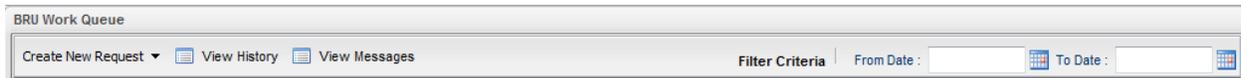
Clicking on the Admin option will display three sub-menu options: Program Crosswalk Maintenance, Organizational Structure Maintenance and Fund Purpose Maintenance. Depending on budget development timing, the Program Crosswalk Maintenance option may or may not be displayed.



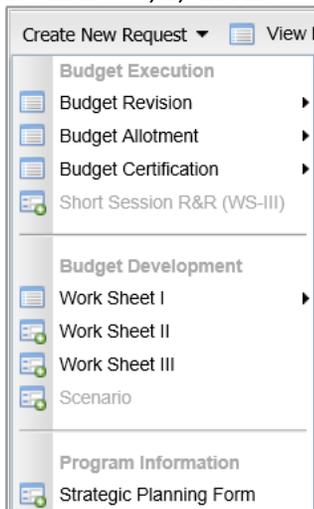
Detailed information regarding Admin functionality, such as creating new budget and fund codes, can be found in other user guides [located on the IBIS website](#). This document focuses on the Home menu and work queue and their features and functionality.

Create New Request

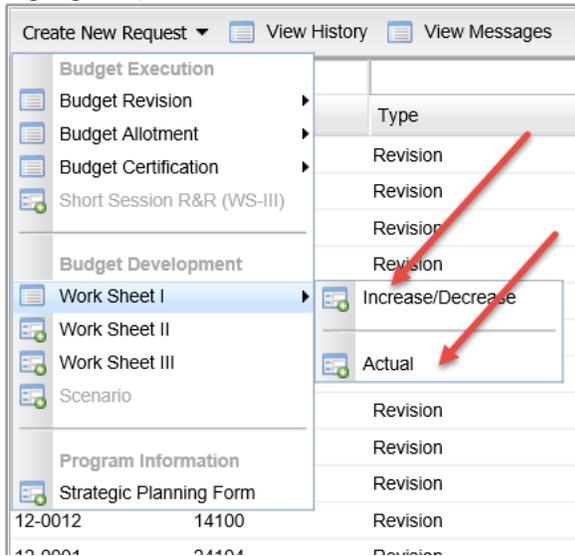
The BRU Work Queue presents several options across the top: Create New Request, View History, View Messages, Filter Criteria (header), From Date and To Date.



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



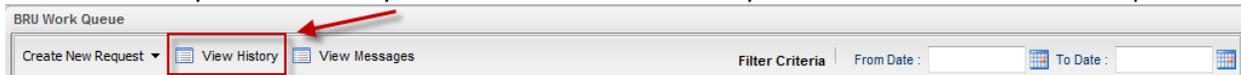
To make a selection from this list, move your cursor/pointer to the preferred option (which will become highlighted) and click on it. Some items will have additional sub-menus as shown below.



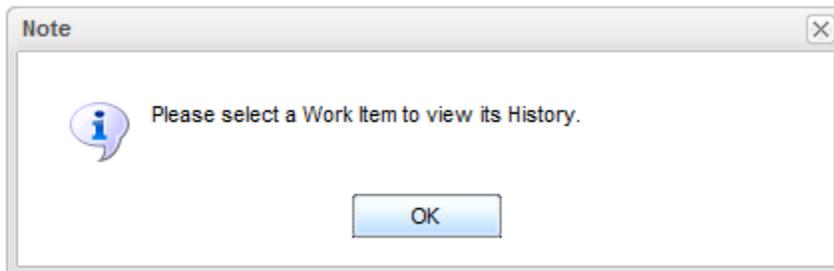
Selecting any of these options will open a “Basic Information” window. This window is discussed in depth in each of the form training documents and will not be addressed in this user guide. For specific form information, visit the other user guides [located on the IBIS website](#)

View History

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



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



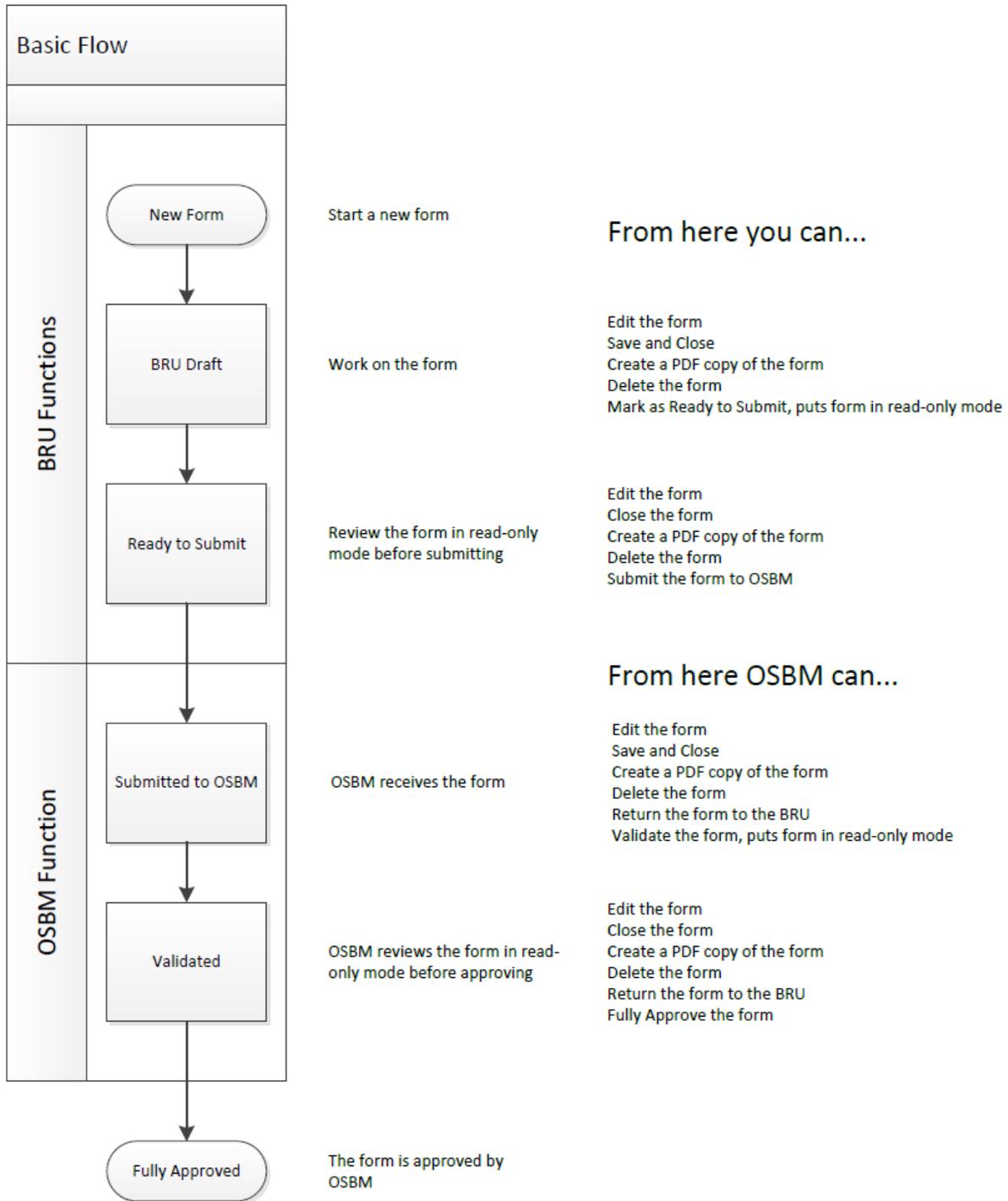
Click on OK to close the message window and return to the work queue.

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

Work Item History Window								
Ref#	Budget Code	Type	Name		Previous Status	Status	Updated By	Date
12-0377	14440	Revision	Increase CSE \$25 Fee Budget	CURRENT	Not Available	Submitted To OSBM	ibisuser11	2017-10-24 11:46 AM
12-0377	14440	Revision	Increase CSE \$25 Fee Budget	HISTORY	Agency Ready To Submit	Submitted To OSBM	dataseeder	2017-07-14 4:52 PM
12-0377	14440	Revision	Increase CSE \$25 Fee Budget	HISTORY	BRU Ready To Submit	Submitted To Agency	dataseeder	2017-07-14 3:25 PM

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.

Title	Created Date	Form						
Conference Report #22 has been Returned To BRU	2013-04-21 08:24:41.760000000	Open Form						
<table border="1"> <tr> <td>Created By:</td> <td>jwhite</td> </tr> <tr> <td>System Message:</td> <td></td> </tr> <tr> <td>User Message:</td> <td>Correct the appopriation transfer amount and re-submit to OSBM.</td> </tr> </table>			Created By:	jwhite	System Message:		User Message:	Correct the appopriation transfer amount and re-submit to OSBM.
Created By:	jwhite							
System Message:								
User Message:	Correct the appopriation transfer amount 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.

Title	Created Date	Form						
Conference Report #22 has been Returned To BRU	2013-04-21 08:24:41.760000000	Open Form						
<table border="1"> <tr> <td>Created By:</td> <td>jwhite</td> </tr> <tr> <td>System Message:</td> <td></td> </tr> <tr> <td>User Message:</td> <td>Correct the appopriation transfer amount and re-submit to OSBM.</td> </tr> </table>			Created By:	jwhite	System Message:		User Message:	Correct the appopriation transfer amount and re-submit to OSBM.
Created By:	jwhite							
System Message:								
User Message:	Correct the appopriation transfer amount 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)

UnLock Form

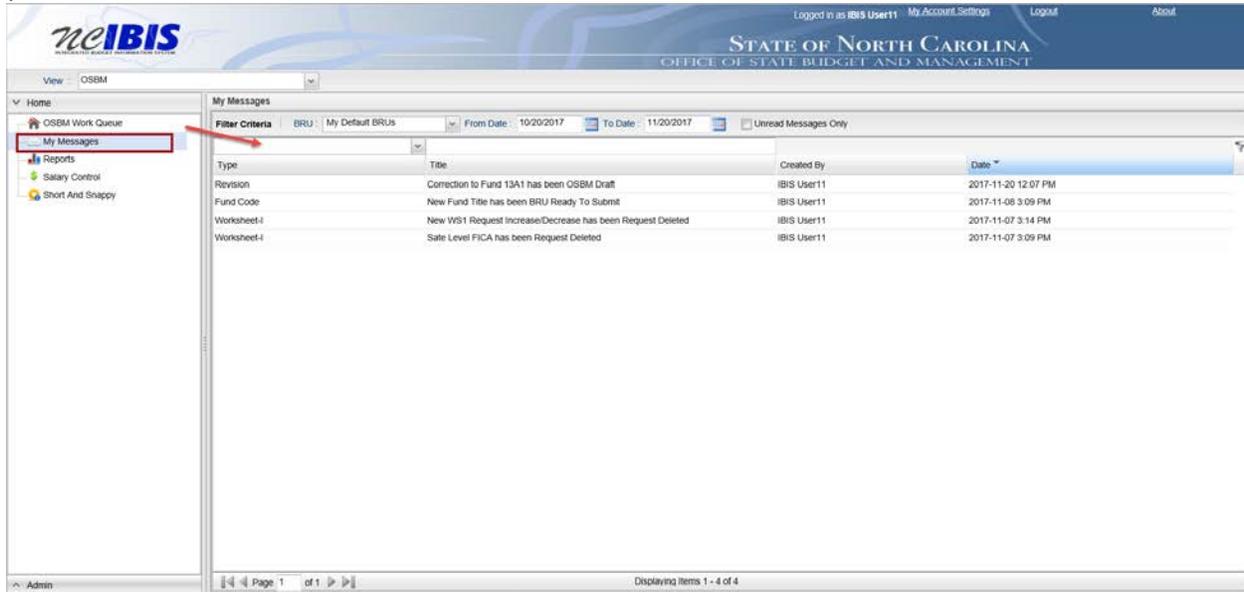
**** STATUS: OSBM_DRAFT ****

Biennium : 2011-13
 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 : 07/01/2012
 Approval Date :
 Recurrence :
 End Date :
 Title : Conference Report #22

Is this revision authorized by General Statute? : No
 Is this revision authorized by Special Provision? : No

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.

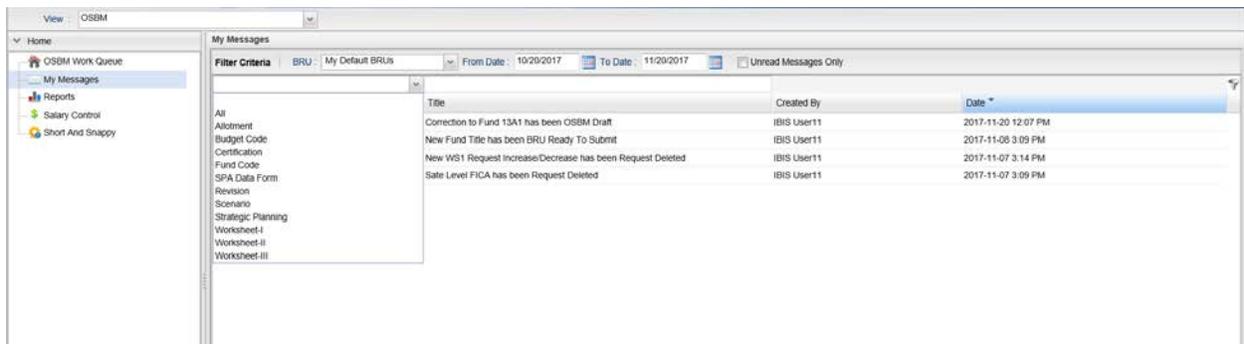


The view has four column headers as shown below: Type, Title, Created By, and Date.

Type	Title	Created By	Date
Revision	Correction to Fund 13A1 has been OSBM Draft	IBIS User11	2017-11-20 12:07 PM
Fund Code	New Fund Title has been BRU Ready To Submit	IBIS User11	2017-11-08 3:09 PM
Worksheet-I	New WS1 Request Increase/Decrease has been Request Deleted	IBIS User11	2017-11-07 3:14 PM
Worksheet-I	State Level FICA has been Request Deleted	IBIS User11	2017-11-07 3:09 PM

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

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



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

My Messages

Filter Criteria | BRU: Division of Aging and Adult | From Date: | To Date: | Unread Messages Only

Revision	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 Aging and Adult | From Date: | To Date: | Unread Messages Only

Revision	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 | From Date: | To Date: | Unread Messages Only

Revision	Title	Created By	Date
Revision	Staff Costs Funded by PCAST has been BRU 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.

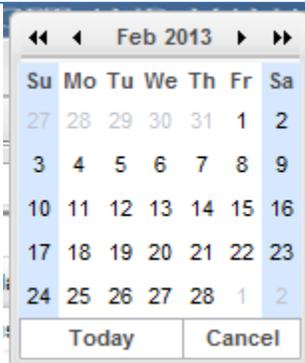
BRU Work Queue

Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Re#	Budget Code	Type	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

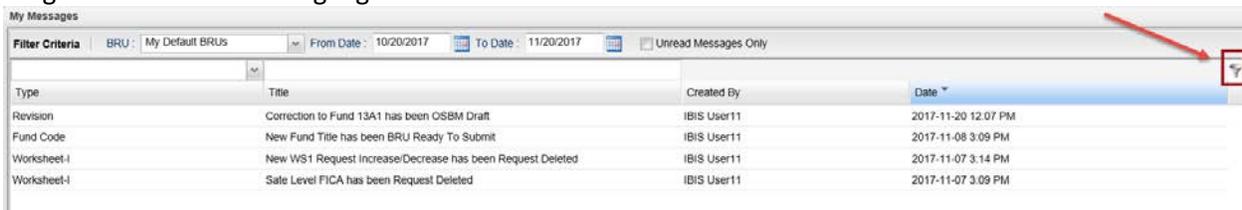
To use the date range filter, enter a start date in the From Date field either by keying it or by selecting the date from the calendar next to the field.



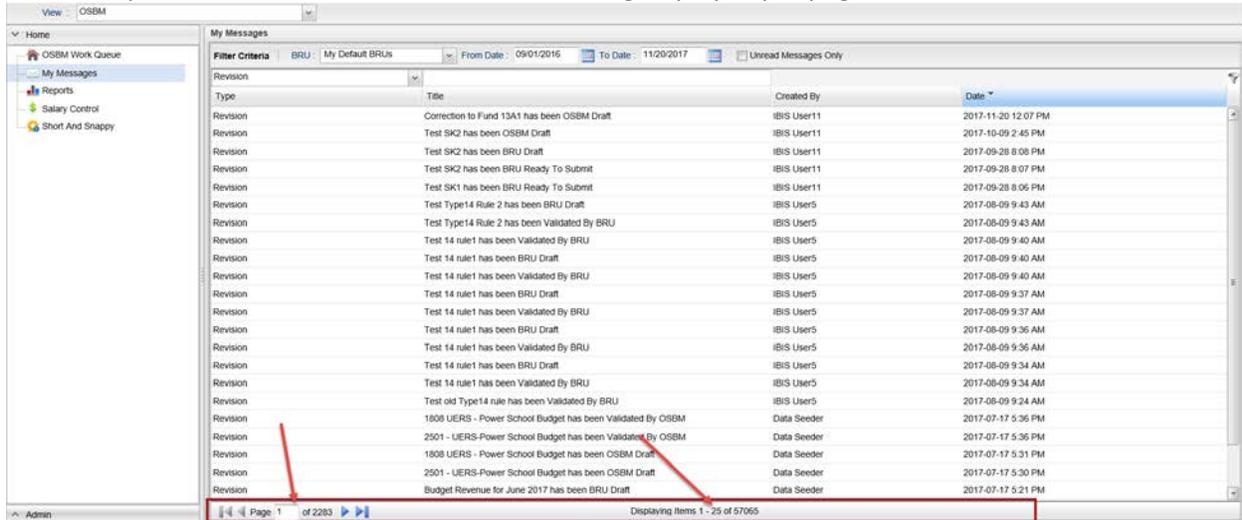
Repeat the same action in the To Date field. The From Date needs to occur prior to the To Date in order to be a valid range.



To complete the filtering process click on the Filter icon, which is a funnel  on the line below the date range filters. The icon is highlighted below.



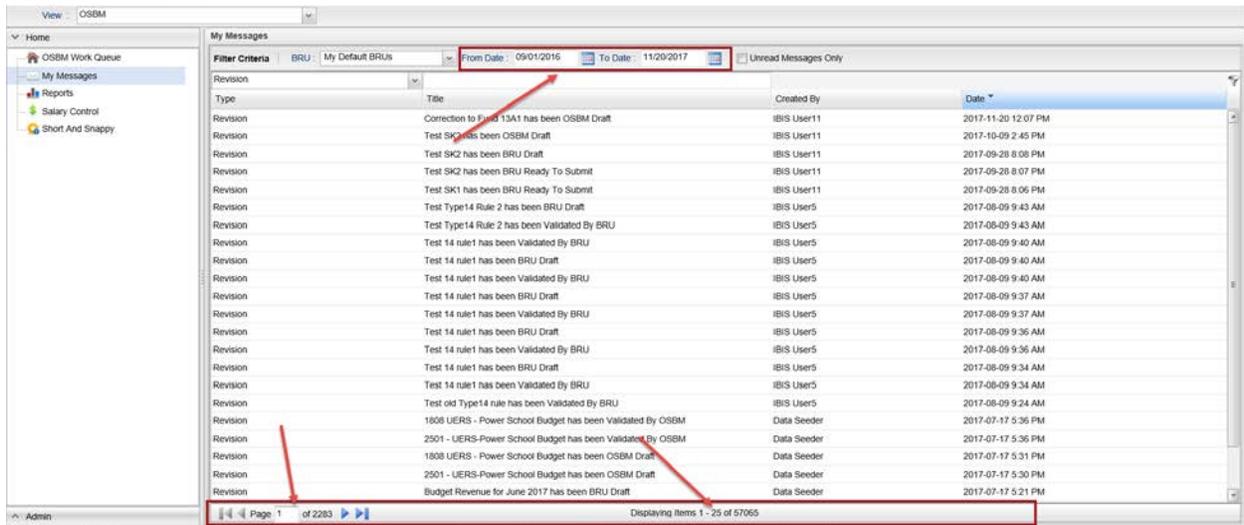
Prior to filtering, the work queue may contain many pages of items. After applying a filter, only the defined set will be displayed. The bottom of the screen displays indicators of the number of pages in the work queue as well as the number of items being displayed per page.



The screenshot shows the 'My Messages' window in the neIBIS application. The interface includes a sidebar with navigation options like 'OSBM Work Queue', 'My Messages', 'Reports', 'Salary Control', and 'Short And Snappy'. The main area displays a table of messages with columns for 'Revision', 'Type', 'Title', 'Created By', and 'Date'. A filter is applied to 'BRU - My Default BRUs' with a date range from 09/01/2016 to 11/29/2017. The table lists various revision messages, including corrections and test messages. At the bottom, a red box highlights the pagination controls, which show 'Page 1 of 2283' and 'Displaying Items 1 - 25 of 57065'.

Revision	Type	Title	Created By	Date
	Revision	Correction to Fund 13A1 has been OSBM Draft	IBIS User11	2017-11-20 12:07 PM
	Revision	Test SK2 has been OSBM Draft	IBIS User11	2017-10-09 2:45 PM
	Revision	Test SK2 has been BRU Draft	IBIS User11	2017-09-28 8:08 PM
	Revision	Test SK2 has been BRU Ready To Submit	IBIS User11	2017-09-28 8:07 PM
	Revision	Test SK1 has been BRU Ready To Submit	IBIS User11	2017-09-28 8:06 PM
	Revision	Test Type14 Rule 2 has been BRU Draft	IBIS User5	2017-08-09 9:43 AM
	Revision	Test Type14 Rule 2 has been Validated By BRU	IBIS User5	2017-08-09 9:43 AM
	Revision	Test 14 rule1 has been Validated By BRU	IBIS User5	2017-08-09 9:40 AM
	Revision	Test 14 rule1 has been BRU Draft	IBIS User5	2017-08-09 9:40 AM
	Revision	Test 14 rule1 has been Validated By BRU	IBIS User5	2017-08-09 9:40 AM
	Revision	Test 14 rule1 has been BRU Draft	IBIS User5	2017-08-09 9:37 AM
	Revision	Test 14 rule1 has been Validated By BRU	IBIS User5	2017-08-09 9:37 AM
	Revision	Test 14 rule1 has been BRU Draft	IBIS User5	2017-08-09 9:36 AM
	Revision	Test 14 rule1 has been Validated By BRU	IBIS User5	2017-08-09 9:36 AM
	Revision	Test 14 rule1 has been BRU Draft	IBIS User5	2017-08-09 9:34 AM
	Revision	Test 14 rule1 has been Validated By BRU	IBIS User5	2017-08-09 9:34 AM
	Revision	Test old Type14 rule has been Validated By BRU	IBIS User5	2017-08-09 9:24 AM
	Revision	1808 UERS - Power School Budget has been Validated By OSBM	Data Seeder	2017-07-17 5:36 PM
	Revision	2501 - UERS-Power School Budget has been Validated By OSBM	Data Seeder	2017-07-17 5:36 PM
	Revision	1808 UERS - Power School Budget has been OSBM Draft	Data Seeder	2017-07-17 5:31 PM
	Revision	2501 - UERS-Power School Budget has been OSBM Draft	Data Seeder	2017-07-17 5:30 PM
	Revision	Budget Revenue for June 2017 has been BRU Draft	Data Seeder	2017-07-17 5:21 PM

After entering a date range and clicking on the filter icon, the number of work queue pages has been reduced as shown below. The date range remains displayed in the criteria boxes. The standard default view of the work queue is to display 25 active items starting with the most recently updated and going backward in time.

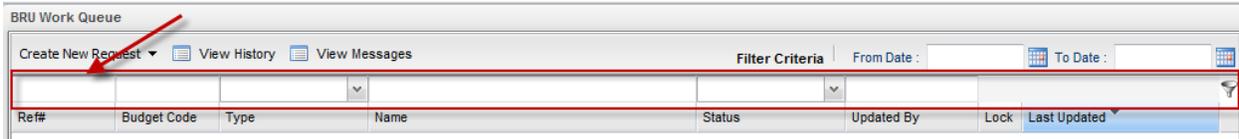


To remove the filter and restore the work queue display to its default appearance, clear the dates from the date range fields and click on the Filter icon again.

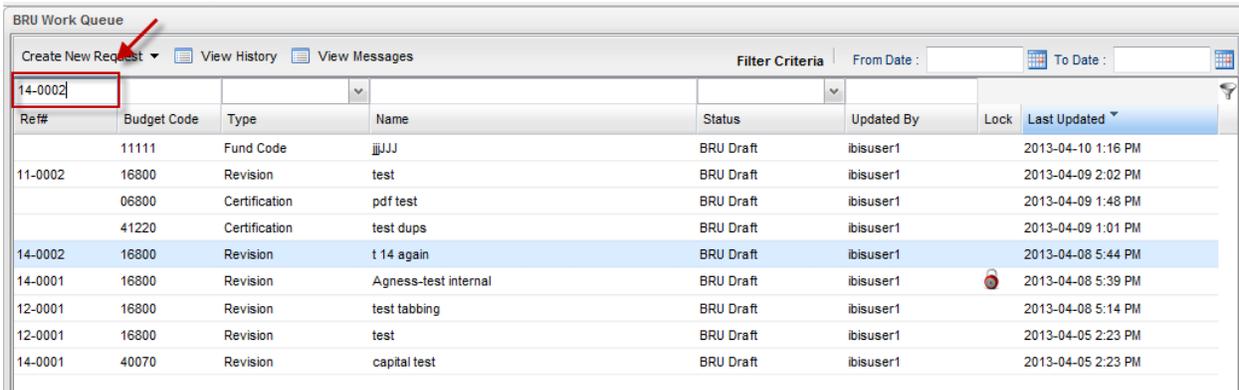
Another set of headers located directly above the work queue table perform more specific sorting and filtering.



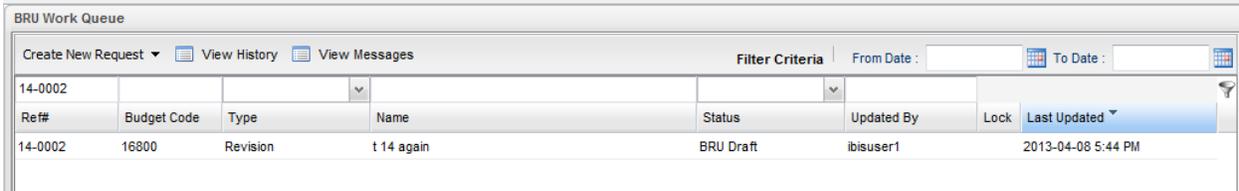
The first of these rows provides “search” functionality, meaning it allows the user to enter in specific search criteria and then filter the work queue to display only results that contain those criteria.



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



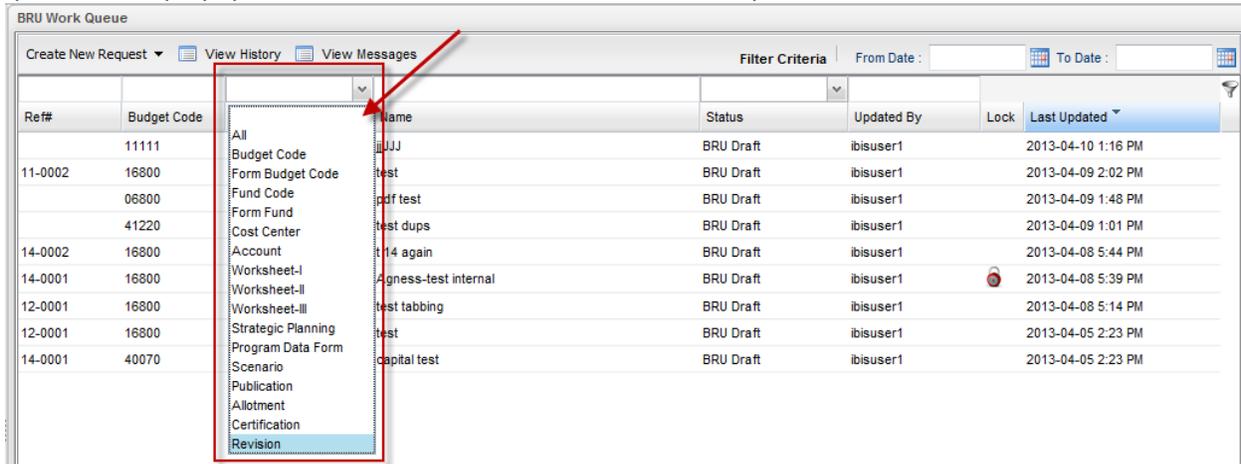
The list in the work queue will display filtered results based on the search as shown below. This type of filtered search can be completed for Ref#, Budget Code, Name, and the Updated By field.



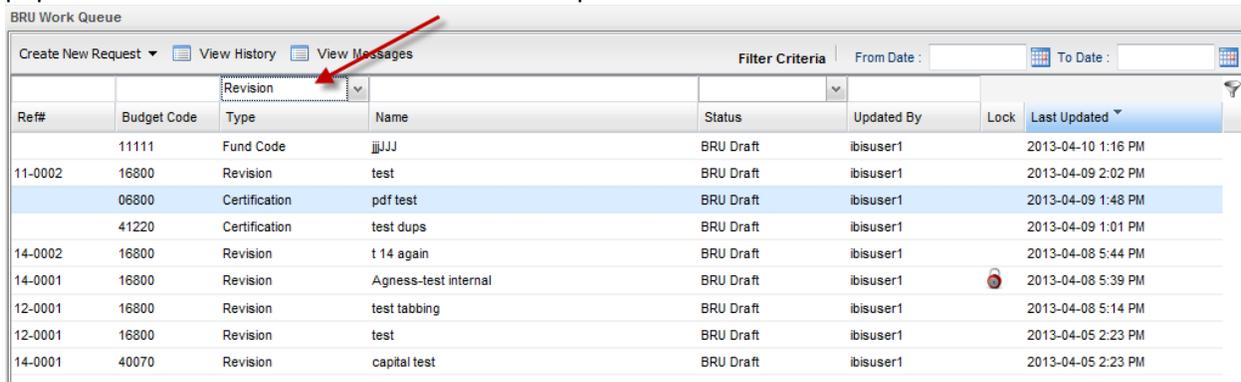
To return the work queue to its unfiltered state, the user should clear the entry from the search field and click the filter button.



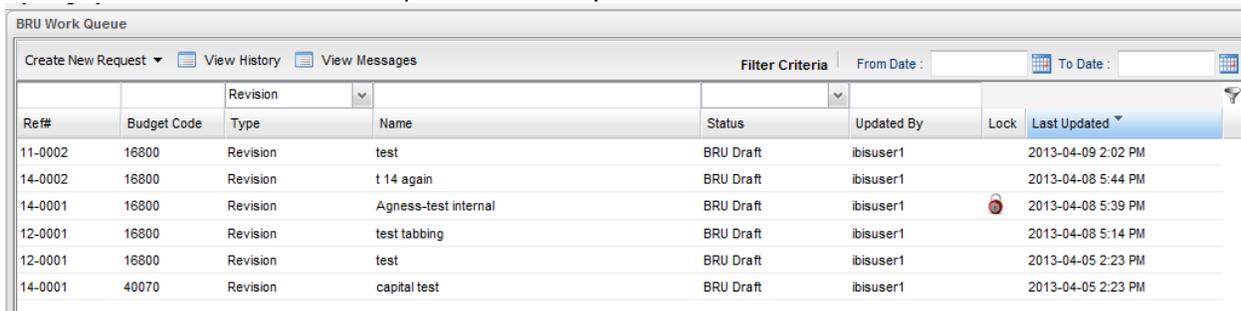
The Type Field and the Status Field have dropdown lists which can be used to filter the items in the work queue. To display specific items, make a selection from the dropdown list.



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



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



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

BRU Work Queue

Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Re#	Budget Code	Type	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	🔒	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 Queue

Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Re#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
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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.

BRU Work Queue

Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Re#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
	11111	Fund Code	jjJJ	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	pdf test	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	🔒	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.

BRU Work Queue

Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Re#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
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	pdf test	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	jjJJ	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).



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.