



INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

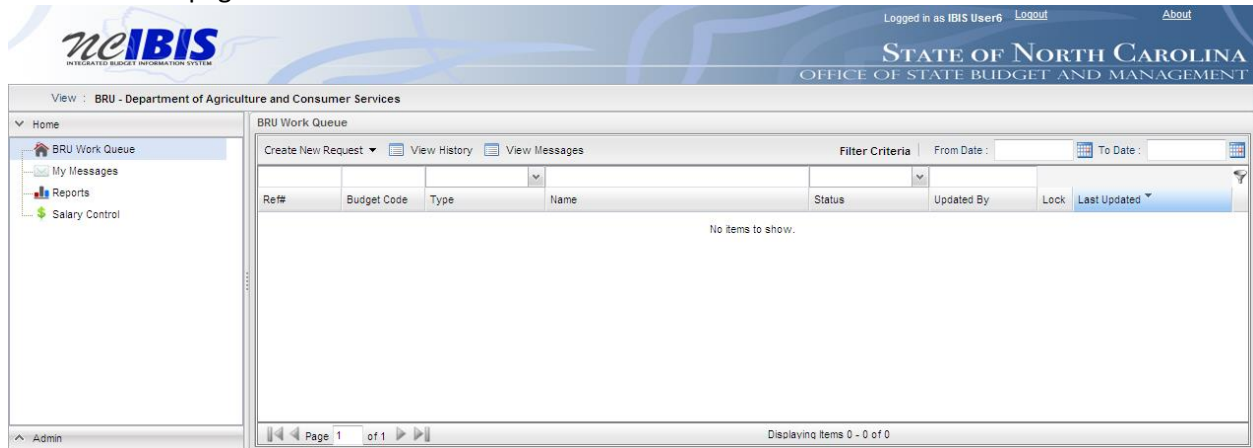
HOME MENU & WORK QUEUE OVERVIEW

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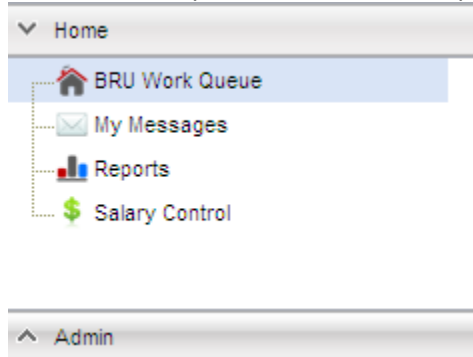
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Home and Admin Menu

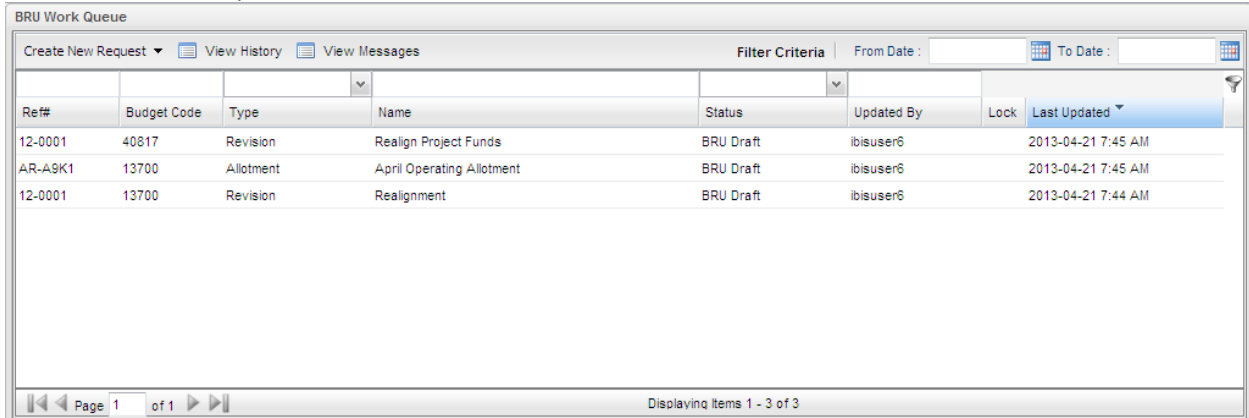
Log into IBIS using your NCID and NCID password. Once the login window has closed, you are presented with the Home page.



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

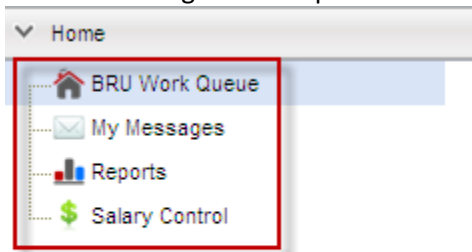
Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

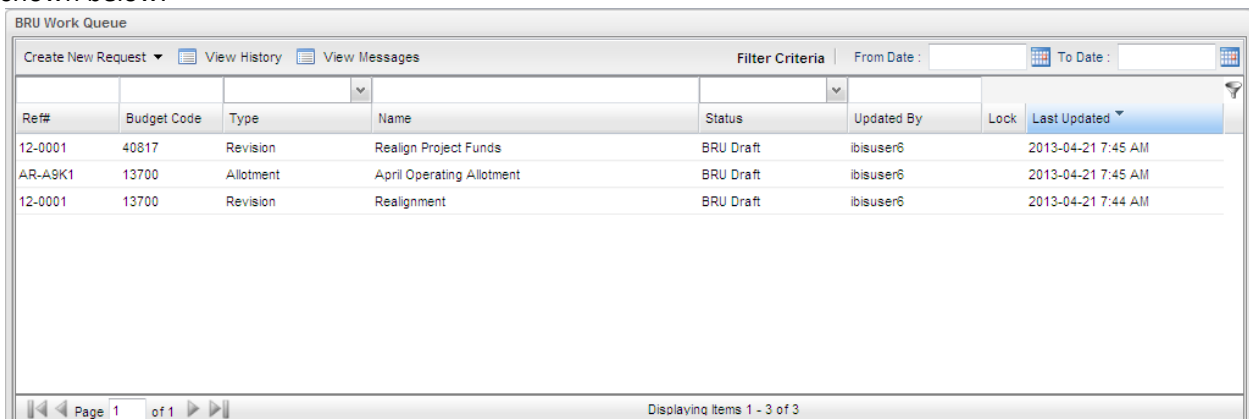
Re#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
12-0001	40817	Revision	Realign Project Funds	BRU Draft	ibisuser6		2013-04-21 7:45 AM
AR-A9K1	13700	Allotment	April Operating Allotment	BRU Draft	ibisuser6		2013-04-21 7:45 AM
12-0001	13700	Revision	Realignment	BRU Draft	ibisuser6		2013-04-21 7:44 AM

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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

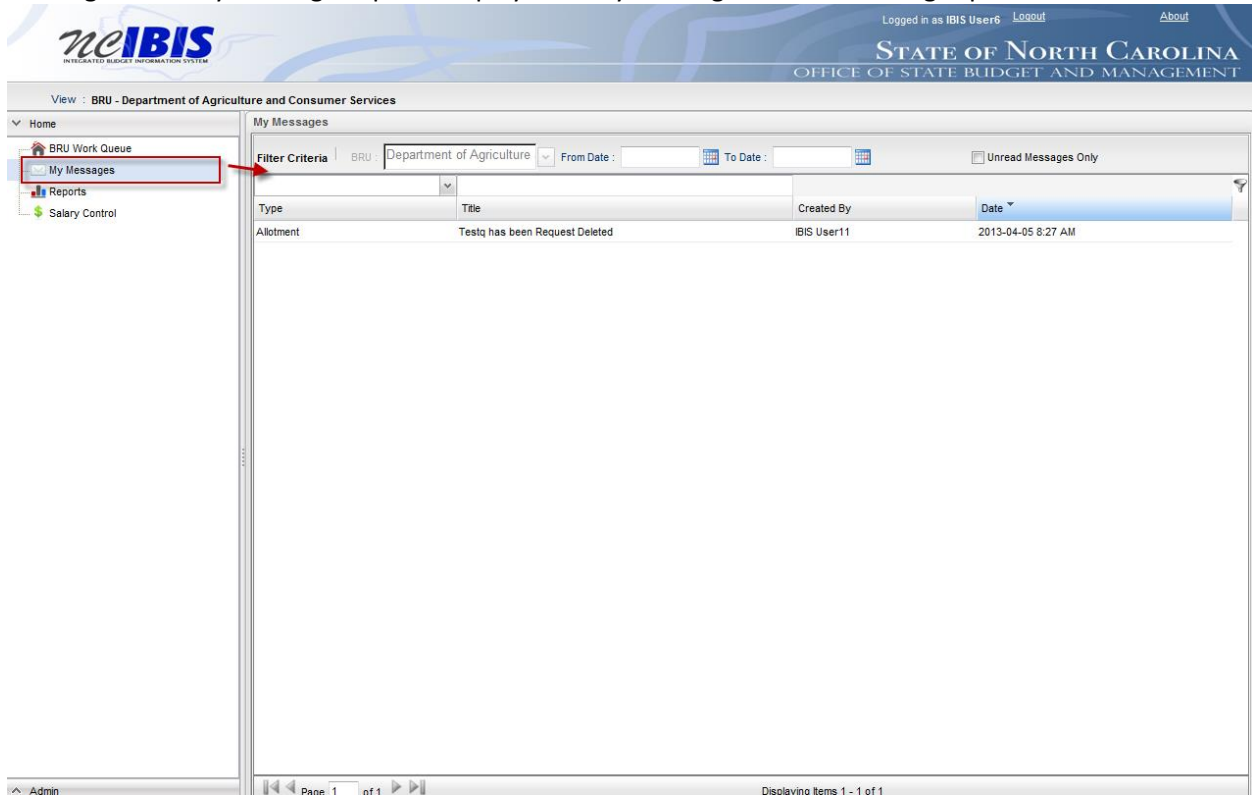
Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Re#	Budget Code	Type	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

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



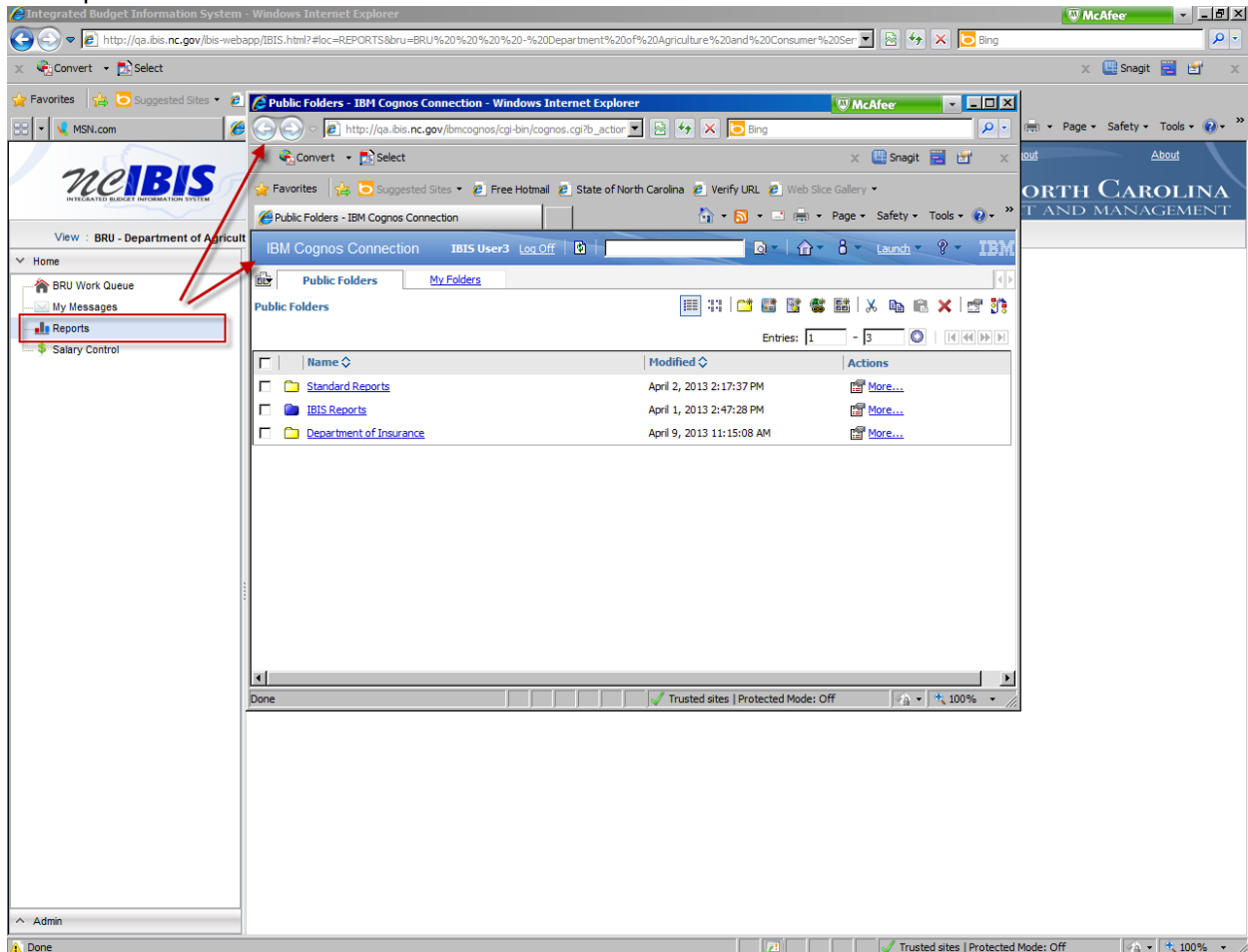
The screenshot shows the neIBIS interface for the Department of Agriculture and Consumer Services. The left sidebar contains a navigation menu with 'My Messages' highlighted by a red box and a red arrow pointing to the main content area. The main content area displays a table of messages with the following data:

Type	Title	Created By	Date
Allotment	Testq has been Request Deleted	IBIS User11	2013-04-05 8:27 AM

At the bottom of the interface, there is a status bar showing 'Disolving Items 1 - 1 of 1'.

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.

Budget Code	Description	Fund Code	Description	Account	Description	Transaction ID	Actual Date	Effective Date	Position #
13700	DACS-GENERAL		No items to show.		No items to show.				
23700	DACS-LIVESTOCK ACQ.								
23702	DACS-DISASTER REC...								
23703	DACS-TOBACCO TRU...								
23704	DACS-SOIL & WATER...								
23705	DACS - FDF								

Code	Title	IBIS FTE	Beacon FTE	IBIS Budget	Beacon Salary	Salary Reserve	Note #
13700	DACS-GENERAL	0	0	\$0.00	\$0.00	\$0.00	0
23700	DACS-LIVESTOCK ACQ.	0	0	\$0.00	\$0.00	\$0.00	0
23702	DACS-DISASTER REC...	0	0	\$0.00	\$0.00	\$0.00	0
23703	DACS-TOBACCO TRU...	0	0	\$0.00	\$0.00	\$0.00	0
23704	DACS-SOIL & WATER...	0	0	\$0.00	\$0.00	\$0.00	0
23705	DACS - FDF	0	0	\$0.00	\$0.00	\$0.00	0
53700	DACS Farmers Market	0	0	\$0.00	\$0.00	\$0.00	0
53725	DACS-WNC AG CT MT...	0	0	\$0.00	\$0.00	\$0.00	0
53750	DACS-STATE FAIR	0	0	\$0.00	\$0.00	\$0.00	0
63700	DACS - TRUST	0	0	\$0.00	\$0.00	\$0.00	0
63702	DACS-NC RURAL REH...	0	0	\$0.00	\$0.00	\$0.00	0
63703	DACS-FINANCE AUTH.	0	0	\$0.00	\$0.00	\$0.00	0
63704	DACS-COOP.GRADING	0	0	\$0.00	\$0.00	\$0.00	0

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

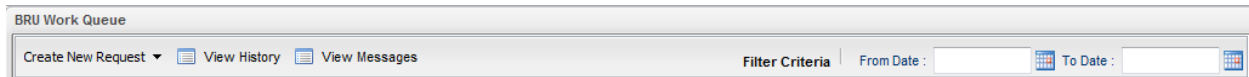
At the bottom of the left pane is an Admin option.

Clicking on the Admin option will display 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.

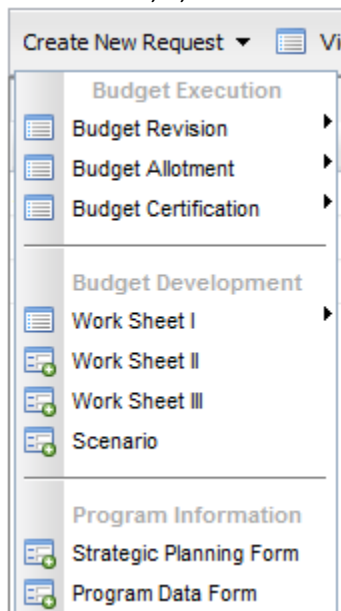
Detailed information regarding Admin functionality, such as creating new budget and fund codes, can be found in other user guides [located on the IBIS website](#). This document focuses on the Home menu and work queue and their features and functionality.

Create New Request

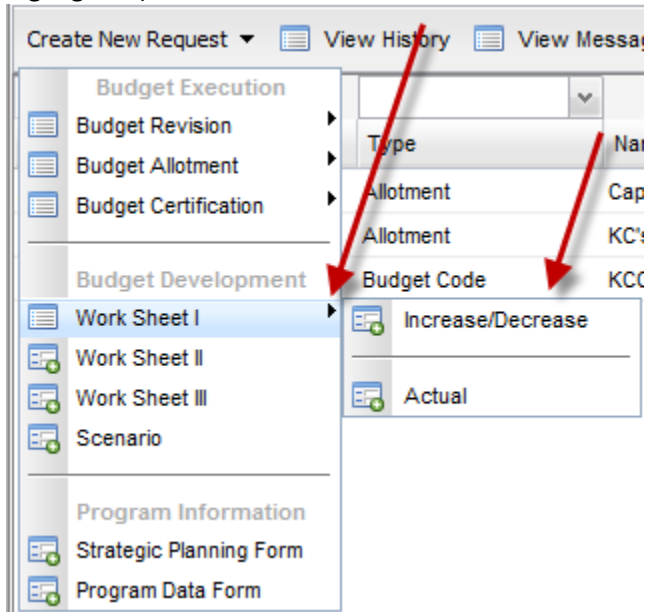
The BRU Work Queue presents several options across the top: Create New Request, View History, View Messages, Filter Criteria (header), From Date and To Date.



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 III.



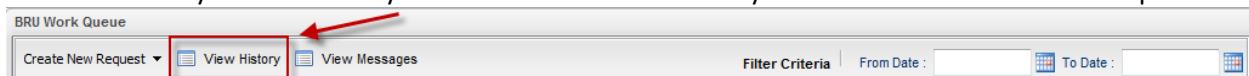
To make a selection from this list, move your cursor/pointer to the preferred option (which will become highlighted) and click on it. Some items will have additional sub-menus as shown below.



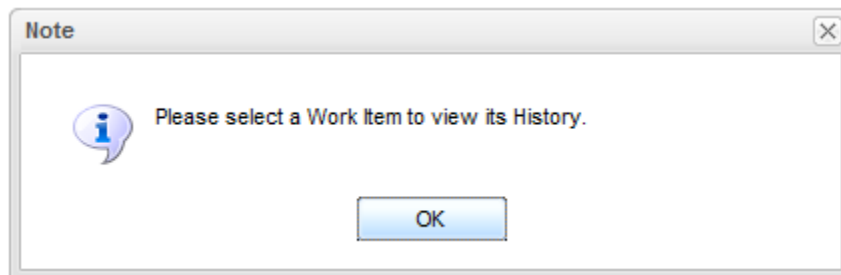
Selecting any of these options will open a “Basic Information” window. This window is discussed in depth in each of the form training documents and will not be addressed in this user guide. For specific form information, visit the other user guides [located on the IBIS website](#)

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:



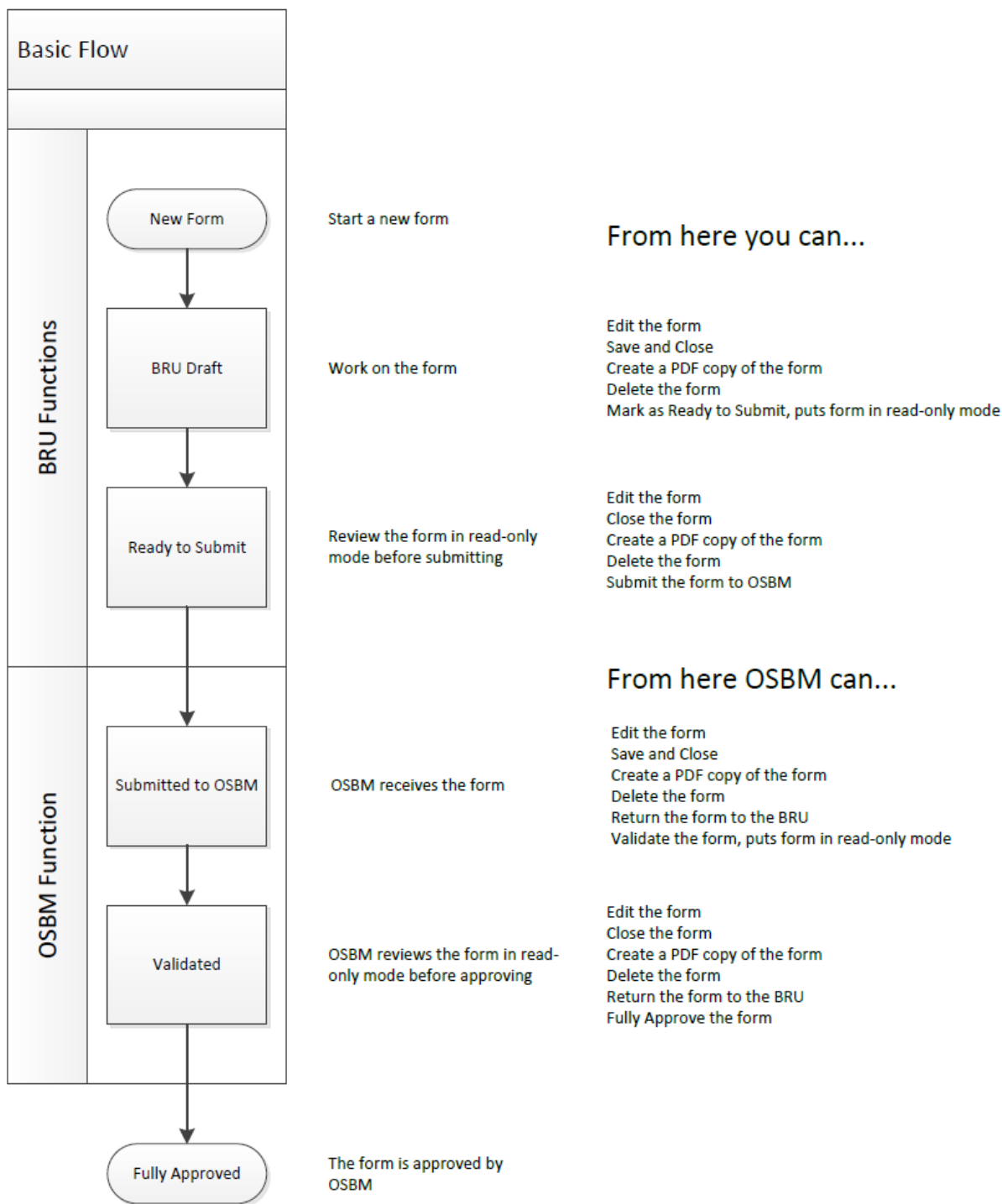
Click on OK to close the message window and return to the work queue.

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.

Ref#	Budget Code	Type	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.

Budget Allotment-Operating: (Title: KC's 2212013 allotment , BRU: 100-Department of Agriculture and Consumer Services , Budget Code: 13700-Agriculture and Consumer Services - General Fund)

UnLock Form

**** STATUS: RETURNED_TO_BRU ****

Basic Information

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
Reference Number : AR-105K4	Request Type : Operating Allotment
Title : KC's 2212013 allotment	IBIS ID : 10645

Justification : This is a justification for KC's 2212013 allotment

Requirements

Account	Allotment Amount
1XXX-Personal Services	\$0
2XXX-Purchased Services	\$0
3XXX-Personal Services	\$50,000
4XXX-Property, Plant and Equipment	\$0
5XXX-Other Expenses and Adjustments	\$2,500
6XXX-Aid and Public Assistance	\$0
7XXX-Agency Reserve	\$0
8XXX-Intergovernmental Transactions	\$0
Planned Requirements	\$52,500

Receipts

Account	Allotment Amount
Federal Receipts	\$0

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.

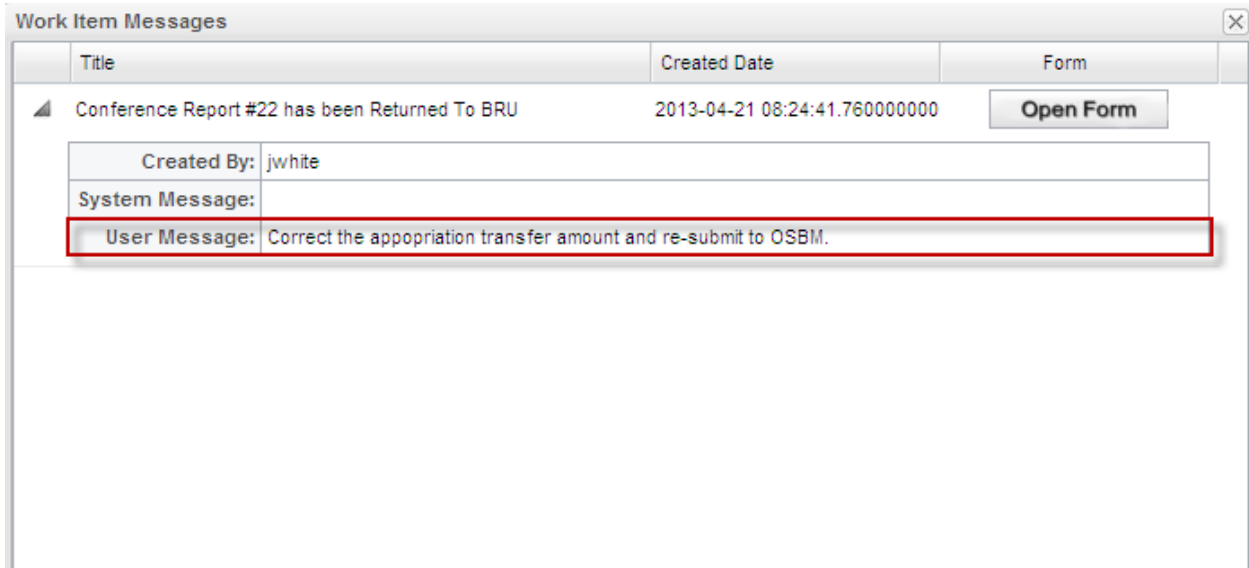
BRU Work Queue

Create New Request View History **View Messages** Filter Criteria From Date : To Date :

Ref#	Budget Code	Type	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

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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 [IBIS workflow process](#). OSBM can also return forms with messages attached. This will be displayed in the user message highlighted below.

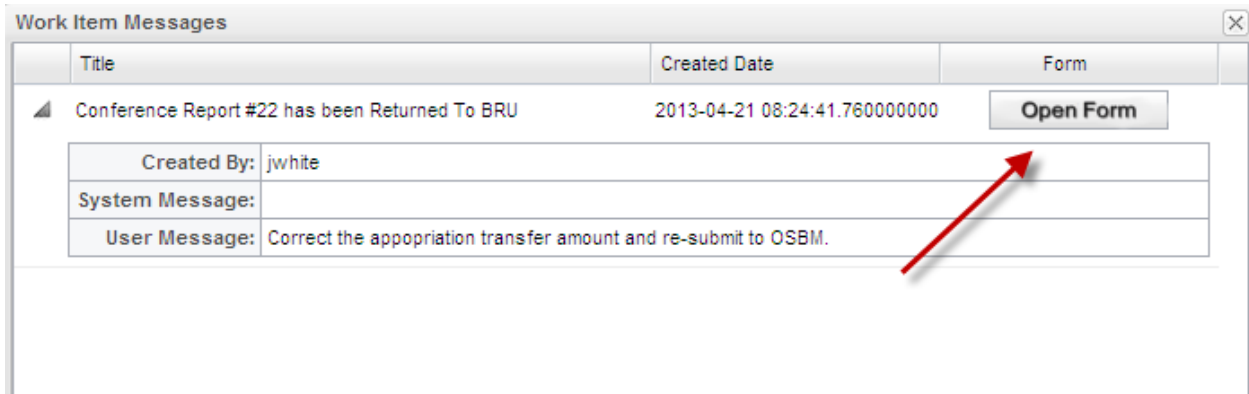


Work Item Messages

Title	Created Date	Form
Conference Report #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 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.

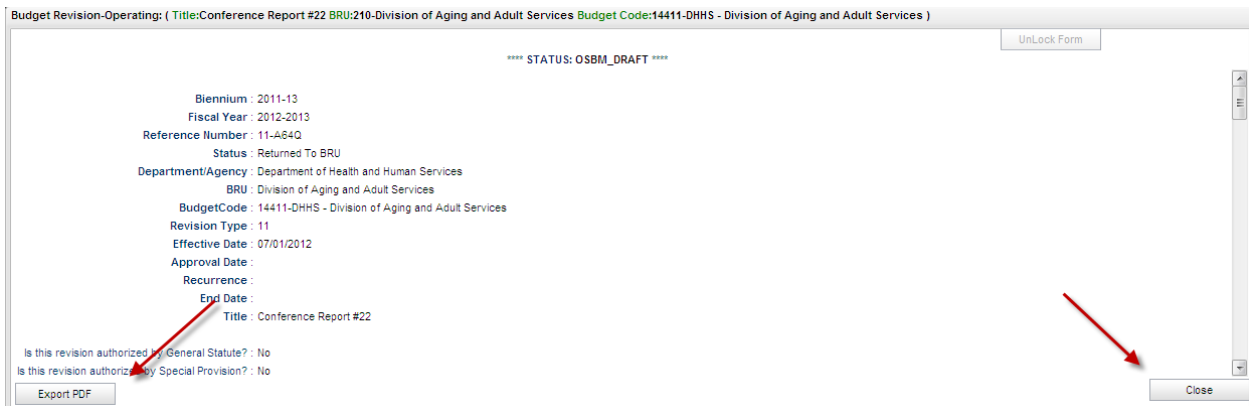


Work Item Messages

Title	Created Date	Form
Conference Report #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 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)

**** STATUS: OSBM_DRAFT ****

UnLock Form

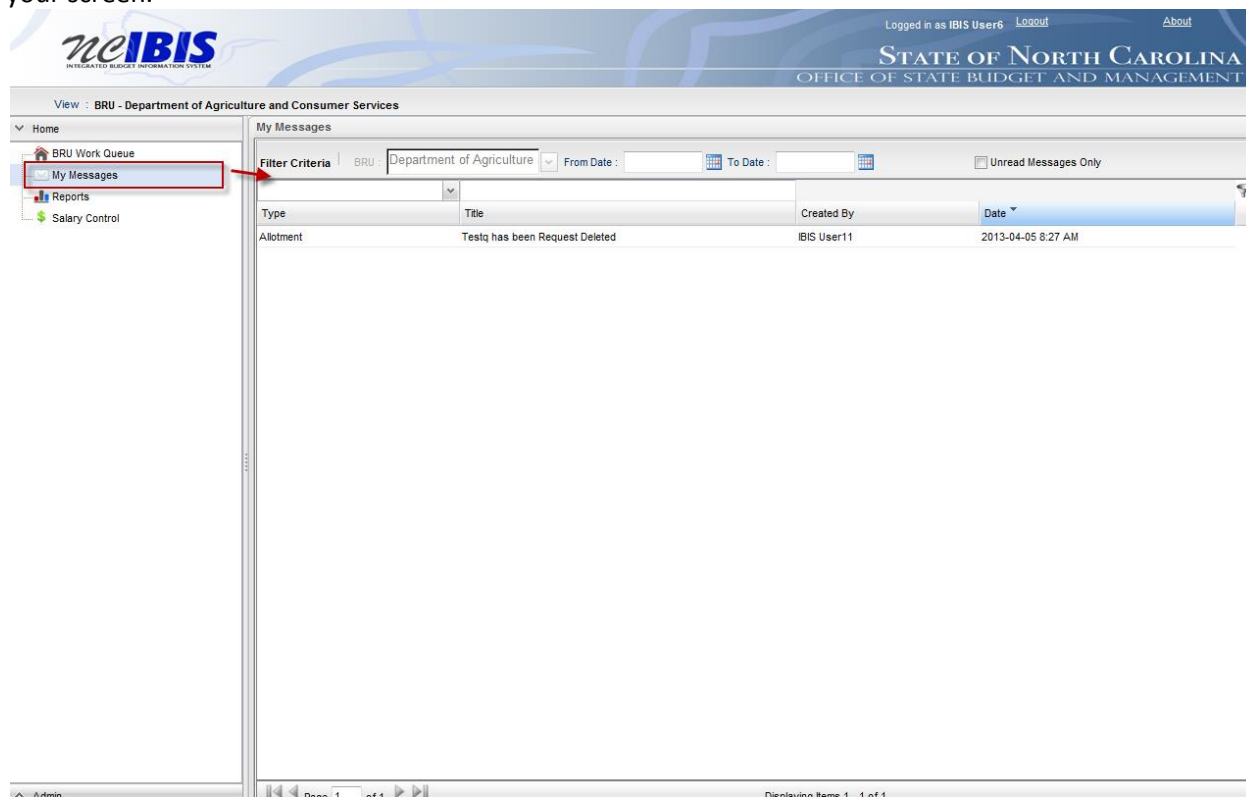
Biennium : 2011-13
 Fiscal Year : 2012-2013
 Reference Number : 11-A64Q
 Status : Returned To BRU
 Department/Agency : Department of Health and Human Services
 BRU : Division of Aging and Adult Services
 BudgetCode : 14411-DHHS - Division of Aging and Adult Services
 Revision Type : 11
 Effective Date : 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
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

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 .

My Messages

Filter Criteria | BRU: From Date: To Date: Unread Messages Only

Type	Title	Created By	Date
All	Conference Report #22 has been Returned To BRU	Joe White	2013-04-21 8:24 AM
Budget Code	Staff Costs Funded by PCAST has been BRU Ready To Submit	Helen Tack	2013-04-16 12:38 PM
Form Budget Code	Budget Existing LTS Grants has been BRU Ready To Submit	Helen Tack	2013-04-16 12:26 PM
Fund Code	Budget Existing LTS Grants has been BRU Ready To Submit	Helen Tack	2013-04-16 12:26 PM
Form Fund	Budget Existing LTS Grants has been BRU Ready To Submit	Helen Tack	2013-04-16 12:26 PM
Cost Center	Non-Profit Contract Reduction has been BRU Ready To Submit	Helen Tack	2013-04-16 11:54 AM
Account	Non-Profit Contract Reduction has been BRU Ready To Submit	Helen Tack	2013-04-16 11:54 AM
Worksheet-I	Non-Profit Contract Housing Program has been BRU Ready To Su...	Helen Tack	2013-04-16 11:47 AM
Worksheet-II	test has been BRU Ready To Submit	Joe White	2013-04-16 10:39 AM
Worksheet-III	test has been BRU Ready To Submit	Joe White	2013-04-16 10:39 AM
Strategic Planning	Realign Retirement Accounts for Closing has been Validated By B...	Helen Tack	2013-04-11 3:01 PM
Program Data Form	Budget Older American Act Funding has been Validated By OSBM	Robert Williams	2013-04-11 1:48 PM
Scenario	Budget Older American Act Funding has been BRU Ready To Sub...	Helen Tack	2013-04-10 2:10 PM
Publication	Budget Older American Act Funding has been BRU Ready To Sub...	Helen Tack	2013-04-10 2:10 PM
Allotment	Salary Reserve Realignment has been BRU Ready To Submit	Helen Tack	2013-04-10 11:38 AM
Certification	Salary Reserve Realignment has been BRU Ready To Submit	Helen Tack	2013-04-10 11:38 AM
Revision	test has been Request Deleted	Helen Tack	2013-04-10 11:01 AM

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: From Date: To Date: Unread Messages Only

Type	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: From Date: To Date: Unread Messages Only

Type	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.

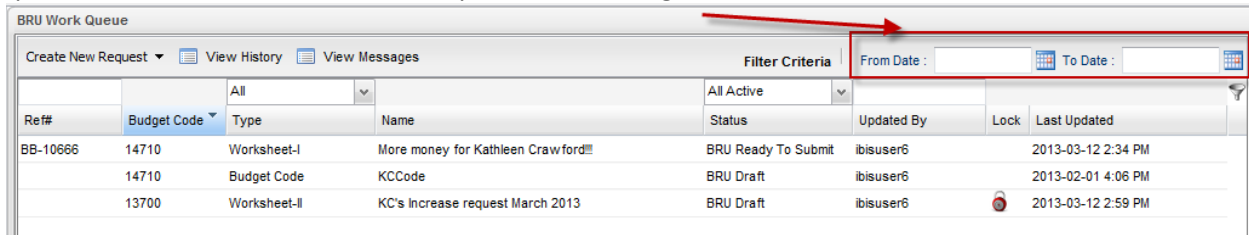
My Messages

Filter Criteria | BRU: From Date: To Date: Unread Messages Only

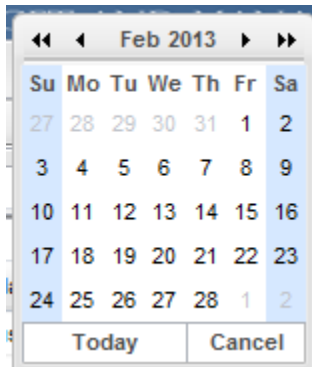
Type	Title	Created By	Date
Revision	Staff Costs Funded by PCAST has been BRU Ready To Submit	Helen Tack	2013-04-16 12:38 PM

Filtering and Sorting

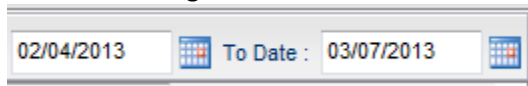
There are various options available for filtering and sorting what is shown in the work queue. One option is to filter by date. There are From Date and To Date fields, which, when utilized, will filter work queue items that do not fall within a specified date range.




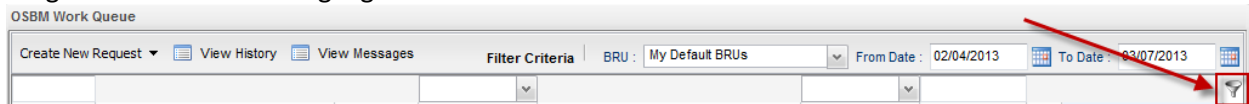
To use the date range filter, enter a start date in the From Date field either by keying it or by selecting the date from the calendar next to the field.



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.

OSBM Work Queue

Create New Request | View History | View Messages | Filter Criteria | BRU: My Default BRUS | From Date: 02/04/2013 | To Date: 03/07/2013

Re#	BRU	Budget Code	Type	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

Page 1 of 7 | Displaying Items 1 - 25 of 166

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.

OSBM Work Queue

Create New Request | View History | View Messages | Filter Criteria | BRU : My Default BRUs | From Date : 02/04/2013 | To Date : 03/07/2013

Ref#	BRU	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
	Department of Commerce	14600	Worksheet-II	alignment	OSBM Draft	ibisuser11		2013-03-06 5:02 PM
	Administrative Office of the Courts	02000	Worksheet-II	ws2form	OSBM Draft	ibisuser11		2013-02-13 4:45 PM
	Division of Mental Health/Development...	14460	Worksheet-II	xx-2	OSBM Draft	ibisuser11		2013-02-13 2:20 PM
	North Carolina Community College Sy...	06800	Budget Code	COMMUNITY COLLEGES-INSTIT	OSBM Draft	ibisuser11		2013-02-12 1:59 PM
BB-9WB0	University of North Carolina at Wilmin...	16060	Worksheet-I	test	Submitted To OS...	ibisuser2		2013-02-11 9:58 AM
BB-xxxx	University of North Carolina at Chapel...	16020	Worksheet-I	Agness test accounts	OSBM Draft	ibisuser11		2013-02-06 12:03 PM
BB-7VY1	Department of Justice	13600	Worksheet-I	sqa	OSBM Draft	ibisuser11		2013-02-06 12:02 PM
BB-7M5G	Division of Mental Health/Development...	14460	Worksheet-I	Division Equipment Exception	Submitted To OS...	ibisuser11		2013-02-06 12:01 PM
BB-7W9R	North Carolina Community College Sy...	06800	Worksheet-I	test blocker for ws1	OSBM Draft	ibisuser11		2013-02-06 12:00 PM
	North Carolina Community College Sy...	16800	Worksheet-II	Web Technologist Position (Business & T...	Validated By OSBM	ibisuser11		2013-02-05 8:12 AM
	Department of State Treasurer	13410	Worksheet-II	Joe Test	OSBM Draft	ibisuser11		2013-02-04 9:03 AM

Page 1 of 1 | Displaying Items 1 - 11 of 11

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.

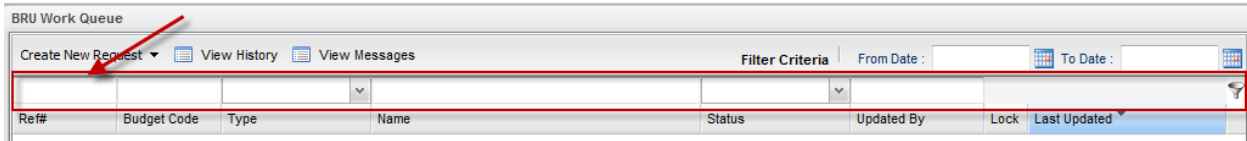
Another set of headers located directly above the work queue table perform more specific sorting and filtering.

BRU Work Queue

Create New Request | View History | View Messages | Filter Criteria | From Date : | To Date : |

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



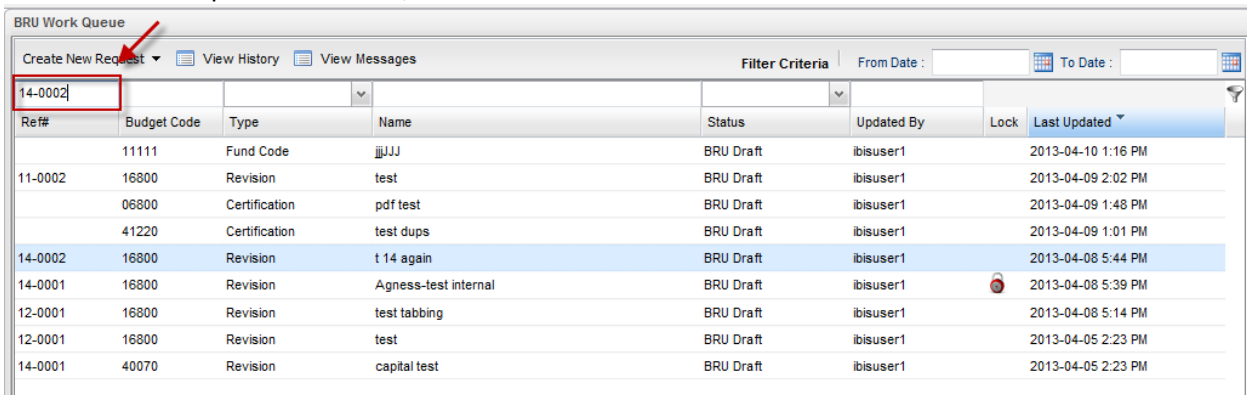
BRU Work Queue

Create New Request ▾ View History View Messages

Filter Criteria From Date: To Date:

Ref#	Budget Code	Type	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.



BRU Work Queue

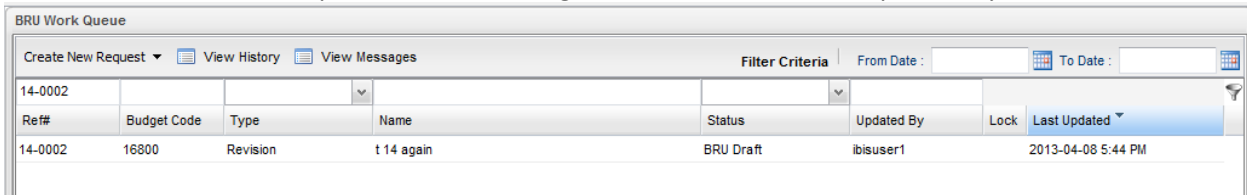
Create New Request ▾ View History View Messages

Filter Criteria From Date: To Date:

14-0002

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
	11111	Fund Code	ijJJJ	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

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.



BRU Work Queue

Create New Request ▾ View History View Messages

Filter Criteria From Date: To Date:

14-0002

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
14-0002	16800	Revision	t 14 again	BRU Draft	ibisuser1		2013-04-08 5:44 PM

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



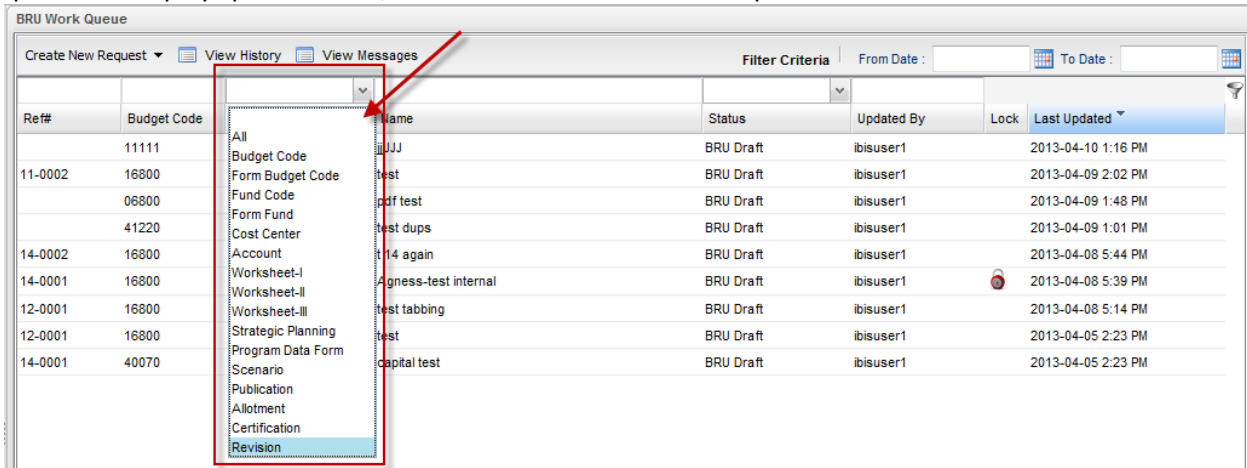
BRU Work Queue

Create New Request ▾ View History View Messages

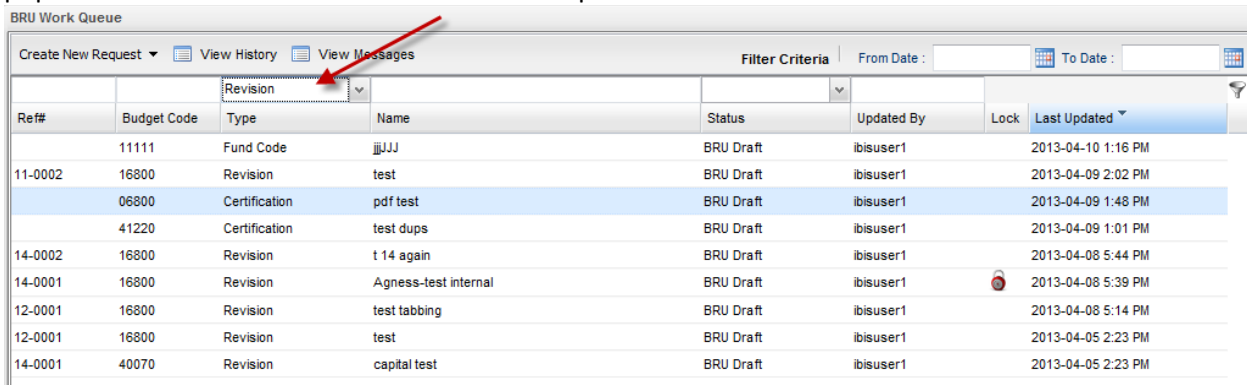
Filter Criteria From Date: To Date:

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
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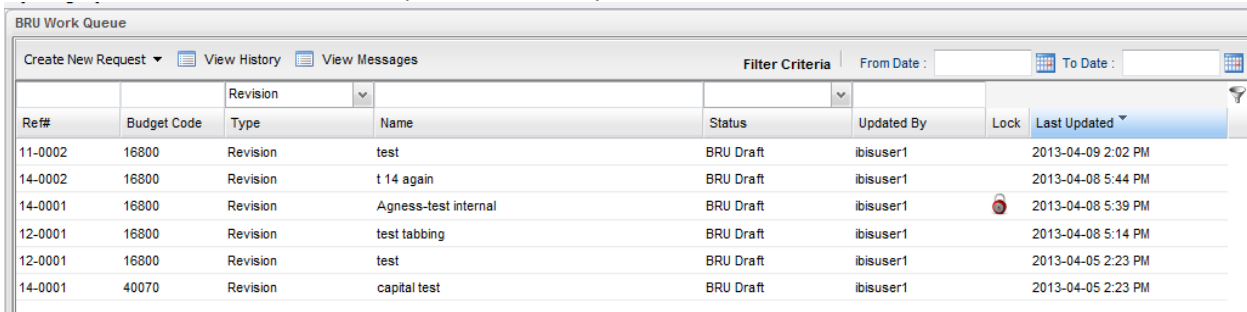
The Type Field and the Status Field have dropdown lists which can be used to filter the items in the work queue. To display specific items, make a selection from the dropdown list.



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	jjj	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	jjj	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.