

IBARS

The Fully Integrated Financial, Personnel, Revenue and Performance Budgeting and Tracking System

QUICK OVERVIEW

One of the primary responsibilities of government is the efficient allocation of tax dollars. Historically, budget requests were developed by simply adjusting current appropriations for the next accounting period. Budgeting is becoming a more sophisticated process requiring extensive supporting documentation to justify budget changes and to allow analysis of the budget by demographic and performance criteria.



IBARS, a leading public sector budget and tracking system, was developed to make budgeting easy and comprehensive. **IBARS** integrates all budget components in one powerful, easy to use system. Expenditures are allocated to cost centers, revenues and funding sources. Other budget components such as special funds, projects and grants may be tracked across agencies. Included are payroll projection modules to calculate costs including expenses resulting from new positions, pay increases and benefit rate changes. Also, performance measurements and narrative support are provided. **IBARS** may be used to produce print ready publications such as the Council, Executive, Commission and Legislative budgets, bills & related documents. **IBARS** supports the full budget cycle from agency request, through final approval and continuing with budget monitoring including “request to spend” control, and expenditure/revenue tracking. Budget versions are available for an unlimited number of 'what if' scenarios. Budget data can be cross reported with multiple tree level selections and groupings.

THE IBARS WORKFLOW CYCLE

IBARS has a fully configurable, multi-track workflow system. The typical **IBARS** process begins by accessing existing expenditure, payroll cost and position information. Next, agencies enter their budget request. Agencies have the ability to maintain several budget what-if 'versions'. This 'what if' capability allows agency management to develop different budget scenarios easily and quickly.

Schedules are available for collection, tracking and integration for any data that is collected as part of the budget process such as capital/IT projects, commodity requests, performance measures & drivers, transfers, revenues, etc. All **IBARS** schedules are dynamically built, fully configurable and adaptable to meet any requirement.

Once the agency request is completed and validated, **IBARS** data is available to the Budget Office for review and publication. A process that had been cumbersome and time consuming becomes simple with a seamless integration of text and data.

Information is passed to the legislature and the public. The legislative branch can utilize **IBARS** to create its own budget scenarios, committee reports and budget bills with extensive security to ensure data confidentiality. The approved budget is entered and appropriations are uploaded to the fund accounting system. With “Read Only” versions and the Internet, budgets are available to the public.

During each fiscal year, budget and revenue to actual tracking is available with optional request to spend and appropriation transfers processes. This leads into the starting point for the following budget cycle.

CONCLUSION

IBARS, with its integrated budget schedules, payroll cost projections, revenue sources, word processing, flexible reporting and spreadsheet capability provides an excellent tool for budgeting and tracking of the appropriated budget actuals.

How IBARS Improves Your Operations

IBARS makes the budget process much more effective and efficient by:

- Reducing the needed time to develop the budget;
- The collection of consistent, structured and validated data;
- Supporting 'across the board' changes to update expenditure, revenue and funding projections;
- Supporting performance based budgeting;
- Generating Council or Executive 'Budget Books', Legislative Budget Law; and
- Providing the capability to cross-report the budget, for example, by demographic factors, programs and grants.

Budget Office Benefits

Reduces the workload by:

- Ensuring all budgets are complete and balanced before submission
- Automatically balancing expenditure changes with revenue sources
- Creating flexible reports online
- Printing an integrated text and data 'Budget Recommendation Book'
- Analyzing the impact of across the board changes easily and quickly
- Flexible and adaptable to changing budgeting and data collection requirements.

Monitoring, Projections, Initialization

- Disaggregate and assign appropriated budget to budget units
- Continuous monitoring of actual expenditures to budget
- Continuous monitoring of revenue projections to actual revenues
- Continuous monitoring of payroll projections to actual payroll
- Adjust current year to address shortfalls and surpluses
- Carry forward of multi-year budgets
- Copy/reorg forward initiatives to future budgets, save rekeying
- Copy/reorg forward narrative to support next session budget and law publications.

Agency Benefits

Reduces the workload by:

- Providing online edit checks
- Validating the budget request is balanced
- Populating payroll expenditure objects based on positions
- Eliminating redundant forms and re-keying of information
- Collecting supporting detail to substantiate request
- Providing ad hoc reporting tools
- Ability to make 'across the board' changes quickly
- Simple submit, resubmit to budget office.

Committee/Legislative Benefits

- Review Recommendation in summary or detail both financials and supporting narrative
- Apply budget adjustments
- Provides drill downs for detailed analysis
- Ability to perform 'what if' analysis
- Analyzing the budget by demographic factors
- Setting budget priorities
- Track resolutions
- Committee status reporting
- Bill generation.

IBARS may be utilized by fiscal managers, budget analysts, legislative staff, and economic analysts to develop and monitor budgets and perform 'what-if' calculations. Budgets may be entered at a detailed or summary level based on the agency. This allows each agency to use the system to meet their information needs. Once budgets are submitted, they may be aggregated, or disaggregated, for use by the executive budget office and the legislature. This allows users to obtain information at the appropriate level. **IBARS** is Internet ready and it is possible to provide controlled public access. **IBARS** dynamic schedules allow for the collection of unlimited customer specific data elements as required to report on unique budget components such as Revenue Projections, Capital & IT Projects, Leasing, Repairs, etc.

FEATURES FOR AGENCIES, BUDGET OFFICES AND LEGISLATIVE BRANCHES

Budget systems should be easy to learn and use. **IBARS** follows all standard Windows and Internet conventions making user training fast and effective. **IBARS** is also very powerful, functionally rich and integrates numeric and narrative information. Following are some key system features.

Budget Checklist

Different agencies have unique budgeting requirements. **IBARS** is the most comprehensive and flexible budget system available. A quick review of the Budget Checklist below, displays how the user is prompted to complete their work. This checklist is flexible based on the budget phase. The system validates that required items are completed before the budget may be considered 'complete'.

Systemwide		
<input checked="" type="checkbox"/> Narrative	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Capital Project	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Budget Request Summary	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Position Detail Data	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Extraordinary Repairs	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Grants Summary	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> IT Capture	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> IT Equipment Over \$5000	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Lease Purchase Agreements	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Licensing, Regulation, Inspection	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Monthly Forecast	<input checked="" type="checkbox"/> Complete	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Fund Balance	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Continuing Appropriations	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Telecommute Analysis	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Submitted Budget Adjustments	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Current Modified Budget	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> Transfer Tracking	<input type="checkbox"/> Not Complete	<input type="checkbox"/>
<input checked="" type="checkbox"/> EPP Requests	<input type="checkbox"/> Not Complete	<input type="checkbox"/>

Easy Access and Version Flexibility

IBARS supports an unlimited number of 'what-if' versions. Different version 'types' may have different users, aggregation levels, security controls and column headings. Accessing budgets is simple and fast. Simply select an agency and a version as shown below. Selections are controlled by system security.

Select - 00101 Office of the Governor			BIEN - 2009						
Copy	Delete	Submit	Version	Version Title	Ctrl Lvl	Type	User	Date Created	Statewide Delete
Copy	Delete		200908100101	Recommendation	B	neweste		11/17/2008	Delete
Copy	Delete		200908200101	New Ben No Sal Incr	B	neweste		12/29/2008	Delete
Copy	Delete		200908300101	Governor's Recommendation	B	neweste		11/21/2008	Delete
Copy	Delete		200908100101	Agency Submitted	B	neweste		10/06/2008	Delete
Copy	Delete	Submit	200908100101	Agency Version	B	neweste		05/20/2008	Delete
Copy	Delete	Submit	200908200101	Post Session-Calc. Salary	B	neweste		05/13/2009	Delete
Copy	Delete	Submit	2009084000101	Final Salary Scenario	B	neweste		06/03/2009	Delete
Copy	Delete	Submit	2009084100101	2009-11 salaries	B	neweste		03/17/2010	Delete
Copy	Delete	Submit	2009084500101	Statewide Copy A01	B	neweste		01/29/2010	Delete
Copy	Delete		200908100101	Initial Download	A	neweste		04/07/2008	Delete
Copy	Delete		200908200101	Len Payroll Test	A	neweste		06/09/2008	Delete
Copy	Delete	Submit	200909100101	Budget Office	B	neweste		10/28/2008	Delete
Copy	Delete	Submit	200909500101	2009-11 salary budget	B	neweste		09/10/2010	Delete
Copy	Delete	Submit	200909100101	Final Budget Narrative	B	neweste		10/30/2008	Delete
Copy	Delete		200908100101	Backup of R01	B	neweste		11/17/2008	Delete
Copy	Delete		200908200101	6/6 New Benefits	B	neweste		11/17/2008	Delete
Copy	Delete		200908300101	5/5 New Benefits	B	neweste		11/19/2008	Delete
Copy	Delete		200908400101	5/6 New Benefits	B	neweste		11/18/2008	Delete
Copy	Delete		200908500101	New Benefits No salary in	B	neweste		12/29/2008	Delete
Copy	Delete		200908100101	Copy of C03	B	neweste		11/19/2008	Delete
Copy	Delete		200908200101	Agency Salary Scenarios	B	neweste		06/01/2009	Delete
Copy	Delete		200908300101	Salary Base - Do Not Chg	B	neweste		03/23/2010	Delete
Copy	Delete		200908100101	Cost to Continue 100 5/5	B	neweste		03/23/2010	Delete
Copy	Delete		200908200101	Cost to Continue 100 5/0	B	neweste		03/23/2010	Delete
Copy	Delete		200908300101	Cost to Continue 2/2	B	neweste		03/23/2010	Delete

Payroll Cost Projections

Payroll costs are major budget components. The **IBARS** payroll projection capability is very comprehensive and supports the following functions:

- Allocation of expenses (personnel and support) by position to cost centers and funding sources
- Assignment of pay increases by various criteria
- Automated re-calculation of expenditures due to benefit rate changes
- Ability to budget for lump sum payouts, grouped positions and partial year positions.
- Full integration with the line item budget and change packages.

Pos List	Pos Info	Pos Benefits	Pos Ben Calcs	Pos Calcs	Pos Alloc	Pos Emp	Def Alloc	Chg Pkg Descr
Pos No: 1234	Pos Seq No: 1	Yr: 2005	Name: JOE ELECTORMAN	Rpt Lvl: 006 ADMINISTRATION				
Year	2005		Class Cd	0 UNKNOWN TITLE				
Pos No	1234		Step					
Pos Seq No	1		Fte	1.00				
Emp Id	12345		Name	JOE ELECTORMAN				
Anniv Date			Longevity	07/01/1100				
Emp Date2			Emp Date3					
Pos Type Cd	A AWEC		Pay Type Cd	Hourly				
Unfunded Ind	Funded		Rate	2543.00				
Compute Incr Ind	<input checked="" type="checkbox"/>		Duration	12				
New Fte Ind	<input type="checkbox"/>		Salary Amount	30,516.00				
Start Dt			Bud Chg					
End Dt			Sub Sched Ind					
Date1	11/01/1985		Sub Sched No					
Date2			Pyrtl Ind	A Cycle A				
Date3			Lump Sum Amt	0.00				
Date4			Lump Sum Descr					
Date5								

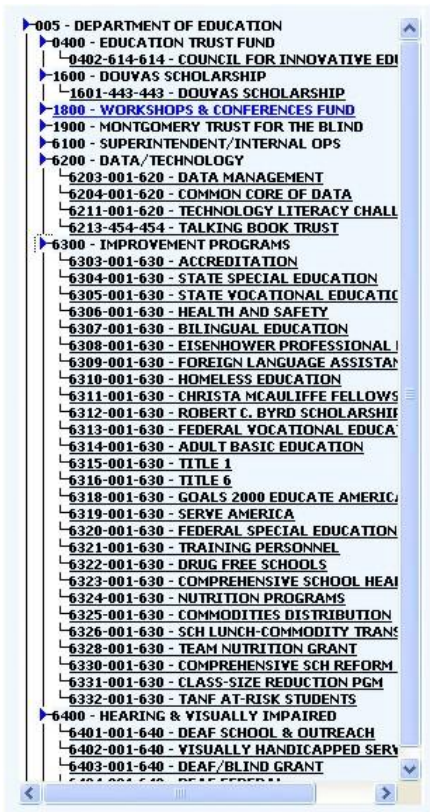
Rpt Lvl	Fund	Alloc Pct	Payroll Line	Increase Ind
2001-001-200 OPERATIONS	1001 GENERAL FUND	55.0%	600 70 ADMINISTRATION	<input type="checkbox"/>
2001-001-200 OPERATIONS	G GENERAL FUND	26.06%	0100 PERSONAL SERVICES	<input type="checkbox"/>
2001-001-200 OPERATIONS	I INTERNAL FUND	18.94%	0100 PERSONAL SERVICES	<input type="checkbox"/>
4005-001-001 MIS SUPPORT CENTER	A AGENCY FUND	75.0%	0100 PERSONAL SERVICES	<input checked="" type="checkbox"/>
4006-001-001 SYSTEM DEVELOPMENT	R SPECIAL REVENUE	25.0%	0100 PERSONAL SERVICES	<input checked="" type="checkbox"/>

Entry of Budget Detail

Entry of budget detail is quick and easy. Split screens and flexible column displays are used to make this process easy and effective.

2001-001-200 OPERATIONS						
Obj Type - Expenditures						
Line - 0400 CENT. SERV./DATA SERV.						
Object No	FY2002 Actuals	FY2003 Budget	FY2004 DOT Guidelines Chgs	FY2004 Agency Adjustments	FY2004 Agency Ceiling	FY2004 Var From Ceiling
0410 - CENTRAL SER DATA-SER -	\$15,518	17,848	\$194	31,195	31,380	(31,380)
0420 - TELECOMMUNICATIONS -	\$0	\$50	1000	200	\$50	(550)
0430 - EQUIPMENT SERVICE CENTER -	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$15,518	18,218	\$1,194	31,395	31,930	-31,930
Total Expenditures	\$1,153,748	1,557,874	\$16,934	2,711,091	2,728,556	(2,404,903)
Total Funding	\$1,153,785	1,557,295	\$16,934	2,711,091	2,728,014	(2,404,361)

Direct access is available to budget change schedules, sub-schedules and narrative screens. Budget changes may be made at a detailed or summary level to support different needs for agencies, the executive budget office and the legislature. Budget adjustments may be configured a variety of ways through ‘Change Packages’, an ‘Adjustments’ subschedule or via a budget edit column. Budget information can be viewed at any summary level by tree navigation.



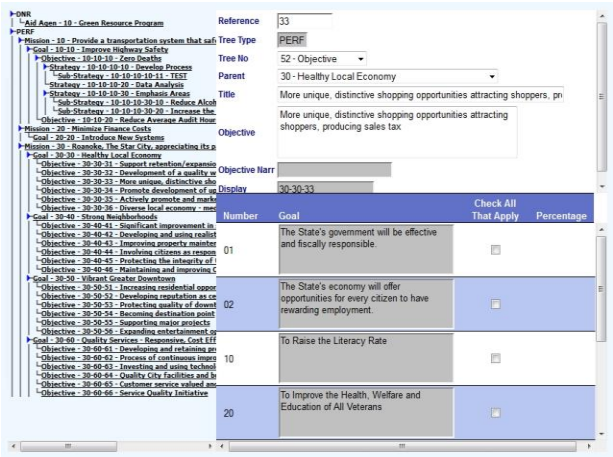
Flexible Column Definitions

Budget detail may be tailored to your needs by using the table driven column title and formula feature. Note that the columns may be uniquely defined by version type. This supports different budget preparation phases plus budget execution.

Col No	Title	Field Type	Col Type	Col Text	Formula	SQL Condition	Sort
Ant 01	2005-07 Biennium Expenditures	Number	Budget Detail				1
Ant 02	2007-09 First Year Expenditures	Number	Budget Detail				2
Ant 03	2007-09 Biennium Balance	Number	Calc Sum		COL04-COL02		3
Ant 04	2007-09 Biennium Appropriation	Number	Budget Detail				4
Ant 05	Cur Bien Approp (ytd only)	Number	Calc Sum		COL04	SF FF FQ	5
Ant 06	Payroll from Subschedule	Number	Budget Detail				6
Ant 07	Cost to Continue Payroll	Number	Calc Sum		COL06-COL05	SF FF	7
Ant 08	Cost to Continue Adjustments	Number	Change Package				8
Ant 09	Cost to Continue Base Operations	Number	Calc Sum		COL04+COL07+COL08		9
Ant 10	2009-11 Base Budget Changes	Number	Change Package				10
Ant 11	2009-11 Budget Request	Number	Calc Sum		COL04+COL07+COL08		11
Ant 12	2009-11 Optional Budget Changes	Number	Change Package				12
Ant 13	2009-11 Base and Optional Request	Number	Calc Sum		COL04+COL07+COL08		13
Ant 14	Compensation Package	Number	Calc Sum		COL04+COL07+COL08		14

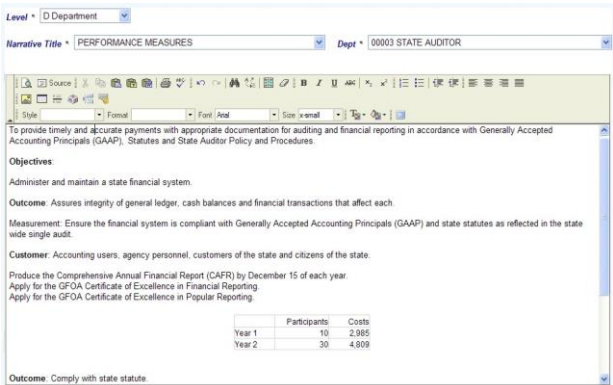
Narrative and Performance Budget Support

Two very important budget components are narrative information and performance measurements. The specific narrative sections desired is table driven and specific to each installation and the entry of mandatory sections is validated.



IBARS supports entry of narrative at various classification levels and budget phases. Information such as Agency Mission Statements, Program Narratives, Budget Justifications, Budget Adjustments, Revenue Projections, Legislative Actions and Performance Factors are integrated into reports. Performance data measurements including goals, objectives and strategies are maintained and several hierarchical structures are available.

The narrative input screen is used to enter budget narrative and footnotes. The user may utilize formatting tools, but fonts and font sizes are standardized to ensure all document sections have a consistent appearance. Images, charts and graphs can also be maintained in the IBARS narrative module. These components may then be included in the budget documents. Global search and replace is available to synchronize terminology for all publication sections.



Narrative and MS Windows Support Tools

A ‘Cut’ and ‘Paste’ capability exists to easily move text data to and from Windows based tools. A ‘Notes’ capability also exists to support changes. ‘Notes’ may be used to maintain confidential information. This is an excellent tool for budget analysts to document and justify adjustments.



Integrated Sub-Schedules and Drill Downs

The budget process includes developing a base budget, an explanation of budget changes and supporting sub-schedule presentations (for example capital projects, capital equipment, commodity code budgeting and narrative). **IBARS** supports these components and more. The following screens provide samples of some of these special components. Note that budget changes may include narrative justification, ‘one-time’ indicators, ‘include’ indicators along with expenditure, funding and performance components.

Budget changes are defined by group and type. The description and justification for the budget changes are entered on this screen. Indicators for ‘include’, one-times’ and special printing are also available.

Group	Type	Change Description
[A Agency]	[A Adjustment to Base]	Adjustment 23
Change No [1]	Include <input checked="" type="checkbox"/>	This is a change package description for adjustments to base te
Priority No [1]	Onetime <input type="checkbox"/>	
	Print Ind <input type="checkbox"/>	
[A Agency]	[J Just In Time]	Net-to-Zero Change
Change No [1]	Include <input checked="" type="checkbox"/>	Transfers activity with a netzero impact.
Priority No [2]	Onetime <input type="checkbox"/>	
	Print Ind <input type="checkbox"/>	
[A Agency]	[J Just In Time]	Other Budget Changes
Change No [2]	Include <input type="checkbox"/>	Miscellaneous Changes.
Priority No [3]	Onetime <input type="checkbox"/>	
	Print Ind <input type="checkbox"/>	
[A Agency]	[M Maintenance Adjustments]	Maintenance Adjustments
Change No [6]	Include <input checked="" type="checkbox"/>	
Priority No []	Onetime <input type="checkbox"/>	
	Print Ind <input type="checkbox"/>	
[B House Committee]	[A Adjustment to Base]	Exception - Positions
Change No [1]	Include <input checked="" type="checkbox"/>	
Priority No []	Onetime <input type="checkbox"/>	
	Print Ind <input type="checkbox"/>	

Templates are available for dozens of “subschedules”, for example the Capital Project template includes project description and justification, along with project costs, appropriation authorization, and bond issuance are among the information maintained. Special capital project budget documents may also be produced.

Capital Project Select				Projects	Summary	Detail	Chg Pkg	Chg Pkg Descr	Def Alloc	Narr
Edit	Version	Type	Description							
<input type="checkbox"/>	2005A0100006	07-006-01-00	Construction Management Contingency							
<input type="checkbox"/>	2005A0700006	07-006-02-00	Driveway/Pato/Drainage - Governors Residence							
<input type="checkbox"/>	2005A0700006	07-006-04-00	State Training School Maghee Building Renovation							

Costs and funding sources for Capital Projects can be projected out for several years.

Capital Projects Select: **Capital Construction** Summary Detail Chg Pkg Chg Pkg Descr Def End Narr

SECTION 1: PROPOSAL

Agency Name: Administration and Information

Project Name: American with Disabilities Act (ADA) Compliance

Agency Manager: Rich Cat

Agency Manager Phone Number/E-mail: Phone: 317-777-7768 E-mail: rkcat@state.vy.us

Executive Sponsor (Agency Director or Designee): Ron Kabelesman

A. Statutory or Other Requirements

1. Is this project a critical, life safety, emergency?

☐ NO

☒ YES (If Yes, cite the Specific Federal Law, rule or order)

ADA Public Law 101-336 / 28 CFR 35.130, mandates compliance. Non-compliant facilities could result in ci

2. Is this project a critical legal liability? (e.g. ADA, IAQ, HazMat, etc.)

☐ NO

☒ YES (If YES, explain)

Complaint-Gravance Process Section 504 of the Rehabilitation Act. Authority: U.S. Department of Justice of

3. Does this project have a prior binding commitment?

☐ NO

☒ YES (If YES, explain)

The Department of A&I is ordered by the State Legislature to oversee ADA Barrier removal at existing facilitie

4. Is this project or expenditure necessary for compliance with federal or state law or rules, other than A1 or A2 from previous?

Project data can be entered and assigned to an object of the line item budget. The equipment is assigned to a budget change and to the appropriate organization and object.

2001-001-200 OPERATIONS						
Obj Type - Expenditures - Line - [0200 SUPPORTIVE SERVICES]						
Project - 10 BAS, CAS, and Security Replace, Upgrad, and Intgrte						
Object No	Current Appropriation	Budget Request	Optional Adjustments	Request Plus Optionals	Subsequent Financial Impact of Project	
(T2031 - IT PRINTING)	103,450	493,250	75,630	568,880	189,450	758,330
Total	103,450	493,250	75,630	568,880	189,450	758,330
Total Expenditures	206,434	493,250	174,680	667,830	391,384	1,059,214
Total Funding	102,984	0	98,950	98,950	201,934	300,884

All subschedule project setup is configurable, may be simple or complex, include formula calculations, dedicated narrative, be one tab or multiple tabs of background info and this may all be changed from year to year as reporting requirements change.

Easy to Request Reports

IBARS makes system reporting easy and flexible. Standard reports are accessible on-line using a menu driven system. The reporting module is very flexible and contains many useful capabilities. Within the reporting module, security authorizations strictly control data access.

Report ID	Report Group	Report Name
FBALD	STANDARD	Fund Balance Detail Report
SR01	STANDARD	Reporting Levels
SR03	STANDARD	Statewide Funding Summary
SR04	STANDARD	Change Package Summary
SR05	STANDARD	Budget Request Summary - Reporting Level
SR06	STANDARD	Budget Validation
SR07	STANDARD	Version Comparison
SR18	STANDARD	Agency Benefits
SR23	STANDARD	Transfer Tracking
SR12	STANDARD	Pay Plan Comparison
SR13	STANDARD	Personal Services Budget
SR14	STANDARD	Position Detail
SR15	STANDARD	Sample Graph
SR20	STANDARD	Event Log
SR21	STANDARD	User Password Configuration Report
SR22	STANDARD	Password Configuration Report
SUBSCH1	STANDARD	SubSchedule Info
NARR	STANDARD	Narrative Reports
TREE	STANDARD	Tree Report
SPLAN	STANDARD	Strategic Plan Report

Each report has selection parameters which allow for the data reported and output format to be tailored. Commonly used selection parameters can be saved as reporting scenarios.

Report Name - Budget Request Summary - Reporting Level

Edit Profile Name

Report Title - Budget Request Summary - Reporting

Version - 2024-A-07-00006

Admin - ☐

Agency - ☐

Series - ☐

Negative Values - ☐

Stwd - ☐

Include Rows with 50 - ☐

Rollup - ☐

Sub Schedule - E Budget Request

Project -

Program - -All-

Reporting Level - 0 All Reporting Levels

Bgt Tree -

Optional Sort - Reporting Level

Sort1 -

Sort2 -

Column 2 - FY2021 Actuals

Column 3 - FY2022 Actuals

Column 4 - FY2023 Estimated

Column 5 - FY2023 Approved

Column 6 - FY2023 Adjustments to Approved

Column 7 - FY2024 Base

Code 1 - 0 (All)

Code 2 - 0 (All)

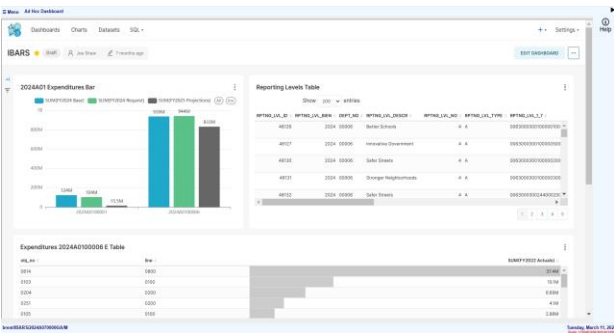
Print Parameter Page - ☐

PDF Watermark -

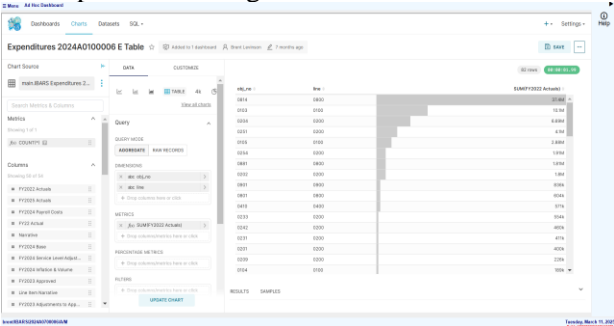
Output Type - ☒ HTML ☐ PDF ☐ Fmt CSV ☐ Standard CSV ☐ Excel

Ad Hoc Dashboard & Query

IBARS includes an integrated business intelligence query. This BI functionality includes creation and deployment of dashboards, charts, data sets and queries. Further, each of these includes import/export capabilities such as remote data query, local data import, as well as data/graphic export. As with the entire IBARS system, this is configurable by role to provide any level interaction from preconfigured dashboard views through to dashboard development, chart & data set creation, and SQL query. All of this functionality is secured through IBARS role security so administrators can provide users with ad hoc access while being confident that the solution enforces role data access privileges. A sample dashboard is shown below.



A sample chart configurator is shown below.



Scenario: Categorize the Budget By Demographic Criteria

It is now possible to answer questions such as, “How much are we spending enterprise wide on children under five years old?” by joining external datasets to budget data. The reporting criteria are table driven and can change as political needs dictate. The user determines the amount of detail desired in the reports and graphs. Also, further multi-agency reporting is supported for legislation and policy initiatives.

Security

Budget data has several confidential phases and components. Agencies, or departments, have access to their data, and within agencies selected users may be restricted to their budget areas. Until the budget request is submitted, agencies control access to their data. After the request is submitted, the budget analyst obtains control of their budget version. The security module assures data confidentiality by organization structure and allows access changes over time.

IBARS has an enterprise role based security model that is configuration based and administrated within the application. This provides complete flexibility in setting up each system's security. Users, roles, password controls and their associated security are configured through IBARS administration screens. Security configuration covers:

- User administration and role association
- Role administration and functional associations
- User agency association
- User tree association (e.g. organization, program, metrics, performance, etc.)
- Workflow (version type, submission, approval, etc.)
- Dashboard views
- Menu, screen, reporting access
- Screen section and field access
- Screen operational access (e.g. access to functional features such as data Approval)
- View, Insert, Delete, No Access by data set
- Password complexity and expiration parameters
- Full audit trail

Security Setup									
Win Grp Assign Win Sys Win Win Frames									
Apply Security To - Window									
Object Name - Admin Tables - Windows that are part of administration									
Default Access	Security	Type	User	Type	Access	Additional Security			
<input type="checkbox"/>	A	M	Read-Write	Update	<input checked="" type="checkbox"/>	Check Dept Sec	<input type="checkbox"/>	Insert	<input checked="" type="checkbox"/>
				Delete	<input checked="" type="checkbox"/>	Check Auth Users	<input type="checkbox"/>		
<input type="checkbox"/>	B	M	Read-Write	Update	<input type="checkbox"/>	Check Dept Sec	<input checked="" type="checkbox"/>	Insert	<input type="checkbox"/>
				Delete	<input type="checkbox"/>	Check Auth Users	<input type="checkbox"/>		
<input type="checkbox"/>	D	A	Read-Only	Update	<input type="checkbox"/>	Check Dept Sec	<input checked="" type="checkbox"/>	Insert	<input type="checkbox"/>
				Delete	<input type="checkbox"/>	Check Auth Users	<input type="checkbox"/>		
<input type="checkbox"/>	D	L	Read-Only	Update	<input type="checkbox"/>	Check Dept Sec	<input checked="" type="checkbox"/>	Insert	<input type="checkbox"/>
				Delete	<input type="checkbox"/>	Check Auth Users	<input type="checkbox"/>		



Enter your User ID and Password to log onto eBudget System

User ID
Password
Login
Clear
Forgot Password?

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Integration

IBARS is a very powerful tool with enormous amounts of extremely valuable data. To support effective data usage, **IBARS** supports full integration with leading spreadsheet and word processing tools. Charts and graphs can be created using **IBARS** data. Other system's data may be integrated through; schedule interfacing, real time API or manual dataset upload. The process is simple and does not require special processing. The capability can be extended to using word processing tools to seamlessly integrate **IBARS** data with text. **IBARS** is used to prepare the required 'Budget Books' and council session law with narrative, data and even charts and graphs. For the more sophisticated user, ad hoc report tools are available.

Internet Access and Reporting

IBARS may be used to distribute budget information over the Internet. The system administrator controls the amount of Internet data and when the data is available. Appropriate data entry may be performed using Internet technology within stringent security controls.

Superior security, performance and features allow Affinity Global Solutions to host **IBARS** for entities that require a full service solution.

VISION

Affinity Global Solutions has dedicated staff focused on providing public sector budget solutions. **IBARS** is a vibrant product with significant ongoing R&D that ensures our customer's investment is retained as business requirements and technologies change. The **IBARS** product roadmap is reviewed and adjusted regularly to insure that **IBARS** is several steps ahead of current practice and ready for future technologies.

Our daily interaction with customers gives us a unique knowledge of the pressure points associated with producing a budget and associated legislative budget law. As a result, we provide product features that makes **IBARS** robust, fast, easy to use and efficient to maintain.

New features and components are provided to our **IBARS** community through standard maintenance. Annual presentations keep everyone up to date on what new features are available, what other entities are doing with **IBARS** and what future development is planned over the next year.



Our personal attention to customer needs and priorities is unrivaled.

Affinity Global Solutions takes pride in providing a budget solution that has few proprietary technology dependencies. For this reason, the **IBARS** user interface (browser navigation and dash board), security, reporting and publications, narrative and processing logic are all written/programmed by Affinity Global Solutions.

The result is limitless flexibility to provide technology solutions, unfettered by the restrictions of 3rd party licensing and components.

IBARS is highly open standards compliant in order to support the broadest range of target application server and browser environments. Technologies used to support **IBARS** are:

- JAVA & JSP (Java Server Pages)
- HTML5 (Hypertext Markup Language)
- JavaScript
- AJAX (Asynchronous JavaScript and XML)
- Fetch API
- XML (Extensible Markup Language)
- CSS (Cascading Style Sheet)
- XSLT (Extensible Style Language Transformation)
- JSON, GeoJSON
- SVG (Scalable Vector Graphics)
- JDBC (Java Database Connectivity)
- PDF (Portable Document Format)

Use of open standards ensures that as application technologies change, **IBARS** has the broadest available options to adapt and quickly meet needs.

IBARS – AT A GLANCE

Benefits At A Glance

- Full budget cycle support
- Unlimited ‘What-if’ capabilities for any budget, committee, or legislative phase
- Unlimited budget ‘change’ packages to document position, expenditure, funding and performance deltas
- Manual or automated funding allocation
- Special funds, grants and projects are tracked across agencies
- Powerful, comprehensive and fully integrated
- Drag-n-drop browser based forms designer
- Integration of text and data
- Ability to analyze budget by policy driven factors (e.g. Demographics)

Results At A Glance

- Ease of entering budget requests
- Consistent budget formats and accounting codes
- Multiple ways to access, present and aggregate data
- Tax dollars allocated efficiently
- Automated generation of budget and legislative publications
- Provide performance measurement information cross-referenced to the line item budget

Technology

- Enterprise licensed
- Browser compatible with Edge, Internet Explorer, Firefox, Chrome, Safari, and Opera
- Enhanced usability and functionality achieved through AJAX
- Oracle, SQL Server and MySQL compatible, portable to other databases
- Platform independent, runs on any Java EE compliant application server
- Optional Single Sign On user access integration
- Optional standalone client for offline data collection and central server synchronization
- AGS hosted or client hosted

Features At A Glance

- Integrated schedules for support data
- Flexible reporting
- Payroll cost projections
- Benefit rate cost projections
- Revenue tracking
- Performance measures and drivers
- Cost allocation and transfers
- Formatted narrative, annotation and footnotes
- Word processing and spreadsheet integration
- Extensive data security based on user, time and phase
- Dynamic schedules (e.g. Capital Equip, Capital Projects, IT Projects, etc.)
- Metrics capture and integration to the budget
- Dynamic version / workflow submissions
- Dynamic menu configuration
- User and version defined screen layouts
- Publication generation using the latest web standards (XML, HTML5, PDF, SVG, CSS3)

THE COMPANY BEHIND THE SYSTEM – AFFINITY GLOBAL SOLUTIONS

IBARS was developed by Affinity Global Solutions of Bismarck, North Dakota. It employs the latest web technologies while representing over **30 years** of development, reengineering and refinement. Affinity Global Solutions (AGS) was founded by individuals who gained their expertise with KPMG Peat Marwick, Andersen Consulting and Electronic Data Systems. AGS has implemented enterprise-wide budget systems in the States of Indiana, Kansas, Maine, Montana, New Hampshire, North Dakota, Oregon, Wyoming and New Jersey.

SUMMARY - WHAT TO DO NOW

If you would like a new budget, revenue or legislative system and want more information about the leading software available, call us toll free at 1-877-528-3438. Our team is available to visit your organization, review your needs and demonstrate **IBARS**. We can then help you determine how to acquire your NEW system.



Affinity Global Solutions
“Implementing Tomorrow’s Technology Today”

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