

**2019 Biennium
IBARS
Long Range Building Program
Training Manual**

March 2016

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I. General Information

The IBARS Long Range Building Program (LRBP) module provides the process for gathering budget request information statewide. The process provides state agencies with an automated format for identifying construction and maintenance projects for state buildings, requesting funding for the projects, and submitting these requests for budget consideration.

These instructions address data entry for completing and submitting LRBP Project requests as well as generating reports. Below are the topics to be covered:

- LRBP - Basic Navigation
- LRBP Screens



- Version Status, Mark Version Complete and Submitting the Version
- Generating Capital Project Reports

The IBARS LRBP versions include:

- I – Agency LRBP Working
- J – Agency LRBP Submitted (Read Only)
- K – A&E LRBP Working

II. LRBP – Basic Navigation

Manuals & Instructions

IBARS Manuals

- IBARS Navigation and Reporting Manual
- IBARS LRBP Training Manual
<https://mine.mt.gov/documentation/sabhrs/mbars/default.mcp>

A&E Instructions

- Please refer to A&E's '**Procedures for Completing Long-Range Building Program Capital Project Request Forms**' for detailed information required for all LRBP project proposals.
<http://architecture.mt.gov/About-Us#170682279-long-range-building-program>

Logging on to IBARS

User ID/Password

- If you need to get an IBARS User ID/password, contact your agency's security officer.

To logon to IBARS:

- From the MINE page, click on "IBARS."
- Enter your User ID and password. Click on the 'Logon' button. User ID must be in CAPS.
- To change your password, click on 'Administration' > 'Password Configuration' > 'Change Password.'
- Note that IBARS will automatically prompt you to change your password every 60 days.

Select the Agency LRBP Working Version

From the 'Home' screen click on the 'Versions' tab on the upper left portion of the screen.



The Version screen will appear.

- The biennium field will default to 2019
- Select the '2019I01XXXXX' version for your agency



This will open the Agency LRBP Checklist .



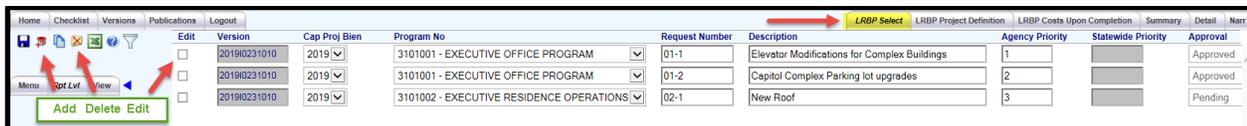
Tip: Remember to use the LOGOUT tab and NOT the red X  in the upper right corner when leaving the application. If you do not exit using the 'logout' action, you will create concurrent connections and eventually be locked out. If you need help to re-enter the system, email MBARSSecurity@mt.gov .

III. LRBP Request Screens

LRBP Select Screen

The LRBP Select screen lists all LRBP projects entered for your agency. You have the ability from this screen to add and delete projects, edit the available fields and SAVE.

Upon selecting the link for LRBP, you will enter the 'LRBP Select' screen. The fields in this screen will be blank when you first enter into the LRBP subschedule. It will only show data after entries are made on the 'LRBP Project Definition' screen.



Using the Screen:

- **Add Icon:**  Clicking on the 'Add' Icon opens an empty 'LRBP Project Definition' screen where users enter information concerning the project.
- **Delete Icon:**  To delete a project, highlight the project you want to delete, click on the 'Delete' icon, the project line will gray out and the font changes to *italic*. Click on the 'Save' icon to permanently delete the project. If you try to leave the page without saving, the system will then ask 'Save Changes To Current Page?'
 - *Note: Clicking on the 'Delete' icon will NOT produce a warning message that asks users if they are certain they want to delete the project. Be careful, a project deleted in error will have to be reconstructed.*

Edit

- **Edit Checkbox:** In order to work with a specific project, click the edit box and it will open up the 'LRBP Project Definition' screen for that project.
- **Sort:** The default sort for the 'LRBP Select' screen is by 'Request Number', in ascending order. Users can click on any column heading to activate a sort of the information by the heading selected. By clicking once on the heading, data is sorted into ascending order and by clicking again on the heading, data is sorted into descending order.
- **Edit Fields:** Changes made to the fields on this screen will subsequently make changes to the same fields in the 'LRBP Project Definition' screen. The 'Version' and 'Statewide Priority' fields cannot be changed by an agency user.

TIP: The font for the tab names will change to '***bolded italic***' when you select the tab. The tabs are not in the order recommended to complete a project. The recommended order in creating your project is as follows:

- 1) *LRBP Project Definition*
- 2) *Narr*
- 3) *Detail*
- 4) *Summary*
- 5) *LRBP Costs Upon Completion*

1) LRBP Project Definition

The LRBP Project Definition screen provides the general information for a project. This will be the starting point for entering new requests and all other data entry screens related to a specific project (project narrative, detail, summary, and cost upon completion screens). All project information on this and subsequent screens must be entered, as appropriate, to provide complete information for the request.

For all new LRBP project requests, the 'LRBP Project Definition' screen is the initial screen that will appear after selecting the "ADD" icon from the 'LRBP Select' screen.

***Required fields**

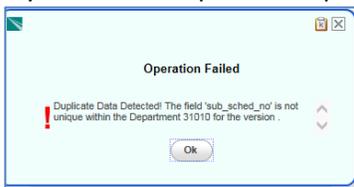
Version: Defaults in and reflects the agency number.

***Cap Proj Bien:** Select the correct biennium for the requested project.

***Program Number:** Select the program number the project is tied to from the dropdown list provided.

Request number:** This field is assigned by the agency. The number must be unique within the department for the version. ***A&E suggests the following format for Request Numbers: first 4 digits of the agency number followed by a sequential number: 6101-01, 6101-02.

If you enter a duplicate Request Number, the following 'Operation Failed' error message will appear.



***Project Title:** Enter a concise and descriptive title that clearly identifies the project. This field is limited to 50 characters.

Agency Priority: Agencies must rank all projects in order of agency priority. Agency priority must be unique within agency and LRBP request biennium.

Statewide Priority: This field should be left blank. Statewide priority will be assigned by A&E after consideration of all requests. Statewide priority values may change throughout the review process.

Est. Completion Date: Agencies must enter the anticipated month, day and year when the project will be complete.

Brief Project Description: Provide a two or three line description to further identify the nature of the project.

Checkboxes: Check the boxes that describe the request.

A. This Project (Check where appropriate)

- *Original or Existing Facility* - Check where appropriate.
- *Major Maintenance* - Select the appropriate major maintenance class:
 - Class I - Projects requiring immediate action to provide safety and protection against costly damage.
 - Class II- Projects that are necessary to correct problems, which, if neglected would deteriorate further into Class I situations or that must be done to provide efficient use of the facility or system.
 - Class III - Projects that are necessary to fully renew the facility or system.

B. Location (Check where appropriate)

Approval: Select from the dropdown to indicate whether this project is “Approved” or “Disapproved.” The approved/disapproved status is version specific and may change throughout the review process. This allows agencies to approve a project for submission to DOA, and DOA/A&E will coordinate with OBPP to approve or disapprove before final submittal to the governor. The default value is “Pending.”

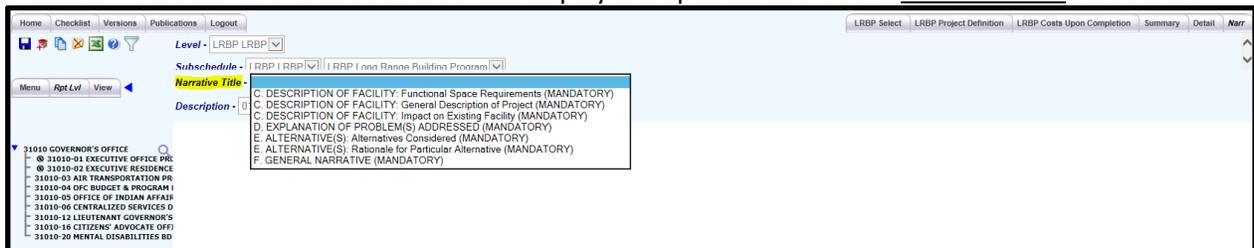
After all information is entered on the page click the “Save” icon.

2) Narratives

The ‘Narr’ screen allows users to enter narratives to describe the facility, problems addressed, alternatives, and other information that relates to the project in general.

TIP: You *MUST* enter the ‘Narr’ screen from the ‘LRBP Project Definition’ screen or the ‘LRBP Costs Upon Completion’ screen. A message stating ‘Narrative not available for the tab selected.’ will display if you try to navigate from the ‘Summary’ or ‘Detail’ screens.

Upon entry of the ‘Narr’ screen the ‘Description’ will default to the LRBP project entered on the ‘LRBP Project Definition’ screen. The ‘Narrative Title’ will display a dropdown with seven **MANDATORY** narratives.



Using the Screen:

On the ‘Narr’ screen is the ‘Narrative Title’ dropdown which lists four groups of narratives (C – F). These four groups are described in detail below. Select a Narrative Title from the drop down to open the text box to enter/update required narrative records. Agencies will have the ability to ‘Copy,’ and ‘Paste’ along with extensive formatting.

C. Description of Facility

This narrative group has three separate narrative types:

- **Functional Space Requirements** – Explain the functional space requirements of the facility.
- **General Description of Project** - Enter a clear, concise description of the project so that its nature can be quickly understood. If necessary, supporting data and additional information should be included in the 'General Narrative' field near the bottom of this screen.
- **Impact On Existing Facility** – Explain the relationship of the project to other projects or facilities, both existing and planned.

D. Explanation of Problem(s) Addressed

Describe why the particular project is needed, what problem(s) it addresses, and the consequences of postponing or disapproving the project.

E. Alternative(s)

This narrative group has two separate narrative types:

- **Alternatives Considered** – Present realistic, alternative methods of addressing the problem(s).
- **Rationale for Selection of Particular Alternative** - Explain why the requested method is preferred over others.

F. General Narrative

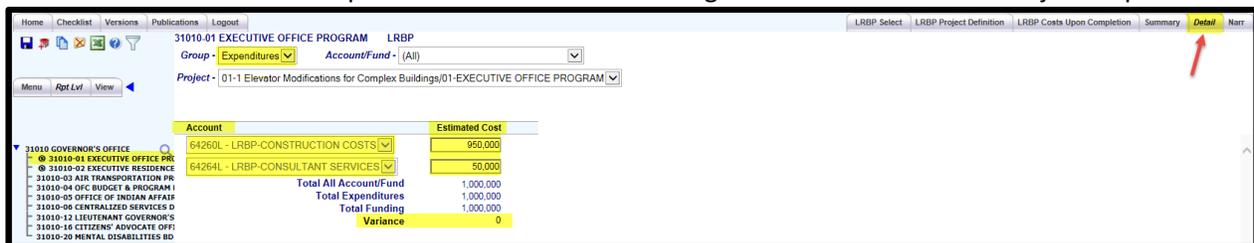
Enter any additional pertinent information in this text box that was not entered elsewhere.

After all information is entered for each narrative click the “Save” icon.

Tip: You must SAVE after entering data into a Narrative Title before moving on to another narrative or you will receive the message ‘Save Changes To Current Page?’

3) Detail (includes Project Estimated Costs and Funding)

This screen allows users to input estimated cost and funding information for a LRBP Project request.



The screenshot shows the 'Detail' screen for a LRBP project. The top navigation bar includes 'Home', 'Checklist', 'Versions', 'Publications', 'Logout', and tabs for 'LRBP Select', 'LRBP Project Definition', 'LRBP Costs Upon Completion', 'Summary', 'Detail', and 'Narr'. The main content area displays the following information:

31010-01 EXECUTIVE OFFICE PROGRAM LRBP
Group: Expenditures Account/Fund: (All)
Project: 01-1 Elevator Modifications for Complex Buildings/01-EXECUTIVE OFFICE PROGRAM

Account	Estimated Cost
64260L - LRBP-CONSTRUCTION COSTS	950,000
64264L - LRBP-CONSULTANT SERVICES	50,000
Total All Account/Fund 1,000,000	
Total Expenditures 1,000,000	
Total Funding 1,000,000	
Variance	0

A red arrow points to the 'Detail' tab in the top navigation bar.

Upon entering the Detail screen you will be asked to select a reporting level prior to adding any detail expenditure or funding costs. Select a program (RL2) from the Reporting Level Tree in the left portion of the window. You can right-click the Department (Agency) name and choose ‘Expand All’ to expand the tree all at once or click on the arrow next to the agency name to expand the individual programs.

Enter Project Expenditures:

Group: Select Expenditures from the list of valid values from the dropdown list

Account/Fund: Select (All) or an appropriate 1st level expenditure account

Project: Verify the correct project is displayed

Account: Select the appropriate account value from the dropdown list

Estimated Cost: Enter the estimated cost of the project for the account specified

Edit/Save:

- Use the Add icon to insert additional rows as needed
- After all of the expenditure information is entered click the Save icon

Tip: If an incorrect account was selected after a 'Save', you will need to delete the row using the delete icon and then add a new row selecting the correct Account.

Enter Project Funding:

Group: Select Funding from the list of valid values from the dropdown list

Account/Fund: Select (All) or an appropriate fund type

Project: Verify the correct project is displayed

Fund: Select the appropriate fund value from the dropdown list

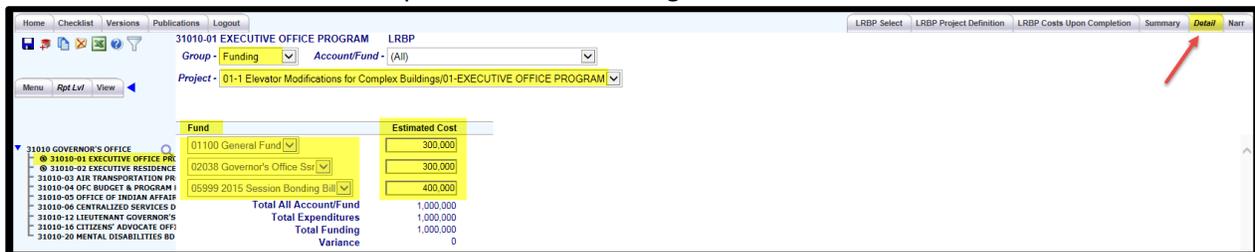
Estimated Cost: Enter the estimated cost of the project for the fund specified

Edit/Save:

- Use the Add icon to insert additional rows as needed.
- After all of the funding information is entered click the Save icon

Tip: If an incorrect fund was selected after a 'Save', you will need to delete that row using the delete icon and then add a new row selecting the correct Fund.

After entering the expenditure and funding information, the totals/variance amounts at the bottom of the screen are calculated by the system and updated. The 'Variance' amount will calculate to zero when correct data has been entered for both expenditures and funding.

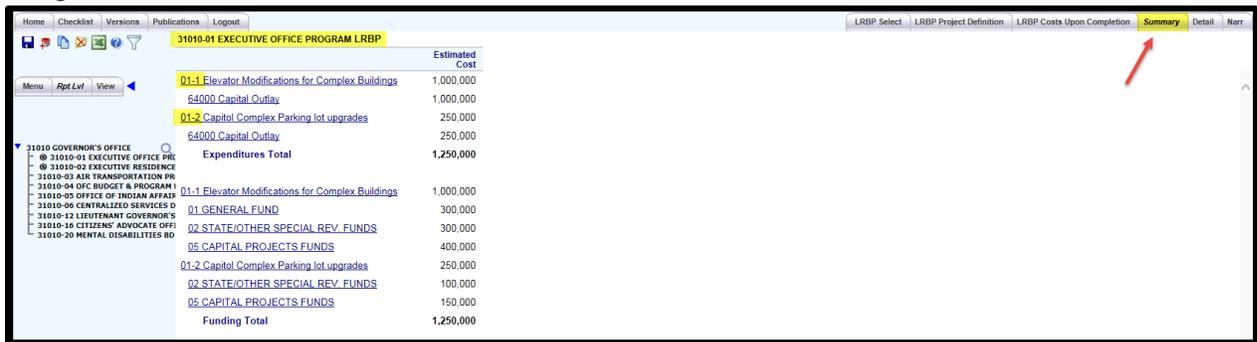


Tip: The system allows users to save data even when out-of-balance, assuming that the data is a 'work-in-progress.' The system will not allow users to flag the version as 'Complete' on the LRBP screen until cost and funding data balance, and all narratives are completed.

Tip: Dropdown values include all valid funds for the selected agency. If a new fund is needed, contact your OBPP Budget Analyst.

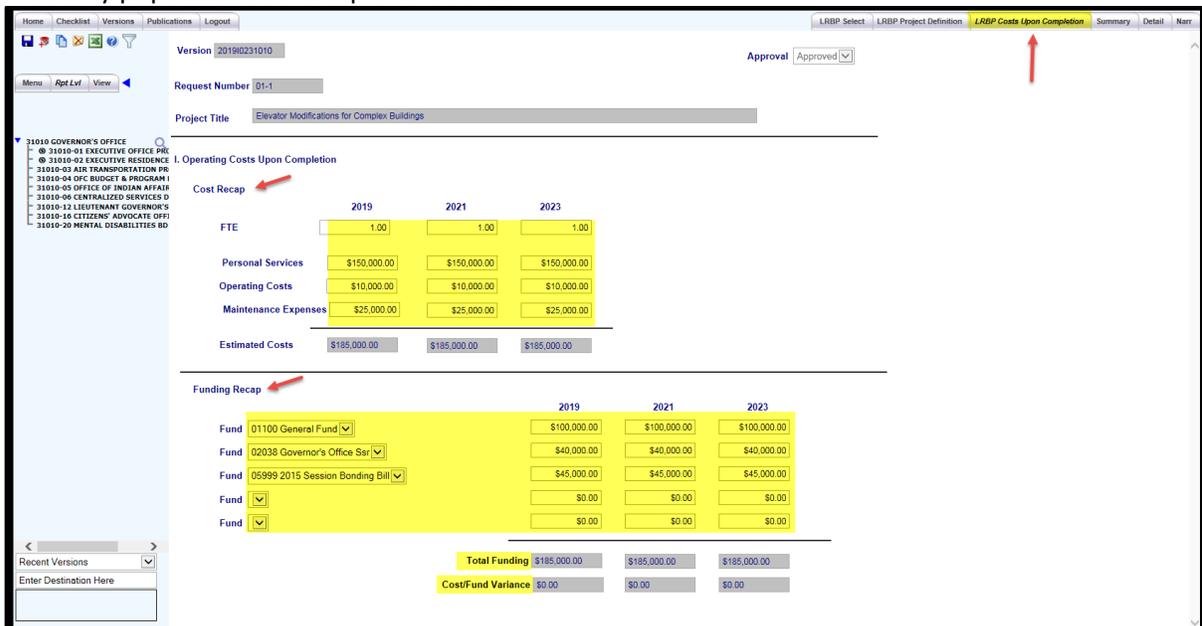
4) Summary

The Summary tab will display the Agency's Reporting Level Rollup Summary for the reporting level chosen. It organizes LRBP Projects by Request Number in ascending order, by estimated project costs and estimated funding.



5) LRBP Costs Upon Completion

This screen captures information concerning operational costs and funding upon project completion. Information for three biennia should be entered if applicable. Some of the information previously entered is automatically populated at the top of the screen.



Using the Screen:

The biennium defaults in the current and two subsequent biennia. There are two sections for entering Operating Costs Upon Completion data.

- Cost Recap
- Funding Recap

Cost and Funding Information

The 'Cost Recap' and 'Funding Recap' on this screen operate independently of each other.

FTE: If additional FTE will be required to support this project after completion, enter the anticipated number of FTE. The system will format the FTE number that is entered to have two decimal places, but if a number other than a whole number is necessary the user must enter the decimal point and fraction of FTE desired.

Costs: Enter the anticipated costs required to support this project after completion. IBARS will calculate the 'Estimated Costs' total amount and display the value at the bottom of the screen.

Fund Type: Select a fund type value from the dropdown list.

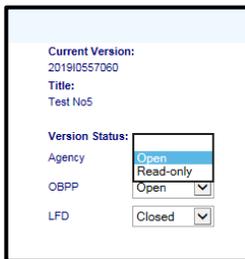
Amount: Enter a dollar amount. IBARS will calculate the 'Total Funding' and 'Cost/Fund Variance' amounts and display the value at the bottom of the screen.

Continue inserting fund types and amounts until all identified costs are funded. After all the information is entered click the Save icon.

IV. Version Status, Mark Version Complete and Submitting the Version

Version Status

On the right side of the HOME screen is the 'Version Status' block that indicates which user groups can view a particular LRBP Project version. Access rights are defaulted by the system upon creation of a version, but the user type that 'owns' the version of budget information (i.e. 'I' versions for agency users) may change the access rights, should the user wish to allow 'Read-Only' access to another user type. To change access rights, the user must choose a valid value from the dropdown list. The 'Open' option allows access and the 'Closed' option disallows access for the selected user type.

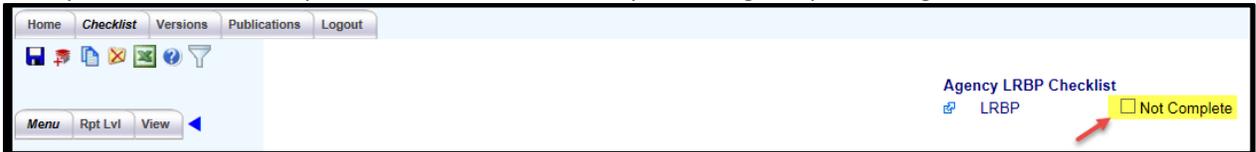


The screenshot shows a form titled 'Version Status' with the following fields and options:

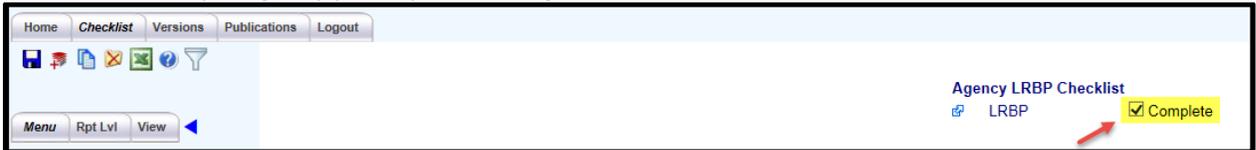
- Current Version:** 201910557060
- Title:** Test No5
- Version Status:** (Dropdown menu)
- Agency:** (Dropdown menu with options: Open, Read-only)
- OBPP:** (Dropdown menu with option: Open)
- LFD:** (Dropdown menu with option: Closed)

Mark Version Complete

Navigate to the LRBP Agency Working Checklist. To the right of LRBP link is the 'Status' checkbox which allows agencies to indicate progress of the LRBP Agency Working version. Two values are available; 'Complete' and 'Not Complete,' and these values may be changed by selecting the checkbox.



Users must change the value to 'Complete' before submitting the LRBP Agency Working version. In order to change the value to 'Complete,' all projects must have balanced costs and funding and all requests must have a unique agency priority value assigned.



If these conditions are not met, the system will prompt the user with an 'Operation Failed' message.

TIP: If you check the Not Complete box and receive the Operations Fail Message - Click on the Red exclamation point and the error message will be revealed.



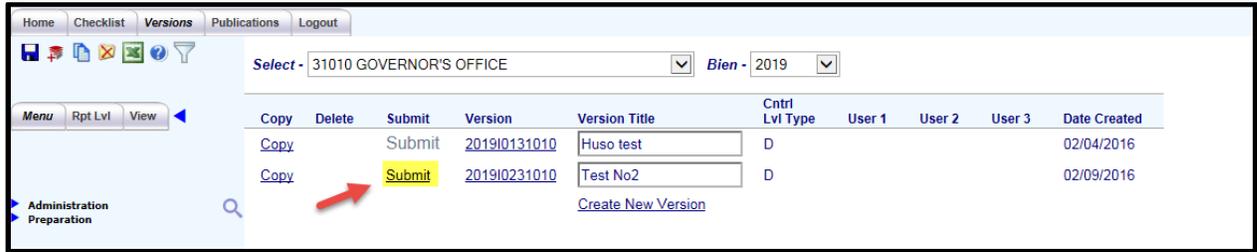
Under the 'Publications' tab the SR06 – Budget Validation report will provide the detail on why the version did not pass validation.

When an agency has finished their LRBP project work and successfully marked the version to 'Complete' it is then ready to 'Submit'.

Note: If users change LRBP Project request information after the Version has been marked to 'Complete', system validations will automatically change the status back to 'Not Complete' in order to force a new validation after the change.

Submitting the Version

Agencies submit the version for review by navigating to the 'Versions' screen and selecting the 'Submit' link next to the Version Title.



Note:

- Only when the Version is successfully checked to 'Complete' will the 'Submit' link become active to submit the version.
- Once submitted, the system does not allow 'I' versions to be modified. If an agency has a need to modify a submitted LRBP Project request, they should notify A&E.

V. Generating LRBP Reports

To generate LRBP reports, first ensure you are in an LRBP version (I, J, or K) then select the Publications tab.



Using the Select lookup, select LRBP (the default value is STANDARD).



The LRBP publications page will open and the 3 LRBP reports will be listed:

- R536 Long Range Building Program Project Detail
- R537 Long Range Building Program Costs Upon Completion
- R538 Long Range Building Program Project Status and Funding

Select the report you wish to run by clicking on the Report ID.

<i>Report ID</i>	<i>Report Group</i>	<i>Report Name</i>
R536	LRBP	Long Range Building Program Project Detail
R537	LRBP	Long Range Building Program Costs Upon Completion
R538	LRBP	Long Range Building Program Project Status and Funding

The report input parameter page will open.

Report Name - R536 - Long Range Building Program Project Detail ▼

Edit Profile Name -

Report Title - Long Range Building Program Pro

Version - 2019-I-01-31010

Admin -

Subschedule - LRBP - Long Range Building Program ▼

Request - All ▼

Approval - All ▼

Print Parameter Page -

Output Type - HTML PDF Standard CSV

The options you may change are the following:

- Request: Leave the default All value to return all projects or select a specific project using the dropdown.
- Approval: Leave the default All value to return all statuses or select a specific status using the dropdown.
The available status options are:
 - Approved
 - Pending
 - Disapproved
- Output Type: Select the preferred output type. The Standard CSV option is only available on the R538 report.

Click the OK button to run the report.