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Financials

**FIN-BP-301-LG**  
**AGENCY CAPITAL BUDGET**  
**DEVELOPMENT BPM**

*Learner Guide*



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## Using this Guide

This guide is designed to serve as a reference document. The guide is divided into sections. Each section represents a different topic.

### Table of Icons

The table shown below lists the icons used throughout this guide. The icons are used to highlight specific content to help quickly navigate through the material.

Icon	Name	Description
	<b>Activity</b>	Indicates an activity will follow. Review the directions and steps to complete the activity.
	<b>Critical</b>	Stresses critical information or warnings around a process or function. Review these carefully as they can help you avoid errors.
	<b>Navigation</b>	Displays the navigation path to the appropriate location within the program being trained.
	<b>Note</b>	Stresses “nice to know” information surrounding the topic. Review these sections carefully.
	<b>Reference</b>	Points to additional resources and materials on specific content. Review for enhancement of understanding.
	<b>Important</b>	Points to important concepts related to a process or function. Review these carefully.

## Course Overview

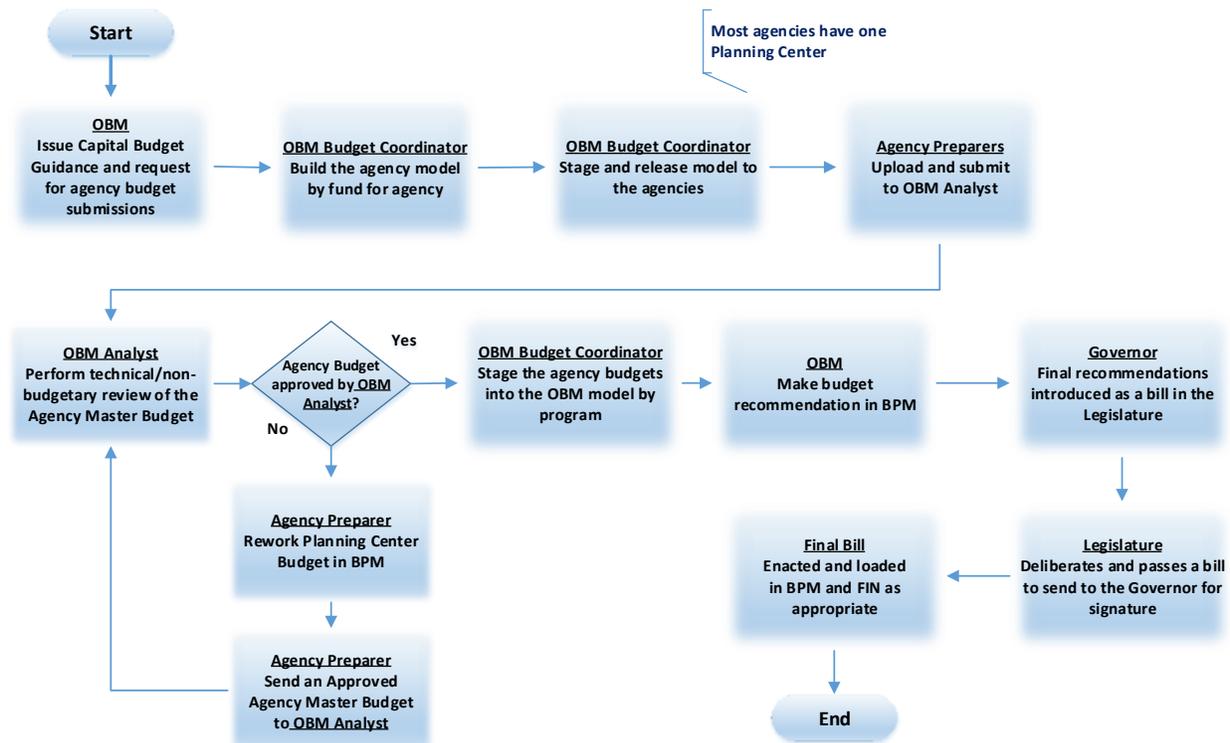
This course is designed to provide the knowledge and skills associated with the **Capital Agency BPM** process.

The OAKS Budget and Planning Module (**BPM**) is used by agencies to plan the requested biennial agency capital budget based on the Guidance published by the Office of Budget and Management (OBM). Every two years, state agencies must submit to OBM in accordance with Section 126.03 of the Ohio Revised Code, a six-year capital improvements plan (CIP) and a two-year capital budget request. Beginning with the FY 2017-2018 capital budget process, BPM will be used by agencies to enter capital budget requests.

The **Agency Capital Budget Development BPM** process is used to electronically prepare, review and submit the biennial budget requests for agency planning centers. This course will take the learner through all steps in the **Agency Capital Budget Development BPM** process from beginning to end. While the budget submission will be done through BPM, agencies will still be required to send in hard copy documentation. Please note BI reports that are generated using BPM data need to be included in a comprehensive hard copy submission to OBM. Benefits of BPM include:

- Spreadsheet upload for easy, accurate completion of line item entries.
- Analytic reporting capabilities.
- Data validation of ChartFields
- Streamlined application processes
- Reduction of user error
- Increased timeliness of submission
- Single repository and system of record

**HIGH LEVEL OVERVIEW OF THE CAPITAL BIENNIAL BUDGET PROCESS**



For additional assistance with **Agency Capital Budget Development BPM** process, use one of the options below:

- For budget or policy related questions, please contact the **OBM Budget Analyst**.
- For **BPM** technical questions email: [obm.bpm@obm.ohio.gov](mailto:obm.bpm@obm.ohio.gov)
- For general OAKS questions contact the OAKS Help Desk: [Oaks.helpdesk@das.ohio.gov](mailto:Oaks.helpdesk@das.ohio.gov)

## Course Objectives

Upon completion of this course, learners will be able to:

### Preparer Role:

- Work with base version, working versions and master version
- Lock/unlock working version
- Enter/Submit data in **My Planning Workspace**
- Add/Delete rows
- Request new ChartFields and/or tree updates
- Upload a budget spreadsheet
- Troubleshoot spreadsheet errors



- Create **AGYCAP** budget
- Enter/Delete/View planning center level notes and line item notes
- Attach/Delete/View line item support documents
- Submit a planning center to an **OBM Budget Analyst**

## Glossary

Term	Definition
Base Version	Version 0 – provided by OBM to start your agency’s planning and budgeting. This version is not editable.
Working Versions	A working draft of a scenario/activity. Multiple working versions can be developed during the budget development process. Best practice is to use 1-3 working versions.
Master Version	Version 4 – starts out as a copy of the base version. When you submit a version for review, BPM automatically overwrites the submitted version into the master version. Because most standard reports use the master version, a working version can also be copied to the master version without submitting, which is helpful for running reports prior to submission.
ChartField	The Chart of Accounts (COA) provides the organizing framework for both management and financial reporting within the financial system. The COA structure is a string of informational fields that identifies, segregates, and categorizes transactional and budget data. It is comprised of individual ChartFields or segments that, when linked together, provide special identification characteristics. Individual values are called ChartFields and are used in unique combinations called ChartField Strings to capture data for management and financial accounting.
Fund	Defines a fiscal and accounting entity with a self-balancing set of accounts. A fund consists of cash and other financial resources together with related liabilities and residual equities or balances, as well as any corresponding changes. Segregates accounting transactions for activities and objectives, and will correspond to the fund structure that the State currently uses. (Sourced from OAKS FIN. Maintained by State Accounting.)
Account	Defines the purpose of the transaction and classifies accounts as balance sheet accounts or operating accounts. Expense accounts begin with ‘5’, (Sourced from OAKS FIN. Maintained by State Accounting.)
Dept	Department – Captures the State and agency organizational chart, and identifies the work unit associated with the transaction. It is always equal to planning center in BPM, and will be 3 digits for Capital. (Sourced from OAKS FIN. Maintained by RACM.)
ALI	Appropriation Line Item – Identifies the legal spending authority authorized by the Ohio General Assembly. (Sourced from OAKS FIN. Maintained by State Accounting.)
Program	Captures the cost of providing a specific good or service in response to an identified social or individual need. Programs coordinate with the executive budget. Will be the 3-digit agency code for Capital Budgets in BPM. (Sourced from OAKS FIN. Maintained by OBM Budget & RACM.)
Serv Loc	Service Location – Captures the county for capital budget requests. Can select from values ‘C0001’ through ‘C0089’. (Sourced from OAKS FIN. Maintained by RACM.)

CAP	Capital request for the next 6 years for new appropriation only, does not include re-appropriation.
Project Type	Captures “Project Type.” Can select from these values: ACQUISITION DEVELOP BASIC RENOVATION CAPITAL EQUIPMENT MAJOR RENOVATION NEW CONSTRUCTION PLANNING SUBSIDY CAPITAL OTHER (Found only in BPM. Maintained by RACM.)
Priorities	Captures “Priorities” of capital projects as defined by the OBM Capital Budget Guidance instructions. Can select from values ‘001’ through ‘099’. (Found only in BPM. Maintained by RACM.)
My Planning Workspace	The area in PeopleSoft where all planning and budgeting work is entered into the system and submitted.
Preparer	The person(s) who enter or modify budget recommendations and other data within agency planning centers for each type of scenario/activity (AGYCAP).
Planning Center	The Planning Centers are the basic structure of an agency’s budget. They are created by agencies to break down the budget level that OBM requires into smaller budget units that roll back up to the OBM level.
Budget Status	<ul style="list-style-type: none"> <li>• Submitted – Sent to next level of review</li> <li>• Open – Can edit or submit</li> <li>• In Review – Reviewer has opened to view or edit</li> <li>• Rejected – Returned to Preparer for changes</li> <li>• Approved – Accepted by Reviewer and submitted to OBM</li> <li>• Not Ready – Reviewer cannot work with this agency-level budget</li> <li>• On Hold – Not submitted but not available for edits</li> </ul>

## Resources

There are many resources available to assist with working through the BPM process. See below for links to these resource documents.

### **Capital Budget Data Sheets:**

[http://obm.ohio.gov/Forms/Capital\\_Budget\\_Data\\_Sheets.aspx](http://obm.ohio.gov/Forms/Capital_Budget_Data_Sheets.aspx)

**OBM Forms Page:** <http://obm.ohio.gov/Forms/default.aspx>

**EPM 9.1: OMyOhio.gov Planning and Budgeting**

**FIN Process Manual:** <http://fin.help4u.obm.ohio.gov/>

**17-18 Capital Budget Guidance:** <http://obm.ohio.gov/Budget/capital/>

## BPM Overview

The Budget and Planning Module (BPM) is a budgeting tool within OAKS Enterprise Performance Management (EPM 9.1) that is used by agencies to request the future operating and agency capital budgets based on the Budget Guidance published by OBM. BPM can be accessed by the Planning and Budgeting link on the MyOhio.gov portal page.

## Capital Budget

Every two years, state agencies must submit to the Office of Budget and Management (OBM), in accordance with Section 126.03 of the Ohio Revised Code, a six-year capital improvements plan (CIP) and a two-year capital budget request. Beginning with the FY 2017-2018 capital budget process, BPM will be used by agencies to enter capital budget requests. For the purpose of this process, “capital” is defined as the cost of acquiring, constructing, reconstructing, rehabilitating, remodeling, renovating, enlarging, improving, and/or equipping facilities. A more specific explanation of how capital appropriations can be used is found in Section 509.20 of H.B. 497, the current capital appropriations bill. If an agency is not sure whether a particular project is a capital project, the agency should consult with its OBM analyst. Re-appropriation is a separate process and not included within BPM.

Capital bill appropriations directly impact operating budgets via debt service payments on the bond issuances used to support capital expenditures. Typically, as in any budget process, the demand for funds exceeds the resources available. The role of OBM, therefore, is to determine the amounts available for capital appropriations, and create a capital budget proposal that reflects the Governor’s priorities and addresses the needs of state agencies within available resources.

During the capital budget process, agencies are asked to prepare and submit a capital budget request for the next capital biennium and estimates for two additional biennia in BPM. Each biennium is a single budget period in BPM, not separate fiscal years like in the operating budget. Once submitted in the capital scenario (CAP scenario) by the **Agency Preparer**, the data flows to the **OBM Budget Analyst** for review and finalization. The **OBM Budget Analyst** sends the final budget to the **OBM Director** and the **Governor** for approval that will ultimately become the introduced version of the capital bill legislation.

## FIN Online Security Form: Roles and Planning Centers

Security roles related to this business process include:

### OH\_EPM\_BP\_PREPARER (+ OH\_EPM\_BP\_AGY\_REPORTING)



Each Preparer also MUST be assigned the **OH\_EPM\_BP\_AGY\_REPORTING** role.

Each **Preparer** must be assigned the appropriate role before Budget and Planning is available for input or view. Only then can the planning centers be assigned.

The planning centers must be assigned to the **Preparer** for the CAP scenarios. Note that an enhancement has been made to the FIN Online Security Form that requires an assignment of at least one planning center for each **Preparer** role before the form can be saved.

The online form is in FIN and is only accessible by the FIN Security Designee for each agency. To get the security, users need to work with their FIN security designee to set up the access.

**Online Security Inquiry in BPM** - A new feature in **BPM** is the online security inquiry, which allows a user, using the employee ID or planning center, to see who is assigned to a planning center.

## BPM Role

There is one role within BPM: **Preparer**

- **Preparers** enter or modify budget recommendations and other data within agency planning centers for the CAP scenario.
- For the agency capital BPM process, **Preparers** will also act as **Reviewers**.

The activities associated with this role will be explained below.

## Activities for the Preparer Role

The **Agency Preparer** can either enter online through **My Planning Workspace** or use the **Budget Data Load Template** to develop planning center budget requests; then submit a single budget version through OAKS workflow in **BPM** to the **OBM Budget Analyst**. Budgets may be developed and submitted for each planning center or a group of planning centers - each agency's process defines this.

The **Agency Preparer** performs these processes:

1. Prepares an agency's budget by planning center.
  - Open planning center
  - Work with planning center either on line through **My Planning Workspace** or by using the **Budget Data Load Template**.
2. Sets up the activities for the agency budget.
  - Request the **AGYCAP** scenario budget
3. Verifies the accuracy of the budget and submits it for approval.
  - Verify the budget for the scenario/activity
  - Submit the budget to OBM Budget Analyst for review

## Capital Scenario Model

See below for the ChartFields required for the CAP scenario model:

CAPITAL SCENARIO/CHARTFIELD MODEL		
<b>CAP</b>		
	DeptID	3-digit code
	Fund	Fund
	ALI	ALI
	Account	Always '570'
	Program	Same as DeptID, except for colleges/universities - 'UNI'
	Service Location	County Code, choose from 'C0001' through 'C0089'
	Dim 2	Project Type, choose from list
	Dim3	Priorities, choose from '001'-'099'

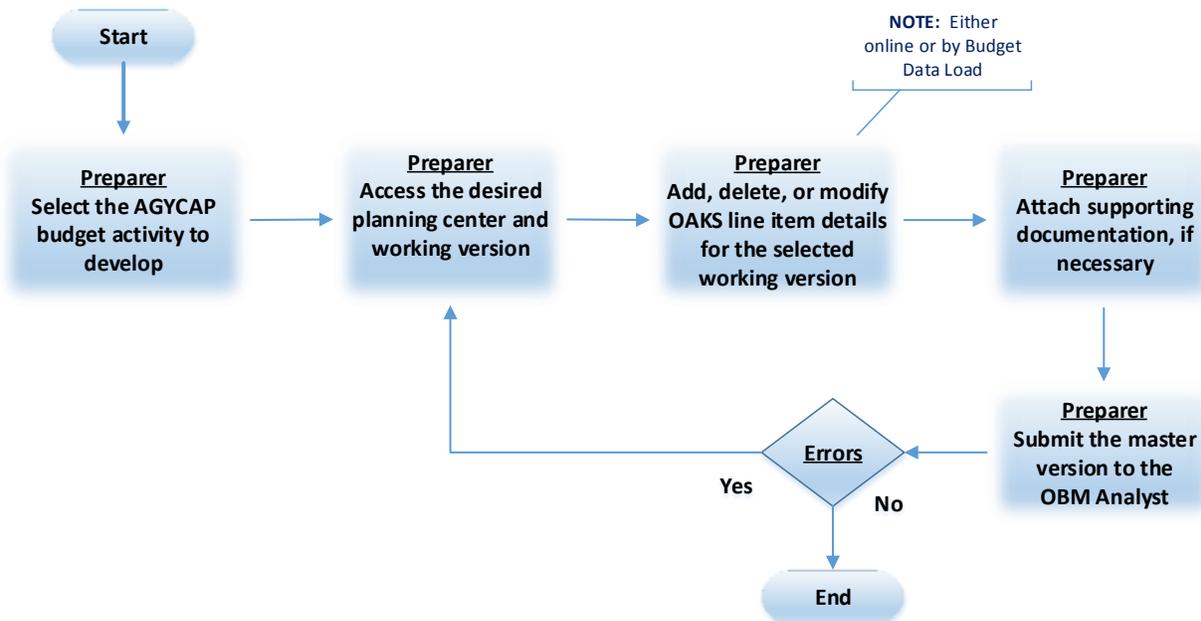
### Overview

There is one scenario to complete as part of capital budget submission – **AGYCAP**. Only one person at a time can enter budget scenarios/activities for a planning center in **My Planning Workspace**. Each agency must either coordinate when and who can enter these scenarios or assign one person to the task for the entire agency. **NOTE:** If the **Budget Data Load** is being used for updates, it can be loaded by multiple users at the same time for the same Planning Center. **Coordination of Budget Data Load updates is critical.**

Below is more detailed information about the **AGYCAP** budget scenario/activity. When entering ChartField strings to the scenario/activity model, **best practice** is to:

- Use **My Planning Workspace** when there are just a few rows of data to add or change.
- Use the **Budget Data Load** when there are a lot of rows and/or updates needed.

**PREPARER – AGENCY CAPITAL BUDGET DEVELOPMENT**



**Remember:** Each agency has one planning center for each budget scenario in OAKS. Only one person at a time can enter budget scenarios for an agency through **My Planning Workspace**. If the **Budget Data Load** is being used for updates, it can be loaded by multiple users at the same time for the same planning center. **Coordination of Budget Data Load updates is critical.**

Agencies submit their master **AGYCAP** budget scenario/activity to their **OBM Budget Analyst** from the agency’s highest review level. The **OBM Budget Analyst** receives one **AGYCAP** version per agency.

The **AGYCAP** scenario/activity for the agency is accessed using the **My Planning Workspace** page. Use the **Line Item Details** page to add line items (ChartField strings) and/or change the amount estimated for each line item (ChartField string) in that version of the scenario/activity.

The **Line Item Details** page is used to view, add, and modify budget amounts. It can be any of the budget activities. This page is also used to enter a ChartField string. It is populated with historical ChartField strings for the type of activity being displayed.



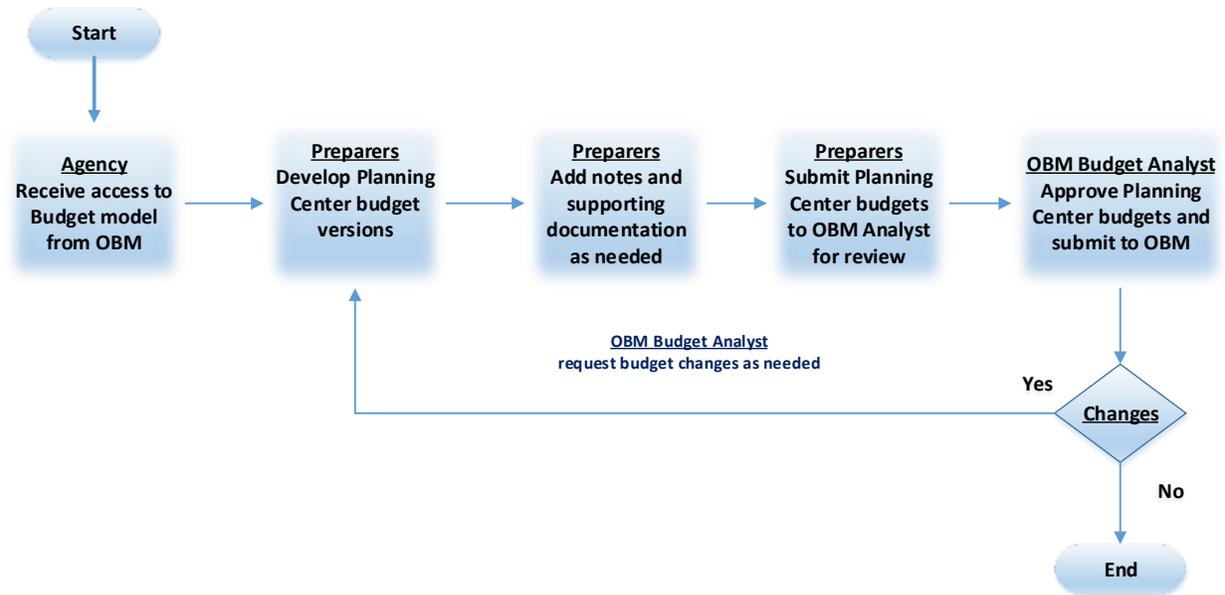
This page now also allows a user to revise or delete existing ChartField strings.

## Working with Planning Centers

### Overview

The planning centers are the basic structure of an agency's budget. They are created by agencies to break down the budget level that OBM requires into smaller budget units that roll back up to the OBM level.

#### PREPARER OVERVIEW AGENCY CAPITAL BUDGET DEVELOPMENT PROCESS



### Agency Request Model

Below is an example of the **Agency Request Model** for the FY2017-2018 biennium. The model shows the names and naming convention for the model, activity and scenario. This document is created by OBM and provided to the agency for use in creating their budget recommendations.

Model Name	Activity Name	Scenario Name	Planning Center
1718_CAP_AGY	Agency Request - Capital	AGYCAP	Capital
		1718AGYCAP	FY 2017 - 2018 Capital Request
			Deptid

### Key Points

Use the **My Planning Workspace** page to do and check budgeting and planning tasks, including:

- Review the status of a planning center scenario/activity
- Enter ChartField strings for a planning center budget or **Budget Data Load** spreadsheet
- Submit a planning center budget for review

## BPM General Tips

Some general tips to keep in mind working with **BPM**:

- **Version 4 is the Master Version.** There will be no **Version 4** in the selection lists for choosing a version.
- Use the **Find** option for quick searches.
- Use the **View 100** option.
- Do not use the **Back** function on the browser bar.
- Create a **Saved Search** to generate the search criteria you use most frequently. For example, save a search as a **Preparer**.
- Switch between **Activities** and **Scenarios** within a role by choosing an option and then clicking the **Refresh** button in **My Planning Workspace**.
- Clicking on **Line Item Properties** will expand the bar to show information about the planning center where the user is viewing or editing data. This is a way for the user to verify that changes are being made in the desired planning center.
- Similarly, clicking on **Dimensions** will expand the bar to show information about the planning center where the user is viewing or editing data. This is also a way for the user to verify that changes are being made in the desired planning center.
- Adding a note to an edited row can be a useful reference later in the process and may remind the user to explain to another user the reason a modification was made.
- Some screens require the use of pop-up windows, be sure to allow pop-ups.



Dollar amounts can be changed in scenarios without saving the action. When the planning center is unlocked (by clicking **Unlock**), the changes are saved. So, be aware as dollar amounts are changed; if the new amounts should NOT apply, be sure to change them back before unlocking the planning center.

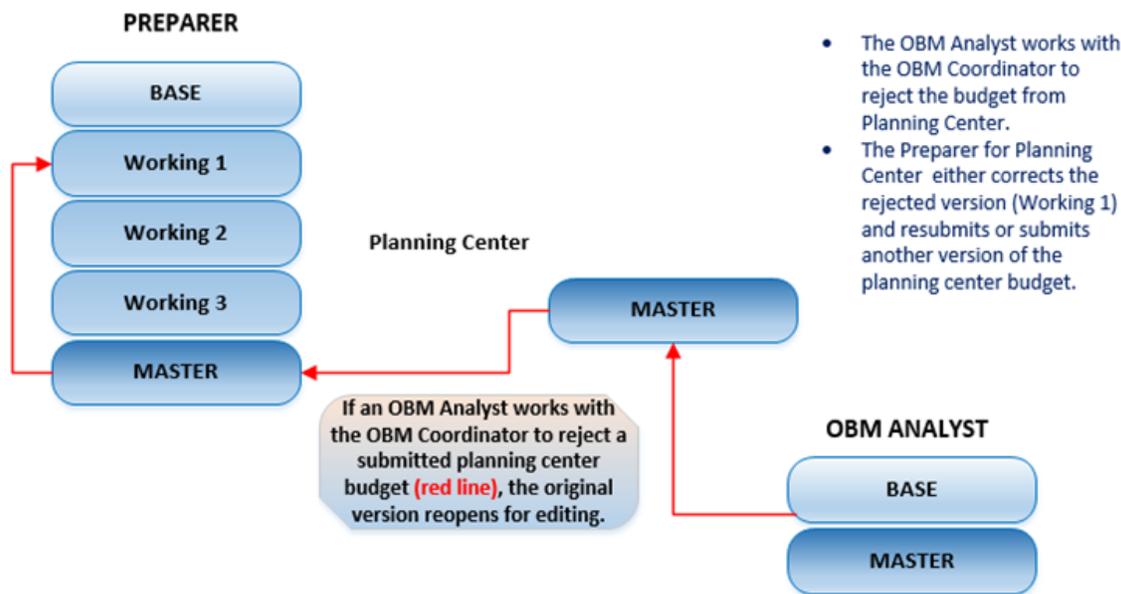
## Versions

- A **working version** is a working draft of a scenario/activity.
- There is one scenario/activity that the agency must submit for each planning center for capital budgeting: AGYCAP. For each planning center scenario/activity, the agency can create multiple different working versions. Best practice is to create up to three working versions.
- OBM provides a **base version (version 0)** to start the agency's planning and budgeting.
- **Version 1** is used to begin budgeting for that planning center scenario/activity.
- The **master version (version 4)** starts out as a copy of the **base** version. When a version is submitted for review, best practice is to copy the **working version** to be submitted to the **master version**. Then submit the **master version**.
- A **working version** can be copied to a **master version** without submitting it. This is helpful for running reports since the reporting tool points to the **master version** data.
- To create a new **working version**, choose another version to copy. Existing versions can be copied into a **working version** for adjustments, rather than always starting from scratch.
- A new feature of **BPM** now allows the user to revise and/or delete an existing line item within the planning center.

- A submitted **working version** becomes the planning center **master version** once submitted.
- Agencies may assign multiple **Preparers** to the same planning centers. However, only one **Preparer** can work on a planning center at a time in **My Planning Workspace**. The planning center is locked while a **Preparer** is working on it. If the **Budget Data Load** is being used for updates, it can be loaded by multiple users at the same time for the same planning center. Coordination of **Budget Data Load** updates is critical. If multiple users are uploading data at the same time, an error message indicating the model is locked will result. In situations where a budget data upload is completed and then followed by another, the data from the first upload will be overwritten by the second upload.
- **Locking and Unlocking a Working version** – When a version is opened for edits, it is locked automatically so only the current user can make changes. Remember to unlock the version when your changes have been made. This is important because:
  - Only one planning center can be open at a time. The user will not be able to open other planning centers until the current open planning center is unlocked.
  - No other users can open a planning center that is locked by another user.

The **OBM Budget Analyst** can assist with unlocking planning centers in the event users run into trouble with unlocking.

### AGENCY CAPITAL BUDGET DEVELOPMENT PROCESS HOW VERSIONS WORK



## Copy to a New Version

Select a budget version to copy.

### Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

### Step By Step

Step	Screen Link
1. Enter or select <b>Preparer</b> in the <b>Role Name</b> field. 2. Click <b>Search</b> .	<a href="#">Preparer_Search</a>
3. A list of all models available to someone with the specified role displays. 4. Click the <b>Scenario</b> for which you wish to copy a version.	<a href="#">Search_Results</a>
The <b>My Planning Workspace</b> page displays the planning center budgets for that model. 5. Click the <b>Copy</b> link for the line item of the version you wish to copy.	<a href="#">My_Planning_Workspace</a>
The <b>Copy Version</b> page displays. 6. Select which version ( <b>master, version 1, version 2 or version 3</b> ) in the <b>To Version</b> drop-down list. 7. Enter a <b>Description</b> that will easily identify the version. 8. Click <b>OK</b> .	<a href="#">Copy_Version</a>
9. <b>My Planning Workspace</b> displays again, with the new copy displayed in the list of models.	<a href="#">My_Planning_Workspace_New</a>

## Locking and Unlocking Working Version of Budget

### Overview

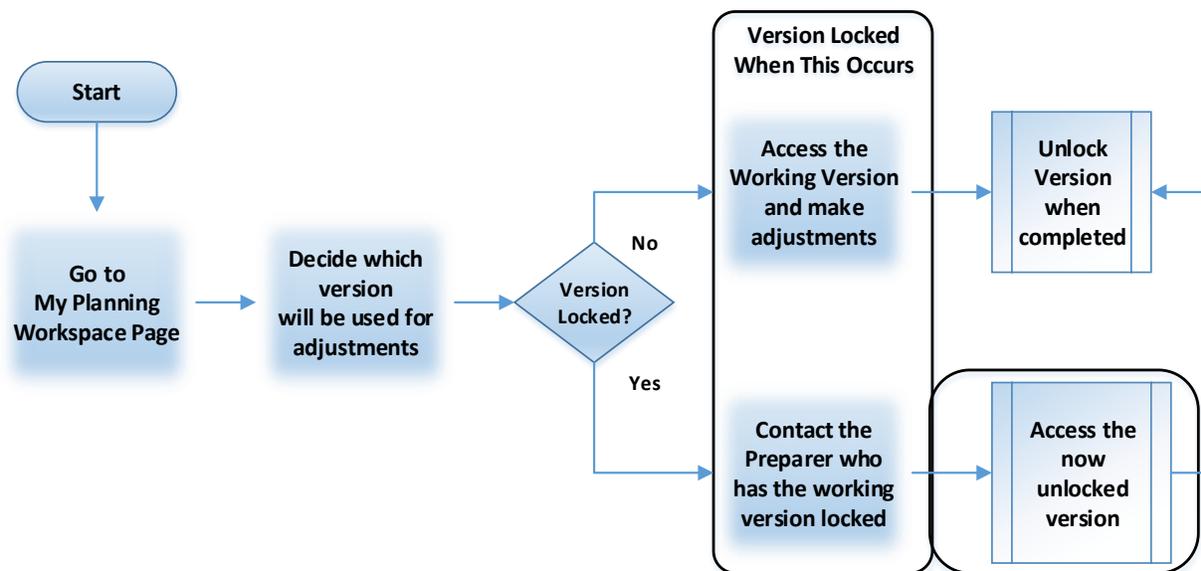
When a **working version** of a scenario/activity is opened for editing, that **working version** is automatically locked. Other people at the agency cannot edit a locked **working version**. To unlock the scenario/activity after making edits, simply click the **Unlock** button for that version

line item on the **My Planning Workspace** page. A **Release** button displays in the same column as the **Unlock** button displays. Click **Release** to release the version.



There is a batch job that runs on a nightly basis to unlock planning centers that have been locked during the day.

### LOCKING AND UNLOCKING VERSIONS



### Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

### Step By Step

Step	Screen Link
1. Enter or select <b>Preparer</b> in the <b>Role Name</b> field.	<a href="#">Preparer Search</a>
2. Click <b>Search</b> .	
A list of all models available to someone with the specified role displays.	<a href="#">Search Results</a>
3. Click the <b>Scenario</b> that has a version you wish to unlock.	
The <b>My Planning Workspace</b> page displays the planning center	

<p>budgets for that model.</p>  <p>This page can be accessed by another link once in the application; one of the possibilities is by clicking the <b>My Workspace</b> link.</p>	
<p>4. Click <b>Unlock</b> or <b>Release</b>, as necessary, for the desired version.</p>	<p><a href="#">Unlock</a></p>

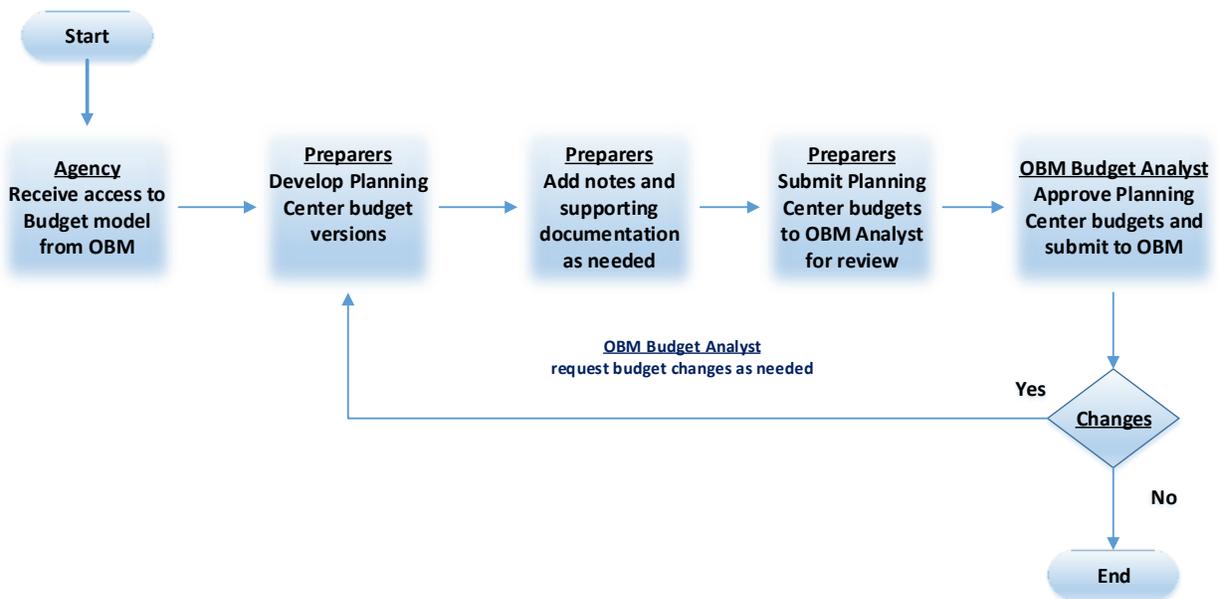
## Budget Set Up Activities Overview

### Overview

Budget set-up activities per planning center include:

- Budget line items
- Add or delete notes attached to a line item (ChartField string)
- Add or delete notes attached to a planning center.
- Attach supporting documentation to a line item (ChartField string).

#### AGENCY PREPARER OVERVIEW - CAPITAL



Any **Preparer** can:

- Enter a budget line item (ChartField string) amount
- Enter an adjustment

- Enter, view, and delete line item notes

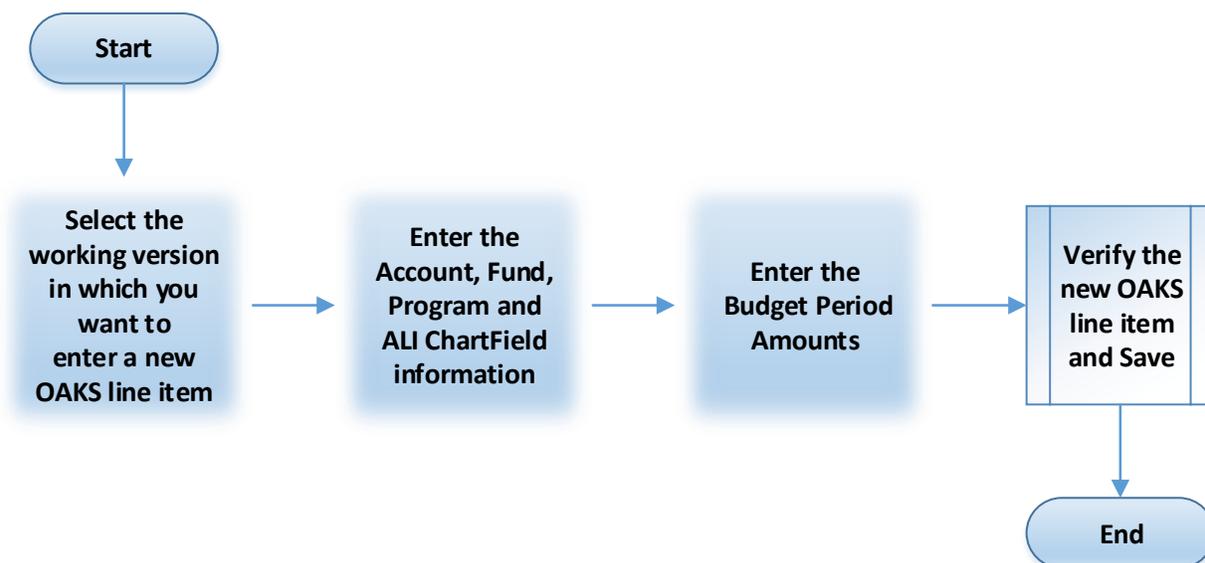
Follow agency’s internal instructions for Agency Capital Budget Development planning.

## Creating a Budget - Entering an OAKS Budget Line Item

### Overview

The foundation of creating an agency budget request is entering OAKS line item amounts. Another critical activity for the budget is checking the ChartField combination for each line item. The additional ChartFields in an OAKS line item enable more specific and detailed agency budget requests.

### Entering an OAKS Budget Line Item



The **Add Line Item** page can be used to add a line item (ChartField string) from a specific version of the budget.

The **Preparer** is ready to provide the **AGYCAP** budget for an agency.

### Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

**Step By Step**

Step	Screen Link
<ol style="list-style-type: none"> <li>1. Enter or select <b>Preparer</b> in the <b>Role Name</b> field.</li> <li>2. Click <b>Search</b>.</li> </ol>	<p><a href="#">Preparer Search</a></p>
<ol style="list-style-type: none"> <li>3. A list of all models available to someone with the specified role displays.</li> <li>4. Click the <b>Scenario</b> that has a version to which a line item (ChartField string) should be added.</li> </ol>	<p><a href="#">Search Results</a></p>
<p>The <b>My Planning Workspace</b> page displays the planning center budgets for that model.</p> <p> This page can be accessed by another link once in the application; one of the possibilities is by clicking the <b>My Workspace</b> link.</p> <ol style="list-style-type: none"> <li>5. Click the <b>Edit</b> link on the line item of the version to be edited.</li> </ol>	<p><a href="#">My Planning Workspace Edit</a></p>
<p>The <b>Line Item Details</b> page displays, with the notice "This version is locked to others while you are editing."</p> <ol style="list-style-type: none"> <li>6. Verify that <b>Add Entry</b> is selected in the <b>Action</b> drop-down field, then click <b>Go</b>.</li> </ol> <p>The <b>Add Line Items</b> page displays, with information about the current version displayed in the header.</p> <p> The new line item (ChartField string) will be added only to this planning center version of the budget.</p>	<p><a href="#">Add Line Item</a></p>
<ol style="list-style-type: none"> <li>7. Select an <b>Account</b> code for the line item (ChartField string) to be created. For capital budgeting, the <b>Account</b> will always be <b>570</b>.</li> </ol> <p> The <b>Look Up Account</b> page displays all account codes, even those that were not used in the previous biennium.</p>	<p><a href="#">Line Item Details</a></p>

8. Select a **Fund** code.
  9. Select a **Department**.
  10. Select a **Program Code**. For capital budgeting, the **Program Code** will always equal the **Department**. The only exception to this is colleges/universities, where the **Program Code** will be 'UNI'.
  11. Select a **Service Location**.
  12. Select an appropriation line item (**ALI**)
  13. Select **Project Type**.
  14. Select **Priorities**.
- Optional**
-  Click the **Add a New Row** icon  to add more items and fill them in as above.
-  Click the **Delete Row** icon  to remove a row that was started but should be removed. (The icon will not remove a line previously entered into the **Line Item Details** page.)
15. Click **Add**.

The line item (ChartField string) is added to the **Line Item Details** page.

16. Click the **Zoom** button (the small arrow to the far right of the screen next to the **Find** button) .

The **Line Item, Main Page** pop-up window displays. Make revisions to the numbers or delete a number. This is the preferred method.

- Optional**
-  Users can create a personalized view rearranging the column display for easier use. See the following section for step by step instructions.

17. Click **Return**. The ChartFields are added to the **working version** of this budget.

[Zoom](#)

[Line Item Added](#)

<p>18. Click the <b>Save</b> button.</p>  <p>The line just updated is highlighted.</p>	<a href="#">Save</a>
<p>19. Click <b>Unlock</b> or <b>Release</b>, as necessary, for the desired version.</p>	<a href="#">Unlock</a>

## Delete or Revise ChartField Strings

ChartField strings can now be deleted and/or revised in **My Planning Workspace**.

### Step By Step

Step	Screen Link
<p>1. Once in the appropriate <b>Activity/Scenario</b> on the <b>Line Item Details</b> page, view the line item details.</p> <p>Click the green check mark next to the ChartField string to be revised or deleted.</p>	<a href="#">Modify ChartFields</a>
<p>This will display the <b>Modify Dimensions</b> screen.</p> <p>2. To make a revision to a ChartField, click the <b>Search</b> button (magnifying glass at the end of the field).</p>	<a href="#">Modify Dimensions</a>
<p>The <b>Look Up</b> screen will be displayed.</p> <p>3. Select the new value for the ChartField.</p>	<a href="#">Look Up</a>
<p>4. Note the new ChartField value.</p> <p>5. To delete a ChartField, click the <b>Delete</b> button.</p>	<a href="#">ChartField Modified</a>
<p>6. A Message pop-up window will be displayed.</p> <ul style="list-style-type: none"> <li>• If you want to continue with the delete function, click <b>OK</b></li> <li>• If the item should not be deleted, click <b>Cancel</b>.</li> </ul>	<a href="#">Delete</a>
<p>7. This will return to the <b>Line Item Details</b> screen. From here new ChartField strings can be added.</p>	<a href="#">Line Item Details Delete</a>

## Personalize View

Users can create a personalized view rearranging the column display for easier use. The standard column display requires the user to open a pop-up window in order to complete the

amounts for each line item (ChartField string). Columns can be re-arranged to display more frequently used columns on the initial display.

### Step By Step

Step	Screen Link
1. Once in the appropriate Activity/Scenario, click the <b>Personalize</b> button.	<a href="#">Personalize</a>
2. Click on the <b>Column</b> name in the <b>Column Order</b> column. 3. Click the up or down arrow to move the selected items up or down in the <b>Column Order</b> . 4. Click the checkbox next to <b>Hidden</b> or <b>Frozen</b> to hide or freeze columns in the display 5. Click the right arrow to move the selected items into the <b>Sort Order</b> column. 6. Click the <b>X</b> to remove items from the <b>Sort Order</b> . 7. Click the checkbox next to <b>Descending</b> to change from Ascending to Descending sort. 8. Columns will be rearranged to the desired order and sort.	<a href="#">Column Order Sort</a>

## Requesting New ChartFields and/or Tree Updates

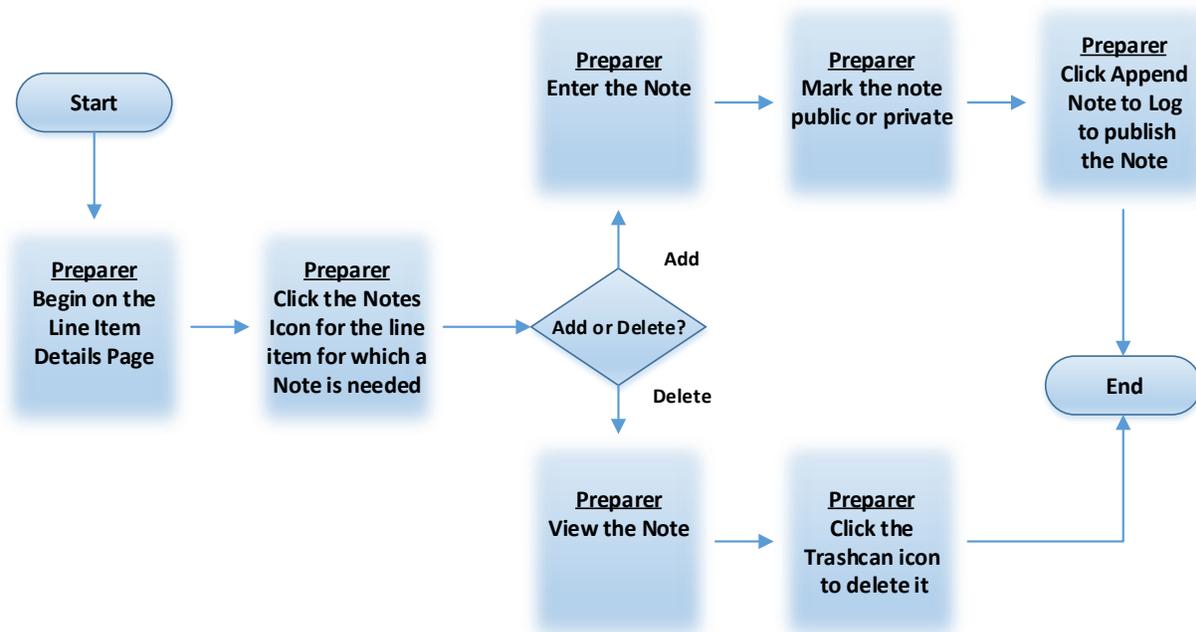
Requesting new ChartFields or updates to trees is a process that is handled outside of the BPM system process. Please see the FIN Process Manual for details.

## Entering, Deleting, Viewing Line Item Notes

### Overview

Notes can be added to BPM line items (ChartField strings) for clarification or to explain why certain budgeting choices were made. Agencies should consider using the Notes functionality to provide detailed information that justifies the dollar amounts entered for each BPM line item (ChartField string). This allows each agency to make a permanent, easily accessible record. However, keep in mind the notes are not a replacement for a comprehensive justification of the agency request in the final, hard copy capital budget request that will be submitted to OBM.

## Entering, Deleting, Viewing Line Item Notes



BPM allows the user to create notes for a budget line item (ChartField string). Notes can be assigned as a public or private status. Only the user who enters a note with a private status can view that note. Other **Preparers** and **OBM Budget Analysts** can view public notes in planning centers to which they have access. OBM Budget Analysts cannot access an agency's budget request or public notes until after the budget due date.

A pushpin on the **Notes** icon (on the **Line Item Details** page) indicates there is a note(s) for that Line Item (ChartField string).

Click the **Notes** icon (on the **Line Item Details** page) to view, edit or add a note.

Click the **Trash Can** icon (on the *Line Item Details* page) to delete a note.

The **Line Item Notes** page is where users can:

- View all public notes for a line item (ChartField string)
- View your own private notes for this line item (ChartField string)
- Enter public and private notes about a line item (ChartField string)
- Delete your own notes about a line item (ChartField string)

**Navigation**

**Planning and Budgeting > Activity Preparation > My Planning Workspace**

**Step By Step**

Step	Screen Link
1. Enter or select <b>Preparer</b> in the <b>Role Name</b> field. 2. Click <b>Search</b> .	<a href="#">Preparer Search</a>
3. A list of all models available to someone with the specified role displays. 4. Click the appropriate <b>Scenario</b> .  The <b>My Planning Workspace</b> page displays the planning center budgets for that model.   This page can be accessed by another link once in the application; one of the possibilities is by clicking the <b>My Workspace</b> link.	<a href="#">Search Results</a>
5. Select the appropriate budget option in the <b>Activity</b> drop-down list. 6. Select the appropriate option in the <b>Scenario</b> drop-down list. 7. Click <b>Refresh</b> .  The table updates to display the versions for the selected <b>Activity</b> . 8. Click the <b>Edit</b> link for the version to which a line item (ChartField string) note should be added.	<a href="#">Activity Scenario</a>
The <b>Line Item Details</b> page displays 9. Click the <b>Zoom</b> button (the small arrow to the far right of the screen next to the <b>Find</b> button)  .  The <b>Line Item, Main Page</b> pop-up window displays.	<a href="#">Zoom</a>
10. Click the <b>Notes</b> icon  for the appropriate line item.	<a href="#">Line Item Notes</a>
The <b>Line Item Notes</b> page displays.	<a href="#">Notes Text Box</a>

<p>11. Enter notes in the <b>Enter Notes</b> text box.</p> <p>12. Select the radio button for the appropriate privacy setting for the note: <b>Public</b> or <b>Private</b>.</p> <p> Multiple notes can be attached to line item and can individually be marked <b>Public</b> or <b>Private</b>.</p> <p>13. Click <b>Append Note to Log</b>.</p> <p>The text entered is moved to the <b>Notes Log</b> text box.</p>	
<p>14. Click <b>OK</b>.</p>	<p><a href="#">OK</a></p>
<p>15. The <b>Line Item Details</b> page displays.</p> <p>The <b>Notes</b> icon for that line item now has a pushpin in it. </p> <p>16. <b>Deleting a Note:</b> Begins with clicking the <b>pushpin note</b>. </p>	<p><a href="#">Notes Attached</a></p>
<p>Scroll to the <b>Notes Log</b>.</p> <p>Click the trash can icon to delete the note displayed. </p> <p>17. <b>Viewing a Note</b> is a simple matter of clicking the pushpin icon. </p> <p>18. If there are multiple notes attached to a ChartField string, click the <b>View All</b> link to have all notes displayed.</p> <p>All Notes in the <b>Notes Log</b> will display.</p>	<p><a href="#">Delete Notes</a></p> <p><a href="#">View Notes</a></p> <p><a href="#">Notes Display</a></p>
<p>19. Click the <b>Unlock</b> link when you are done.</p> <p>The <b>My Planning Workspace</b> page displays.</p>	<p><a href="#">Unlock Notes</a></p>



When copying a planning center, be aware that any line item notes attached to that planning center will be copied as well. If the notes are not needed on the copy, they can be deleted.

## Attaching, Deleting, and Viewing Supporting Documents

### Overview

Supporting documents can be attached to working versions to provide reasons for allocations and budget decisions.

In OAKS, attach files to a version of a planning center scenario/activity. Other **Preparers** who have access to this planning center can see your attachments and open them from the **Attachments** link on the **Line Item Details** page.

These file types can be attached:

- MS Word (.doc and .docx files)
- MS Excel (.xls and .xlsx files)
- Text (.txt files)
- Adobe (.PDF files)

Supporting documents can be attached to any version of a scenario/activity for a planning center.

- **BPM** allows any file type to be attached.
- OBM recommends that executable files (those files ending in .exe) and databases not be uploaded due to the potential for malicious software in these file types.
- Please note that the State's IT policies apply to all files uploaded to **BPM**.

### Size Limitations

BPM recommends that file uploads be limited to a maximum of:

- Single File: 10MB (zip larger files before attaching)
- Total Agency: 500MB

When an **Attachments Exist** link is visible on the **Line Item Details** page, use it to open attachments for that budget version.

Remember to click the **Save** button on the **Line Item Details** page to finalize a file attachment.

### Navigation

**Planning and Budgeting > Activity Preparation > My Planning Workspace**

### Step By Step

Step	Screen Link
1. Enter or select <b>Preparer</b> in the <b>Role Name</b> field.	
2. Click <b>Search</b> .	<a href="#">Preparer Search</a>
3. A list of all models available to someone with the specified role displays.	<a href="#">Search Results</a>

<p>4. Click the appropriate <b>Scenario</b>. The <b>My Planning Workspace</b> page displays the planning center budgets for that model.</p> <p> This page can be accessed by another link once in the application; one of the possibilities is by clicking the <b>My Workspace</b> link.</p>	
<p>5. Select the appropriate budget option in the <b>Activity</b> drop-down list.</p> <p>6. Select the appropriate option in the <b>Scenario</b> drop-down list.</p> <p>7. Click <b>Refresh</b>. The table updates to display the versions for the selected <b>Activity</b>.</p> <p>8. Click the <b>Edit</b> link for the version to which a document attachment should be made.</p>	<p><a href="#">Activity</a></p>
<p>9. Click on the paper icon  in the <b>Notes</b> column.</p>	<p><a href="#">To Attach Document</a></p>
<p>The <b>Line Item Notes</b> screen displays. Scroll down to the bottom of the screen.</p> <p>In the <b>Attach Documents, File Details</b> box:</p> <p>10. Enter a descriptive name for the document in the <b>Description</b> field.</p> <p>11. Click <b>Attach</b></p> <p>The <b>Attach Budget Documents</b> page displays. If files have already been attached, a line item will display for each attached file.</p> <p> If an attachment already exists, the link will read <b>Attachments Exist</b>.</p> <p> If an attachment exists that needs to be removed, click the <b>Delete</b> button for that line item.</p>	<p><a href="#">Attach Document</a></p>
<p>An Upload window displays.</p> <p>12. Click <b>Browse</b>.</p>	<p><a href="#">Upload Browse</a></p>
<p>13. The <b>Choose File</b> window displays.</p>	<p><a href="#">Choose File</a></p>

<p>14. Navigate to and select the desired file, then click <b>Open</b>.</p>	
<p>The full path for the selected file displays in the text field.</p> <p>15. Click <b>Upload</b>.</p>	<p><a href="#">Upload Chosen File</a></p>
<p>The <b>Attach Documents, File Details</b> box redisplay. There is now a link with the file name to the left of the <b>Description</b> field, and the <b>Added By</b> and <b>Date Added</b> fields are populated.</p> <p><b>Optional</b></p>  <p>Click the <b>Add a new row</b> icon  to add another attachment. Perform the steps that take place on <b>the Attach Budget Documents</b> page to attach another document.</p> <p>Delete attachments by clicking the <b>Delete</b> button on the <b>Attach Budget Documents</b> page.</p> <p>15. Click <b>OK</b>.</p>	<p><a href="#">File Attached</a></p>
<p>The <b>Line Item Details</b> page displays.</p> <p>There is now a pushpin in the <b>Note</b> icon to indicate an attachment (or note) for that line item.</p>	<p><a href="#">Attachment Saved</a></p>
<p>16. Click the <b>Unlock</b> link when done.</p> <p>The <b>My Planning Workspace</b> page displays.</p>	<p><a href="#">Unlock</a></p>

**General Recommendation:**

Only attach files that the **OBM Budget Analyst** may use when reviewing and trying to understand how the budget amount was calculated. If a file is larger than 10MB, be sure to compress it.

**Suggested Budget Attachments:**

- Spreadsheets
- Assumptions
- Historical figures
- Usage documentation
- Grant Information

**Attachments to Avoid:**

- Strategic Plans: instead provide a link if the attachment is online.
- Personnel Files: these files are likely subject to Ohio's Open Records laws. Use discretion if attaching these files.



- Extremely Large Files
- Undocumented Files: Must include author, date uploaded and location on the agency network.
- Out-of-Date Files

## Budget Data Load Template

### Overview

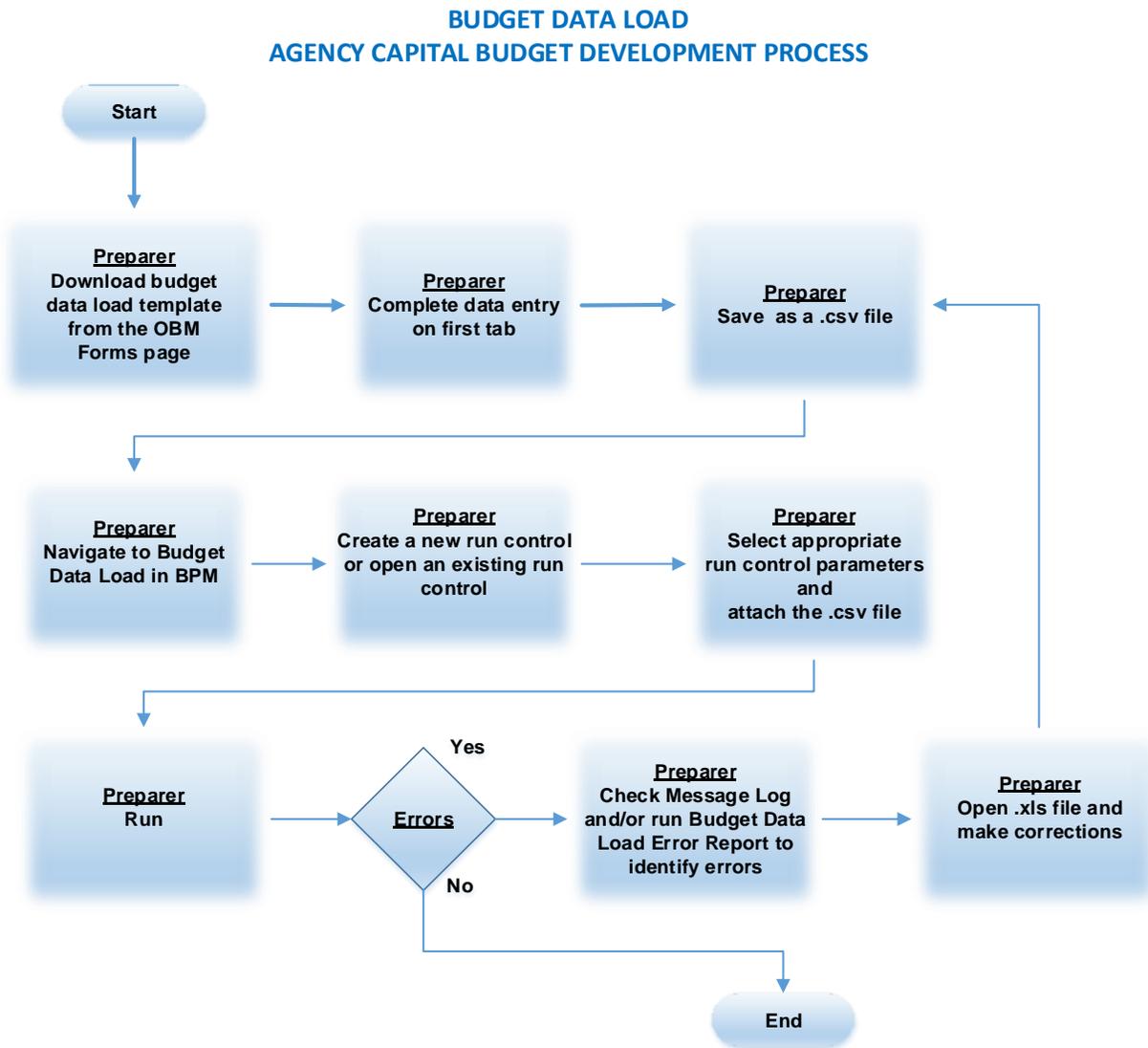
The **Budget Data Load Template** can be used in establishing budget estimates for an entire planning center and scenario/activity. Separate spreadsheets are necessary for each scenario/activity and planning center combination (i.e., the spreadsheets cannot be combined for different scenarios/activities on the same spreadsheet or for different planning centers).

### Model and Activity Table

Based on the table below, find the type of data required for the CAP Scenario/Activity for the **Budget Data Load** to be uploaded to the Budget and Planning Module (**BPM**).

<u>Model Name</u>		<u>Activity Name</u>		<u>Scenario Name</u>		<u>Planning Center</u>
1718_CAP_AGY	Agency Request - Capital	AGYCAP	Capital	1718AGYCAP	FY 2017 - 2018 Capital Request	Deptid

## Budget Data Load Process



### Overview

There are **Budget Data Load Templates** for the capital budget model (**AGYCAP**) provided by OBM. Each template is unique to one agency and will be “prepopulated” with the appropriate agency Fund and ALI combinations from the current fiscal year. The templates are accessible through the [myOhio.gov](http://myOhio.gov) website: [FIN Home > OBM Forms > OAKS Budget and Planning Module \(BPM\) > BPM Spreadsheet Upload Template 2016 Biennium](#).

### Understanding Importing Line Items

The **Budget Data Load** process enables multiple **AMTPER** method line items to be imported at one time. This process imports line item data (ChartField strings) from a .csv file into the specified business unit, planning model, scenario, activity, planning center, and budget version. Keep the following considerations in mind when using this process:

- All locks to the model need to be released prior to running the engine and the model must be in the **Released** state or the upload will fail.
- Only method amounts are updated (adjustment and allocation amounts are not updated).
- Any line items that have been manually deleted after the model was released will be reintroduced by the import process if the combination exists in the input .csv file.
- Deleting lines from the budget data load will not delete lines that already exist in **BPM**. It is necessary to go back to **My Planning Workspace** to revise or delete existing ChartField strings online.
- This process locks the Planning Center. The Planning Center will automatically unlock when the upload process is completed.
- The system does not prevent multiple concurrent processes from writing data to the same planning center; if multiple import files are being processed for the same planning center, they should be run sequentially.

### Tips for Using the Budget Data Load

- Always save the working version as an .xls or .xlsx document. When you have the final version to load, save it as a .csv file. The .csv file must be .csv comma delimited and not .csv Macintosh or .csv MS-DOS.
- If corrections are needed after the .csv file has been saved, go back to the .xls or .xlsx version to make the corrections and save as a new .csv to load.
- The navigation path to load the final .csv file is **Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget Data Load**
- For revisions where the row of data is no longer needed, it is necessary to delete the line, not just clear the data. Simply clearing the data and saving the file as .csv, will still add commas for that line, which will cause an error when loading.
- The first row of the .csv file must be a header row that names the ChartFields, then the budget periods to be loaded, **in order in which they originally appear**. **DO NOT CHANGE THE HEADER ROW**.
- The ChartField names must exactly match those specified in the activity definition for the model; and all of the model's selected activity dimensions, including CURRENCY\_CD must be included in the header row. Use headers provided – **DO NOT CHANGE THE HEADER ROW**.
- All alpha characters within the body of the spreadsheet must be UPPER CASE.
- Each ChartField member in the .csv file must already exist in Budgeting and Planning. If new ChartFields are needed for the upcoming biennium, follow the standard process to have the ChartFields created in FIN prior to usage in BPM.
- Budget period amounts should not contain currency symbols, commas or decimal points. All dollar amounts should be entered in whole dollars.
- Budget period amounts should be entered as values, not as formulas.
- If the value for a budget period is zero, the user must enter a number zero (0) because a blank value will result in an error. No fields can be left blank in the file.

Below is an example of data expected for the **AGYCAP** budget scenario:

## Capital (AGYCAP) Scenario

Data Expected in each field on first tab	
<b>DeptID</b>	3-digit agency code
<b>Fund_Code</b>	Fund
<b>Product</b>	ALI
<b>Account</b>	Will be '570'
<b>Program_Code</b>	Program will be the 3 digit agency code and should match the DeptID field. All colleges & universities will use 'UNI'
<b>Class_FLD</b>	Service Location code. Choose county code, C0001 through C0089
<b>Dimension2</b>	Project Type. Choose from 'New Construction', 'Subsidy Capital', 'Basic Renovation', 'Site Development/Land Acquisition', 'Capital Equipment', 'Planning', 'Major Renovation', and 'Other'
<b>Dimension3</b>	Prioritization of capital requests. Choose from '001' - '099' for each row to tie priorities with multiple rows together
<b>CURRENCY_CD</b>	Always 'USD'
<b>201711</b>	Full appropriation requested for the 2017-2018 biennium, dollar amount, no comma or \$ sign or blanks
<b>201911</b>	Full appropriation requested for the 2019-2020 biennium, dollar amount, no comma or \$ sign or blanks
<b>202111</b>	Full appropriation requested for the 2021-2022 biennium, dollar amount, no comma or \$ sign or blanks

Example row of data to use											
DeptID	Fund_Code	Product	Account	Program_Code	Class_FLD	Dimension2	Dimension3	CURRENCY_CD	201711	201911	202111
DAS	1280	C10007	570	DAS	C0067	New Construction	2	USD	129900	130999	132999

## CSV File Requirements

The key to successful budget dataloads is accuracy in completing the spreadsheet template. The .csv file must meet the following requirements:

- The first row of the .csv file must be a header row that names the ChartFields, then the budget periods to be loaded, in order. **DO NOT CHANGE THE HEADER ROW** – this will create errors.
- The ChartField names must exactly match those specified in the activity definition for the model; and all of the model's selected activity dimensions, including CURRENCY\_CD must be included in the header row. Again, **DO NOT CHANGE THE HEADER ROW** – this will create errors.
- Each ChartField member in the .csv file must already exist in BPM.
- Budget period amounts should not contain currency symbols, commas or decimal points. All amounts should be entered in whole dollars.
- Budget period amounts should be entered as values, not as formulas.
- If the value for a budget period is zero, the user must enter the number zero (0) because a blank value will generate errors.
- The entire spreadsheet must be formatted as text. The template will be set up this way so that any leading zeros in the numbers entered will remain intact. It is a good idea to double check the formatting to avoid errors.
- All alpha characters in the field entries **must** be upper case – capital letters.

## Validations

During the import process, the system checks that the data in the .csv file meets various requirements for BPM, such as ChartField combinations. Only rows that pass the requirements are imported. View the details for rows that do not import by viewing the **Budget Data Load Error Report**.

The method ID default will be updated for ChartField combinations provided in the .csv file. The method ID will be updated to **AMTPER** if the method override flag is enabled.

### Tips for Loading the .csv file into BPM

- Navigation path to load the final .csv file into BPM is: **Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget Data Load**
- When the user loads a .csv file to a budget version, it will:
  - Replace any rows in the online budget version with what is in the .csv file for rows that have the same ChartField strings that are on the .csv file.
  - Add rows to the online budget version with new ChartField strings that are in the .csv file that were not already in the online budget version.
  - Do nothing to the ChartField string rows already in the online budget version that are not on the .csv file.
  - Deleting lines from the budget data load will not remove lines that already exist in **BPM**. It is necessary to go back to **My Planning Workspace** online to revise or delete existing ChartField strings.
- This process locks the Planning Center. The Planning Center will automatically unlock when the upload process is completed.
- **BPM** does not prevent multiple concurrent processes from writing data to the same planning center; if multiple import files are being processed for the same planning center, they should be run sequentially.
- Both the .xls (or .xlsx) and .csv files can be saved to the location of the user's choice. It is suggested that the file(s) be saved in a location that easy to remember and access by the user.

Below is an example of the run control fields for the **AGYCAP** budget scenario:

**Run Control Fields for Current (AGYCAP) Scenario:**

### Budget Data Load

User ID: 10067493 Report Manager

Run Control ID: EJTCAP [Process Monitor](#) Run

**Process Request Parameters**

\*Description:

\*Process Frequency:  ▼

\*Business Unit:   STATE

\*Planning Model ID:   [1718 CAPITAL AGY](#)

\*Scenario:   1718 AGY CAPITAL

\*Activity:   AGY CAPITAL

\*Planning Center:   ADJUTANT GENERAL

\*Budget Version:  ▼

Source File:

**Navigation**

Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget Data Load

**Step By Step**

Step	Screen Link
<p>1. To search for an existing Run Control, make sure the <b>Find Existing Value</b> tab is open, enter a few letters of the description in the <b>Search By:</b> field. To get a full list of existing run control values, leave the description in the <b>Search By:</b> field blank.</p> <p>2. Click <b>Search</b>.</p>	<p><a href="#">Budget Dataload Search</a></p>
<p>3. To create a new Run Control, make sure the <b>Add a New Value</b> tab is open.</p>	<p><a href="#">Add New Value</a></p>
<p>4. Add a name in the <b>Run Control ID</b> field.</p> <p> There should be no spaces in the name – use underscores between words.</p>	<p><a href="#">New ID</a></p>



<p>5. Click <b>Add</b>.</p>	
<p>6. Enter a description for the Run Control in the <b>Description</b> field.</p> <p>7. <b>Planning Model ID</b> '1718_CAP_AGY is the CAP Planning Model. Select using the magnifying glass at the end of the field.</p> <p>8. <b>Scenario</b> '1718AGYCAP' is the CAP Scenario for the FY 2017 – 2018 biennium. Select using the magnifying glass at the end of the field.</p> <p>9. <b>Activity</b> 'AGYCAP' is the CAP Activity. Select using the magnifying glass at the end of the field.</p> <p>10. Select the <b>Planning Center</b></p> <p>11. Choose the working version to load the.csv file from the drop down list in the <b>Budget Version</b> field. There are up to 36 working versions but best practice recommends using <b>Version 1</b>.</p> <p> Note the version must already exist in <b>BPM</b> to be able to select it here in the run control.</p> <p>12. <b>Click Add to attach the .csv file as the Source File.</b></p> <p>13. Click <b>Run</b>.</p>	<p style="text-align: center;"><a href="#">Run Control</a></p>
<p>14. The <b>Process Scheduler</b> screen will display. Click <b>OK</b>.</p>	<p style="text-align: center;"><a href="#">Process OK</a></p>
<p>15. This will return to the <b>Run Control</b> Screen. Click the <b>Process Monitor</b> link.</p>	<p style="text-align: center;"><a href="#">Process Monitor</a></p>
<p>16. The next screen shows the Process List. You can monitor the progress of your Run Control. Click <b>Refresh</b>.</p> <p>17. When it is complete, the <b>Run Status</b> will indicate <b>Success</b> and the <b>Distribution Status</b> will indicate <b>Posted</b>.</p> <p> In this case, <b>Success</b> indicates the process completed, it DOES NOT indicate that all the data successfully load into <b>BPM</b>.</p> <p>18. Click the <b>Details Link</b> next to the Budget Dataload line item</p>	<p style="text-align: center;"><a href="#">View Process Request</a></p>

you would like to review.	
19. Click the <b>Message Log</b> link.	<a href="#">Message Log</a>
20. The <b>Message Log</b> and all related messages are displayed. The next section will go into detail regarding error messages and the <b>Budget Data Load Error Report</b> .	<a href="#">Message Log Results</a>



**IMPORTANT:** When using this feature, the system will place the uploaded file into the version selected by the user. The **Budget Data Load** is both Incremental and Destructive.

- **Incremental:**
  - Add rows to the budget version with new ChartField strings that are in the .csv file that were not already in the budget version.
  - Do nothing to the ChartField strings rows already in the budget version but not in the .csv file.
- **Destructive:** If the ChartFields are the same but the amounts are different, then the amount will be overridden.



The spreadsheet upload will fail if the planning center that the file is loading has already been locked by another user. The planning center must be unlocked before the spreadsheet will upload.

## Troubleshooting Spreadsheet Errors

### Overview

Once the Budget Data Load entry is complete and the user is ready to upload, errors will stop the file from uploading to BPM. Below are examples of some of the possible error messages:

**Error: Invalid Fund and extra line in the .csv file**

**Message: Invalid dimension or budget period found in the input file header row.**

**Message Log**

**Process**

Instance: 2315      Type: Application Engine  
 Name: BP\_LI\_IMPT      Description: Line Item Import

Personalize | Find | View All | First | 1-14 of 14 | Last

Severity	Log Time	Message Text	Explain
10	4:19:36PM	Report Repository URL is: http://xmq3web01.oaks.ohio.gov:9150/SchedulerTransfer/bidwqa (63,68)	Explain
10	4:19:36PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1898/AE_BP_LI_IMPT_2315.trc file size: 85KB (63,53)	Explain
10	4:19:36PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1898/AE_BP_LI_IMPT_2315.AET file size: 5KB (63,53)	Explain
10	4:19:36PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1898/AE_BP_LI_IMPT_2315.stdout file size: 3KB (63,53)	Explain
10	4:19:36PM	File transfer successful. Success (63,52)	Explain
10	4:19:36PM	Successful Http Reply Code: 200 - OK (63,57)	Explain
	4:19:36PM	Published message with ID a7666e14-25ae-11e5-9ab8-8526e3e54eca to create entry in folder GENERAL.	Explain
	4:19:36PM	Successfully posted generated files to the report repository	Explain
10	4:19:20PM	Line Item Import Engine Started	Explain
10	4:19:21PM	..Processing File Header	Explain
	4:19:21PM	Invalid dimension or budget period found in the input file header row.	Explain
10	4:19:22PM	0 line items are successfully updated.	Explain
10	4:19:22PM	0 line items are not updated because of errors.	Explain
10	4:19:22PM	Line Item Import Engine Ended	Explain

Return

When the above message is displayed in the Message Log, verify the headers including the budget period in the .csv file. This is a hard stop. The file could not be processed so there is no need to run the **Budget Data Load Error Report**.

Additional error messages include:

**Error: Model Locked when doing Budget Data upload**  
**Message: Processing File Header**

**Message Log**

**Process**

Instance: 2310                      Type: Application Engine  
 Name: BP\_LI\_IMPT                  Description: Line Item Import

Severity	Log Time	Message Text	Explain
10	3:31:08PM	Report Repository URL is: http://xmq3web01.oaks.ohio.gov:9150/SchedulerTransfer/bidwqa (63,68)	<a href="#">Explain</a>
10	3:31:08PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1893/AE_BP_LI_IMPT_2310.trc file size: 90KB (63,53)	<a href="#">Explain</a>
10	3:31:08PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1893/AE_BP_LI_IMPT_2310.AET file size: 5KB ( 63,53)	<a href="#">Explain</a>
10	3:31:08PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1893/AE_BP_LI_IMPT_2310.stdout file size: 3KB (63,53)	<a href="#">Explain</a>
10	3:31:08PM	File transfer successful. Success (63,52)	<a href="#">Explain</a>
10	3:31:08PM	Successful Http Reply Code: 200 - OK (63,57)	<a href="#">Explain</a>
	3:31:08PM	Published message with ID e232cfb2-25a7-11e5-9ab8-8526e3e54eca to create entry in folder GENERAL.	<a href="#">Explain</a>
	3:31:08PM	Successfully posted generated files to the report repository	<a href="#">Explain</a>
10	3:30:53PM	Line Item Import Engine Started	<a href="#">Explain</a>
	3:30:53PM	Cannot Import because the model is currently locked.	<a href="#">Explain</a>
10	3:30:53PM	..Processing File Header	<a href="#">Explain</a>
10	3:30:54PM	0 line items are successfully updated.	<a href="#">Explain</a>
10	3:30:54PM	0 line items are not updated because of errors.	<a href="#">Explain</a>
10	3:30:54PM	Line Item Import Engine Ended	<a href="#">Explain</a>

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**Error: Department Mismatch between Run Control page and budget data load**  
**Message: Invalid dimension or budget period found in the input file header row.**

**Message Log**

**Process**

Instance: 2315                      Type: Application Engine  
 Name: BP\_LI\_IMPT                      Description: Line Item Import

Personalize | Find | View All | First 1-14 of 14 Last

Severity	Log Time	Message Text	Explain
10	4:19:36PM	Report Repository URL is: http://xmq3web01.oaks.ohio.gov:9150/SchedulerTransfer/bidwqa (63,68)	<a href="#">Explain</a>
10	4:19:36PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1898/AE_BP_LI_IMPT_2315.trc file size: 85KB (63,53)	<a href="#">Explain</a>
10	4:19:36PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1898/AE_BP_LI_IMPT_2315.AET file size: 5KB ( 63,53)	<a href="#">Explain</a>
10	4:19:36PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150708/1898/AE_BP_LI_IMPT_2315.stdout file size: 3KB (63,53)	<a href="#">Explain</a>
10	4:19:36PM	File transfer successful. Success (63,52)	<a href="#">Explain</a>
10	4:19:36PM	Successful Http Reply Code: 200 - OK (63,57)	<a href="#">Explain</a>
	4:19:36PM	Published message with ID a7666e14-25ae-11e5-9ab8-8526e3e54eca to create entry in folder GENERAL.	<a href="#">Explain</a>
	4:19:36PM	Successfully posted generated files to the report repository	<a href="#">Explain</a>
10	4:19:20PM	Line Item Import Engine Started	<a href="#">Explain</a>
10	4:19:21PM	..Processing File Header	<a href="#">Explain</a>
	4:19:21PM	Invalid dimension or budget period found in the input file header row.	<a href="#">Explain</a>
10	4:19:22PM	0 line items are successfully updated.	<a href="#">Explain</a>
10	4:19:22PM	0 line items are not updated because of errors.	<a href="#">Explain</a>
10	4:19:22PM	Line Item Import Engine Ended	<a href="#">Explain</a>

[Return](#)

**Error: Incorrect Account used.**

**Message: Invalid dimension or budget period found in the input file header row.**

**ChartField: ACCOUNT**

**Budget Data Load Error Report**

Business Unit: STATE STATE  
 Planning Model ID: 1718\_CAP\_AGY [1718 CAPITAL AGY](#)  
 Scenario: 1718AGYCAP 1718 AGY CAPITAL  
 Activity: AGYCAP AGY CAPITAL  
 Planning Center: ADJ  
 Budget Version: 1  
 Process Instance: 2311

Line Number	ChartField	ChartField Value	Message Text
2	ACCOUNT	600	Invalid dimension or budget period found in the input file header row.

Return to Search Previous in List Next in List Notify Refresh

**Error: Incorrect Program Code and Missing ChartFields**

**Message: ChartField Combo Edit failed**

**Budget Data Load Error Report**

Business Unit: STATE STATE  
 Planning Model ID: 1718\_CAP\_AGY [1718 CAPITAL AGY](#)  
 Scenario: 1718AGYCAP 1718 AGY CAPITAL  
 Activity: AGYCAP AGY CAPITAL  
 Planning Center: ADJ  
 Budget Version: 1  
 Process Instance: 2323

Line Number	ChartField	ChartField Value	Message Text
2			Chartfield Combo Edit failed

Return to Search Previous in List Next in List Notify Refresh

**Error: Invalid Fund and extra line in csv**

**Message: Invalid dimension or budget period found in the input file header row.**

**Message: Input line %1 has wrong number of tokens.**

**ChartField: FUND\_CODE**

**Budget Data Load Error Report**

Business Unit: STATE STATE  
 Planning Model ID: 1819\_OPER\_AGY [1819 OPERATING AGY](#)  
 Scenario: 1819AGYOPA 1819 AGENCY OPERATING A  
 Activity: AGYOPA AGY OPERATING A  
 Planning Center: EXPPC  
 Budget Version: 1  
 Process Instance: 2324

Line Number	ChartField	ChartField Value	Message Text
2	FUND_CODE	5070	Invalid dimension or budget period found in the input file header row.
3			Input line %1 has wrong number of tokens.

Return to Search Previous in List Next in List Notify Refresh

**Error: Incorrect ALI used.**

**Message: Invalid dimension or budget period found in the input file header row.**

**ChartField: PRODUCT**

**Budget Data Load Error Report**

Business Unit: STATE STATE  
 Planning Model ID: 1819\_OPER\_AGY [1819\\_OPERATING\\_AGY](#)  
 Scenario: 1819AGYOPA 1819 AGENCY OPERATING A  
 Activity: AGYOPA AGY OPERATING A  
 Planning Center: EXPPC  
 Budget Version: 1  
 Process Instance: 2327

Error Details			
Line Number	ChartField	ChartField Value	Message Text
2	PRODUCT	935002	Invalid dimension or budget period found in the input file header row.

Return to Search Previous in List Next in List Notify Refresh

**Error: Incorrect Program Code and Missing ChartFields**

**Message: ChartField Combo Edit failed**

**Budget Data Load Error Report**

Business Unit: STATE STATE  
 Planning Model ID: 1819\_OPER\_AGY [1819\\_OPERATING\\_AGY](#)  
 Scenario: 1819AGYOPA 1819 AGENCY OPERATING A  
 Activity: AGYOPA AGY OPERATING A  
 Planning Center: EXPPC  
 Budget Version: 1  
 Process Instance: 2329

Error Details			
Line Number	ChartField	ChartField Value	Message Text
2			Chartfield Combo Edit failed

Return to Search Previous in List Next in List Notify Refresh

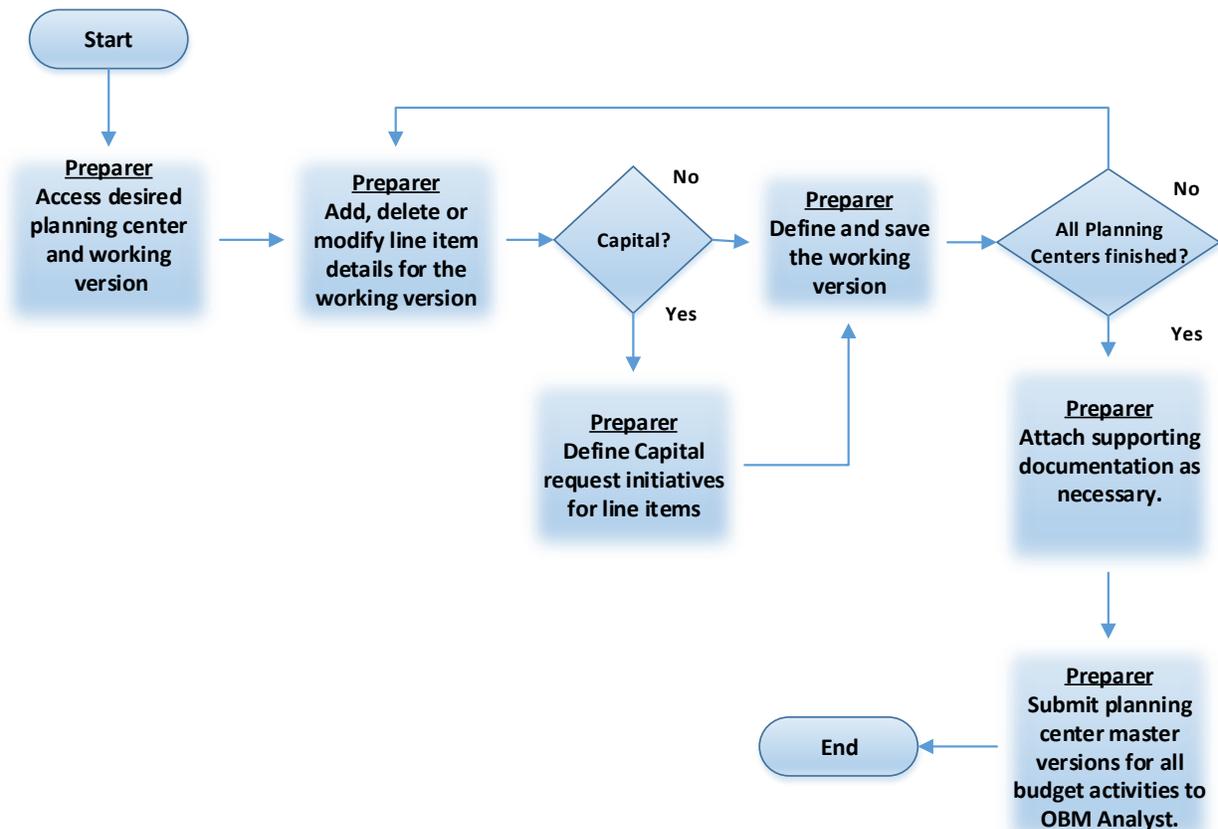
**Security Error**

A security error message normally means that your security access has not been properly set up in BPM. Contact your **Agency Security Designee** to request the appropriate security access.

## Submitting a Planning Center Budget for Review

### Overview

#### Submitting a Capital Planning Center Budget for Review



This process is performed by the **Preparer** when submitting the budget to the **OBM Budget Analyst**.

Before submitting a working version, OBM recommends opening and verifying the **working version/master version** one last time. Confirm each line item (ChartField string) is accurate and entered correctly.

After adding and adjusting line items (ChartField strings) in a planning center budget for a scenario/activity, submit one **working version** of the planning center budget for that scenario/activity. When a version is submitted, **BPM** copies that version to the **master version** and then submits the **master version** to the next level for review. Only submit *one working version* from each planning center. After submitting a planning center budget for a scenario/activity, an **OBM Budget Analyst** can view and approve it.

**BPM** automatically updates the **master version** when the **Submit** button is clicked for a **working version** or when the **working version** is manually copied into the **master version**.

- A **Preparer** can see only their assigned planning centers and the status of their budget versions. Notice that the version submitted and the **master version** both now have a **Status** of **Submitted**. If the **OBM Budget Analyst** rejects the planning center budget, the status changes to **Rejected**.
- All planning centers must be submitted before an **OBM Budget Analyst** can review the budget. If a submitted **working version** of a budget needs to be updated, the **OBM Budget Analyst** will work with the OBM Coordinator to reject the budget to make it available to the **Preparer**.
- A **Preparer** can only edit a planning center when the status of the planning center is **Open** or **Rejected**. If an **OBM Budget Analyst** rejects a planning center, the **OBM Budget Analyst** should contact the **Preparer** by phone or by email to make them aware the planning center has been rejected and why it has been rejected.



When submitting the capital scenario/activity for a planning center, **BPM** automatically forwards that planning center’s budget to the **OBM Budget Analyst**.



All planning center budgets **MUST** be submitted, even if they include \$0 amounts or blank line items (ChartField strings). Blank line items may be deleted so they do not show up on reports.

### Navigation

Planning and Budgeting > Activity Preparation > My Planning Workspace

### Step By Step

Step	Screen Link
1. Enter or select <b>Preparer</b> in the <b>Role Name</b> field. 2. Click <b>Search</b> .	<a href="#">Preparer Search</a>
3. A list of all models available to someone with the specified role displays. 4. Click the appropriate <b>Scenario</b> . The <b>My Planning Workspace</b> page displays the planning center budgets for that model.  This page can be accessed by another link once in the application; one of the possibilities is by clicking the <b>My Planning Workspace</b> link.	<a href="#">Search Results</a>
5. Select the appropriate budget option in the <b>Activity</b> drop-down list.	<a href="#">Activity Scenario</a>

<p>6. Select the appropriate option in the <b>Scenario</b> drop-down list.</p> <p>7. Click <b>Refresh</b>.</p> <p style="padding-left: 40px;">The table updates to display the versions for the selected <b>Activity</b>.</p> <p>8. Click the <b>Edit</b> link for the version to be submitted.</p>	
<p>The <b>Line Item Details</b> page displays.</p> <p>9. Verify each line item for accuracy.</p> <p style="padding-left: 40px;">Using the instructions for <b>Copy Version</b>, copy the version just verified to the <b>Master Version</b>.</p>	<p><a href="#">Line Item Verify</a></p>
<p>10. Click the <b>Select</b> check box next to the <b>Planning Center Master Version</b> that is ready for submission.</p> <p> Multiple planning centers can be selected.</p> <p>11. Click <b>Submit</b></p>	<p><a href="#">Submit</a></p>
<p>The <b>Submit Confirmation</b> page displays.</p> <p>12. Review the Planning Centers information to confirm the correct items are being submitted.</p> <p>13. Click <b>OK</b>.</p> <p style="padding-left: 40px;">The selected planning centers copied to the <b>master version</b> are submitted to the <b>OBM Budget Analyst</b>.</p>	<p><a href="#">Submit Confirmation</a></p>
<p>14. The <b>My Planning Workspace</b> page again displays. The <b>master version</b> will display a status of <b>Submitted</b>.</p>	<p><a href="#">Submitted</a></p>

## Course Recap

This course was designed to provide the knowledge and skills associated with the **Agency Capital BPM** process for **Preparers**.

The **Agency Capital BPM** process is used to electronically prepare, review and submit the biennial budget requests for agency planning centers. This course has taken the learner through all steps in the **BPM** process from beginning to end for the **Preparer** role. While the budget submission will be done through **BPM**, agencies will still be required to send in hard copy documentation. Important points to be remembered as you work through the **BPM** process:



- **BPM** process can be done online through **My Planning Workspace** or by using the **Budget Data Load** template.
- Only one planning center can be open at one time.
- Only one **Preparer** can be in a planning center at one time.
- When a planning center is opened, **BPM** automatically locks it so no other user can be making changes.
- **Budget Data Load** will fail if the planning center is locked.
- **OBM Budget Analyst** cannot access **master version** until it is in the **Submitted** status.
- **OBM Budget Analyst** will work with OBM Coordinator to **Reject** the version back to the **Preparer** if changes are needed.
- **OBM Budget Analyst** approves the version to submit to the **OBMCAP** scenario.

## Agency Budget Reporting

The following reports are available to agencies to assist in creating budget requests:

**Role Needed: OH\_EPM\_BP\_AGY\_REPORTING**

**Navigation: Public Folders > BI Reporting Folders > BI Standard Reports > Budgeting and Planning**

REPORT NAME	AGENCY/OBM MODEL & VERSION	PURPOSE
BPM-0021 Capital Improvement Plan Summary Report	Agency/OBM Version 4	Line item summary for the next three biennia. User has the option to include historical data.
BPM-0021 Capital Improvement Plan Summary Report (Run using Agency Model to display Agency Request)	Agency Version 4	Summary of the request for the next three biennia. User has the option to include historical data.
BPM-0021 Capital Improvement Plan Summary Report (Run using OBM Model to display OBM Recommendations)	OBM Version 4	Summary of OBM recommendations for the next biennium. User has the option to include historical data.
BPM-0020 Capital Variance Analysis Report	Agency/OBM Version 4	Compares Agency Request to OBM Recommendation or legislative versions

## BI Report Books

BI Report Books can be accessed via the Useful Links button in the BI Portal.



## Appendix A: FAQs

Question	Answer/Solution
Why can't I access any menu options in BPM?	Your security access has not been properly set up in BPM. Contact your Agency Security Designee to request the appropriate security access.
Why can't I see my planning center in My Planning Workspace?	Your security access has not been properly set up in BPM. Contact your Agency Security Designee to request the appropriate security access.
How do I unlock a planning center?	When you open a <b>Working</b> version of a scenario/activity for editing, that <b>Working</b> version is <i>automatically locked</i> . Other people at your agency cannot edit a locked <b>Working</b> version. To unlock the scenario/activity after you have made your edits, simply click the <b>Unlock</b> button for that version line item on the <i>My Planning Workspace</i> page.
What do I do if I have an issue when trying to submit my budget to OBM?	Make sure all <b>Preparer</b> planning centers have been submitted.
What do I do if I think my reports are not accurate?	Work with the OBM Analyst to resolve the issue.
How do I request a new ChartField or Tree or changes to existing ChartFields or Trees?	Refer to the FIN Process Manual for instructions.
How can I validate what ChartFields are available for me to use?	Run the GL-00075 report in BI.
How do I revise or delete ChartField strings?	New functionality in <i>My Planning Workspace</i> allows users to either delete the ChartField string or revise the ChartFields all on the same screen.
Do I need to submit all scenarios/planning centers, even if we are not requesting anything?	Yes, all planning centers must be entered even if no budget request is being made.
What do I do about rows with \$0?	Either leave and submit as \$0 or delete the item if the agency does not want it to show up on reports
How do I track a bill through the legislature?	BPM-0020 is the Capital Variance Analysis report and is updated with the budget versions as they go through the legislature. Agency can run report and compare their requested budget to the OBM recommendations or to the legislative versions.

## Appendix B: Best Practices

Best Practices for BPM Activities	
Naming Working Versions	When copying a version, give the new version a name that is meaningful to you.
How to Report on Working Versions	Copy into a master version and run the report prior to submitting the master version.
Saving Favorite Links in BPM (i.e., My Planning Workspace)	Create a “ <i>Saved Search</i> ” to generate the search criteria you use most frequently. For example, save one search as a “ <b>Preparer</b> ” and save another as a “ <b>Reviewer</b> .” <b>Save Search Criteria</b> appears at the bottom of the <i>My Planning Workspace</i> screen.
Save Viewing Preferences in BPM (i.e., which fields and sorting order are displayed, adding in descriptions – setting up different views)	<p>Users can set up viewing preferences and save the view(s) for future use. This is done through the <i>User View Details</i> page.</p> <ul style="list-style-type: none"> <li>Click the <b>Create</b> link in the <i>User View</i> group box on the <i>Line Item Details</i> page).</li> <li>Enter a description for the view definition.</li> <li>Click <b>Copy</b> to copy the user view.</li> </ul> <p><b>Entering Row Display Filter Information:</b></p> <ul style="list-style-type: none"> <li>Access the <i>Row Display Filter</i> page (select the <i>Row Display Filter</i> tab on the <i>User View Details</i> page).</li> </ul> <p> If your user role is <b>Casual Preparer</b>, you cannot define any private views. You may only select public views defined by the coordinator.</p> <ul style="list-style-type: none"> <li><b>Dimensions</b> – displays only those dimensions available to you, defined by activity.</li> <li><b>Dimension Level</b> – select up to three dimensions to display on the row, nested hierarchically in the order you select them. Values are <i>First</i>, <i>Second</i>, and <i>Third</i>. This field is grayed out if all of the following conditions are true: <ul style="list-style-type: none"> <li>You navigate to this page from the <i>Line Item Details</i> page.</li> <li>You have only partial access to the planning center version from which you are navigating.</li> <li>User view is private.</li> </ul> </li> </ul> <p> For a flat view, do <i>not</i> select any dimension levels.</p> <ul style="list-style-type: none"> <li><b>Show Code</b> – select to display the associated dimension’s value code.</li> <li><b>Show Description</b> – select to display the associated dimension’s description.</li> <li><b>Filter Dimension Members</b> tab - specify the From and To range and the Account Category that you want to display for each of the dimension rows.</li> </ul> <p><b>Enter Display Option Information</b></p> <ul style="list-style-type: none"> <li>Access the <i>Row Display Options</i> page (select <i>Row Display Options</i> tab on the <i>User View Details</i> page).</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Row Summary</b> – select to display only summary nodes for the first row dimension.</li> <li>• <b>Row Detail</b> – select to display only detailed (editable) cells for all row dimensions.</li> <li>• <b>Hide Zero Total Amounts for Proposed Budget/Forecast</b> – select to hide line items for which the total amount is zero (0). If you select this option, the system displays only those line items with entered values.</li> <li>• <b>Method Amount</b> – select to display the assigned method rows for accessing method details or entering budget amounts.</li> <li>• <b>Adjustment Amount</b> – select to display rows for incremental or mass adjustment amounts when applied.</li> <li>• <b>Allocation Amount</b> – select to display amount rows that you cannot modify using the line item activity; these amounts are applied through the <i>Edit Allocation</i> option when available on <i>My Planning Workspace</i> for the master version.</li> <li>• <b>Total Amount</b> – displays the total of the method, adjustment, and allocation amount.</li> </ul> <p> Access to modifying the method, adjustment, and allocation amount must be granted.</p> <ul style="list-style-type: none"> <li>• <b>Display Entry Currency</b> – select to display all entry currency rows. Alternatively, enter a currency value in the <i>Filter Dimension Members</i> grid on the <i>Row Display Filter</i> page to display only one entry currency.</li> <li>• <b>Preparation</b> – Historical information appears as full year totals in the columns.</li> </ul>
<p>Large Variances from Current Biennium Appropriation and What is Being Requested for the next Biennium</p>	<p>In these situations, as much documentation as possible should be attached to the line item. As a <b>Preparer</b>, it is necessary to be able to explain large variances as well as any new request being made for the next Biennium.</p>
<p>Unlocking Planning Centers When Exiting</p>	<p>Only one planning center can be open at one time and only one Preparer can be working in that planning center at one time. It is imperative that users unlock planning centers when are exiting so that other Preparers and Reviewers can open the planning center and so that a user can open other planning centers.</p>
<p>Be Able to Write Narratives to go along with Budget requests.</p>	<p>There may be questions from those who review the request at the agency and from the OBM Budget Analysts regarding ChartField strings within your budget. Be prepared to explain the request. Writing a narrative related to the request and attaching it to the line item will provide much needed documentation. Documents that will be submitted in the hard copy request to OBM do not need to be attached in BPM.</p>

## Appendix C: Screenshots

### Copy to New Version - Preparer Search

ORACLE

Favorites > Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Role Name: begins with    1

Business Unit: begins with

Planning Model ID: begins with

Activity: begins with

Scenario: begins with

Case Sensitive

2

[Basic Search](#)

[Back](#)

Search Results



**3**

View All First 1-32 of 32 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP AGY</a>	<a href="#">AGYCAP</a>	<a href="#">1718AGYCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP OBM</a>	<a href="#">OBMCAP</a>	<a href="#">1718OBMCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPA</a>	<a href="#">1819AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPB</a>	<a href="#">1819AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPC</a>	<a href="#">1819AGYOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYREV</a>	<a href="#">1819AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYTRF</a>	<a href="#">1819AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETA</a>	<a href="#">1819TARGTA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETB</a>	<a href="#">1819TARGTB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETC</a>	<a href="#">1819TARGTC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER OBM</a>	<a href="#">OBMOPC</a>	<a href="#">1819OBMOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYAPR</a>	<a href="#">1819AGYAPR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYCUR</a>	<a href="#">1819AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI14AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI14AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI14AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TAD</a>	<a href="#">BI14AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TBD</a>	<a href="#">BI14AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI14AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI14AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OAD</a>	<a href="#">BI14OBMOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OBD</a>	<a href="#">BI14OBMOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM REV</a>	<a href="#">BI14OBMREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM TRF</a>	<a href="#">BI14OBMTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTAD</a>	<a href="#">BI16AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTBD</a>	<a href="#">BI16AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI16AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI16AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI16AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI16AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI16AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 OBM ADM</a>	<a href="#">BI OBM CUR</a>	<a href="#">BI16OBMCUR</a>

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## My Planning Workspace / Copy

ORACLE

[Favorites](#) | [Main Menu](#) > [Planning and Budgeting](#) > [Activity Preparation](#) > [My Planning Workspace](#)

### My Planning Workspace

Role Name: Preparer [Workspace Search](#)  
 Business Unit: STATE [User Preferences](#)  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY [Email](#)  
 Activity: AGYCAP [Planning Guidelines](#)  
 Scenario: 1718AGYCAP

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Version: All
Status: All

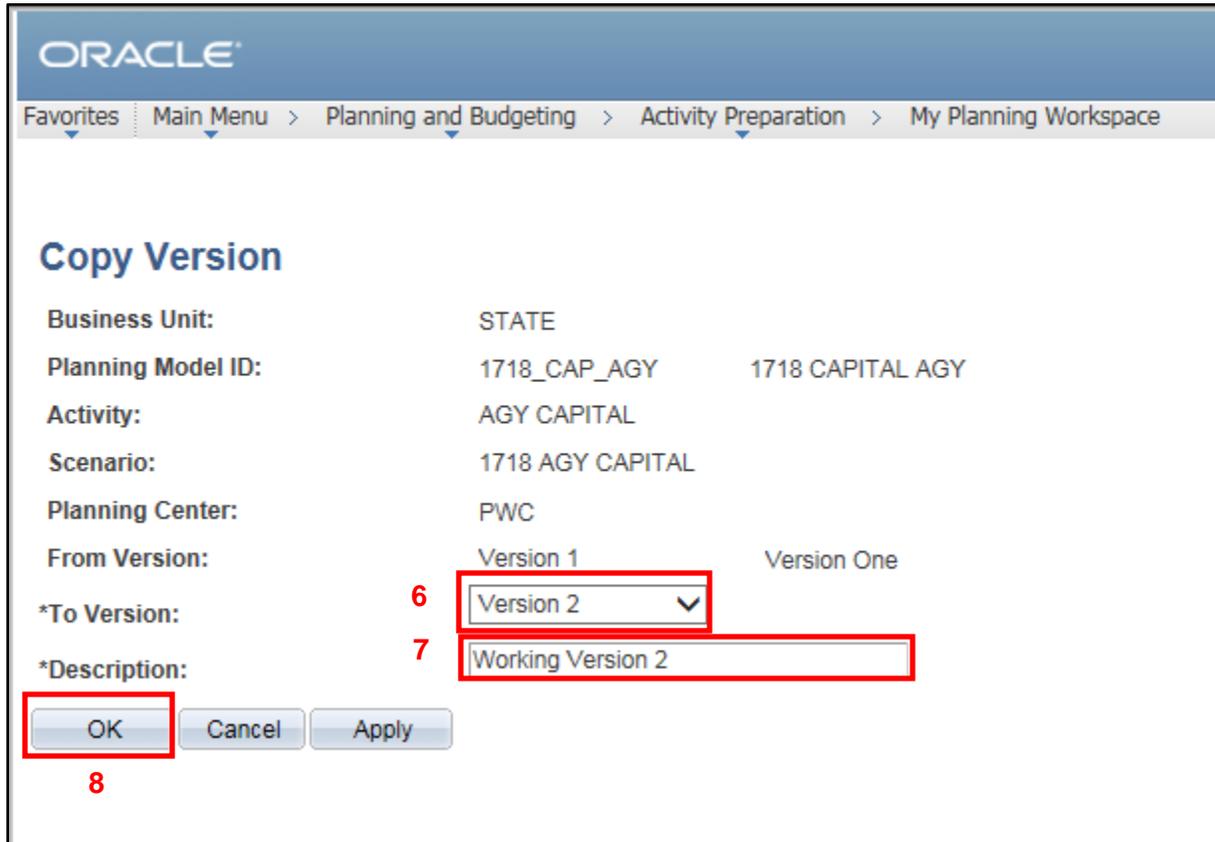
My Planning Workspace
Personalize | Find | View All | First 1-6 of 6 Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<b>5</b>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

Select All
 Clear All

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## Copy Version



**ORACLE**

Favorites Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Copy Version

Business Unit: STATE

Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY

Activity: AGY CAPITAL

Scenario: 1718 AGY CAPITAL

Planning Center: PWC

From Version: Version 1 Version One

\*To Version: **6** Version 2

\*Description: **7** Working Version 2

**8** OK Cancel Apply

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## My Planning Workspace – New Version

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

**Role Name:** Preparer [Workspace Search](#)  
**Business Unit:** STATE [User Preferences](#)  
**Planning Model ID:** 1718\_CAP\_AGY 1718 CAPITAL AGY [Email](#)   
**Activity:** AGYCAP [Planning Guidelines](#)  
**Scenario:** 1718AGYCAP

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

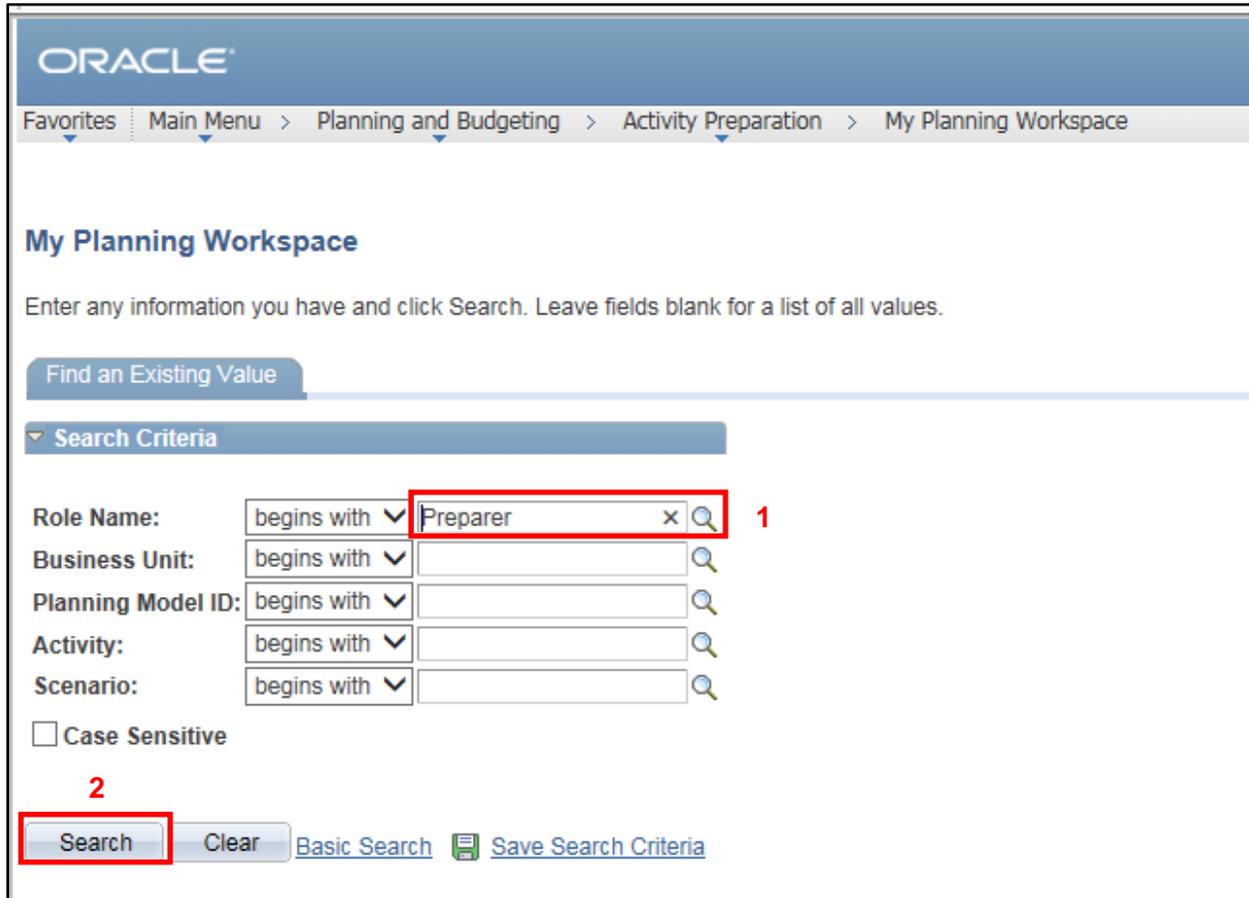
Version: All  Status: All

**My Planning Workspace** Personalize | Find | View All | First 1-7 of 7 | Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

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## Unlock Version – Preparer Search



The screenshot shows the Oracle My Planning Workspace search interface. At the top, the Oracle logo is displayed. Below it is a breadcrumb trail: Favorites > Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace. The main heading is "My Planning Workspace". Below the heading is a text prompt: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a button labeled "Find an Existing Value". Below this is a section titled "Search Criteria" with a dropdown arrow. The search criteria include: "Role Name:" with a dropdown set to "begins with" and a text input containing "Preparer" (highlighted with a red box and labeled "1"); "Business Unit:" with a dropdown set to "begins with" and an empty text input; "Planning Model ID:" with a dropdown set to "begins with" and an empty text input; "Activity:" with a dropdown set to "begins with" and an empty text input; "Scenario:" with a dropdown set to "begins with" and an empty text input. There is a checkbox for "Case Sensitive". At the bottom, there is a "Search" button (highlighted with a red box and labeled "2"), a "Clear" button, a "Basic Search" link, and a "Save Search Criteria" link with a document icon.

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**Search Results**

<b>Search Results</b>				
View All		First 1-32 of 32 Last		
<u>Role Name</u>	<u>Business Unit</u>	<u>Planning Model ID</u>	<u>Activity</u>	<u>Scenario</u>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP AGY</a>	<a href="#">AGYCAP</a>	<a href="#">1718AGYCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP OBM</a>	<a href="#">OBMCAP</a>	<a href="#">1718OBMCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPA</a>	<a href="#">1819AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPB</a>	<a href="#">1819AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPC</a>	<a href="#">1819AGYOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYREV</a>	<a href="#">1819AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYTRF</a>	<a href="#">1819AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETA</a>	<a href="#">1819TARGTA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETB</a>	<a href="#">1819TARGTB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETC</a>	<a href="#">1819TARGTC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER OBM</a>	<a href="#">OBMOPC</a>	<a href="#">1819OBMOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYAPR</a>	<a href="#">1819AGYAPR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYCUR</a>	<a href="#">1819AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI14AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI14AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI14AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TAD</a>	<a href="#">BI14AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TBD</a>	<a href="#">BI14AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI14AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI14AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OAD</a>	<a href="#">BI14OBMOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OBD</a>	<a href="#">BI14OBMOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM REV</a>	<a href="#">BI14OBMREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM TRF</a>	<a href="#">BI14OBMTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTAD</a>	<a href="#">BI16AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTBD</a>	<a href="#">BI16AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI16AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI16AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI16AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI16AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI16AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 OBM ADM</a>	<a href="#">BI OBM CUR</a>	<a href="#">BI16OBMCUR</a>

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## Unlock

My Planning Workspace
New W

Role Name: Preparer

Business Unit: STATE

Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY

Activity: AGYCAP

Scenario: 1718AGYCAP Refresh

[Workspace Search](#)

[User Preferences](#)

[Email](#)

[Planning Guidelines](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

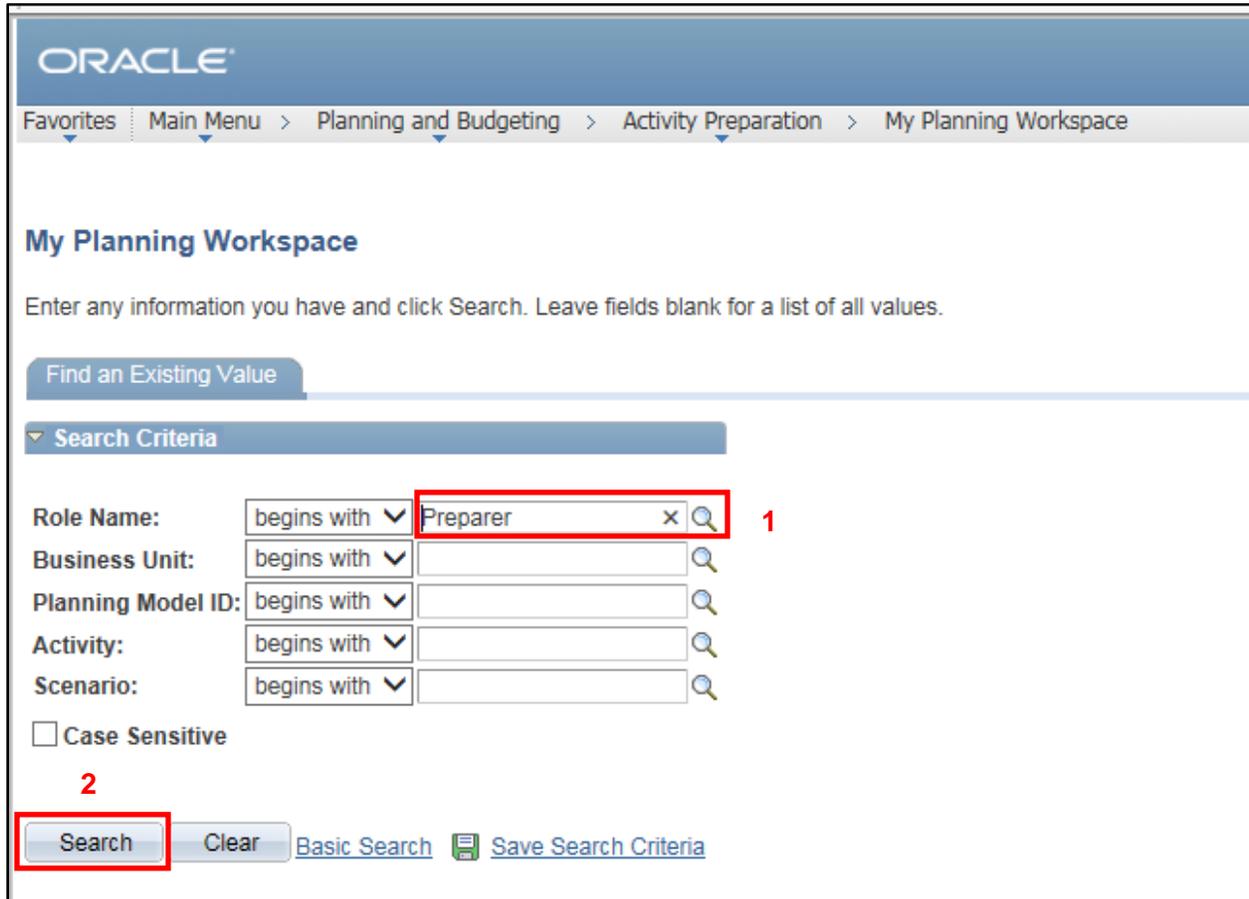
Submit
Version: All
Status: All
Refresh

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Unlock	Edit	View	Copy	Allocations	Notes	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open					<a href="#">View</a>	<a href="#">Copy</a>			
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open				<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open					<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open					<a href="#">View</a>	<a href="#">Copy</a>			
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open	06/08/15 2:21:50PM	S10145833	4	<a href="#">Unlock</a>	<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open				<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open					<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>		

Submit

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## Creating a Budget - Entering an OAKS Budget Line Item – Preparer Search



The screenshot shows the Oracle My Planning Workspace search interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace. Below this is the title "My Planning Workspace" and a prompt: "Enter any information you have and click Search. Leave fields blank for a list of all values." A button labeled "Find an Existing Value" is present. Underneath is a section titled "Search Criteria" with a dropdown arrow. It contains five search criteria, each with a "begins with" dropdown and a search input field with a magnifying glass icon. The "Role Name" field is highlighted with a red box and contains the text "Preparer", with a red "1" next to it. Below the search criteria is a checkbox for "Case Sensitive". At the bottom, there is a "Search" button highlighted with a red box and a red "2" next to it, along with "Clear", "Basic Search", and "Save Search Criteria" options.

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## Search Results

**Search Results** 3

View All First 1-32 of 32 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP AGY</a>	<a href="#">AGYCAP</a>	<a href="#">1718AGYCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP OBM</a>	<a href="#">OBMCAP</a>	<a href="#">1718OBMCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPA</a>	<a href="#">1819AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPB</a>	<a href="#">1819AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPC</a>	<a href="#">1819AGYOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYREV</a>	<a href="#">1819AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYTRF</a>	<a href="#">1819AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETA</a>	<a href="#">1819TARGTA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETB</a>	<a href="#">1819TARGTB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETC</a>	<a href="#">1819TARGTC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER OBM</a>	<a href="#">OBMOPC</a>	<a href="#">1819OBMOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYAPR</a>	<a href="#">1819AGYAPR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYCUR</a>	<a href="#">1819AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI14AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI14AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI14AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TAD</a>	<a href="#">BI14AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TBD</a>	<a href="#">BI14AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI14AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI14AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OAD</a>	<a href="#">BI14OBMOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OBD</a>	<a href="#">BI14OBMOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM REV</a>	<a href="#">BI14OBMREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM TRF</a>	<a href="#">BI14OBMTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTAD</a>	<a href="#">BI16AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTBD</a>	<a href="#">BI16AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI16AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI16AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI16AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI16AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI16AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 OBM ADM</a>	<a href="#">BI OBM CUR</a>	<a href="#">BI16OBMCUR</a>

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[Back](#)

## My Planning Workspace / Edit

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

Role Name: Preparer  
 Business Unit: STATE  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP  
 Scenario: 1718AGYCAP Refresh

Workspace Search  
 User Preferences  
 Email  
 Planning Guidelines

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit Version: All Status: All Refresh

My Planning Workspace Personalize | Find | View All | First 1-7 of 7 Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open			View	Copy			
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			Edit	View	Copy	Edit Adjustment	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open			View	Copy	Edit Allocations		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open			View	Copy			
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			Edit	View	Copy	Edit Adjustment	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open		5	Edit	View	Copy	Edit Adjustment	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open			View	Copy	Edit Allocations		

Submit

Select All  Clear All

## Add Line Item

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

Line Item Properties

Dimensions and Members 6

Action Menu

Action: Add Entry Go Analysis: Go Hot Keys Help

User View

Private  Public View: Refresh View Create

Save 1 to 0 of 0 View 30 Hold All

Totals

Save

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

[Back](#)

## Line Item Details

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

Line Item Details

**Add Line Item**

Business Unit: STATE STATE  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP AGY CAPITAL  
 Scenario: 1718AGYCAP 1718 AGY CAPITAL  
 Planning Center: PWC PUBLIC WORKS COMMISSION  
 Version: Version 2 Version 2

7 8 9 10 11 12 13 14

Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities
570	7038	PWC	PWC	C0025	C15001	PWCCA01G	CAPITAL EQUIPMENT	001

15

Add Cancel

## Zoom

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

- Line Item Properties
- Dimensions and Members
- Action Menu

Action: Add Entry Go Analysis: Go [Hot Keys Help](#)

User View

Private  Public View: Refresh View Create

Save 1 to 1 of 1 View 30 Hold All

16

Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Default
<input checked="" type="checkbox"/> 570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	AMTPEI

Totals

Save

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

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## Line Item Added

Line Item, Main page

Line Item Details															
Account	Fund Code	Department	Program Code	Service Location	ALI	Project Type	Priorities	Currency	Default	2017-2018 Capital Biennium	2019-2020 Capital Biennium	Method ID	Total Amount	2021-2022 Capital Biennium	Total Amount
570	7038	PWC	PWC	C0014	C15001	CAPITAL EQUIPMENT	012	USD	AMTPER	10,000.00	243,330.00		287,430.00	34,100.00	287,430.00

Return 17

## Save

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

- Line Item Properties
- Dimensions and Members
- Action Menu

Action: Add Entry  Analysis:   [Hot Keys Help](#)

User View

Private  Public View:   View Create

Line Item Details											Personalize	Find
Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Capital Item		
<input checked="" type="checkbox"/> 570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	00		

Totals

18

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## Unlock

**My Planning Workspace**

Role Name: Preparer  
 Business Unit: STATE  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP  
 Scenario: 1718AGYCAP

Workspace Search  
 User Preferences  
 Email  
 Planning Guidelines

Submit Refresh

Version: All Status: All Refresh

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Unlock	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open					View	Copy		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open				Edit	View	Copy	Edit Adjustment	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open					View	Copy	Edit Allocations	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open					View	Copy		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open	06/08/15 2:21:50PM	S10145833	19	Unlock	Edit	View	Copy	Edit Adjustment
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open				Edit	View	Copy	Edit Adjustment	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open					View	Copy	Edit Allocations	

## Modify ChartFields

Account	Fund Code	Department	Program Code	Service Location	ALI	Project Type	Priorities	Currency	Default	2017-2018 Capital Biennium
<input checked="" type="checkbox"/> 570 1	7038	PWC	PWC	C0014	C15001	CAPITAL EQUIPMENT	012	USD	AMTPER	10,000

[Back](#)

## Modify Dimensions

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

Line Item Details

**Modify Dimensions** Delete

Business Unit: STATE STATE  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP AGY CAPITAL  
 Scenario: 1718AGYCAP 1718 AGY CAPITAL  
 Planning Center: PWC PUBLIC WORKS COMMISSION  
 Version: Version 1 Version 1

Dimension Details <span style="float: right;">Personalize   [X]</span>				
Dimensions	Dimension Member	Description	To Value	Description
Account	570	Capital Items	570 x	Capital Items
Service Location	C0014	CLINTON COUNTY	C0014	CLINTON COUNTY
Department	PWC	PUBLIC WORKS COMMISSION	PWC	PUBLIC WORKS COMMISSION
Fund Code	7038	STATE CAPITAL IMPROVEMENTS	7038	STATE CAPITAL IMPROVEMENTS
ALI	C15001	INFRASTRUCTURE-DISTRICT 1	C15001	INFRASTRUCTURE-DISTRICT 1
Program Code	PWC	PUBLIC WORKS COMMISSION	PWC	PUBLIC WORKS COMMISSION
Project Type	CAPITAL EQUIPMENT	Capital Equipment	CAPITAL EQUIPMENT	Capital Equipment
Priorities	012	Initiative 012	012	Initiative 012

OK Cancel Apply

[Back](#)

## Look Up



Look Up To Value ? Help

Search by: Service Location begins with

Look Up Cancel [Advanced Lookup](#)

### Search Results

View 100 First 1-89 of 89 Last

Service Location	Description
<a href="#">C0001</a>	ADAMS COUNTY
<a href="#">C0002</a>	ALLEN COUNTY
<a href="#">C0003</a>	ASHLAND COUNTY
<a href="#">C0004</a>	ASHTABULA COUNTY
<a href="#">C0005</a>	ATHENS COUNTY
<a href="#">C0006</a>	AUGLAIZE COUNTY
<a href="#">C0007</a>	BELMONT COUNTY
<a href="#">C0008</a>	BROWN COUNTY
<a href="#">C0009</a>	BUTLER COUNTY
<a href="#">C0010</a>	CARROLL COUNTY
<a href="#">C0011</a>	CHAMPAIGN COUNTY
<a href="#">C0012</a>	CLARK COUNTY
<a href="#">C0013</a>	CLERMONT COUNTY
<a href="#">C0014</a>	CLINTON COUNTY
<a href="#">C0015</a>	COLUMBIANA COUNTY
<a href="#">C0016</a>	COSHOCTON COUNTY
<a href="#">C0017</a>	CRAWFORD COUNTY
<a href="#">C0018</a>	CUYAHOGA COUNTY
<a href="#">C0019</a>	DARKE COUNTY
<a href="#">C0020</a>	DEFIANCE COUNTY
<a href="#">C0021</a>	DELAWARE COUNTY
<a href="#">C0022</a>	ERIE COUNTY
<a href="#">C0023</a>	FAIRFIELD COUNTY
<a href="#">C0024</a>	FAYETTE COUNTY
<a href="#">C0025</a>	FRANKLIN COUNTY
<a href="#">C0026</a>	FULTON COUNTY
<a href="#">C0027</a>	GALLIA COUNTY
<a href="#">C0028</a>	GEAUGA COUNTY
<a href="#">C0029</a>	GREENE COUNTY
<a href="#">C0030</a>	GUERNSEY COUNTY
<a href="#">C0031</a>	HAMILTON COUNTY

3

[Back](#)

ChartField Modified

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

Line Item Details

**Modify Dimensions** Delete 5

Business Unit: STATE STATE  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP AGY CAPITAL  
 Scenario: 1718AGYCAP 1718 AGY CAPITAL  
 Planning Center: PWC PUBLIC WORKS COMMISSION  
 Version: Version 1 Version 1

Dimension Details <span style="float: right;">Personalize   [icon]</span>				
Dimensions	Dimension Member	Description	To Value	Description
Account	570	Capital Items	570 <input type="text"/>	Capital Items
Service Location	C0014	CLINTON COUNTY <span style="border: 1px solid red; padding: 2px;">4</span>	C0007 <input type="text"/> <span style="border: 1px solid red; padding: 2px;">x</span>	BELMONT COUNTY
Department	PWC	PUBLIC WORKS COMMISSION	PWC	PUBLIC WORKS COMMISSION
Fund Code	7038	STATE CAPITAL IMPROVEMENTS	7038 <input type="text"/>	STATE CAPITAL IMPROVEMENTS
ALI	C15001	INFRASTRUCTURE-DISTRICT 1	C15001 <input type="text"/>	INFRASTRUCTURE-DISTRICT 1
Program Code	PWC	PUBLIC WORKS COMMISSION	PWC <input type="text"/>	PUBLIC WORKS COMMISSION
Project Type	CAPITAL EQUIPMENT	Capital Equipment	CAPITAL EQUIPM <input type="text"/>	Capital Equipment
Priorities	012	Initiative 012	012 <input type="text"/>	Initiative 012

OK Cancel Apply

**Delete**

**Message**

Are you sure you want to delete this line item? (9370,11320)

6 OK Cancel

[Back](#)

**Line Item Details Delete**

Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

Line Item Properties

Dimensions and Members

Action Menu

Action: Add Entry  Analysis:   [Hot Keys Help](#)

User View

Private  Public View:   View Create

Totals

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

## Personalize

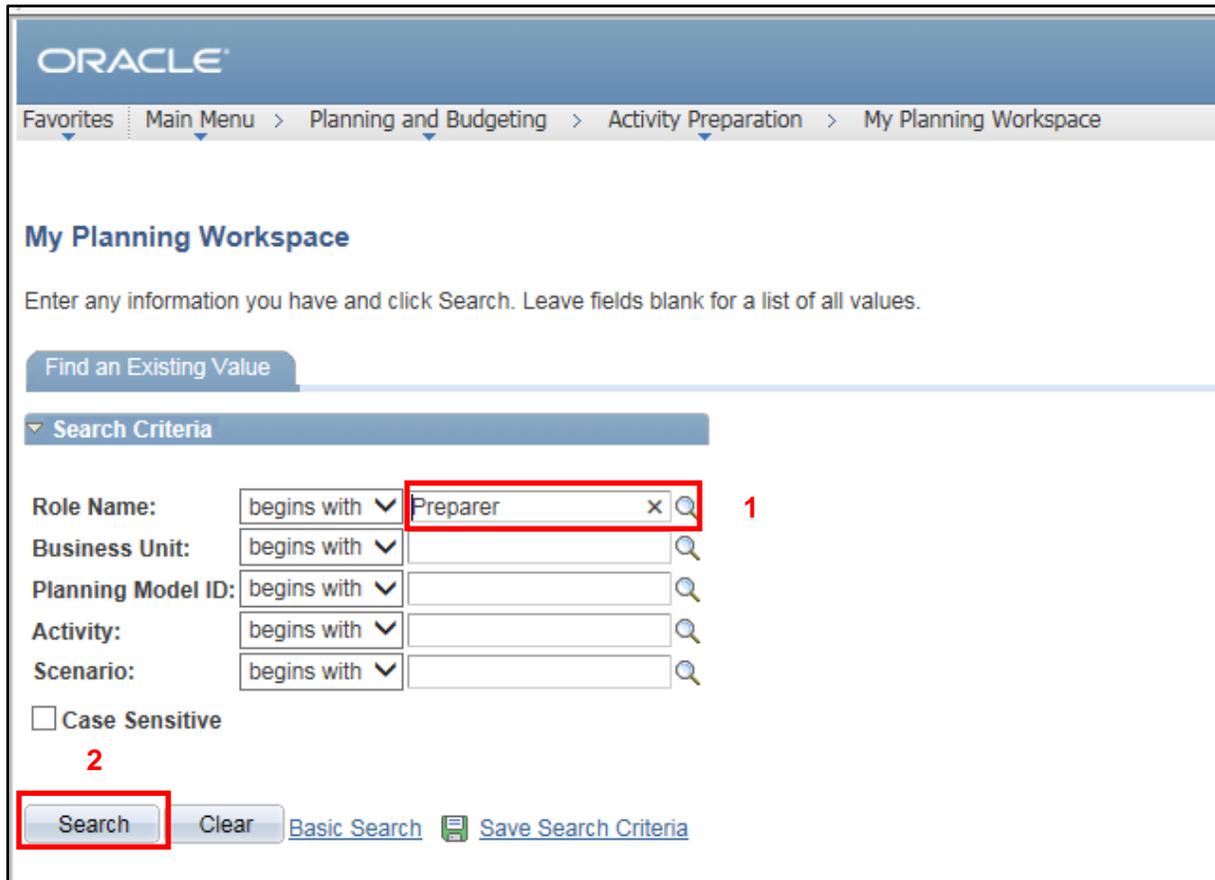
Line Item Details											Personalize	Find	
	Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	1	Default	
<input checked="" type="checkbox"/>	570	7038	PWC	PWC	C0025	C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD		AMTPE	

[Back](#)

## Column Order Sort



## Entering, Deleting, Viewing Line Item Notes – Preparer Search



The screenshot shows the Oracle My Planning Workspace search interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace. Below this is the 'My Planning Workspace' header and a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A 'Find an Existing Value' button is present. The search criteria section includes fields for Role Name, Business Unit, Planning Model ID, Activity, and Scenario, each with a 'begins with' dropdown and a search icon. The 'Role Name' field contains the text 'Preparer' and is highlighted with a red box and a red '1'. Below the search criteria is a 'Case Sensitive' checkbox. At the bottom, there is a 'Search' button highlighted with a red box and a red '2', along with 'Clear', 'Basic Search', and 'Save Search Criteria' options.

[Back](#)



Search Results

**Search Results** 3

View All First 1-32 of 32 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP AGY</a>	<a href="#">AGYCAP</a>	<a href="#">1718AGYCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP OBM</a>	<a href="#">OBMCAP</a>	<a href="#">1718OBMCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPA</a>	<a href="#">1819AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPB</a>	<a href="#">1819AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPC</a>	<a href="#">1819AGYOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYREV</a>	<a href="#">1819AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYTRF</a>	<a href="#">1819AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETA</a>	<a href="#">1819TARGETA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETB</a>	<a href="#">1819TARGETB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETC</a>	<a href="#">1819TARGETC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER OBM</a>	<a href="#">OBMOPC</a>	<a href="#">1819OBMOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYAPR</a>	<a href="#">1819AGYAPR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYCUR</a>	<a href="#">1819AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI14AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI14AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI14AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TAD</a>	<a href="#">BI14AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TBD</a>	<a href="#">BI14AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI14AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI14AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OAD</a>	<a href="#">BI14OBMOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OBD</a>	<a href="#">BI14OBMOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM REV</a>	<a href="#">BI14OBMREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM TRF</a>	<a href="#">BI14OBMTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTAD</a>	<a href="#">BI16AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTBD</a>	<a href="#">BI16AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI16AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI16AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI16AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI16AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI16AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 OBM ADM</a>	<a href="#">BI OBM CUR</a>	<a href="#">BI16OBMCUR</a>

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## Activity Scenario

ORACLE  
 Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

**My Planning Workspace**

Role Name: Preparer  
 Business Unit: STATE **5,6**  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP  
 Scenario: 1718AGYCAP **Refresh** **7**

[Workspace Search](#)  
[User Preferences](#)  
[Email](#)  
[Planning Guidelines](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit Version: All Status: All Refresh

**My Planning Workspace** Personalize | Find | View All | First 1-7 of 7 Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open			<b>8</b> <a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

Submit  
 Select All  Clear All

## Zoom

Line Item Details Personalize | Find | **9**

	Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Default
<input checked="" type="checkbox"/>	570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	AMTPE

Totals  
 Save

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

[Back](#)

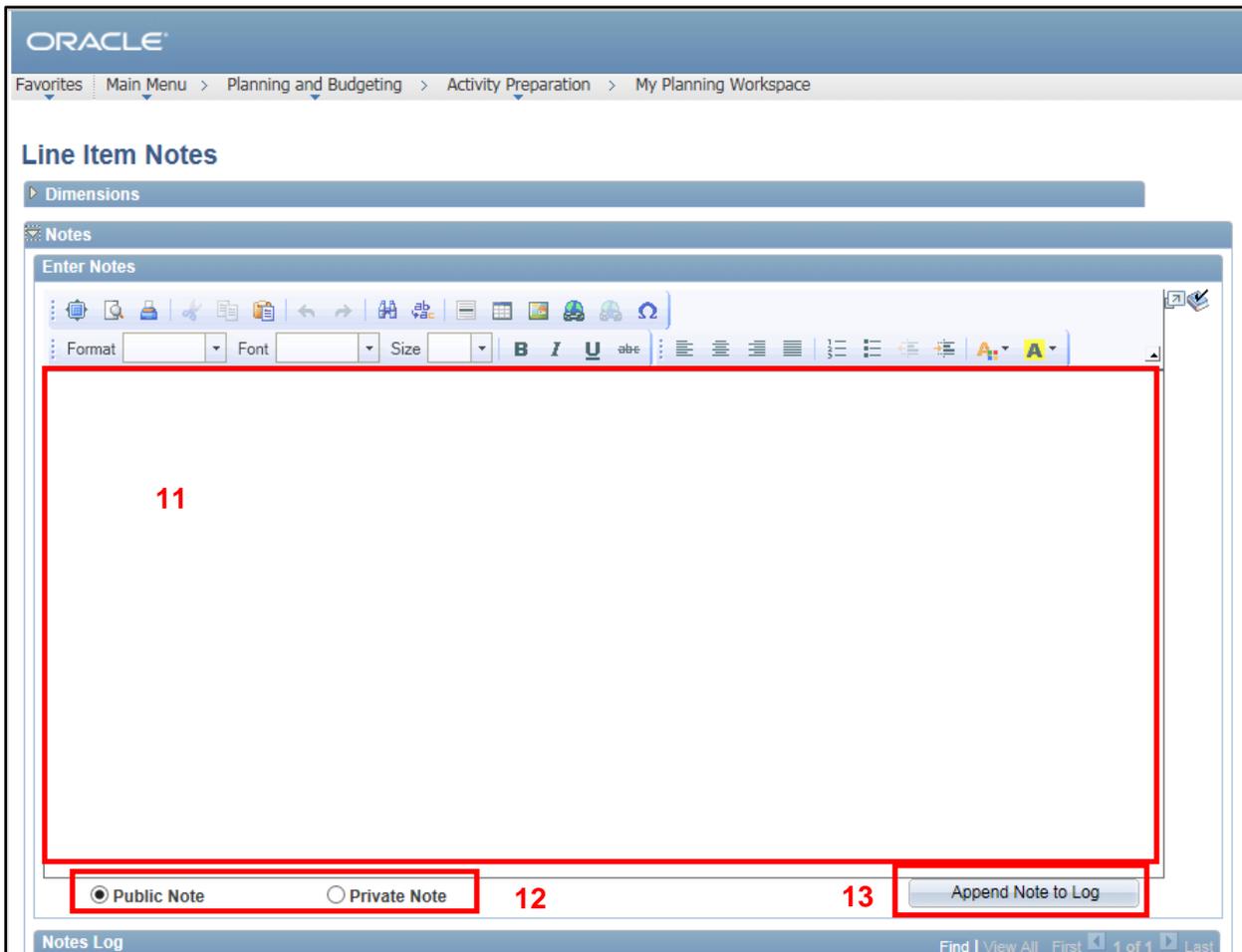
## Line Item Notes



Line Item, Main page

Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Default	Method ID	Hot Keys	Total Amount	2017-2018 Capital Biennium	2020-2021 Capital Biennium
570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	AMTPER	AMTPER		45,000.00	30,000.00	10,000.00

## Notes Text Box



ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Line Item Notes

Dimensions

Notes

Enter Notes

Format | Font | Size | **B** *I* U abc | [List Icons] | A+ | A-

11

Public Note  Private Note 12

13

Notes Log Find | View All First 1 of 1 Last

[Back](#)

OK

Notes Log Find | View All First 4 of 1 Last

Test message

Public Note     Private Note    User ID: S10145833    Date/Time Stamp: 06/10/2015 3:10:08PM    [Edit Notes](#)

---

**Attach Documents**

To attach a new document, click Add. Enter a brief description of the document then click the attach icon.  
To view a document, click the File Name link  
To remove a document, click the Delete button.

File Details		Personalize	
File Name	Description	User ID	Date/Time Stamp
14	<input type="text"/>	<a href="#">Attach</a>	<a href="#">+</a>

[OK](#)   [Cancel](#)   [Apply](#)

[Back](#)

## Notes Attached

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

Line Item Properties

Dimensions and Members

Action Menu

Action:   Analysis:   [Hot Keys Help](#)

User View

Private  Public View:   View Create

Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Amount	Notes
<input checked="" type="checkbox"/> 570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	15,16	

Totals

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

## Delete Notes

Notes Log

Find | View All | First | 1 of 1

Test message

17

Public Note  Private Note User ID: S10145833 Date/Time Stamp: 06/10/2015 3:10:08PM

[Back](#)



## View Multiple Notes

The screenshot displays a web application window titled "Notes Log". The window has a header bar with a "Find" search box and a "View All" button highlighted with a red rectangle. To the right of the "View All" button are "first" and "Last" navigation buttons, and a "1 of 3" indicator. The main content area contains a single note titled "Test Note" with a red "18" badge in the top right corner. Below the note is a horizontal scrollbar. At the bottom of the window, there is a status bar with the following information: "User ID: S10145833", radio buttons for "Public Note" (selected) and "Private Note", "Date/Time Stamp: 09/20/2015 9:17:24AM", and an "Edit Notes" button.

[Back](#)



## Notes Display

The screenshot displays a web application window titled "Notes Log". At the top right, there are navigation controls: "Find | View\_1", "First", "1-3 of 3", and "Last". The main content area shows a list of notes. The first note is "Test Note", which is selected and expanded to show a detailed view. Below the note title, there is a metadata bar containing: "User ID: S10145833", radio buttons for "Public Note" (selected) and "Private Note", "Date/Time Stamp: 08/20/2015 9:17:24AM", and an "Edit Notes" button. Below this bar, the text "Test Note 2" is visible, indicating the start of the next note in the list. The interface includes a scroll bar on the right side of the note content area.

[Back](#)



## Unlock Notes

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Line Item Details

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

▶ Line Item Properties

▶ Dimensions and Members

▼ Action Menu

Action: Add Entry  Analysis:   [Hot Keys Help](#)

User View

Private  Public View:   View Create

1 to 1 of 1

Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Amount
<input checked="" type="checkbox"/> 570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	1.00

▶ Totals

Go to Planning Workspace: [Don't Unlock](#) [Unlock](#) This version is locked to others while you are editing.

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[Unlock](#)

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## Attaching, Deleting and Viewing Support Documents – Preparer Search

ORACLE

Favorites Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Role Name: begins with ▾ Preparer × 🔍 1

Business Unit: begins with ▾ 🔍

Planning Model ID: begins with ▾ 🔍

Activity: begins with ▾ 🔍

Scenario: begins with ▾ 🔍

Case Sensitive 2

Search Clear Basic Search Save Search Criteria

[Back](#)



Search Results

**Search Results** 3

View All First 1-32 of 32 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP AGY</a>	<a href="#">AGYCAP</a>	<a href="#">1718AGYCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP OBM</a>	<a href="#">OBMCAP</a>	<a href="#">1718OBMCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPA</a>	<a href="#">1819AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPB</a>	<a href="#">1819AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPC</a>	<a href="#">1819AGYOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYREV</a>	<a href="#">1819AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYTRF</a>	<a href="#">1819AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETA</a>	<a href="#">1819TARGTA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETB</a>	<a href="#">1819TARGTB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETC</a>	<a href="#">1819TARGTC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER OBM</a>	<a href="#">OBMOPC</a>	<a href="#">1819OBMOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYAPR</a>	<a href="#">1819AGYAPR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYCUR</a>	<a href="#">1819AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI14AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI14AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI14AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TAD</a>	<a href="#">BI14AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TBD</a>	<a href="#">BI14AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI14AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI14AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OAD</a>	<a href="#">BI14OBMOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OBD</a>	<a href="#">BI14OBMOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM REV</a>	<a href="#">BI14OBMREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM TRF</a>	<a href="#">BI14OBMTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTAD</a>	<a href="#">BI16AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTBD</a>	<a href="#">BI16AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI16AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI16AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI16AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI16AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI16AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 OBM ADM</a>	<a href="#">BI OBM CUR</a>	<a href="#">BI16OBMCUR</a>

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## Activity

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

Role Name: Preparer  
 Business Unit: **5,6** STATE  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP  
 Scenario: 1718AGYCAP **Refresh** 7

[Workspace Search](#)  
[User Preferences](#)  
[Email](#)  
[Planning Guidelines](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Submit Version: All Status: All Refresh

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open		<b>8</b>	<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

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## To Attach Document

ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

Role Name: Preparer [Workspace Search](#)  
 Business Unit: STATE [User Preferences](#)  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY [Email](#)  
 Activity: AGYCAP [Planning Guidelines](#)  
 Scenario: 1718AGYCAP

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Version: All Status: All

#### My Planning Workspace

Workspace | Details |

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a> 8	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

Select All  Clear All

## Attach Document

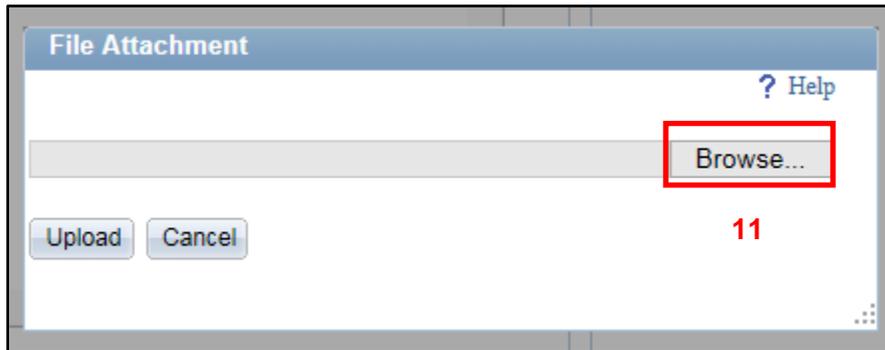
Attach Documents

To attach a new document, click Add. Enter a brief description of the document then click the attach icon.  
 To view a document, click the File Name link.  
 To remove a document, click the Delete button.

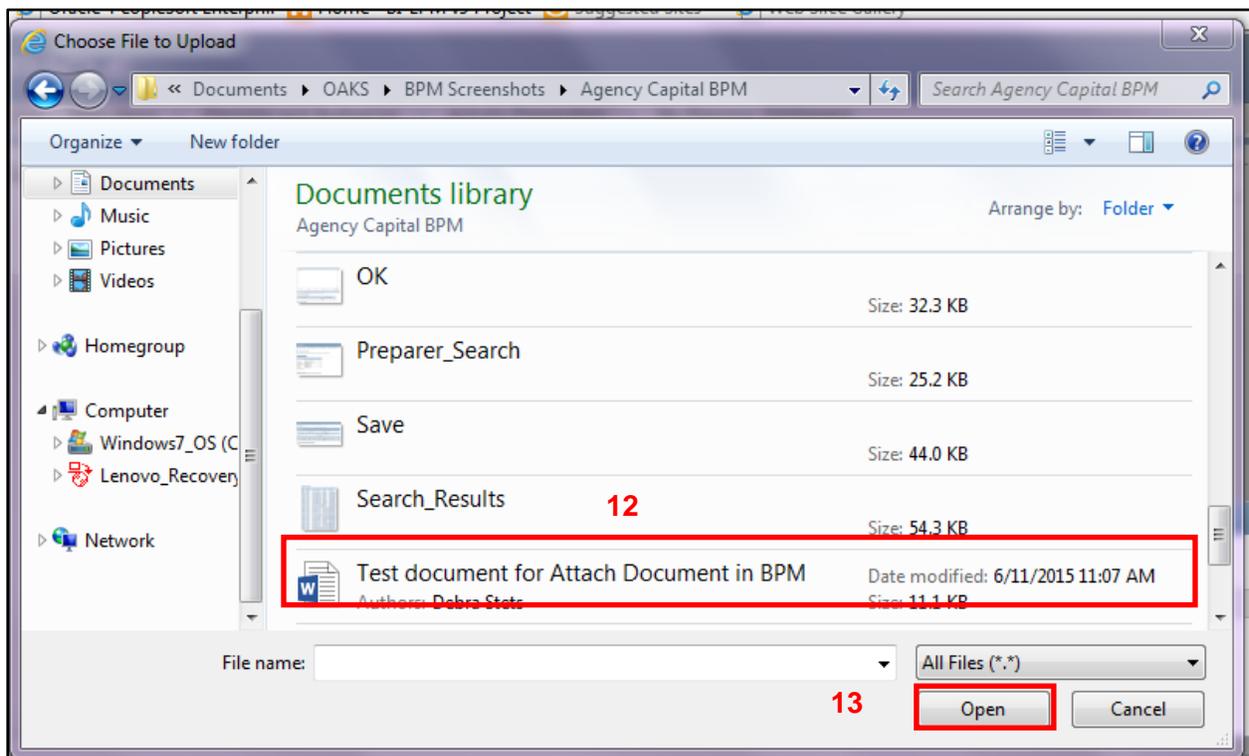
File Details				
File Name	Description	User ID	Date/Time Stamp	
	<input style="border: 2px solid red;" type="text"/>			<input style="border: 2px solid red;" type="button" value="Attach"/>

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## Upload Document

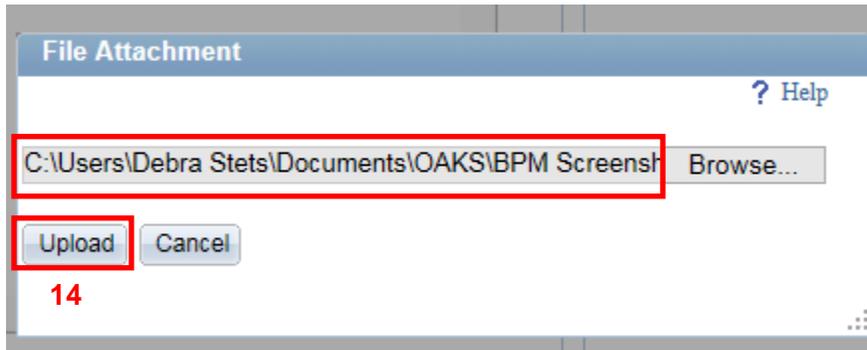


## Choose File

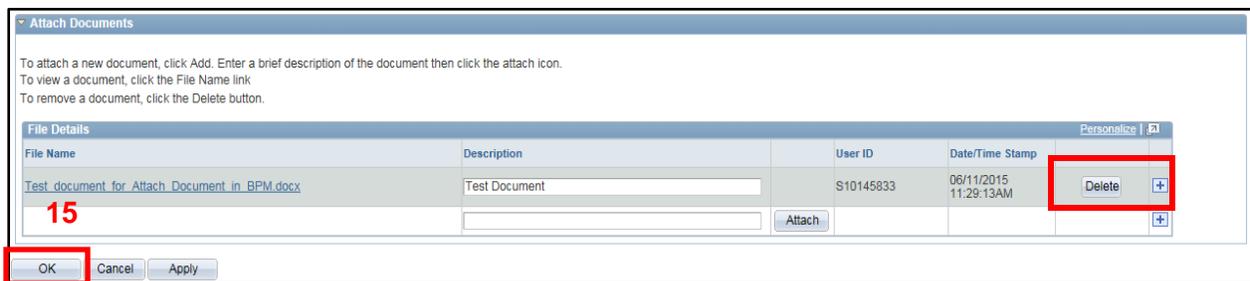


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## Upload Chosen File



## File Attached



[Back](#)

## Attachment Saved

ORACLE

[Favorites](#) | [Main Menu](#) > [Planning and Budgeting](#) > [Activity Preparation](#) > [My Planning Workspace](#)

### My Planning Workspace

**Role Name:** Preparer [Workspace Search](#)  
**Business Unit:** STATE [User Preferences](#)  
**Planning Model ID:** 1718\_CAP\_AGY 1718 CAPITAL AGY [Email](#)  
**Activity:** AGYCAP [Planning Guidelines](#)  
**Scenario:** 1718AGYCAP

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

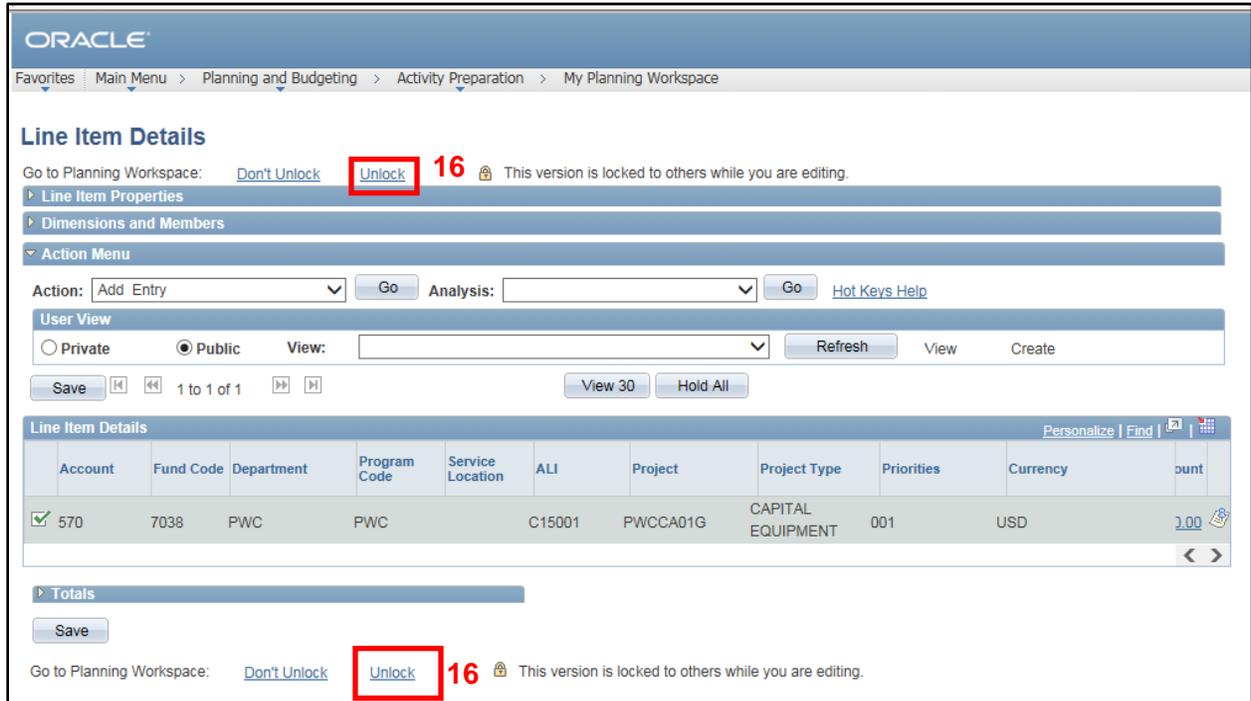
Version: 
Status:

My Planning Workspace
Personalize | Find | View All | | First 1-7 of 7 | Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

[Back](#)

## Unlock



ORACLE

Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### Line Item Details

Go to Planning Workspace: [Don't Unlock](#) **Unlock** 16  This version is locked to others while you are editing.

▶ Line Item Properties

▶ Dimensions and Members

▼ Action Menu

Action: Add Entry  Analysis:   [Hot Keys Help](#)

User View

Private  Public View:   View Create

Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Amount
<input checked="" type="checkbox"/> 570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	1.00 

▶ Totals

Go to Planning Workspace: [Don't Unlock](#) **Unlock** 16  This version is locked to others while you are editing.

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## Budget Data Load Search

Favorites | Main Menu > Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget

### Budget Data Load

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search Criteria

**Search by:** Run Control ID begins with  **1**

Case Sensitive **2**

**Search** [Advanced Search](#)

**1**

Find an Existing Value [Add a New Value](#)

### Add New Value

Favorites | Main Menu > Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget

### Budget Data Load

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value** **3**

Search Criteria

**Search by:** Run Control ID begins with

Case Sensitive

**Search** [Advanced Search](#)

**3**

Find an Existing Value [Add a New Value](#)

[Back](#)

### Create New ID

[Favorites](#) | [Main Menu](#) > [Planning and Budgeting](#) > [Planning and Budgeting Setup](#) > [Process Model](#) > [Budget Data Load](#)

### Budget Data Load

[Find an Existing Value](#) | [Add a New Value](#)

Run Control ID:  4

[Add](#) 5

[Find an Existing Value](#) | [Add a New Value](#)

### Run Control

[Favorites](#) | [Main Menu](#) > [Planning and Budgeting](#) > [Planning and Budgeting Setup](#) > [Process Model](#) > [Budget Data Load](#)

### Budget Data Load

User ID: S10145833 [Report Manager](#) [Run](#) 13  
 Run Control ID: PWCCAP1 [Process Monitor](#)

**Process Request Parameters**

\*Description:  6

\*Process Frequency:  ▾

\*Business Unit:

\*Planning Model ID:   7

\*Scenario:   8

\*Activity:   9

\*Planning Center:   10

\*Budget Version:  ▾ 11

Source File:  [Add](#) [View](#) [Delete](#)

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[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

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Process OK

Favorites | Main Menu > Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget Data Load

### Process Scheduler Request

User ID S10145833      Run Control ID PWCCAP1

Server Name  Run Date 08/20/2015

Recurrence  Run Time 3:28:38PM

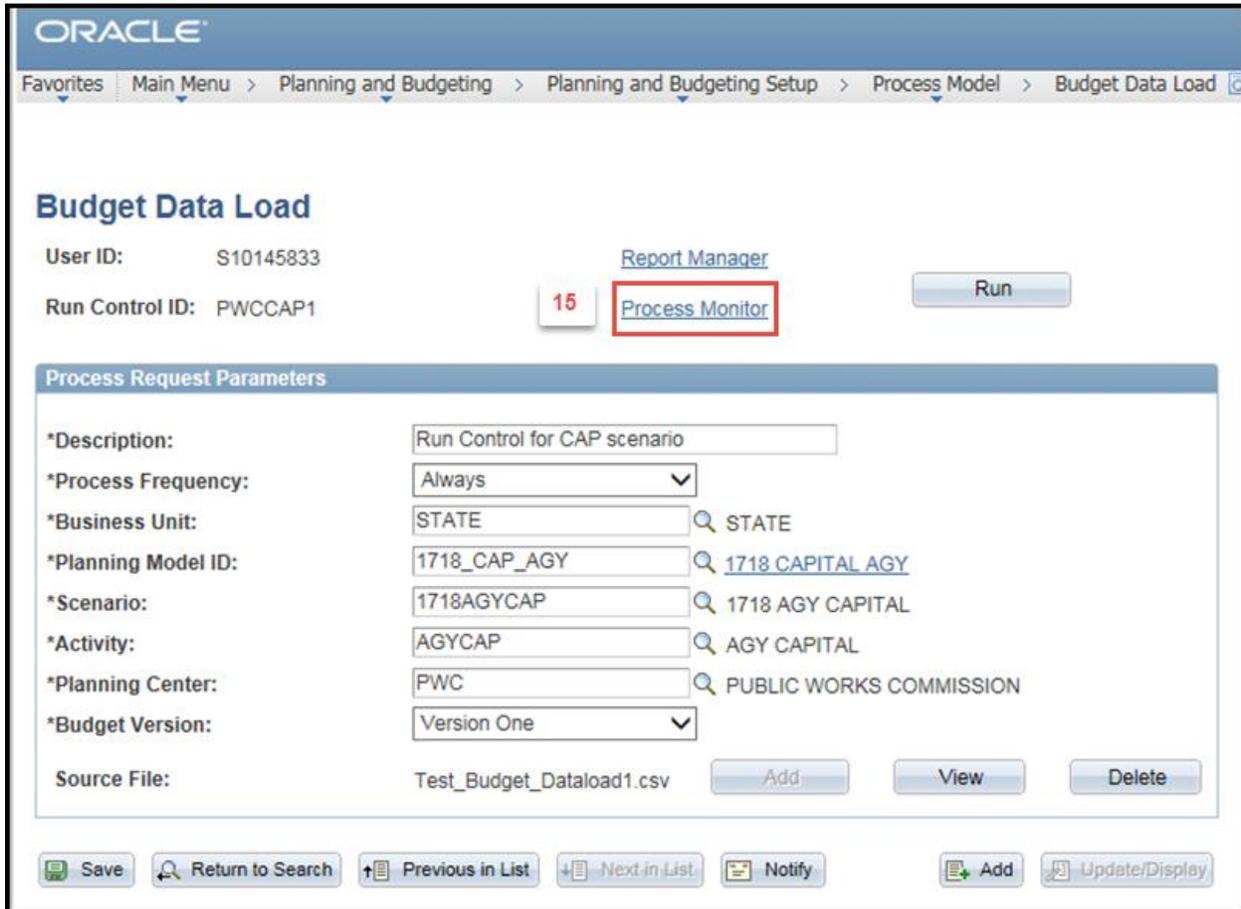
Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Line Item Import	BP_LI_IMPT	Application Engine	Web	TXT	<a href="#">Distribution</a>

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## Process Monitor



The screenshot shows the Oracle Process Monitor interface for a 'Budget Data Load' process. The breadcrumb trail at the top reads: Favorites | Main Menu > Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget Data Load. The main title is 'Budget Data Load'. Below the title, the 'User ID' is S10145833 and the 'Run Control ID' is PWCCAP1. There are two links: 'Report Manager' and 'Process Monitor', with the latter highlighted by a red box. A 'Run' button is also present. A red box with the number '15' is located between the 'Run Control ID' and the 'Process Monitor' link. Below this is a section titled 'Process Request Parameters' containing several fields: '\*Description:' (Run Control for CAP scenario), '\*Process Frequency:' (Always), '\*Business Unit:' (STATE), '\*Planning Model ID:' (1718\_CAP\_AGY), '\*Scenario:' (1718AGYCAP), '\*Activity:' (AGYCAP), '\*Planning Center:' (PWC), and '\*Budget Version:' (Version One). Each field has a search icon and a list of suggestions. At the bottom of this section are 'Add', 'View', and 'Delete' buttons. The 'Source File' is 'Test\_Budget\_Dataload1.csv'. At the very bottom of the interface are navigation buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

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## View Process Request

ORACLE

[Favorites](#) | [Main Menu](#) > [Planning and Budgeting](#) > [Planning and Budgeting Setup](#) > [Process Model](#) > [Budget Data Load](#) > [Process Monitor](#)

Process List | Server List

View Process Request For 16

User ID

Server

Run Status

Type  Last   Days

Name  Instance  to

Distribution Status   Save On Refresh

Process List 17 18

Personalize | Find | View All | Print | First | 1-2 of 2 | Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2701		Application Engine	BP_LL_IMPT	S10145833	08/20/2015 11:18:08AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2700		Application Engine	BP_LL_IMPT	S10145833	08/20/2015 10:56:54AM EDT	Success	Posted	<a href="#">Details</a>

[Go back to Budget Data Load](#)

Process List | [Server List](#)

[Back](#)



## Message Log

Favorites | Main Menu > Planning and Budgeting > Planning and Budgeting Setup > Process Model > Budget Data Load > Process Monitor

**Process Detail**

**Process**

Instance	2707	Type	Application Engine
Name	BP_LI_IMPT	Description	Line Item Import
Run Status	Success	Distribution Status	Posted

**Run** | **Update Process**

Run Control ID	PWCCAP1	<input type="radio"/> Hold Request
Location	Server	<input type="radio"/> Queue Request
Server	PSUNX2	<input type="radio"/> Cancel Request
Recurrence		<input type="radio"/> Delete Request
		<input type="radio"/> Restart Request

**Date/Time** | **Actions**

Request Created On	08/20/2015 3:54:21PM EDT	<a href="#">Parameters</a>	Transfer
<b>Run Anytime After</b>	<b>08/20/2015 3:54:16PM EDT</b>	<a href="#">Message Log</a>	<b>19</b> <a href="#">View Locks</a>
Began Process At	08/20/2015 3:54:31PM EDT	<a href="#">Batch Timings</a>	
Ended Process At	08/20/2015 3:54:46PM EDT	<a href="#">View Log/Trace</a>	

OK Cancel

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## Message Log Results

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**Message Log**

**Process**

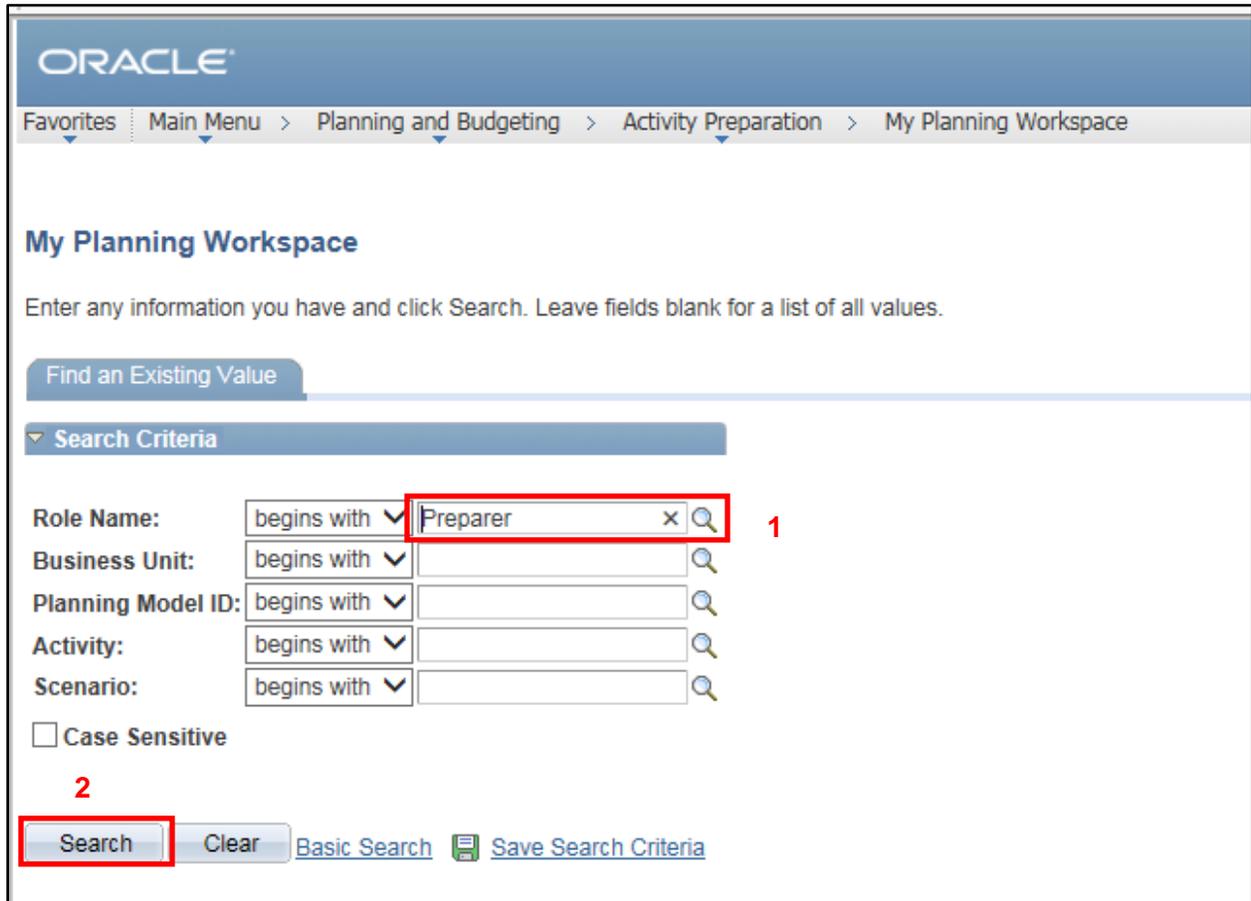
Instance: 2707      Type: Application Engine  
 Name: BP\_LI\_IMPT      Description: Line Item Import

Severity	Log Time	Message Text	Explain
10	3:54:31PM	Line Item Import Engine Started	Explain
10	3:54:32PM	..Processing File Header	Explain
	3:54:32PM	Invalid dimension or budget period found in the input file header row.	Explain
10	3:54:32PM	0 line items are successfully updated.	Explain
10	3:54:32PM	0 line items are not updated because of errors.	Explain
10	3:54:32PM	Line Item Import Engine Ended	Explain
10	3:54:46PM	Report Repository URL is: http://xmq3web01.oaks.ohio.gov:9150/SchedulerTransfer/bidwqa (63,68)	Explain
10	3:54:46PM	Transferred file: /u01/oracle/psft/rpt/BIDWQA/20150820/2290/AE_BP_LI_IMPT_2707.stdout file size: 0KB (63,53)	Explain
10	3:54:46PM	File transfer successful. Success (63,52)	Explain
10	3:54:46PM	Successful Http Reply Code: 200 - OK (63,57)	Explain
	3:54:46PM	Published message with ID 4f07f6e6-4775-11e5-b50a-93824dd314cf to create entry in folder GENERAL.	Explain
	3:54:46PM	Successfully posted generated files to the report repository	Explain

[Return](#)

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## Submitting a Planning Center Budget – Preparer Search



The screenshot shows the Oracle Planning and Budgeting interface for a Preparer Search. The breadcrumb trail is: Favorites > Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace. The page title is "My Planning Workspace". Below the title, there is a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." A tab labeled "Find an Existing Value" is active. Underneath, a "Search Criteria" section contains five search fields, each with a "begins with" dropdown and a search icon. The "Role Name" field is highlighted with a red box and contains the text "Preparer", with a red "1" next to it. Below the search fields is a "Case Sensitive" checkbox, which is unchecked. At the bottom, a "Search" button is highlighted with a red box and labeled with a red "2". Other buttons include "Clear", "Basic Search", and "Save Search Criteria".

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Search Results

**Search Results** 3

View All First 1-32 of 32 Last

Role Name	Business Unit	Planning Model ID	Activity	Scenario
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP AGY</a>	<a href="#">AGYCAP</a>	<a href="#">1718AGYCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1718 CAP OBM</a>	<a href="#">OBMCAP</a>	<a href="#">1718OBMCAP</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPA</a>	<a href="#">1819AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPB</a>	<a href="#">1819AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYOPC</a>	<a href="#">1819AGYOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYREV</a>	<a href="#">1819AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">AGYTRF</a>	<a href="#">1819AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETA</a>	<a href="#">1819TARGTA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETB</a>	<a href="#">1819TARGTB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER AGY</a>	<a href="#">TARGETC</a>	<a href="#">1819TARGTC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OPER OBM</a>	<a href="#">OBMOPC</a>	<a href="#">1819OBMOPC</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYAPR</a>	<a href="#">1819AGYAPR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">1819 OP AGY ADM</a>	<a href="#">AGYCUR</a>	<a href="#">1819AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI14AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI14AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI14AGYREV</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TAD</a>	<a href="#">BI14AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TBD</a>	<a href="#">BI14AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY 01</a>	<a href="#">BI AGY TRF</a>	<a href="#">BI14AGYTRF</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI14AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM OAD</a>	<a href="#">BI14OBMOPA</a>
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<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2014 OBM 01</a>	<a href="#">BI OBM REV</a>	<a href="#">BI14OBMREV</a>
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<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTAD</a>	<a href="#">BI16AGYTAD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BIAGYTBD</a>	<a href="#">BI16AGYTBD</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OAD</a>	<a href="#">BI16AGYOPA</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY OBD</a>	<a href="#">BI16AGYOPB</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY 01</a>	<a href="#">BI AGY REV</a>	<a href="#">BI16AGYREV</a>
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<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 AGY ADM</a>	<a href="#">BI AGY CUR</a>	<a href="#">BI16AGYCUR</a>
<a href="#">Preparer</a>	<a href="#">STATE</a>	<a href="#">BI 2016 OBM ADM</a>	<a href="#">BI OBM CUR</a>	<a href="#">BI16OBMCUR</a>

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## Activity/Scenario

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### My Planning Workspace

Role Name: Preparer  
 Business Unit: STATE **5,6**  
 Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY  
 Activity: AGYCAP  
 Scenario: 1718AGYCAP **Refresh** **7**

[Workspace Search](#)  
[User Preferences](#)  
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[Planning Guidelines](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

Version: All Status: All **Refresh**

My Planning Workspace

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open			<b>8</b> <a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

**Submit**

Select All  Clear All

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## Line Item Verify

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### Line Item Details

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- ▶ [Line Item Properties](#)
- ▶ [Dimensions and Members](#)
- ▼ [Action Menu](#)

Action:   Analysis:   [Hot Keys Help](#)

**User View**

Private  Public View:   View Create

1 to 1 of 1

Line Item Details											<a href="#">Personalize</a>   <a href="#">Find</a>   <input type="text"/>
	Account	Fund Code	Department	Program Code	Service Location	ALI	Project	Project Type	Priorities	Currency	Default
<input checked="" type="checkbox"/>	570	7038	PWC	PWC		C15001	PWCCA01G	CAPITAL EQUIPMENT	001	USD	AMTPE

< >

▶ [Totals](#) 9

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## Submit

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Favorites | Main Menu > Planning and Budgeting > Activity Preparation > My Planning Workspace

### My Planning Workspace

Role Name: Preparer

Business Unit: STATE

Planning Model ID: 1718\_CAP\_AGY 1718 CAPITAL AGY

Activity:

Scenario:

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[Planning Guidelines](#)

To view or change your budget or plan, select Edit or View for the desired Planning Center version. To copy a version, click Copy. To submit the completed budget or plan for approval, select the desired version for each Planning Center and click Submit.

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Version:

Status:

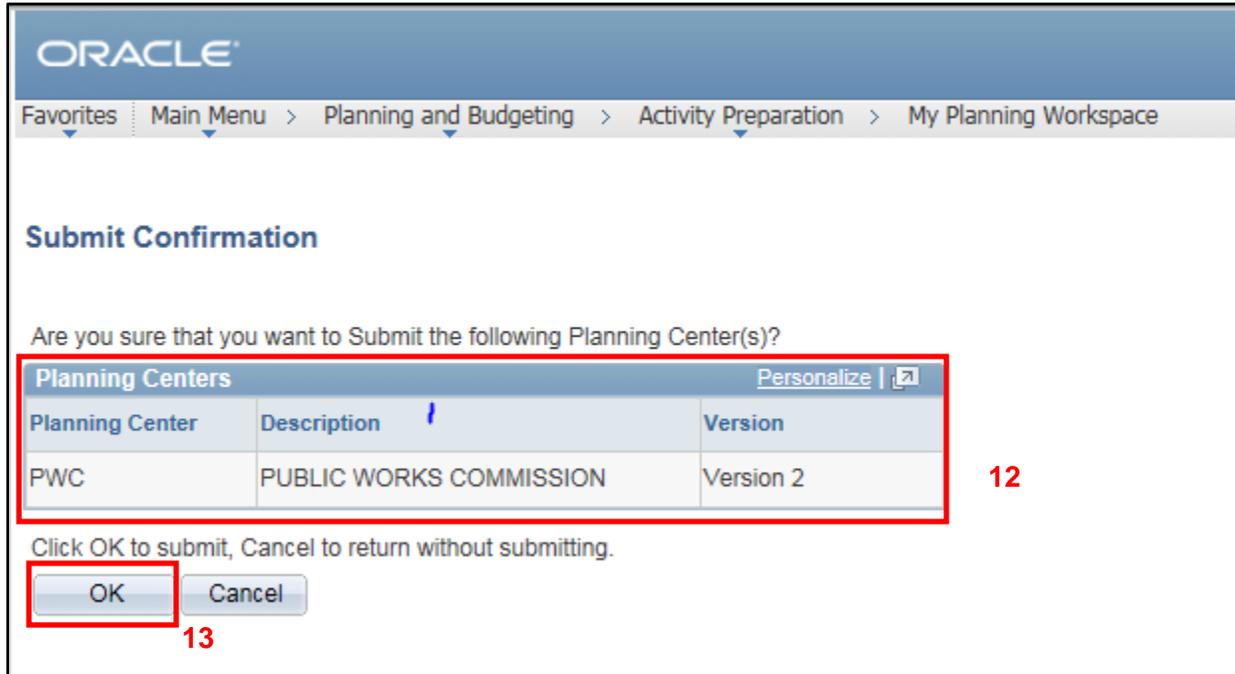
My Planning Workspace
Personalize | Find | View All | | First 1-7 of 7 | Last

Select	Planning Center	Description	Version	Description	Status	Locked Date	Locked By	Edit	View	Copy	Allocations	Notes
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	BWC	BUR OF WORKERS' COMPENSATION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Base	Base Version	Open				<a href="#">View</a>	<a href="#">Copy</a>		
<b>10</b>	PWC	PUBLIC WORKS COMMISSION	Version 1	Version One	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input checked="" type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Open			<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Open				<a href="#">View</a>	<a href="#">Copy</a>	<a href="#">Edit Allocations</a>	

Select All
  Clear All

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## Submit Confirmation



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### Submit Confirmation

Are you sure that you want to Submit the following Planning Center(s)?

Planning Centers		
Planning Center	Description	Version
PWC	PUBLIC WORKS COMMISSION	Version 2

Click OK to submit, Cancel to return without submitting.

OK Cancel

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## Submitted

<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Version 2	Working Version 2	Submitted	14	Edit	<a href="#">View</a>	Copy	<a href="#">View Adjustment</a>	
<input type="checkbox"/>	PWC	PUBLIC WORKS COMMISSION	Master	Master Version	Submitted			<a href="#">View</a>	Copy		

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