

# System Navigation and Features

The System Navigation and Features help provides general information about working with the PB System. The topics covered are listed below:

## 1. Menus

## 2. Field Types

- Lookup List
- Dropdown
- Text
- Rich Text
- Calendar/Date
- Attachment
- Radio
- Checkbox
- Grids

## 3. Standard Buttons

- Submit
- Validate
- Save
- Cancel
- Reload
- Print
- Help
- Spell Check

## 4. Work Flow

## Menus

### Overview

The PB System menus allow users to navigate to the Work Tray, access modules to create new work items, access administration functionality, and access the reports module.



- **Work Tray** – Displays the Work Tray to provide access existing work items.

### Work Tray

- **Operating Budget** – Allows authorized users to access the modules related to the operating budget and create new operating budget work items. Some of the operating budget menu items have submenus.

Operating Budget	Capital Budget	Budget
Base Budget Targets		
Base Budget Adjustment Preparation		
Base Budget		
Base Budget Adjustment		
Technical Adjustment		
Decision Package		
General Assembly Adjustment		
Supplemental Reporting		
Budget Reduction Strategy		

- **Capital Budget** – Allows authorized users to access the modules related to the capital budget and create new capital budget work items. Some of the capital budget menu items have submenus.

Capital Budget	Budget Execution	Six Year
Capital Budget Requests		
Maintenance Reserve		

- **Budget Execution** – Allows authorized users to create new budget execution adjustments.

Budget Execution	Six Year Plans	Narrative
Budget Execution Adjustment		

- **Six Year Plans** – Allows authorized users to access the modules related to the six year plans.

Six Year Plans	Narrative	Reporting	Adm
Six Year Financial Plan			
Six Year Nongeneral Fund Revenue			
Estimate			

- **Narrative** – Allows authorized users to access the narrative modules related to the Six-Year Capital Outlay Plan and the Budget Bill.

Narrative	Reporting	Administration	Toolbox
Budget Bill Narrative			
Six-Year Capital Outlay Plan Narrative			

- **Reporting** – Allows authorized users to access the reports module.

### Reporting

- **Administration** – Allows authorized users to access administration functionality. Some of the administration menu items have submenus.

Administration	Toolbox
Agency Review Step Maintenance	
Base Budget Targets	
Budget Reduction	
Bulk Document Loader	
Chart of Accounts	
External Interface Administration	
Maintain Formatted Styles	
Manage Cost Code List	
Manage Operating Project Code List	
Notification Preferences	
User Security Permissions	

- **Toolbox** – Allows Agency Functional Administrators and the DPB Functional Administrator to transfer or cancel work items.


Toolbox
Transfer Work Item
Cancel Work Item
About

## Field Types

### Overview

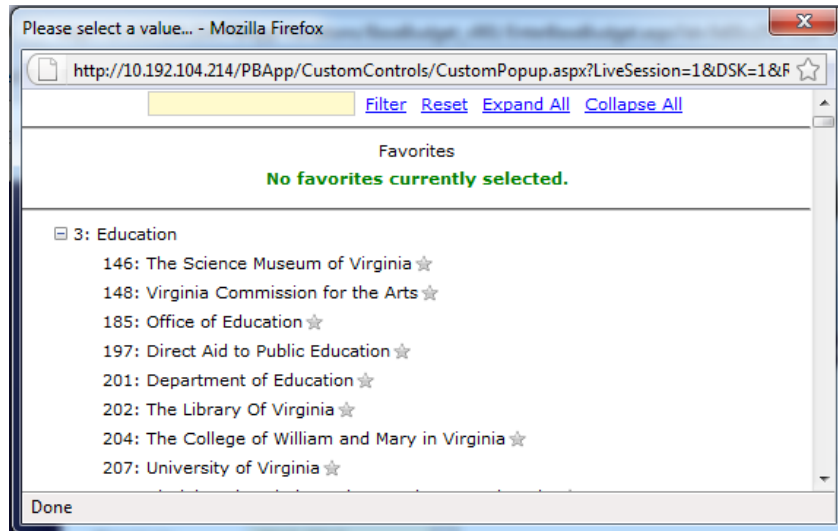
The PB System contains several different types of fields. The sections describe the field types and any special considerations related to them.

### Lookup List

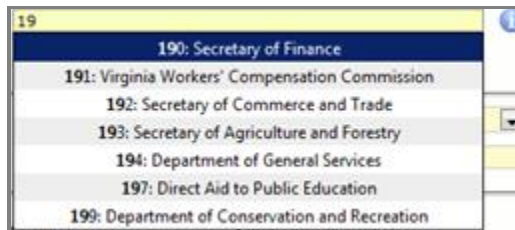
1. Clicking the  symbol displays a window showing the values in the lookup list.

Agency	<input type="text"/>	
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2. Select a value from the list or, for long lists, type the value that you are looking for in the text box and click **Filter**. The values in the list will display only those that match the filter criteria. Additionally, the **Expand All**, **Collapse All**, and **Reset** buttons help to manage the lookup list.



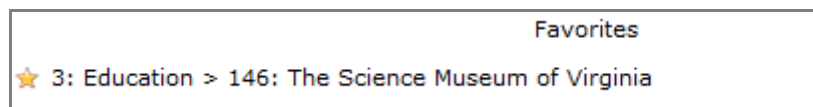
3. Alternatively, typing directly into a lookup list will filter the values automatically. You can either select the value from the filtered list or press the **Enter** key once you have typed the value.



4. If an entry is invalid, it will display in red.

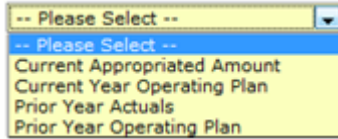


5. To establish favorites in a lookup list, click the ★ next to the desired value. This will make the selected value appear under **Favorites** each time you access that lookup list. You can establish as many favorite values as you want.

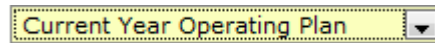


## Dropdown

1. Click anywhere in the dropdown box to display the values.

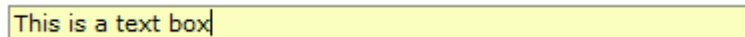


2. Select the value from the list and it will display in the box.



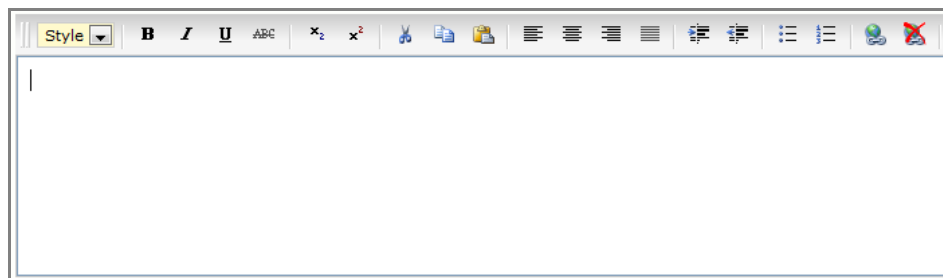
## Text Box

Text boxes allow you to type your own text or paste text copied from another source into the PB System. When pasting copied text, the source formatting will be removed.



## Rich Text Box

A rich text box allows you to type your own text or paste text copied from another source into a PB System text box. The source formatting of the copied text should persist when pasted into the box. The options for rich text boxes are similar to those used in Microsoft Word.



## Date/Calendar

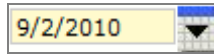
1. Clicking the calendar icon next to the date field displays a calendar for the current month.



2. Use the arrows to move forward or back month by month within the same year. Use the dropdown arrow to change the year.

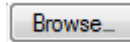


3. Select a date and it will be populated in the field.

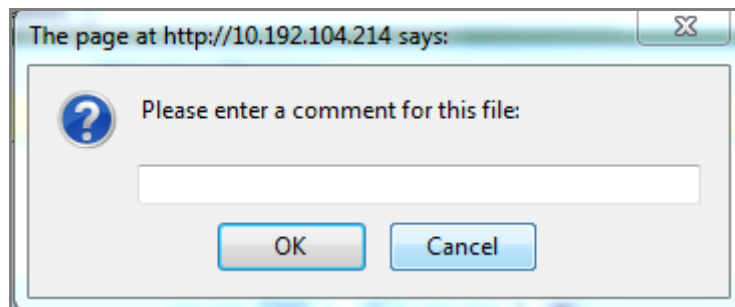
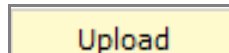


## Attachments

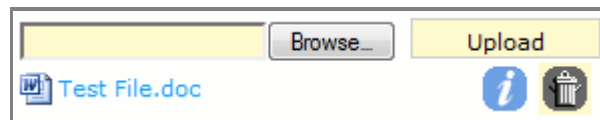
1. Clicking the **Browse** button allows you to select a file you want to upload from your computer. Once selected, the file location will display in the field.





2. Click the **Upload** button and enter a comment for the file.



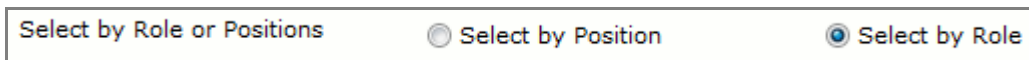
3. The name of the attached file will be displayed below the field and can be accessed by clicking its hyperlink. There is an 8MB limit on file attachments.



4. Clicking  shows who uploaded the file, the date, the file size, and the comment entered when the file was uploaded.
5. Clicking  allows an authorized user to delete the file.

## Radio Buttons

A radio button is a field that allows you to choose only one of a predefined set of options. In the example below, by clicking "Select by Position," will automatically unselect "Select by Role"



## Checkbox

Checkboxes allow you to make multiple selections from a predefined set of options.



A rectangular box containing three rows. Each row has a text label on the left and a small square checkbox on the right. The labels are 'Form FF Applicable', 'Form OM Applicable', and 'Form OYF Applicable'.

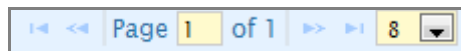
Form FF Applicable	<input type="checkbox"/>
Form OM Applicable	<input type="checkbox"/>
Form OYF Applicable	<input type="checkbox"/>

## Grids

A grid contains rows and columns of cells similar to a Microsoft Excel spreadsheet. Each cell within a grid can contain a different type of field (text, numeric, checkbox, lookup list, etc.). While each grid may have different characteristics, there are some common elements between them.

### Display

At the bottom of a grid there are two fields. The arrows allow you to choose which page of data to display. The double arrows (inside) move forward or back a single page of data at a time, while the single arrows with a line (outside) let you jump to the first or last page of data. Typing the page number into the page box will jump to that page. The dropdown box lets you select the number of rows to display per page.

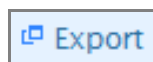


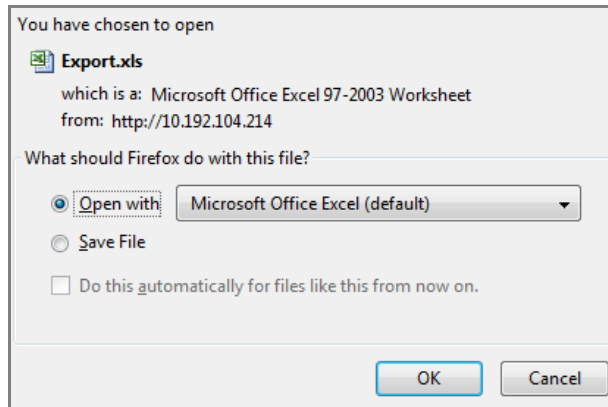
A horizontal bar with navigation controls. From left to right: a double left arrow, a single left arrow, the text 'Page 1 of 1', a single right arrow, a double right arrow, the number '8', and a dropdown arrow.

### Import/Export

Importing grid data is a quick and easy way to get a large amount of data from a Microsoft Excel spreadsheet into the PB System. Exporting data and then importing it again is a useful way to manipulate PB System data as a group using Excel's capabilities. The main consideration when importing data from Excel is that the column headings must match the PB System grid exactly.

1. Clicking the **Export** button displays a window that lets you select whether to save a file or open it. Either save the file to your computer for later use or open it in Excel (default) and then save it to your computer. You need to save the file to be able to upload it during the import.

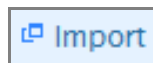




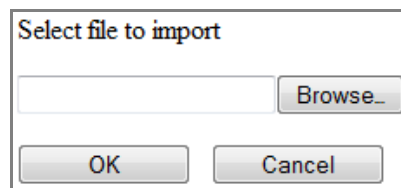
- When you open the file in Excel, the first value in each column will correspond to the column in the PB System grid and you will be able to use all of Excel's functionality. Columns can be added for analytical purposes after exporting, but the original columns in the grid must be preserved if you are importing. Formulas can be added, but only the values will be available in the PB System after the file is uploaded. Once you are finished with the data and want to upload it to the PB System grid, save the file.

	A	B	C	D	E	F	G
1	Program	Fund	Subobject	FY 2011 D	FY 2012 D	One-time Funding?	
2						FALSE	
3						FALSE	
4						FALSE	
5						FALSE	
6						FALSE	
7						FALSE	
8						FALSE	
9						FALSE	
10						FALSE	
11						FALSE	

- Click the **Import** button. The **Select file to import** window will appear where you can select your import file.

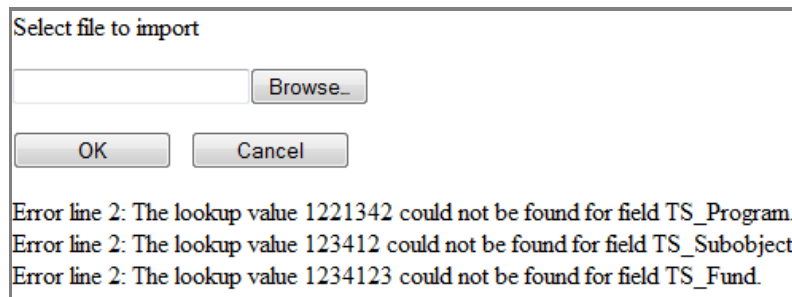


- Click the **Browse** button and select the file that you want to import from your computer, and then click the **OK** button. The import process will begin.



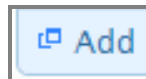


5. The data from the imported file will appear in the destination grid, and any errors will be displayed below the **Select file to import** window. If there are errors, correct them and then import the file again.




### Adding Rows

To add a row to the grid, click the **Add** button. The row will be added to the bottom of the grid.



### Copying Rows

To copy a row in the grid, click the  button in the row that you want to copy.

### Deleting Rows

To delete a row in the grid, click the  button in the row that want like to delete.

### Refreshing the Grid

The **Refresh** button will update any total rows at the bottom of the grid based upon the data entered.



## Standard Buttons

### Overview

The PB System contains several buttons that are common between work items. The following sections list the common buttons and any special considerations related to those buttons.

### Submit

The **Submit** button appears on all work items and allows you to submit the document forward or back in the workflow. Also, you can submit a document to the same step in the workflow to make it available to other users with the same credentials. Submission actions are specific to a

work item and the current step in the workflow. For information on specific actions, consult the help information for each module.



Submit

## Validate

The **Validate** button performs a validation on the current work item based upon the system rules and that work item's business rules. All system rules must be satisfied you submit the work item to the next step in the workflow. Once the validate button is clicked, you will be taken to the Validation tab, which displays the business rules and their status:



Validate

- ✓ – The system rule has been satisfied.
- ⚠ – A warning to the user about a DPB business rule.
- ✗ – A system rule has not be satisfied.

## Save

The **Save** button saves the current work item but does not submit it to the next step in the work flow. If you save a work item and then close it, you will be able to access the saved version in the Claimed Work Items tab in the Work Tray.



Save

## Cancel

The **Cancel** button cancels a claim on a work item and reverts it to the last time it was submitted.



Cancel

## Reload

The **Reload** button refreshes the current work item to the state it was in when it was claimed from the available items in the Work Tray.



Reload

## Print

The **Print** button allows you to print an Adobe PDF version of the current work item, including all tabs of data and any data you entered since the work item was claimed. Printing also saves the work item.



Print

## Help

The **Help** button opens context-sensitive help based for the current work item.



Help

## Spell Check

The spell check button opens a screen that offers replacement options for misspelled words. To replace a misspelled word, click on the word you want to use to replace the misspelled word. If you cannot find the correct word, click **More Results** to get more replacement options. You can choose to ignore any of the spell check corrections by clicking **Ignore** or all corrections by clicking **Ignore All**.



Spell Check									
print <b>scree</b> n 9/7 - 2									
screen	scree	siren	screw	scream	scriven	scrape	More Results	Ignore	Ignore all

## Workflow

### Overview

Some modules in the PB System create work items that are sent through a workflow process. In general, the workflow goes from the Agency Analyst to the Agency Reviewers and then to DPB. Some work items originate in DPB and are never seen by the agency. There are also modules in the system that do not have a related work flow. Those modules act more like forms that can be accessed at all times. Modules that create work items that are sent through a workflow process are listed below, as well as those that do not have workflow.

### Modules with Workflow

- Base Budget
- Base Budget Adjustments

- Technical Adjustments
- Decision Packages
- Supplemental Reporting
- Budget Reduction Strategy
- Capital Budget Request
- Maintenance Reserve Request
- Budget Execution Adjustment
- Six-Year Nongeneral Fund Revenue Estimate

**Modules without Workflow**

- Capital Budget Request Prioritization
- Maintenance Reserve Prioritization
- Decision Package Prioritization
- Administration