

CAPITAL BUDGET REQUEST

POLICIES AND PROCEDURES

PBCS USER MANUAL

Capital Outlay includes the broad category of expenditures related to the acquisition, construction, development, extension, enlargement, or improvement of land, waters, property, highways, roads, buildings, structures, equipment, or facilities. Capital outlay includes renovation and rehabilitation to enhance and improve existing facilities and structures, and also includes extraordinary non-routine actions for major corrective repairs or to extend expected service lives. Capital outlay projects are primarily facility related and generally represent non-recurring expenditures outside the ability of agencies and departments to fund within their operating budgets. The term capital outlay also applies to various state programs that provide funding, loans, or grants for projects to local government entities, including local school systems and counties. Although primarily funded by general obligation bonds, capital outlay projects may also be funded from other various funding sources, including "cash" (i.e., general state revenues), consistent with state statutes. Agencies do not need to identify the source of state funds for requested capital projects, as this will be determined by OPB as funding recommendations are developed.

Many activities related to keeping facilities operational and in good order involve necessary expenses that are not generally considered capital outlay. For example, preventive maintenance activities and utilities are generally considered part of Regular Operating Expenses. For additional guidance on how to distinguish between operating and capital requests, please refer to the Amended FY 2018 & FY 2019 Budget Instructions.

Introduction to PBCS

Capital budget requests will be submitted electronically using the on-line Planning and Budget Cloud Services application. PBCS will be the official record of capital outlay authorizations for all state agencies for FY 2018 and beyond.

REQUESTING PBCS ACCESS

Those needing access to PBCS should complete a user access request form on OPB's website. OPB must also have a "Request for Access" on file for each individual agency user.

To add a user, agencies should:

- 1. Go to the OPB website at opb.georgia.gov.
- 2. Under the Apps and Resources menu, click on OPB Applications.
- 3. Under the header **OPB Applications**, there is a link for the user access request form. Click the link to download the form.
- 4. Print and complete the form for new users and user updates.
- 5. Fax form(s) to 404-656-7916.
- 6. Users will receive an email from Oracle when their login information has been established.

SYSTEM OVERVIEW

Logging In

- 1. Go to **opb.georgia.gov.**
- 2. Click on **PBCS** link under Applications on the right side of the screen.

- 3. On the page titled **Sign In to Oracle Cloud**, enter **a419537** in the box under **Enter your Identity Domain**.
- 4. Click on **Go** below the entry box. You may click on the box next to **Remember my choice** to automatically fill in the Identity Domain for future log-ins.
- 5. Enter your "User ID" and password. Users should have received a User ID from Oracle and should have already updated the temporary password initially included from Oracle.
- 6. Click on **Sign In** or press **ENTER** on keyboard.

PBCS Navigation to Capital Budget

After log-in, the PBCS homepage appears. This screen provides access to budget tasks and reports.

To enter Capital Requests in the system:

1. Click on the green Tasks button.



2. The main task list screen will appear. Click the drop down triangle to the right of Tasks: All Task Lists.

Tasks: All Task Lists 🗸

3. Click on Capital Budget – 1) Agency Request Entry on the menu that appears under All Task Lists.

Tasks: A	ll Task Lists	-	
175	175	Capital Budget - 1) Agency Request Entry	*

4. To enter a new project, select Task: **1. Add Project**.



5. On the screen that appears, a scenario, single agency, and fiscal year will already be selected and appear in the top left of the window. To select a different agency or fiscal year for the capital request, click on the pencil icon on the far right hand side of the screen to select the scenario, agency, and fiscal year in which you wish to work.



6. Click the drop down arrow next to the field for Scenario, Agency, and Years and select the desired selections from the drop down list. Click Apply.

		Apply Cancel
Agency	402-Agriculture, Department of	▼ 4
Scenario	Budget v	
Years	FY19 •	P

7. It is now time to select a project type. Based on the type of project you wish to enter, select Add a Specific Project or Add a MultiYear Ongoing Project.

Select a Project Type and Add a Project Add a Specific Project Add a MultiYear Ongoing Project

Capital projects in this system are considered to be one of two types: **Specific Project** or **MultiYear Ongoing Projects**. To help determine the appropriate project type, use the following criteria:

Specific Project:

- Has defined scope: type, size, quantity, and location.
- Has defined start and end; may span several years to complete.
- May have discrete phases (design, construction, etc.).
- Has specific recommendation and appropriation for that specific project.
- Funding may span several budget cycles to fully fund the project.

Examples of Specific Projects:

- Design, construction, and equipment for a new building.
- Re-roofing a specific building.
- Installation of emergency generators at a specific location.

MultiYear Ongoing Project:

- Projects that have continuous activities for which there is no expected clear end date.
- Often related to major repairs or rehabilitation of facilities.
- Funding is generally annual allocation; often sub-allocated or managed by the agency's central office to locations and for similar activities.
- Projects should be of similar service lives and type of activity. Projects that are submitted with various activities with a wide mix of expected service lives will be "unsubmitted" by OPB for agency revision and re-submittal.

Examples of MOP Projects:

- Obsolete Equipment Replacement (5-year service life)
- Miscellaneous Facility Repairs (5-year service life)
- Building HVAC System Replacement (20-year service life)

HOW TO ADD A SPECIFIC PROJECT

1. To add a Specific Project, select the Add a Specific Project tab then click List of Specific Projects.



2. Click the orange Actions button and select Add a Specific Project from the drop down menu.



3. A dialog box will appear stating that your project was added successfully. Click ok.



4. On the next screen you will enter background project information, starting with the Project Title. The information entered in this section sets the basis for what an agency needs to enter on subsequent screens. All fields on this screen must be completed before moving to the next input screen.

	Project Number	Project Title	Project Type	Agency P
List of Specific Projects				
SProject_1	40220190000101		Specific Project	

Project Title

Include a short description of the project. Examples of appropriate titles are:

• Smith Library Addition

- Replace Boiler in Anderson Hall
- Statewide ADA Improvements

Agency Priority

The priority number entered must be unique whole numbers, preferably sequential with no duplications.

Institution Name

Enter the campus name for the proposed project. If this field does not apply to your project request, enter NA.

Location of Project (City)

For Specific Projects, enter the city location for the proposed project. If submitting a project for several cities, enter "Various" into this field.

Location of Project (County)

Use the drop-down list to select the appropriate county for the location of the proposed project. If the project is located in multiple counties, select "Various" from the list. If the project is located statewide, select "Statewide" from the list.

GSFIC Project Number

If a GSFIC project number has been assigned for this project, it should be shown here. If not, enter NA.

Project Category

Choose the most appropriate project category from drop-down box that best fits the overall nature and scope of the project. Choices for project category are:

- Equipment
- Major Repairs
- Improvements & Renovations
- Information & Communication Systems
- New Construction
- Property Acquisition
- Vehicles
- Water Resources
- Other

Project Contact Name

Enter the appropriate agency contact person.

Contact Phone

Enter appropriate contact information.

Contact Email Address

Enter the contact person's email address.

5. Once all information has been entered, click **Save** at the top of the screen.

1. Add	Add Project ¹ Seve Refer												
Period Input	Agency 402-Agriculture, Dep	Scenario artment of Budget											
	ecific Project Type and		ng Project										
· · ·		Project Number		ect Title	Project Type	Agency Priority	Institution Name	Location of Project (City)	Location of Project (County)	GSFIC Project Number	Project Category	Project Contact Nam	
List of S	Specific Projects												

6. Click ok.



7. The next step is to enter project details (justification and funding). You will do so by first selecting the project in which you wish to enter detail information.

1. Add	Project 0								s S	<u>S</u> ave <u>R</u> efresh <u>A</u> ctions ▼		
Period Input	Agency 402-Agriculture, Departme	Scenario nt of Budget										
Select	🝸 Select a Project Type and Add a Project											
Add a Spe	ecific Project Add a Multi	Year Ongoi	ng Project									
	Projec	t Number	Project Title	Project Type	Agency Priority	Institution Name	Location of Project (City)	Location of Project (County)	GSFIC Project Number	Project Category	Project Contact Name	
List of	acific Projects											
SProject_1	1 40221)190000101	New State Building	Specific Project	1	NA	Atlanta	Fulton County	NA	New Construc	Jane Doe	

8. Click the orange Actions button and select **Enter Specific Project Details** from the drop down menu.



9. The next screen provides two tabs for entering project detail information: Enter Project Justification and Enter Project Funding.

1. Add Project 0

Agency 402-Ag	priculture, Department of	Project SProject_1	Scenario Budget					
v Sp	ecific Project Details							
Years FY19								
	Proj	ect Title			Project Number	Agency Priority	Location of Project (City)	Location of Project (Cou
Input	New State Building				40220190000101	1	Atlanta	Fulton County
	ecific Project Details Project Justification		oject Fundin	g				
-		_			FY19			
	-ENTER JUSTIFICATIO	NS			1115			
			1	New St	ate Building			
Projec	a mue							

10. Click on Enter Project Justification and begin entering detail information. The information requested in this section is used to document the project scope, need, and future budget impact.

1. A	dd Project 0					
01_Pro	oject Information By Pr	oject Type >	02_Proje	ct Fi	unding for Specific Proje	ct
Agency 402-44	griculture, Department of	Project SProject 1	Scenario Budget			
	ecific Project Details		Duugot			
Years FY19						
	Proj	ect Title			Project Number	Agency Priority
Input	New State Building				40220190000101	1
💌 Sp	ecific Project Details					
Enter	Project Justification	s Enter Proj	ject Fundi	ing		
					FY19	
	ENTER JUSTIFICATIO	DNS				
Proje	ct Title			Ne	w State Building	
Proje	ct Type			Spe	ecific Project	
Proje	ct Description & Scope					
	e State Owned ?					
If No.	describe Acquisition Pla	an				
	e Activity Use					
If Yes	, describe Private Use					
🗉 Pric	ority Consideration and	Justification fo	or funding			
Urge	ency					
Imp	ortance					
-						

Project Description and Scope

For a Specific Project, the description should include building size, type and number of rooms, etc., to fully explain what the agency intends to build or buy. If the project involves multiple buildings, mention and provide information on each facility. Supplemental information should be provided as an attachment to fully describe the project.

For those proposed facility projects involving new construction and subsequent proposed renovation of vacated space upon occupation of the newly constructed facility, **the renovation activity** <u>must be</u> <u>submitted as a separate project</u> with full supporting information and details, and not be combined with the new construction project. Combined projects may result in the project being "unsubmitted" back to the agency for re-work, or adjusted directly by OPB. Please contact OPB if any clarification is needed for a given project.

For a Multiyear Ongoing Project, the description should explain the proposed number of facilities and types of activities included in the FY 2019 funding request. Supplemental information must be provided to fully support and explain the funding request.

Property Ownership

For **Specific Project - New Construction** projects, indicate if the planned construction site is currently owned by the state. If not currently owned by the state, describe the plan to have the property acquired, transferred, or donated for use on this project in the text box.

Private Activity Use

To assist with appropriate funding recommendations, agencies must identify if any portion of the requested project is intended to be allocated for dedicated *private activity use*. Private activity use is defined as the use (direct or indirect) of the capital project (facility, equipment, etc.) by a person, firm, corporation, or entity (including the federal government and its agencies) that is not a state or local government unit. Private activity use exists if it is intended that oral or written agreements or contracts will be executed for leases, management contracts, research agreements, or other arrangements that convey special legal entitlements for beneficial use of the capital project. Private activity use does not include use of the project by the general public where the user has no special legal entitlement to use. Also, private activity use does not include various contractual services such as janitorial, maintenance, repair, or accounting services, or incidental areas such as vending machines in a snack area.

Priority Considerations and Justification for Funding

This justification information enables agencies to better highlight the project's priority considerations and provide concise justification on why the project should be funded. Information should be provided related to the projects:

- Urgency
- Importance
- Expected Impacts / Benefits

• Leveraging of State Funds

Operating Impact

The text box on this screen to provide a brief summary of the project operating impact related net operating cost, staffing levels, and other operating budget impacts. If there is no operating impact, enter **No Significant Impact (NSI)** in the field.

Attachments

The final entry of the project justification is for attachments. Right click in the box labeled "attachments" and select **Attachments** from the menu options. Upload supporting documentation for the proposed project. Type "*Attachments Included*" in the text box. This will help OPB identify your attachments.

Agency 402-Agricultu	ure, Department of	Project SProject_1	Scenario Budget		۵	1
Specific	c Project Details				Edit	·
Years FY19					Adjust	•
Nava		ect Title		ABC	Comments	y Priority
Input	State Building			扫	Supporting Detail	
	c Project Details	Enter Pro	viect Eundin	©]	Change History	
Enter Proje	ectousuncations		ject Fundin	Ø	Attachments	
Is Site State	e Owned ?			0	Lock/Unlock Cells	
lf No, descr	ibe Acquisition Pla	in		-	Analyze	
Private Acti	vity Use					L
lf Yes, desc	ribe Private Use			4)	New Ad Hoc Grid	
□ Priority C	onsideration and	Justification f	or funding		Data Validation Messages	
Urgency				i.	Predictive Planning	
Importanc	e			+ - × ÷	Business Rules	
Impact/Be	enefits				Smart Push Details	
Leveragin	g State Funds			IJ	Grid Validation Messages	
Operating I	mpact				▼	
Attachment	e					-

At a minimum, agencies must submit to OPB the detailed supporting documentation of <u>analyses</u>, <u>assumptions</u>, and <u>calculations</u> made to develop and compile the **Total Construction Cost** and the **Loose Equipment & Furniture** cost. *Unsupported narrative statements that only state that costs are "based* on" comparable previous projects, historical information, or published sources are not sufficient in themselves. Separate cost estimates for each facility must be prepared and submitted if the project includes multiple buildings. Failure to provide adequate supporting cost detail at the time of request submittal may hinder OPB review and recommendation development. 11. Now click the **Enter Project Funding** tab and begin entering funding information. Enter funding amounts for the current legislative budget session and subsequent years.

The cost summary table for Specific Projects is a detailed breakout of all costs associated with a project. Be sure to include any non-state funds. Once all funding amounts have been entered, click **Save** at the top of the screen to see final calculation.

												-
1. Add Projec	t 0								n No	<u>S</u> ave	<u>R</u> efresh <u>A</u>	ctior
01_Project Information	By Project Type > 02_Project Funding for	Specific Proje	ect									
Agency	Project Scenario											
402-Agriculture, Departn												
Specific Project E	Details											
Years FY19												
	Project Title Proje	ct Number	Agency Pri	ority Loc	ation of Project (C	ty) Location of Project (Cour	1					_
Input New State Build		220190000101	1	Atla	anta	Fulton County						
V Specific Project D	Details											_
Enter Project Justinica	tions Enter Project Funding											
Total Project Costs		Prior Years	FY 2018 FY 20									
Total_Project_Costs	Planning / Programming		50	00	5000							
	Property Acquisition					_						
	Design		100		10000	-						
	Construction			100000	100000							
	Loose Equipment		450	0 400000	445000	-						
Total Non-State Funds	Total Project Costs - Specific Projects Private Contributions for C and E		1500	00 100000	115000							
- star - starte - unus	Agency_Funds											
	Local_Funds			50000	5000							
	Local_i unus			30000	50000							
	Federal											
	Federal			_		-						
	Foundation					-						
		5		50000	50000	- - -						

12. You have now completed the entry of one Specific Project. To return to the project type selection screen so that you can enter additional Specific Projects or begin entering MultiYear Ongoing Projects, click <u>01_Project Information By Project Type</u>.

. A	dd Project 🖸)								
1 Pro	iect Information By Pr	oiect Type >	02 Project Fi	Inding for Specific Proje	ct					
01_Project Information By Project Type > 02_Project Funding for Specific Project Agency Project Scenario 402-Agriculture, Department of SProject 1 Budget										
V Sp	ecific Project Details			1						
/ears FY19										
	Pro	ject Title		Project Number	Agency Priority	Location of Project (City)	Location of Project (Co			
Input	New State Building			40220190000101	1	Atlanta	Fulton County			

13. After clicking the link above, you should see the following screen.

I. Add Project 0								6	ave <u>R</u> efresh <u>A</u> c	tions 👻 📄
Head Agency Scenario Years apput 402-Agriculture, Department of Budget FV19 x Select a Project Add a Add a Project										
	Project Number	Project Title	Project Type	Agency Priority	Institution Name	Location of Project (City)	Location of Project (County)	GSFIC Project Number	Project Category	Project Conta
List of Specific Projects										
SProject_1	40220190000101	New State Building	Specific Project	1	NA	Atlanta	Fulton County	NA	New Construction - N	Jane Doe

14. If you have additional Specific Projects, please repeat steps 1-12 above.

HOW TO ADD A MULTIYEAR ONGOING PROJECT

1. To add a MultiYear Ongoing Project, select the Add a MultiYear Ongoing Project tab then click List of MultiYear Ongoing Projects.



2. Click the orange Actions button and select Add a MultiYear Ongoing Project from the drop down menu.



3. A dialog box will appear stating that your project was added successfully. Click ok.



4. On the next screen you will enter background project information, starting with the Project Title. The information entered in this section sets the basis for what an agency needs to enter on subsequent screens. All fields on this screen must be completed before moving to the next input screen.

	Project Number	Project Title	Project Type
List of MultiYear Ongoing Projects			
MYOProject_1	40220190000102		MultiYear Ongoing Project

- 5. For detailed instructions on entering background information, please follow **steps 4 through 6** under **How to Add a Specific Project**.
- 6. The next step is to enter project details (justification and funding). You will do so by first selecting the project in which you wish to enter detail information.

Add a Specific Project Add a MultiYea	r Ongoing Project						
	Project Number	Project Title	Project Type	Agency Priority	Institution Name	Location of Project (City)	Loca
Lis of MultiYear Ongoing Projects							
-		Statewide MRR		1	NA	Atlanta	
MYOProject_1	40220190000102		MultiYear Ongoing Project				Fulto

7. Click the orange Actions button and select **Enter MY Ongoing Project Details** from the drop down menu.



8. The next screen provides two tabs for entering project detail information: Enter Project Justification and Enter Project Funding.



9. For detailed instructions on entering project justifications, please follow **step 10** under **How to Add a Specific Project**.

10. Once you have completed all entries under the **Enter Justifications** tab, it is now time to enter funding amounts for the proposed project. Click the **MY Ongoing Project Funding** tab.

1. Ao	dd Projec	t O					
01_Pro	ject Information	By Pr	oject Type > 0	3_Projec	ct Fu	nding for Multi-Year Pro	ject
Agency 402-Ag	riculture, Departm	nent of	Project MYOProject_1	Scenario Budget			
▼ Mu	lti-Year Ongoir	ng Pro	ject Details	_			
Years FY19							
			ject Title			Project Number	Agency Priority
Input	Statewide MRF	2				40220190000102	1
Mu	lti-Year Ongoir	ng Pro	ject Deta s				
Enter	Justifications	MY C	Ongoing Project	t Funding	g		
						FY19	
	ENTER JUSTIF	ICATIO	ONS				
Projec	t Title				Sta	tewide MRR	
Projec	t Type				Mult	Year Ongoing Project	

11. After clicking the tab, you should see the screen below.

1_Project Information		_ ,		,							
Agency 402-Agriculture, Departr	Project nent of MYOProject	Scenario 1 Budget									
Multi-Year Ongoi	ng Project Detail	S									
Years FY19											
	Project Title		Project Number	er	Agency Pri	iority	Location o	f Project (Cit	y) Locatio	n of Projec	ct (Co
Statewide MR	R		4022019000	00102			Atlanta		Fulton (
▼ Multi-Year Ongoi			4022010000		tivity Title	No. O		No			
▼ Multi-Year Ongoi				Ac	tivity Title	No_O			_0C		
▼ Multi-Year Ongoi				Ac	tivity Title Y 2019			No. 18 FY 2019	_0C		 Tota
Multi-Year Ongoi	MY Ongoing Proj	ect Funding	-	Ac	•				_0C		 Tota
Multi-Year Ongoi Enter Justifications	MY Ongoing Proj	ect Funding	DSTS	Ac	•				_0C		 Tota
Multi-Year Ongoi Enter Justifications	MY Ongoing Proj	ect Funding R PROJECT Co	DSTS	Ac	•				_0C		Tota
Multi-Year Ongoi Enter Justifications	MY Ongoing Proj DD ACTIVITY FOR Private Contr	ect Funding R PROJECT Co	DSTS	Ac	•				_0C		Tota
Multi-Year Ongoi Enter Justifications	MY Ongoing Proj DD ACTIVITY FOR Private Contr Agency_Fun	ect Funding R PROJECT Co ribution for C an d	DSTS	Ac	•				_0C		Tota
Multi-Year Ongoi Enter Justifications	MY Ongoing Proj DD ACTIVITY FOF Private Contr Agency_Fun Local_Fund	ect Funding R PROJECT Co ribution for C an d	DSTS	Ac	•				_0C		Tota
Multi-Year Ongoi Enter Justifications	MY Ongoing Proj DD ACTIVITY FOF Private Contr Agency_Fun Local_Fund Federal_Fun	ect Funding R PROJECT Co ribution for C an d	DSTS	Ac	•				_0C		Tota

12. For MultiYear Ongoing Projects, you must add the project activity or activities to the cost summary table. To do so, right click in the box that reads "RIGHT CLICK AND ACTIVITY FOR PROJECT

COSTS". (You can also click on the box and use the orange Actions button at the top of the screen to add an activity.)

1_Project Informat	ion By Project Type > 03	_Project Funding for Multi-`	Year Pro	ject						
Agency	Project S artment of MYOProject 1	Scenario								
	joing Project Details	Judget								
Years FY19										
	Project Title	Project Num	ber	Agency P		Location of F	Project (Cit	y) Locatio	n of Projec	ct (Co
Statewide N	IRR	40220190	000102	1		Atlanta		Fulton (County	
▼ Multi-Year Ong	oing Project Details MY Ongoing Project I		000102							
▼ Multi-Year Ong			A	ctivity Title	No_00			_0C		
▼ Multi-Year Ong			A	ctivity Title FY 2019		rs FY 2018		_0C		
Multi-Year Ong Enter Justifications		Funding	A					_0C		
Multi-Year Ong Enter Justifications	MY Ongoing Project I ADD ACTIVITY FOR PR	Funding	A					_0C		
Multi-Year Ong Enter Justifications	MY Ongoing Project I ADD ACTIVITY FOR PR	Funding	A					_0C		Tota
Multi-Year Ong	ADD ACTIVITY FOR PR Private Contributi	Funding	A					_0C		
Multi-Year Ong Enter Justifications	ADD ACTIVITY FOR PR Private Contributi Agency_Fund	Funding	A					_0C		
Multi-Year Ong Enter Justifications	ADD ACTIVITY FOR PR Private Contributi Agency_Fund Local_Fund	Funding	A					_0C		
Multi-Year Ong Enter Justifications RIGHT CLICK AND	ADD ACTIVITY FOR PR Private Contributi Agency_Fund Local_Fund Federal_Fund	Funding	A					_0C		

13. Once you right click on the box, you will see the following drop down menu.

Agency				Project	Scenario	-
	-			MYOProject_1 ject Details	Budget	
Years FY19		5				
	_			ject Title		Project N
Input	State	wide MRF	ર			402201
V Mi	ulti-Yea	ar Ongoir	ng Pro	ject Details		
					E.m. dim a	
_	Justific	ations N	IY On	going Project	Funding	
_	Justific	ations	IY On	going Project		
_	Justific	ations N	IY On	going Project		
Enter	IT CLIC	K AND A	pe			
Enter	IT CLIC					
Enter	IT CLIC	K AND A	pe			
Enter	IT CLIC	K AND A		Add Activit		

14. Select Add Activity.

Agency 402-Ag	griculture, Depar		Project MYOProject_1	Scenario Budget	
MI	ulti-Year Ongo	oing Pro	ject Details		
Years FY19					
			ect Title		Project Nu
Input	Statewide M	RR			402201
- M.	ulti-Year Ongo	oing Pro	ject Details		
INIC	and rour onge				
	Justifications	MY On	joing Project	Funding	
		MY On	going Project	Funding	
Enter	Justifications _		joing Project	Funding	2070-
		MY Ong	going Project	Funding	
Enter		APE			
Enter	Justifications	Apero	Add Activity		
Enter	Justifications	APE			

15. The following screen will appear. From here you can enter the (1) budget amount for the new activity and (2) a description of the activity.

COBS_Add New A	Activity		Launch Cancel	I
* Please Enter Budget Amount (\$\$) for the New Activity:	_	* Budget Year	°ç.	
* Please Enter Activity Title for the New Activity		-		

16. There is also a field for Budget Year. Please enter the current budget development year (ex. FY 19)

COBS_Add New A	Activity		ĥô	<u>L</u> aunch	<u>C</u> ancel
* Please Enter Budget Amount (\$\$) for the New Activity:	10000	* Budget Year	FY19	P	
* Please Enter Activity Title for the New Activity	Roof Repair				

17. Once you have entered the activity information and budget year, click **Launch**.

COBS_Add New	Activity	₿ No	Launch <u>C</u> an	icel
* Please Enter Budget Amount (\$\$) for the New Activity:	10000 * Budget Year FY	Y19	P	
* Please Enter Activity Title for the New Activity	Roof Repair			

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- 18. A dialog box will appear stating that you have successfully added an activity. Click Ok.
- 19. You should now see the screen below, listing the project activity and amount.

1. Add Project

Total State Funds

01_Project Information By Project Type > 03_Project Funding for Multi-Year Project

Agency 402-Ag	riculture, Department	Project Scenario t of MYOProject_1 Budget									
	lti-Year Ongoing I										
Years FY19											
	F	Project Title	Project Number	ſ	Agency Pri	ority	Location of P	roject (City) Locatio	n of Projec	t (Coui
Input	Statewide MRR		4022019000	0102	1		Atlanta		Fulton (County	
πpuι			4022019000	0102					Fulton	Jounty	
Enter	Justifications MY	Ongoing Project Funding		A	ctivity Title	No_O		No_			
					FY 2019	Prior Ye	ars FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGH	F CLICK AND ADD	ACTIVITY FOR PROJECT C	OSTS								
Total_	Project_Costs	Activity_1	F	Roof F	Repair			10000			10000
		Total Project Costs - MY O	ngoing Activities					10000			10000
Total I	Non-State Funds	Private Contribution for C ar	nd E								
		Agency_Fund									
		Local_Fund									

20. Repeat steps 14 through 18 to enter additional activities.

Total State Funds - MY Ongoing Projects

Total Non State Funds - MYOngoing Projects

Federal_Fund Foundations Others

21. To update / change the title of an activity, right click on the Activity.

Enter Justifications MY	Ongoing Project Funding							
		Activity Title	No_OC		No	00		
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Tota
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS							
Total_Project_Costs	Activity_1	Roof Repair			10000			1000
	Total Project Costs - MY Ongoing Activities				10000			1000
Total Non-State Funds	Private Contribution for C and E							
	Agency_Fund							
	Local_Fund							
	Federal_Fund							
	Foundations							
	Others							
	Total Non State Funds - MYOngoing Projects							
Total State Funds	Total State Funds - MY Ongoing Projects				10000			1000

10000

10000

22. The following drop down menu will appear. Select Update Activity.

Agency 402-Ag	priculture, Depa	Project rtment of MYOProject_1	Scenario Budget	
<u>▼</u> Mu	Ilti-Year Onge	oing Project Details		
Years FY19				
		Project Title		Project Nu
Input	Statewide M	RR		4022019
<u>▼</u> Mu	ılti-Year Ongo	oing Project Details		
Enter	Justifications	MY Ongoing Project	Funding	
	T CLICK AND	APE ACTIVITY FOR F		<u></u>

23. The following screen will appear.

COBS_Update Act	ivity	Launch Cancel
* Please Enter Activity Title for the New Activity		* Select Activity "Activity_1"
* Budget Year	P	

- 24. Enter the new Activity Title. For this example, I will change the activity from "Roof Repair" to "Boiler Repair". Enter Budget Year (FY19) and click Launch.
- 25. Click ok.
- 26. The new title will appear on the screen.

Agency 402-Agriculture, Department (Project of MYOProject_1	Scenario Budget									
Review MY Ongoing Projects Details											
Review MY Ongoing Project Info Review Project Justifications Review MY Ongoing Project Fund Enter MY Ongoing Project Debt Funding Plan											
				Activity Title	No_C)C		No_	00		
Fund				FY 2019	Prior Ye	ears	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR P	ROJECT COSTS									
Total_Project_Costs	Activity_1			Boiler Repair				10,000			10,000

27. To enter funding for future years, click the box under the year and enter the funding amount. You can also enter non-state funding by entering the amount next to the corresponding non-state fund.

	Project Title	Project Numbe	r	Agency Pr	iority	Location of P	roject (Cit	/) Locatio	n of Projec	t (Cou
Statewide MRR		4000040000		1		Atlanta		E. Hank	t.	
Input		4022019000	0102					Fulton (Jounty	
Multi-Year Ongoing	Project Details									
Enter Justifications MY	Ongoing Project Funding									
			A	tivity Title	No_O	2	No_	00		
				FY 2019	Prior Ye	ars FY 2018	FY 2019	FY 2020	FY 2021	Tot
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COS									
Total_Project_Costs	Activity_1	1	Roof R	epair			10000	2500		100
	Total Project Costs - MY Onge	oing Activities					10000			100
Total Non-State Funds	Private Contribution for C and	E								
	Agency_Fund						5000			
	Local_Fund									
	Federal_Fund									
	Foundations									
	Others							2500		
	Total Non State Funds - MYO	ngoing Projects								
Total State Funds	Total State Funds - MY Ongoing	Projects					10000			100

28. Click **Save** at the top of the screen. The following message box will appear stating your data has been saved. Click ok.



29. You will now see the total amount of non-state funds and total state funds. Please note that funding totals will only appear after you save the data.

		Activity Title	No_OC		No	00		
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
	ACTIVITY FOR PROJECT COSTS							
Total_Project_Costs	Activity_1	Roof Repair			10000	2500		12500
	Total Project Costs - MY Ongoing Activities				10000	2500		12500
Total Non-State Funds	Private Contribution for C and E							
	Agency_Fund				5000			5000
	Local_Fund							
	Federal_Fund							
	Foundations							
	Others					2500		2500
	Total Non State Funds - MYOngoing Projects				5000	2500		7500
Total State Funds	Total State Funds - MY Ongoing Projects				5000	0		5000

30. You have now completed the entry of one MultiYear Ongoing Project. To return to the project type selection screen so that you can enter additional MultiYear Ongoing Projects, click <u>01_Project</u> <u>Information By Project Type</u>.

		id Project		3_Project Fu	unding for Multi-Year Pro	oject		
Age 402	-	riculture, Department o	Project of MYOProject_1	Scenario Budget				
▼	Mu	Iti-Year Ongoing P	roject Details	1				
Yea FY								
		Pr	oject Title		Project Number	Agency Priority	Location of Project (City)	Location of Project (Cou
Inp	out	Statewide MRR			40220190000102	1	Atlanta	Fulton County

31. After clicking the link above, you should see the following screen.

1. Add	Project 0										
Period	Agency	Scenario	Years								
Input	402-Agriculture, De	partment of Budget	FY19								
▼ Select	a Project Type and	Add a Project									
Add a Spe	ecific Project Add	a MultiYear Ongoi	ng Project								
		Project Number	Project Title	e Project Type	Agency Priority	Institution Name	Location of Project (City)	Location of Project (County)	GSFIC Project Number		
List of S	List of Specific Projects										
			New State Building		1	NA	Atlanta		NA		
SProject 1	1	40220190000101		Specific Project				Fulton County			

32. If you have additional MultiYear Ongoing Projects, please repeat steps 1-18 above.

HOW TO SUBMIT CAPITAL REQUESTS

- 1. You have reached the final step of the capital request process. It is now time to submit your proposed projects to OPB. Through the PBCS system all capital requests will be submitted as a group. There is no single submission of a project.
- 2. Click Close in the top right corner of your screen to exit and return to the main task list.
- 3. You should now see the following screen. Select Submit Project for Approval.

2 All	2 Incomplete	0 Today	0 Week	2 Future	0 Complete
•	v			Ŧ	~
Туре	Name				
1160					
	1. Add Project				

4. The next screen will display a list of all Specific and MultiYear Ongoing projects in which you have entered. Total requested state funds will also be displayed. Review the list to ensure it is accurate before submission.

Period Input	Scenario Budget		ency 2-Agriculture, Department of				
<u> </u>	oudge.						
Projec	t Approval Status	Project Submiss	Project Submission Comments	Project Un-Submission Date	Project Un-Submission Commen		
	han its at	7/10/47	Test Projects 7.13.17	7/00/47			
01-50	bmitted	7/13/17		7/26/17			
<u> </u>							
<u>v</u>			Project Number	Project Title	Project Type		10_OC
V			No_Activity	No_Activity	No_Activity	Total State Funds - Specific Projects	Total State Funds - MY Ongoing Pro
<u>v</u>							
		00 IECTS	No_Activity	No_Activity	No_Activity	Total State Funds - Specific Projects	Total State Funds - MY Ongoing Pro
TLIST (DF SPECIFIC PR	OJECTS	No_Activity No_Fund	No_Activity No_Fund	No_Activity	Total State Funds - Specific Projects	Total State Funds - MY Ongoing Pro
LIST (ROJECTS	No_Activity No_Fund	No_Activity	No_Activity	Total State Funds - Specific Projects	Total State Funds - MY Ongoing Pro Total State Funds
LIST (ROJECTS	No_Activity No_Fund	No_Activity No_Fund	No_Activity No_Fund	Total State Funds - Specific Projects Total State Funds	Total State Funds - MY Ongoing Pro Total State Funds
LIST (SProjec	Ľ1	OJECTS	No_Activity No_Fund 40220190000101	No_Activity No_Fund	No_Activity No_Fund	Total State Funds - Specific Projects Total State Funds	Total State Funds - MY Ongoing Pro Total State Funds
LIST (SProjec	Ľ1		No_Activity No_Fund 40220190000101 ECTS	No_Activity No_Fund	No_Activity No_Fund	Total State Funds - Specific Projects Total State Funds	Total State Funds - MY Ongoing Pro Total State Funds

5. Click in the Project Approval Status box.

a.

2. Sub	mit Proje	ect for Ap	proval 0		
Period Input	Scenario Budget		Agency 402-Agriculture, Department of		
Project	Approval Statu	s Project Submi	iss Project Submission Comments	Project Un-Submission Date	Project Un-Submission Commer
Un-Sub		7/13/1	Test Projects 7.13.17	7/26/17	

- Save
 Refresh
 Actions →
 Complete
 Previou

 Workflow

 Edit
- 6. Click the orange Actions button and select **Workflow** from the drop down menu.

7. Select Submit.

<u>S</u> ave <u>R</u> efresh	<u>Actions</u> ↓ □ <u>C</u> omplete	Previous Next C
	▲ Workflow	► 🕞 Submit
	Edit	•

8. Click ok.

Launch Confirmation Submission Done!!	Message
	OK Cancel

9. The following screen will appear. Comments are not required but you may enter them here if you wish to do so. Click **Launch**.

COBS_All_Projects_Submit		Launch Cancel
Enter Comments:	1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-	

10. If there are no errors, you will receive a success message that your capital request was successfully submitted. Click ok.

Information COBS_AIL_Projects_Submit was successful. OK	•
OK	

11. You will now see the following screen with a Project Approval Status of "Submitted".

Period Scenario Input Budget		Ingency IO2-Agriculture, Department of				
Project Approval State	us Froject Submis	s Project Submission Comments	Project Un-Submission Date	Project Un-Submission Commen		
Submitted	7/27/17	7	7/26/17			
Y						
<u> </u>		Project Number	Project Title			No_OC
<u>v</u>		Project Number No_Activity No_Fund	Project Title No_Activity No_Fund	Project No_Ac No_F	ivity Total State Funds - Specific F	No_OC Projects Total State Funds - MY Ongoing Pro Total State Funds
	POIECTS	No_Activity	No_Activity	No_Ad	ivity Total State Funds - Specific F	Projects Total State Funds - MY Ongoing Pro
	ROJECTS	No_Activity No_Fund	No_Activity No_Fund	No_Ad	ivity Total State Funds - Specific F	Projects Total State Funds - MY Ongoing Pro
LIST OF SPECIFIC P	ROJECTS	No_Activity No_Fund	No_Activity	No_Ad	ivity Total State Funds - Specific F Ind Total State Funds	Projects Total State Funds - MY Ongoing Pro
LIST OF SPECIFIC P SProject_1		No_Activity No_Fund 40220190000101	No_Activity No_Fund	No_Ac No_F	ivity Total State Funds - Specific F Ind Total State Funds	Projects Total State Funds - MY Ongoing Pro Total State Funds
LIST OF SPECIFIC P SProject_1LIST OF MULTI-YEAR		No_Activity No_Fund 40220190000101	No_Activity No_Fund	No_Ac No_F	ivity Total State Funds - Specific F Ind Total State Funds	Projects Total State Funds - MY Ongoing Pro Total State Funds

12. Click **Close** to exit and return to the main task list.



Issues Tracking System (ITS)

OPB ISSUES TRACKING SYSTEM

The Issues Tracking System (ITS) allows all users to create tickets to file trouble reports, ask questions, submit comments or raise issues about the PBCS System.

1. To generate a support ticket, click the home icon at the top of the screen to take you to the main PBCS home page from your current location in the system.



2. On the left hand side of the screen is a gray box for announcements. Under the header **Report An Issue**, scroll down until you see a highlighted link that says "Right click Here."





3. Right click the highlighted blue link and select "Open link in new tab" on the popup menu.

Report an Iss	sue	
window".		
Right click <u>He</u> Activity Re	Open link in new tab Open link in new window Open link in incognito window	-
1 Anr	Save link as Copy link address Inspect	Ctrl+Shift+

4. A new tab will appear at the top of your browser. Click on the new tab to view the ticket submission screen.

SUBMIT A NEW TICK	(ET		Ś
YOU ARE REPORTING AN ISSU OPB - PBCS	E WITH THE FOLLOWING APPLI	CATION:	"Mandatory field
REPORTED BY:		SUBJECT: '	
YOUR EMAIL: '		DESCRIPTION OF ISSUE:	
PHONE NUMBER:			
			Ø' 🗐

5. Complete the form as described below:

Field Name	Explanation
Reported By	Please enter your name, if not already populated, so that you can be contacted regarding this ticket if necessary.
Your email:	Enter your email address. It is a required field.
Subject (mandatory field)	Enter the subject of the ticket. For example – "Unable to Add Project"
Description of Use	Type in your question, suggestion, or issue. Please provide the necessary information and explain the issue giving as many details as possible. If an error message appeared, please be sure to include it in its entirety. Please be sure to include your agency name.

6. Click the disk icon to submit the ticket. Click the slash icon to cancel the ticket.



- 7. As soon as the disk icon is clicked, a ticket number is assigned and an email is generated. The email will reference your ticket number and include a link that you can click on to see the current status of your ticket. You can also contact the Help Desk via email at (Helpdesk@opb.state.ga.us). Be sure to include your ticket number in the email. Please submit a separate ticket for each issue, question, or suggestion you may have.
- 8. You may now click the tab in your browser header to return to PBCS.