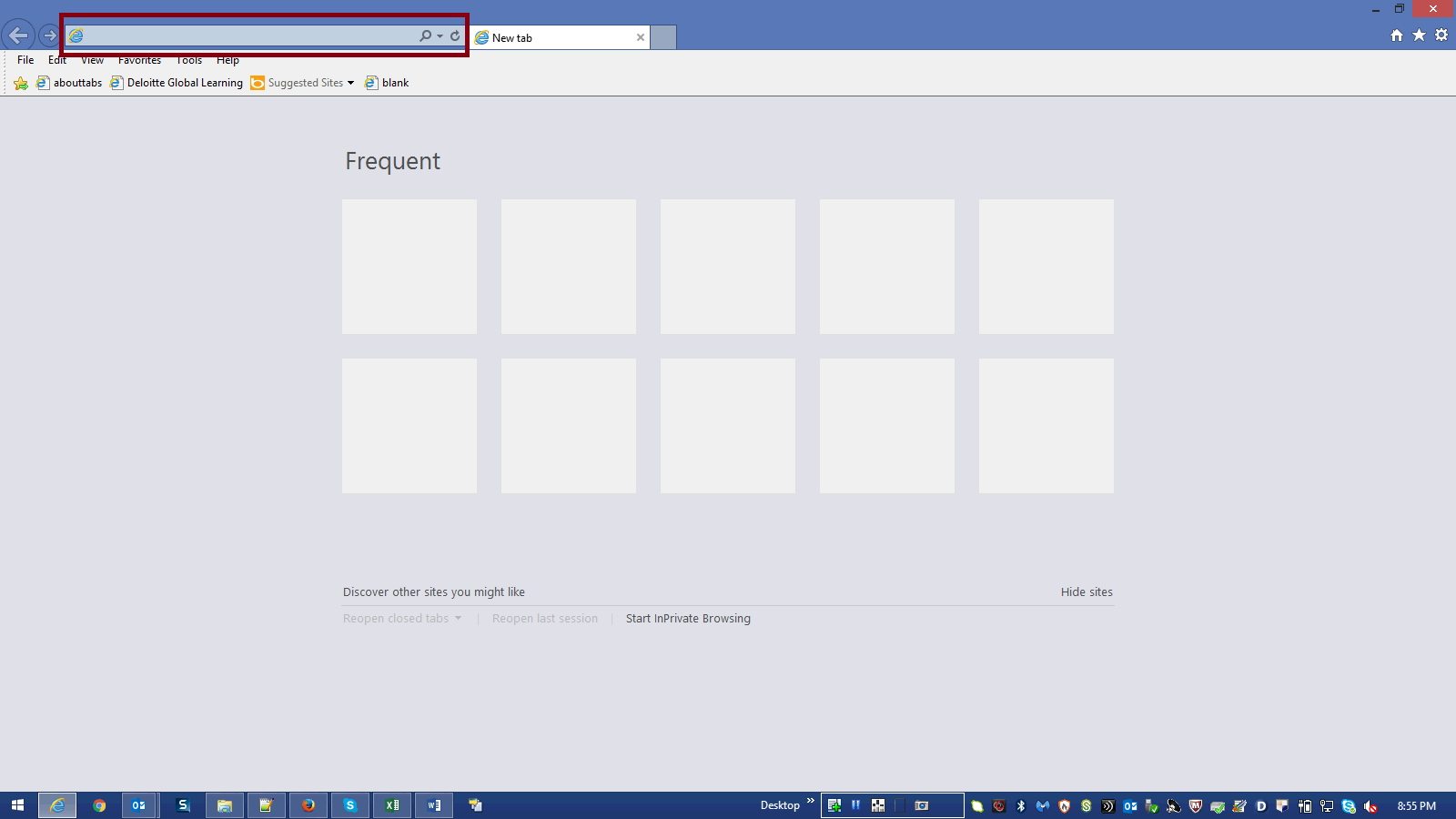
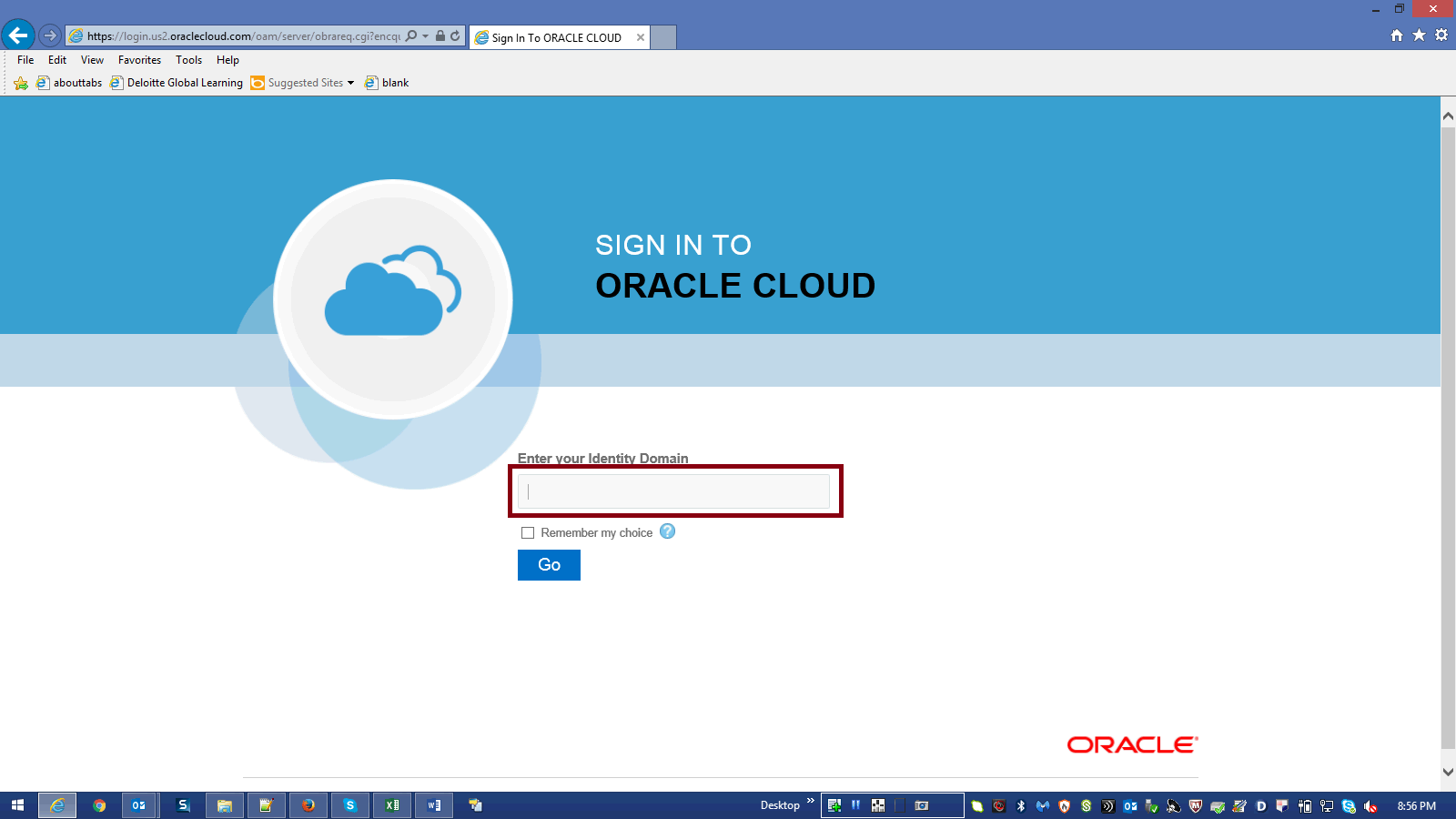
|  |  |
| --- | --- |
| **Topic Name** | 2.1AOBPlanner: Budget Management-Agency Entry and submittal of AOB |
| **Department** |  |
| **File Name** |  |
| **Date Modified** |  |
| **Last Changed by** |  |
| **Status** |  |
| **Owner** |  |

#### Test Procedure

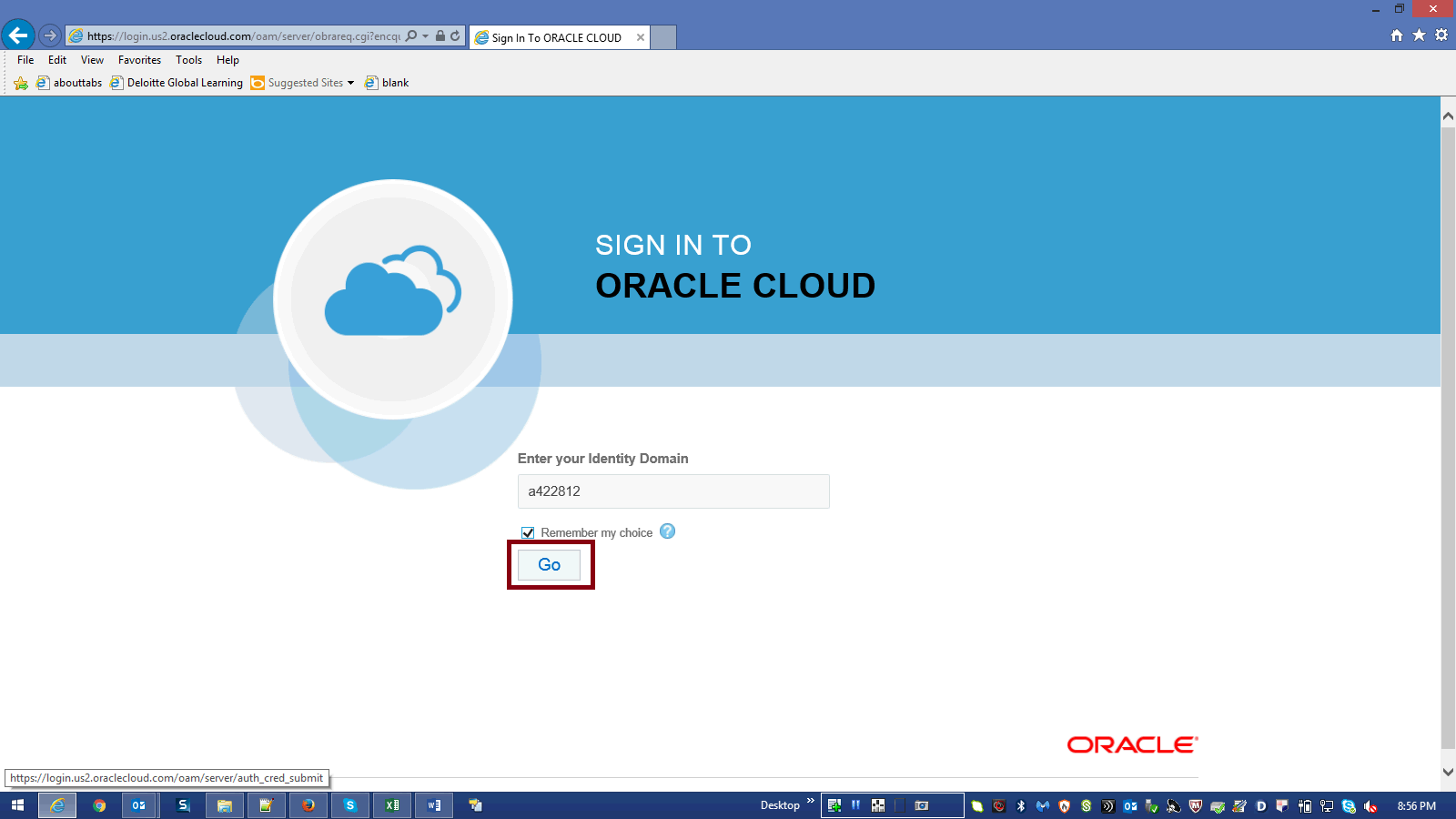
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click **New tab** tab. (Launch web browser Firefox or Google Chrome) |  |



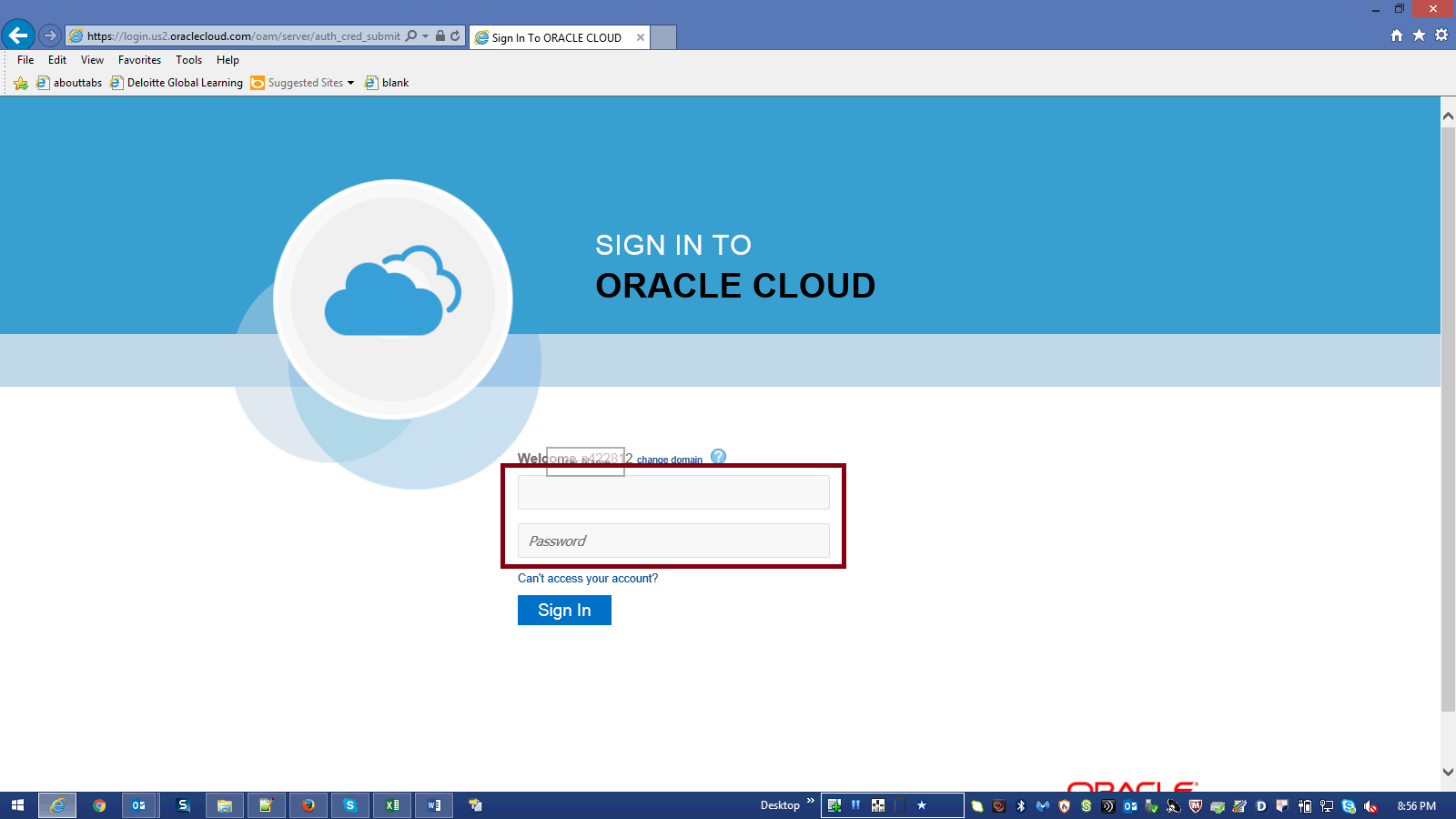
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Copy application URL :  **https://planning- a419537.pbcs.us2.oraclecloud.com/HyperionPlanning** |  |
|  | Paste URL in browser and hit **enter** |  |



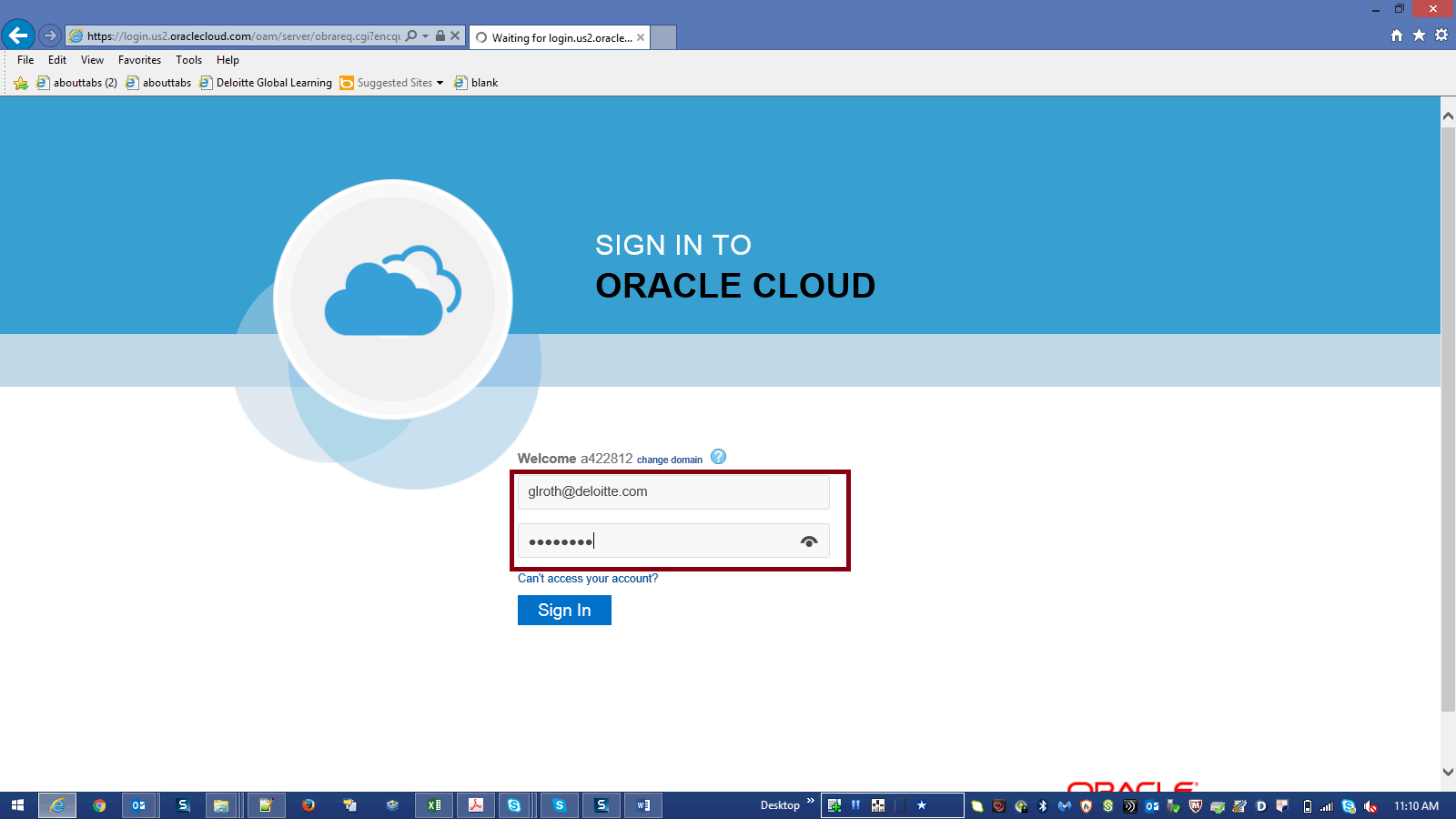
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | **Enter your Identity Domain** in the highlighted box. |  |



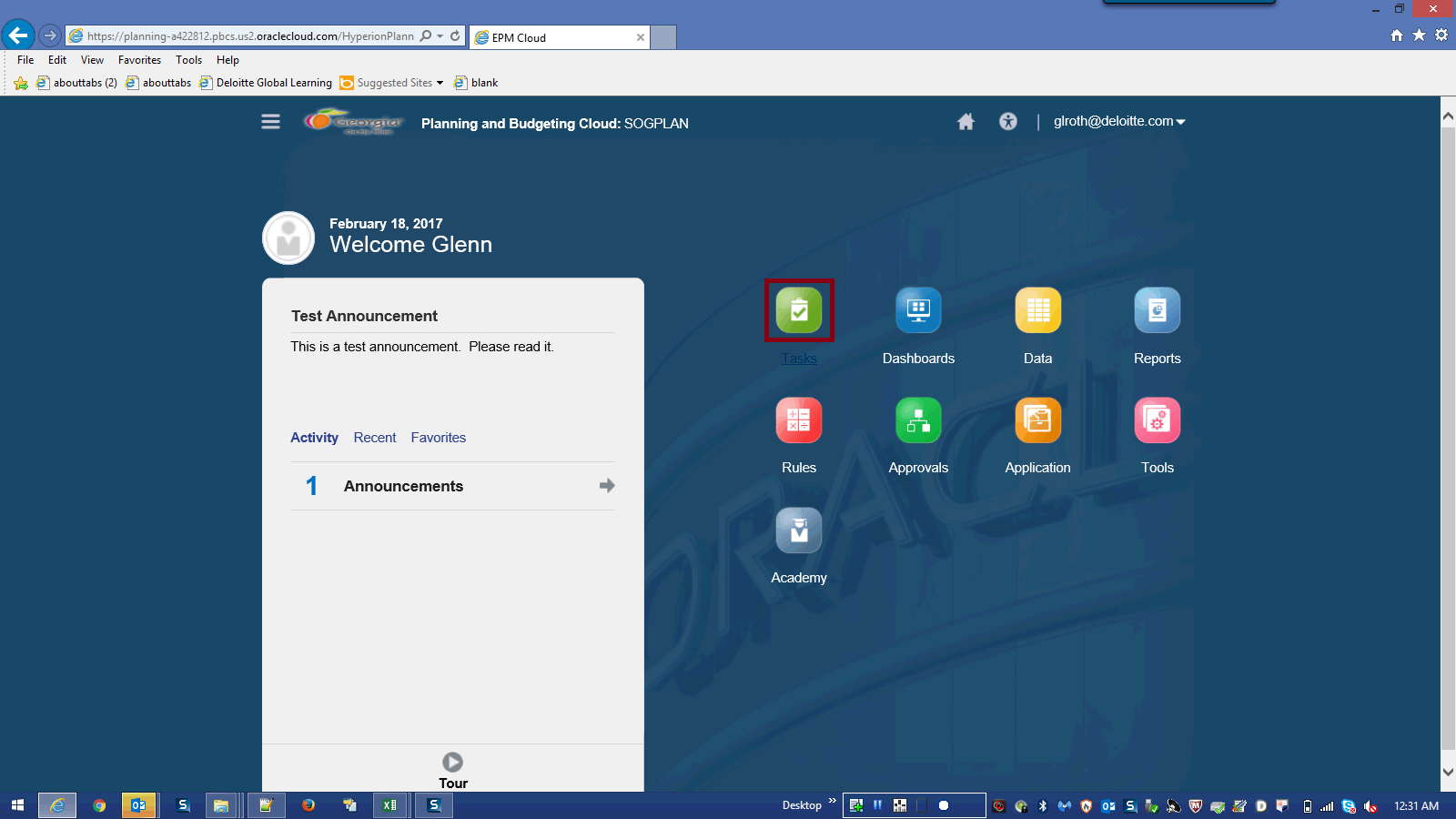
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click **Go** button. |  |



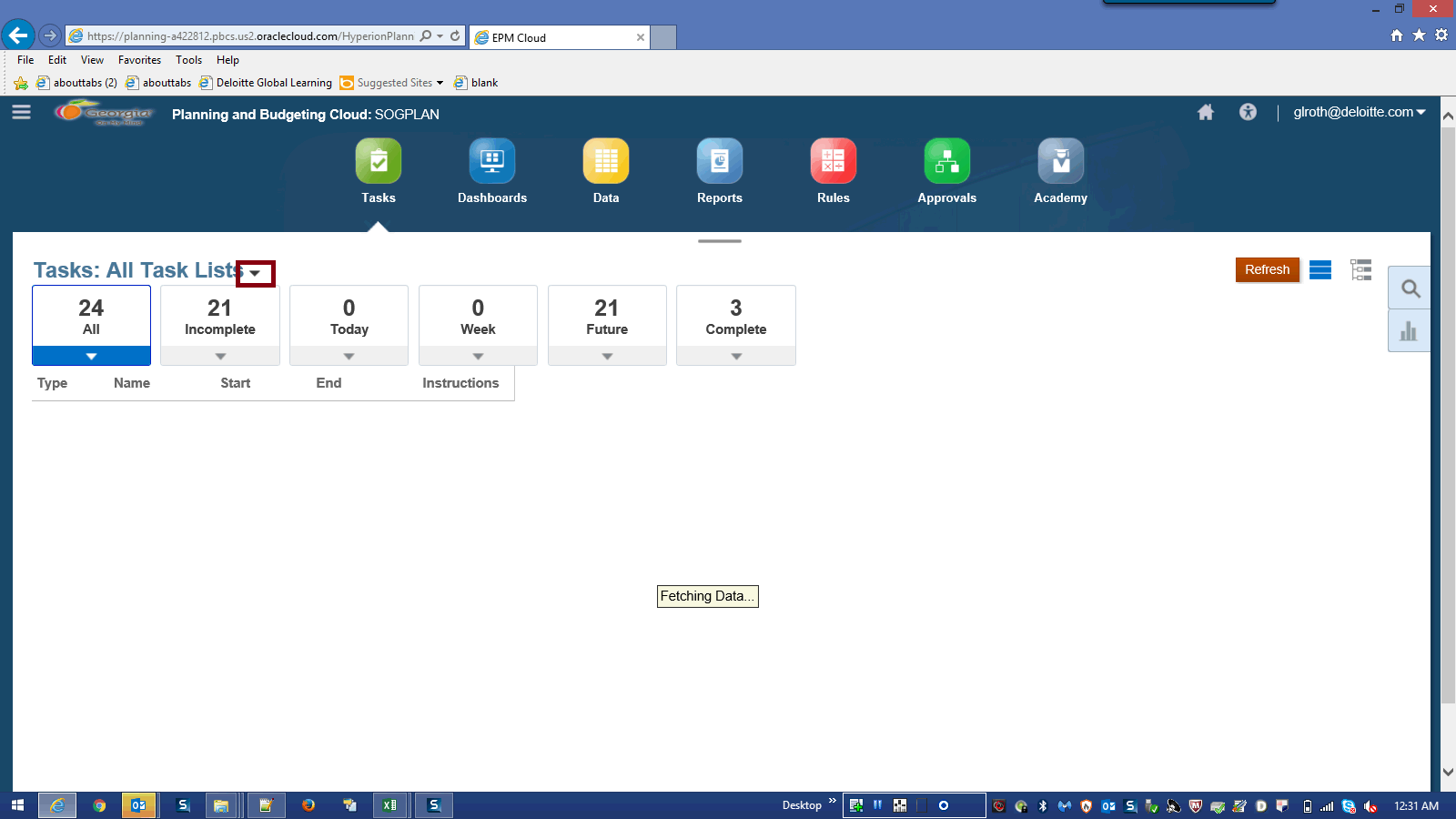
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Enter Your **UserName** and **Password**.  Enter a valid value  E.g.Username "xxxxx@xxxx.com".  Password : xxxxxx |  |



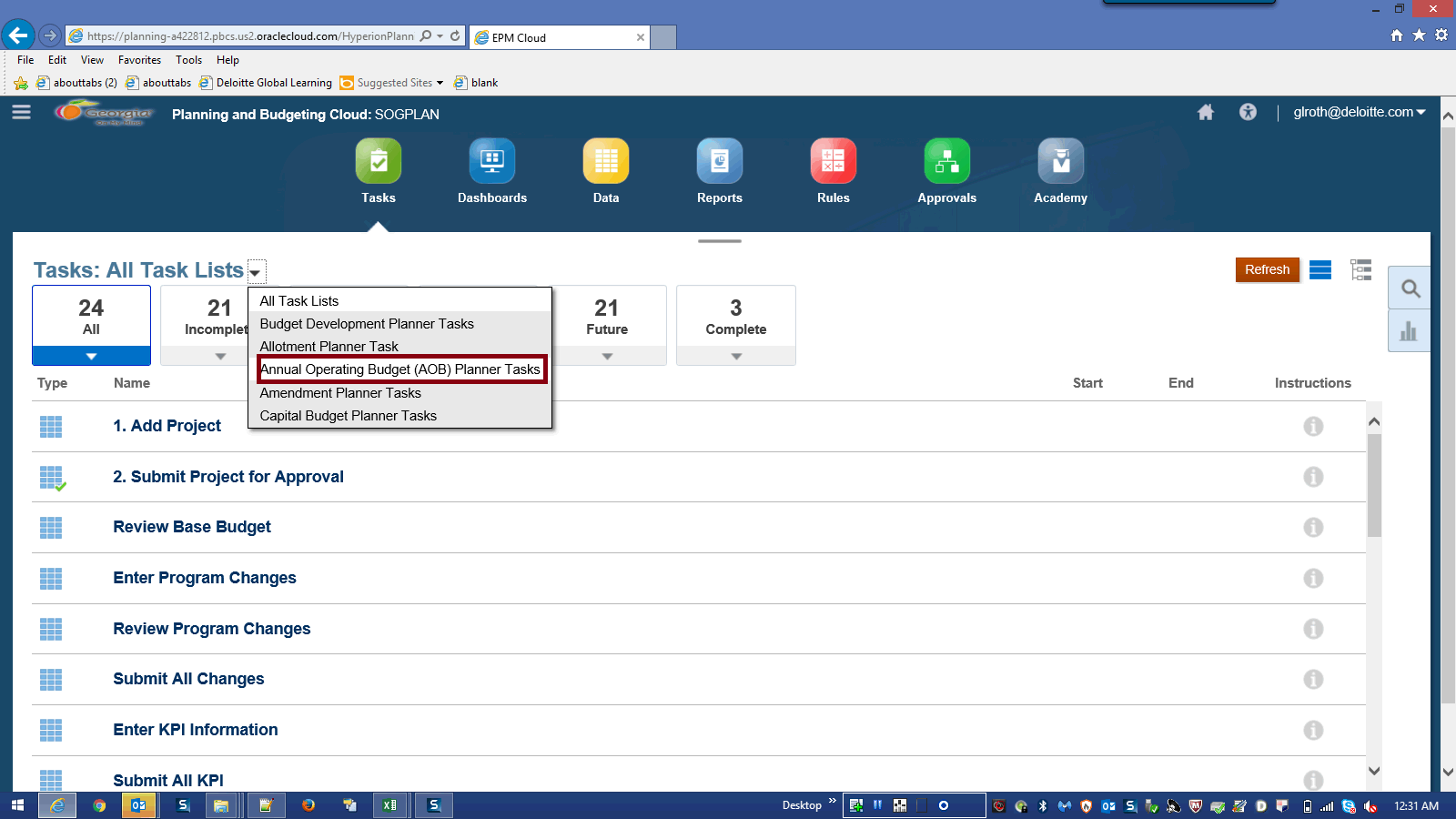
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click **Sign in**. |  |



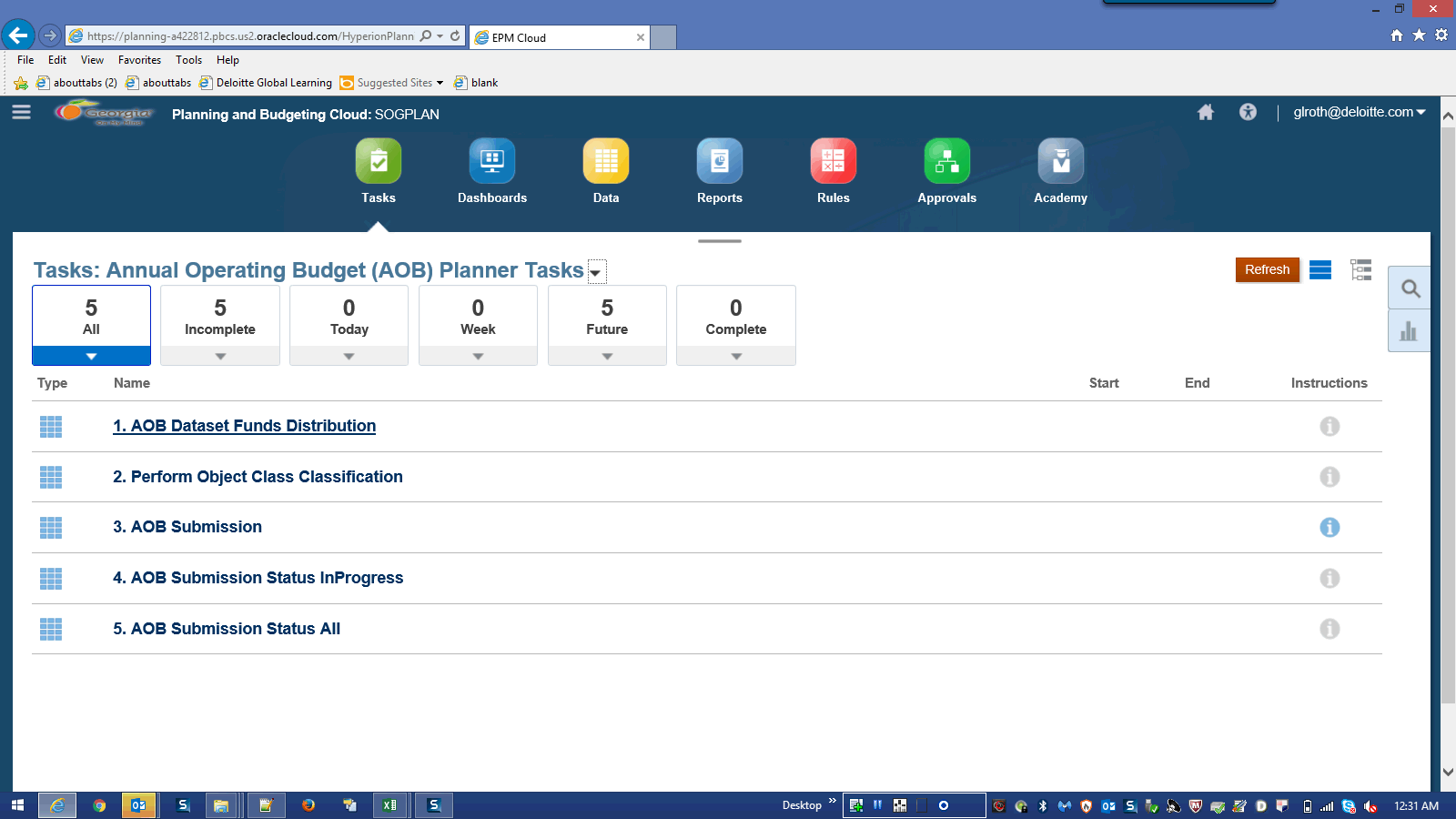
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Tasks** link. |  |



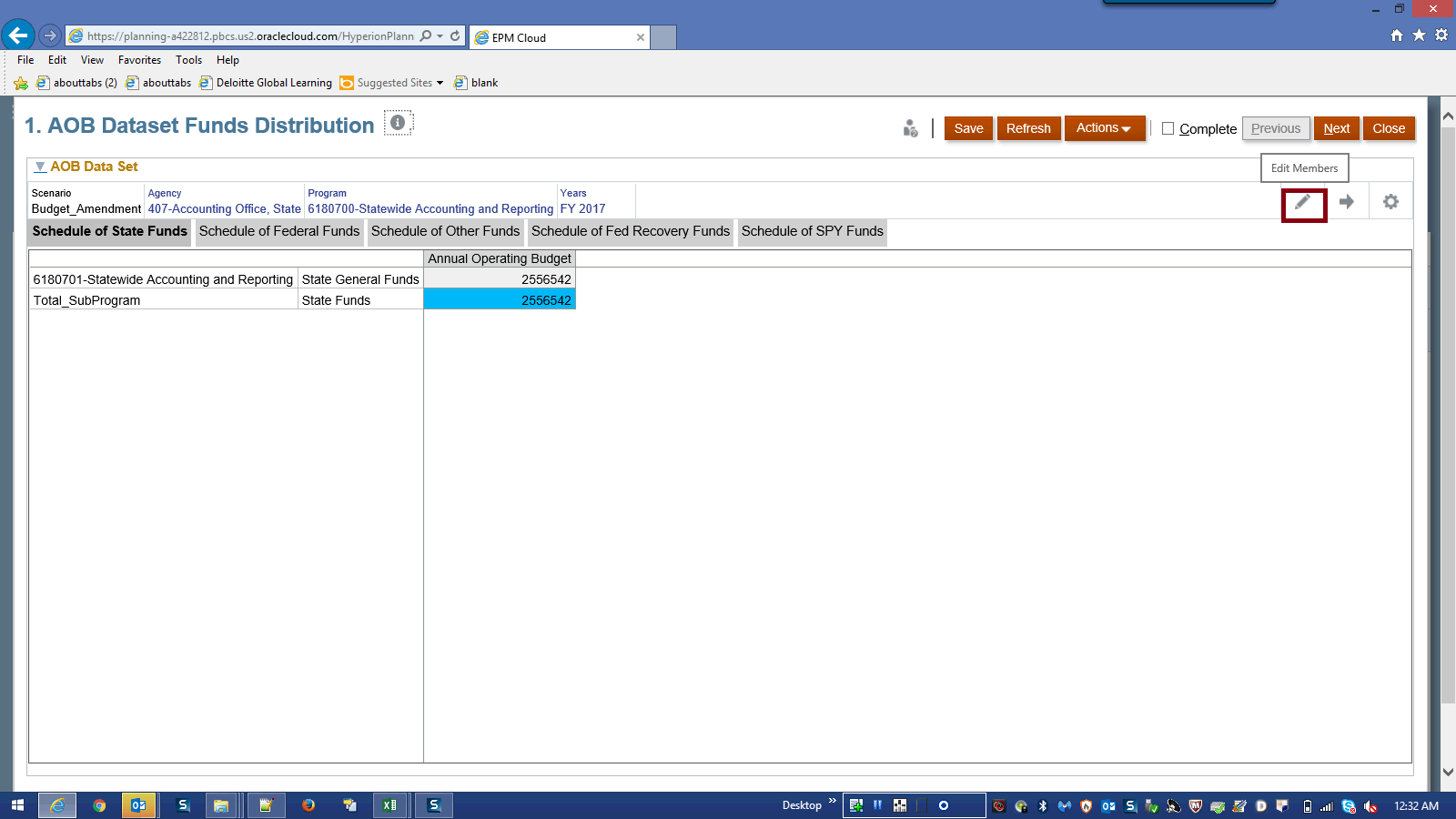
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Tasks: All Task Lists…** list. |  |



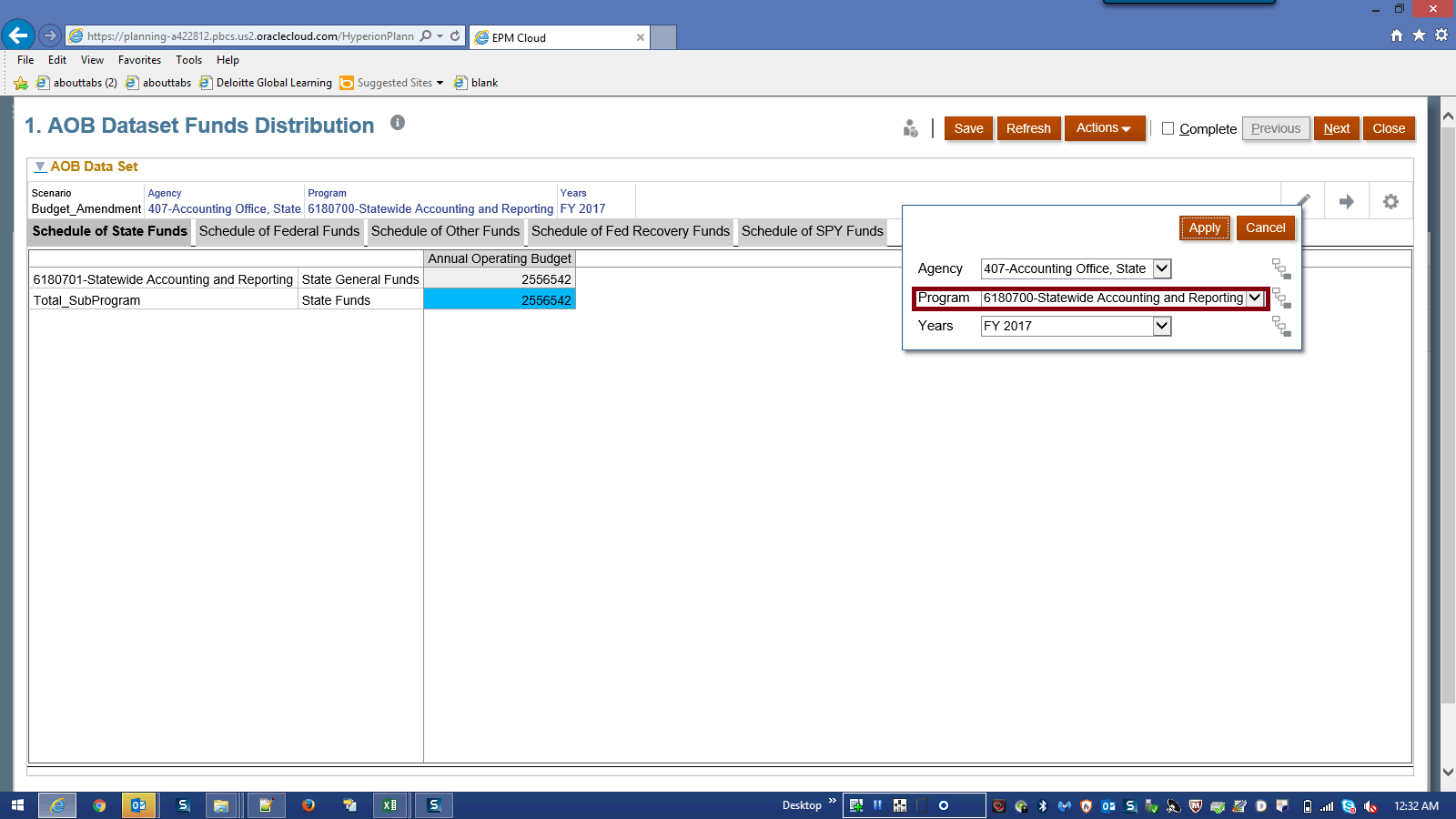
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Annual Operating Budget (AOB) Planner Tasks** list item. |  |



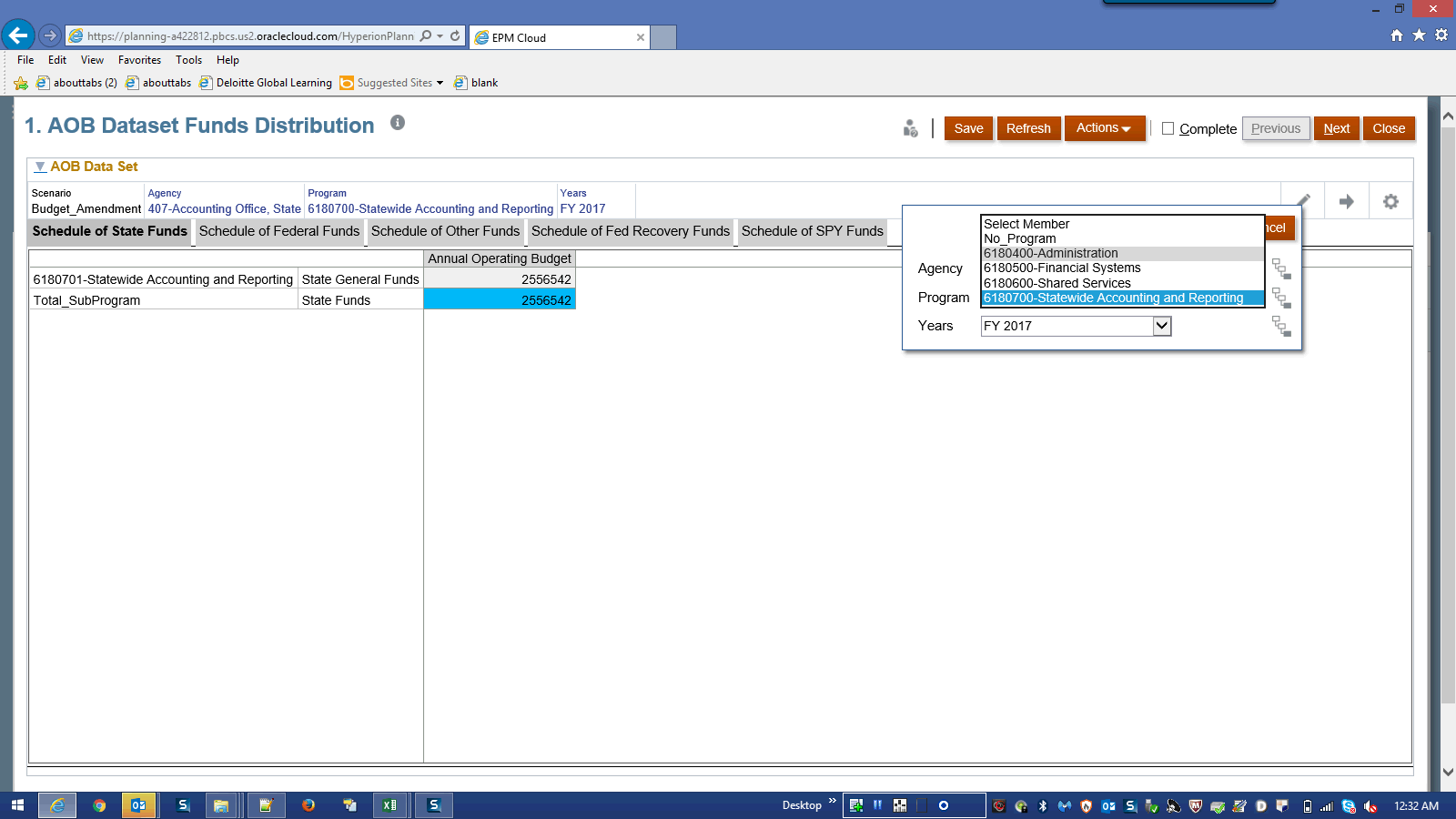
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **1. AOB Dataset Funds Distribution** link. |  |



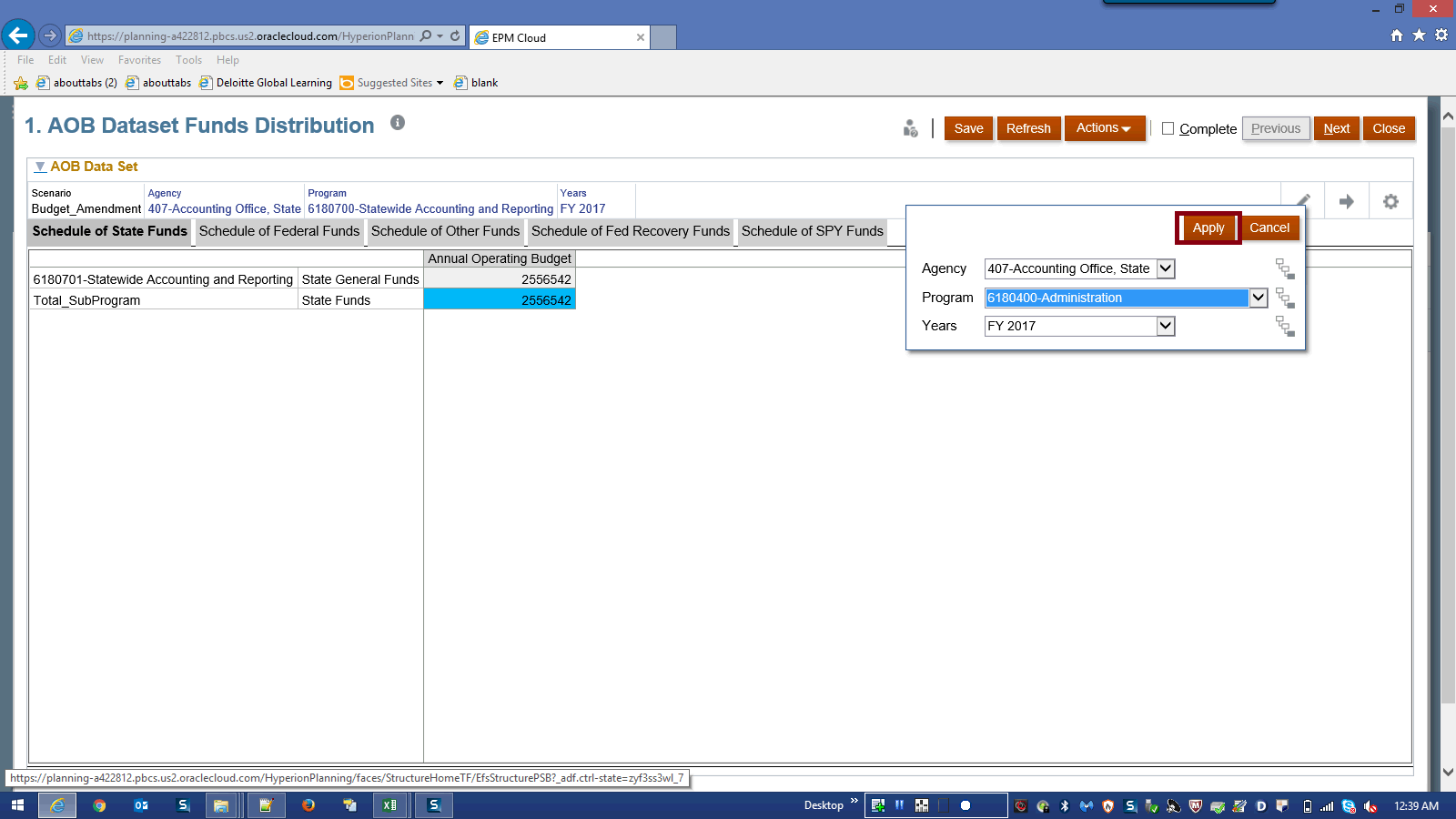
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Edit Members** button. |  |



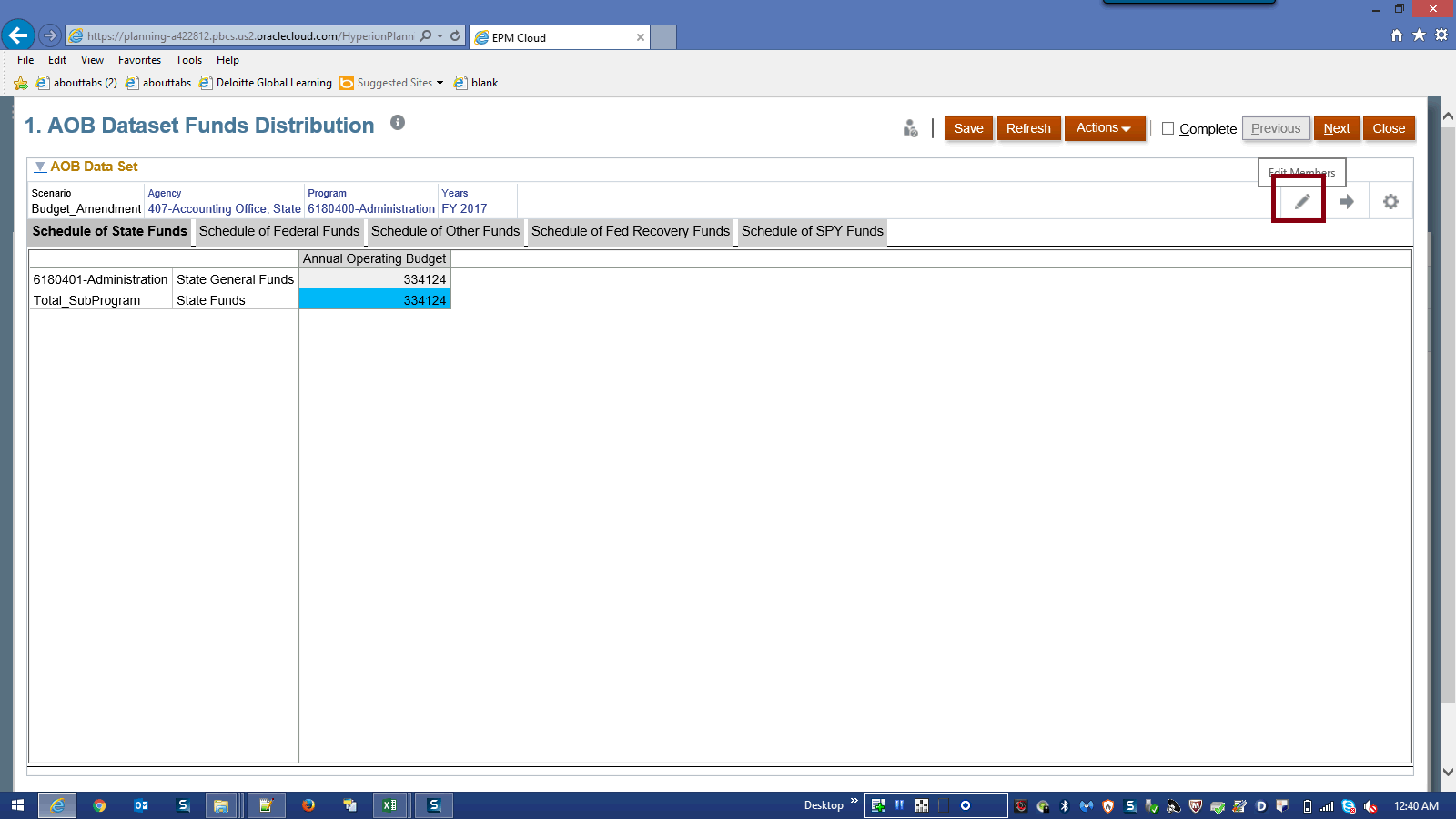
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Program** list. |  |



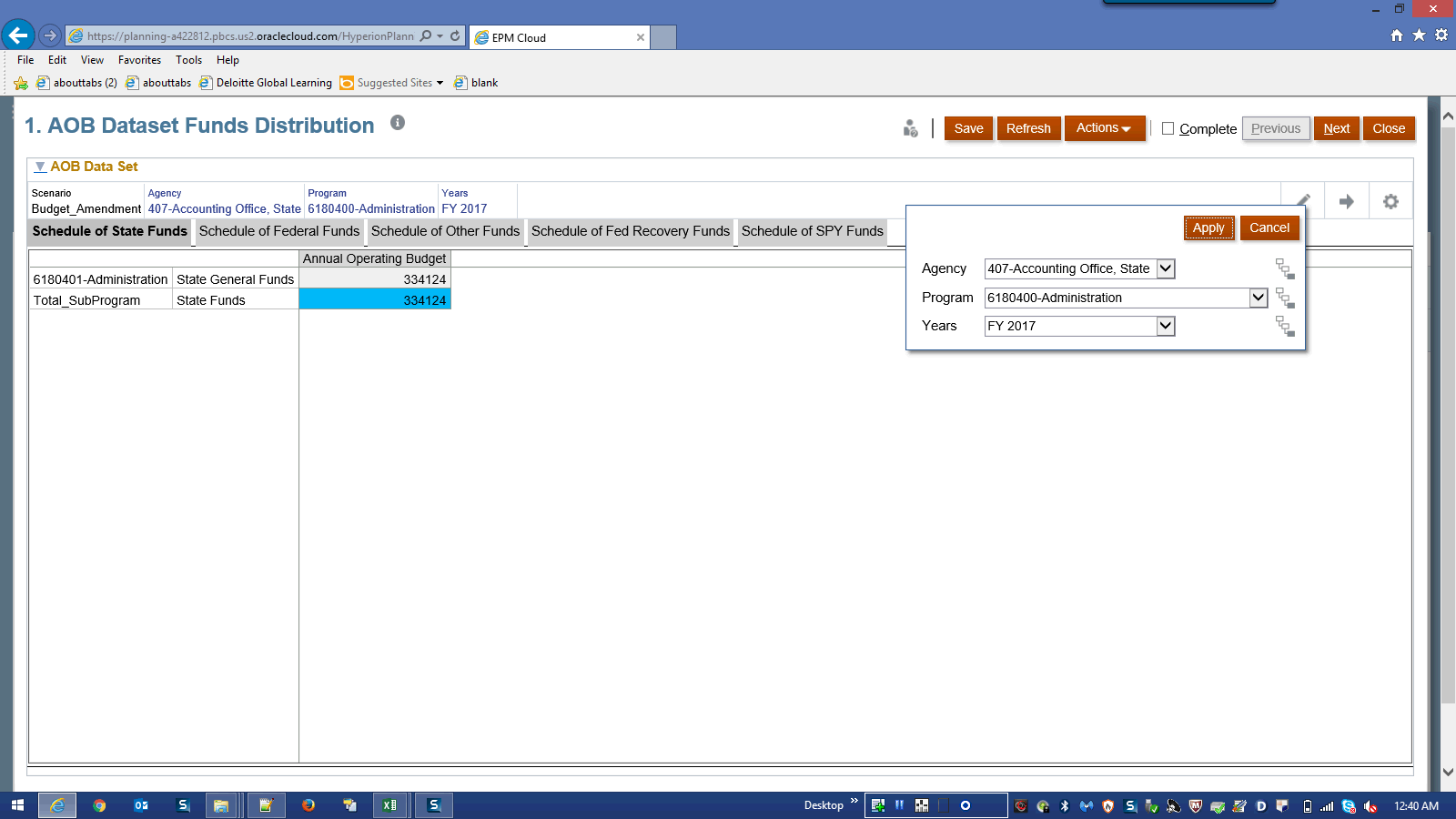
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **program name** list item. |  |



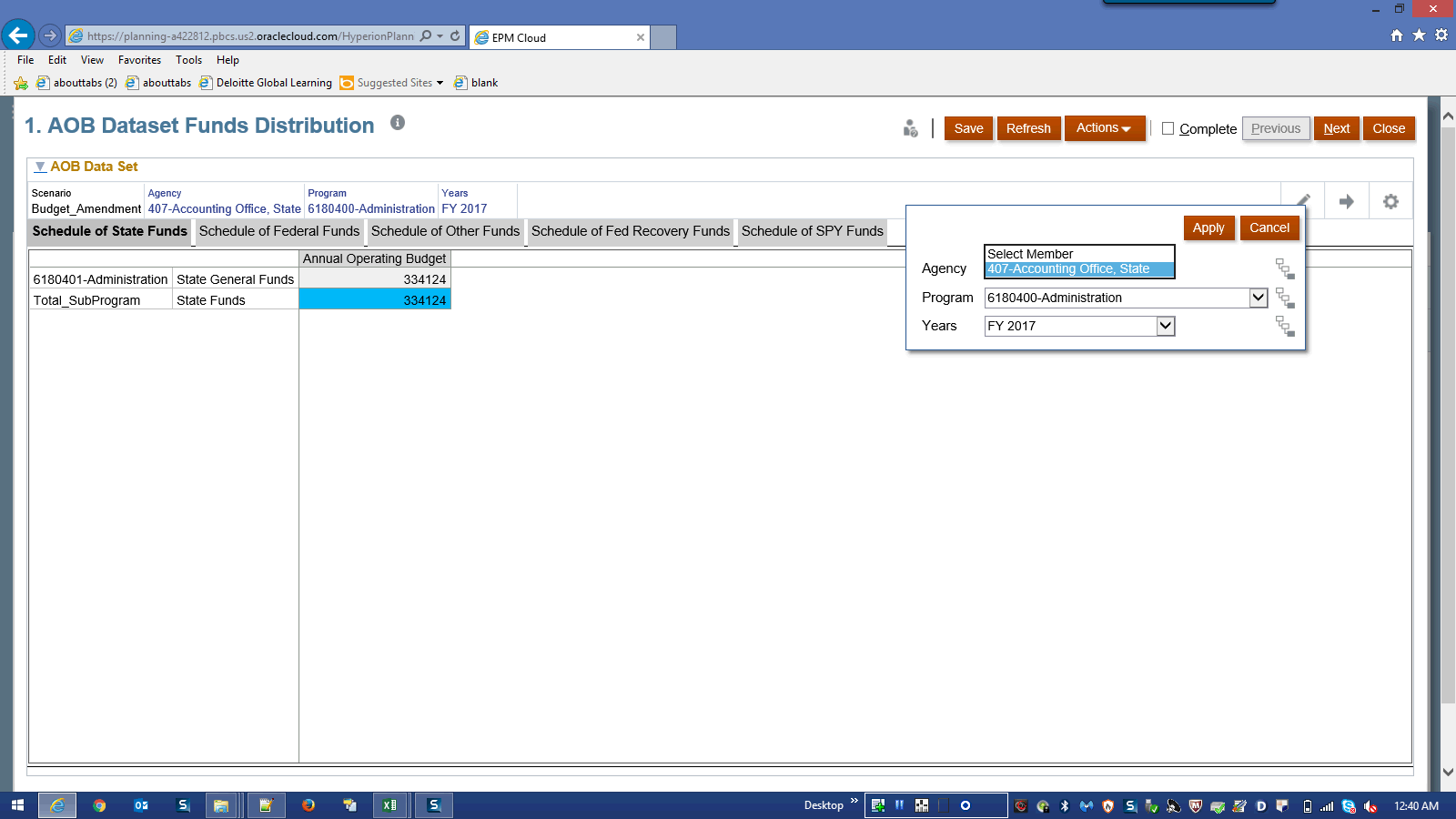
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Apply** object. |  |



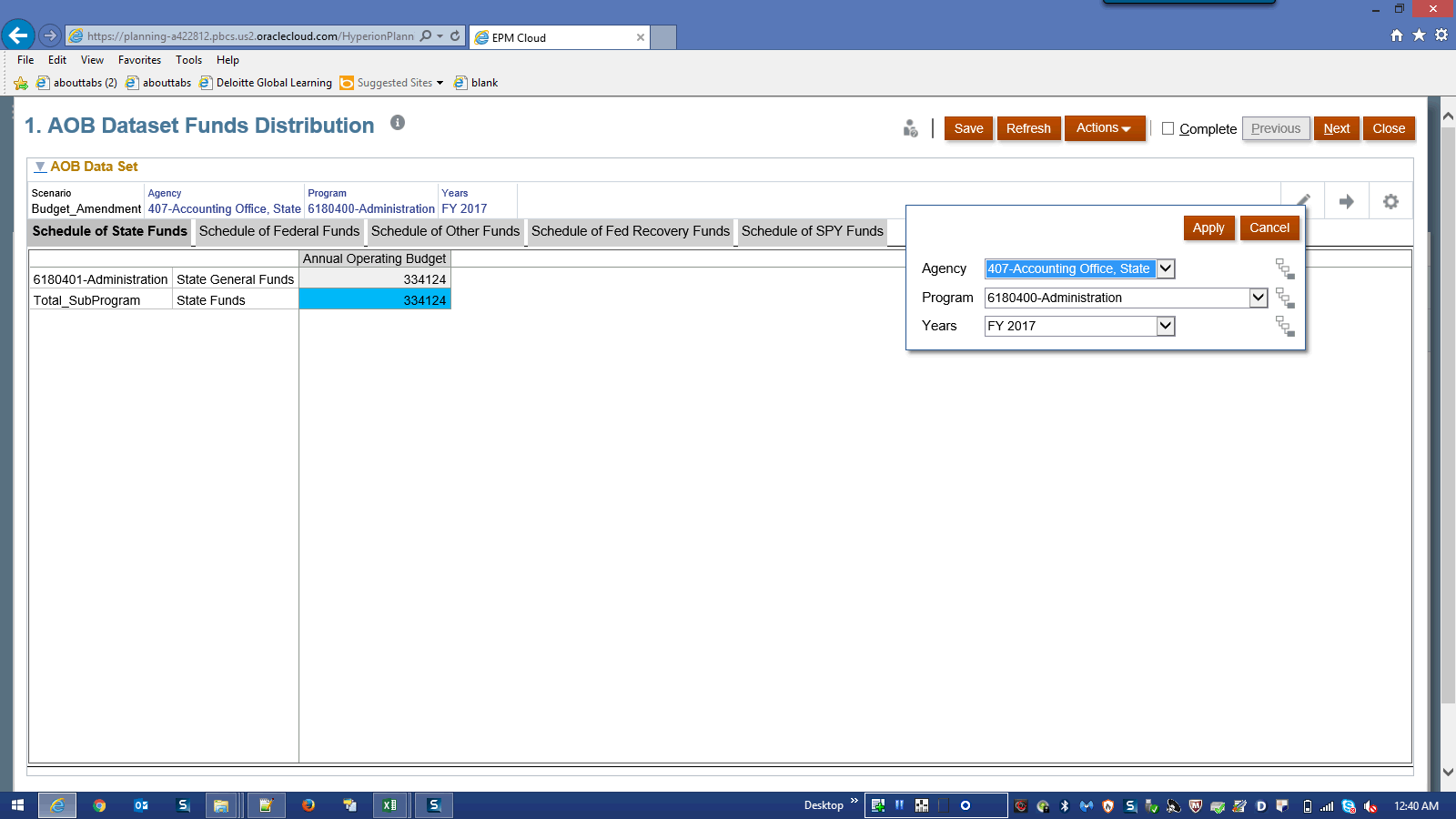
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Edit Members** button. |  |



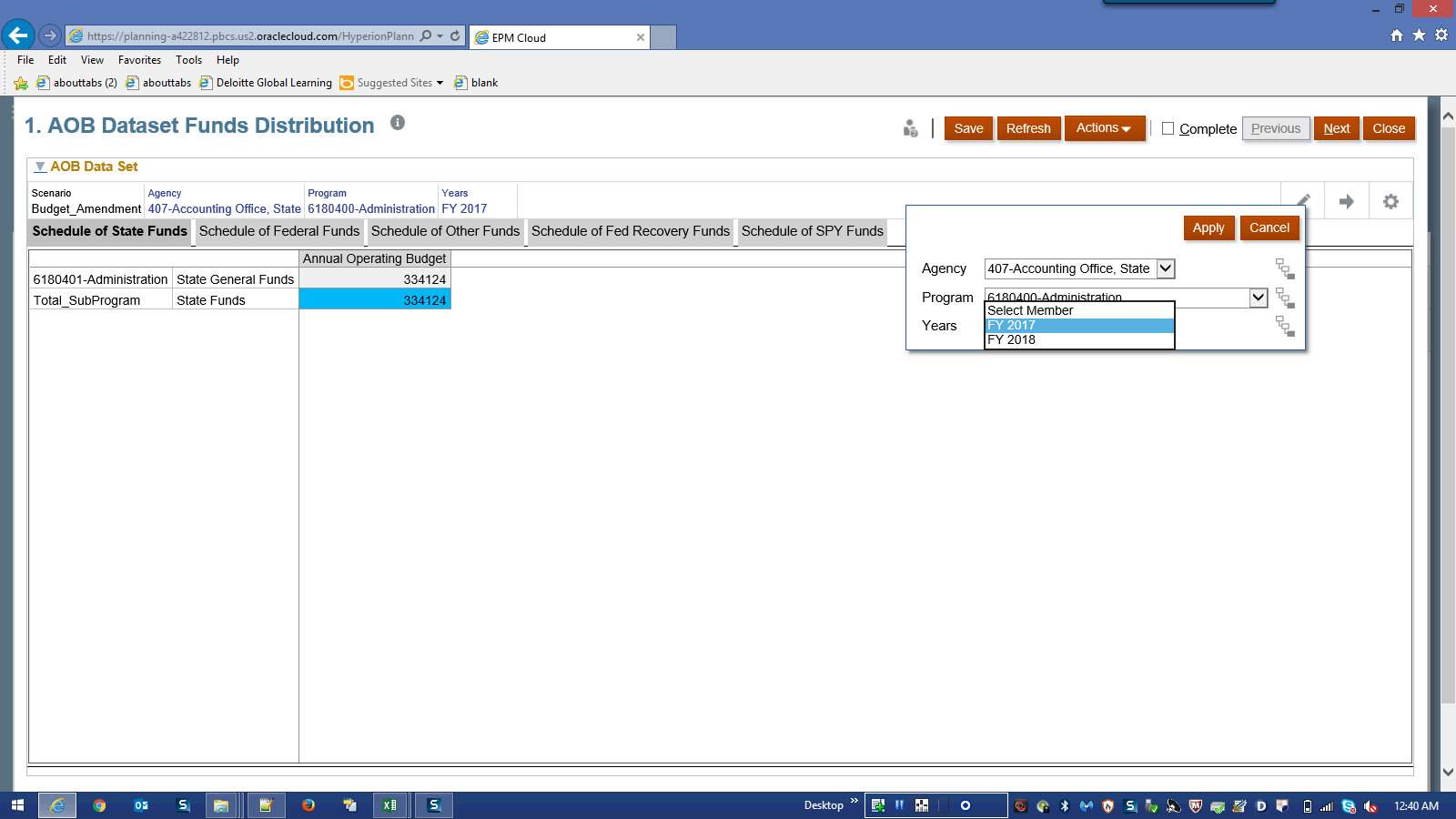
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Agency** list. |  |



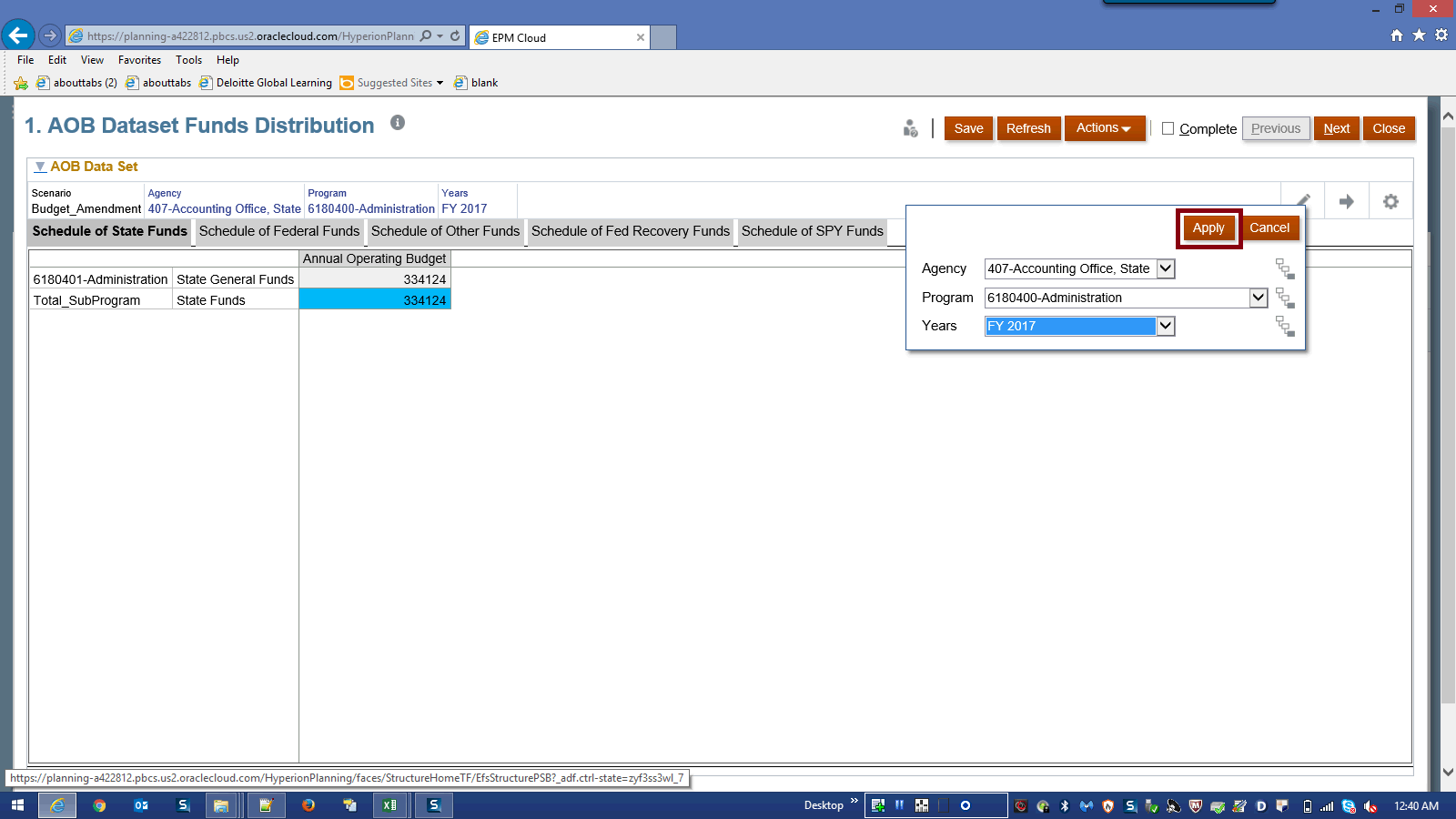
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **407-Accounting Office, State** list item. |  |



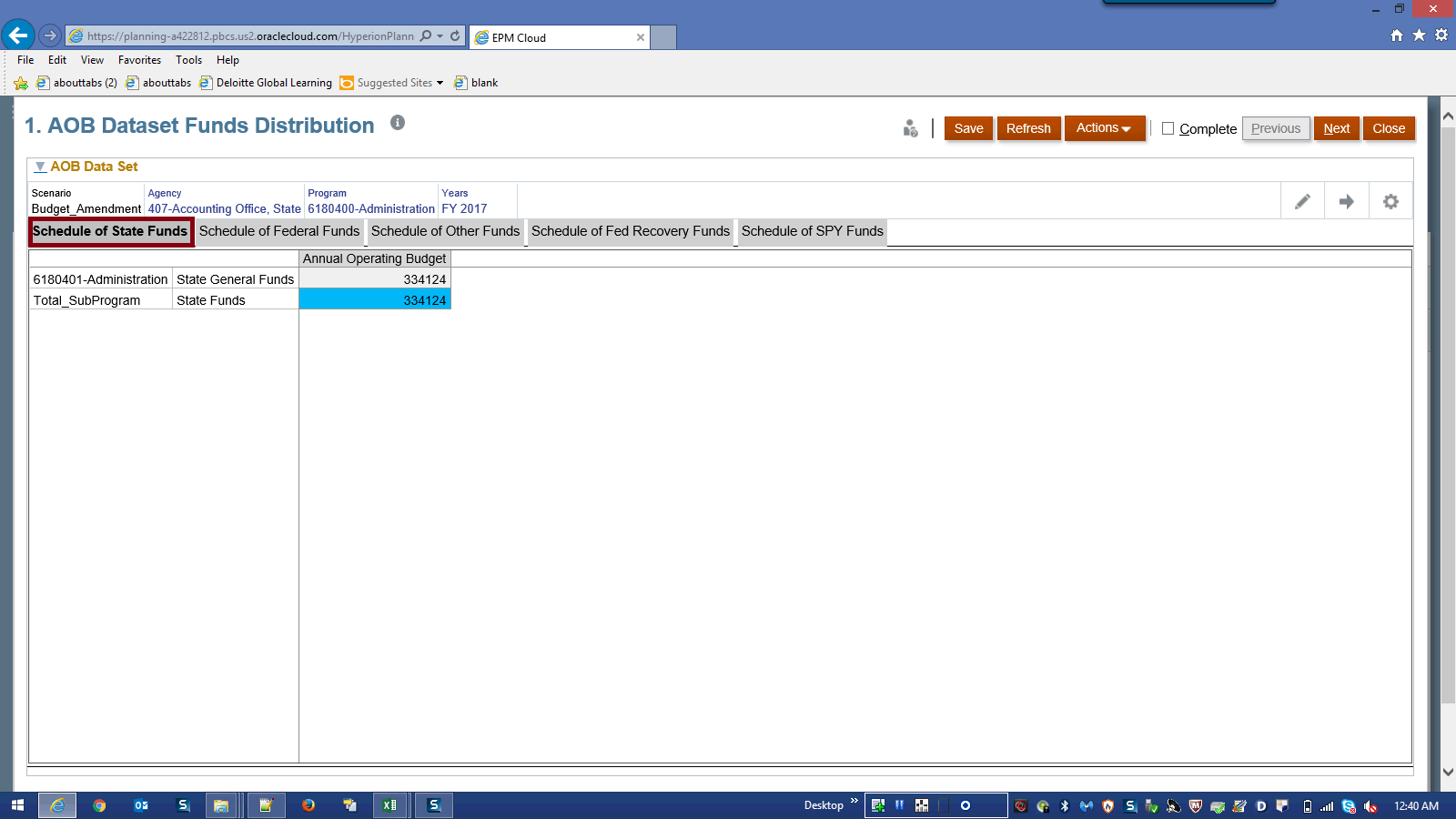
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Years** list. |  |



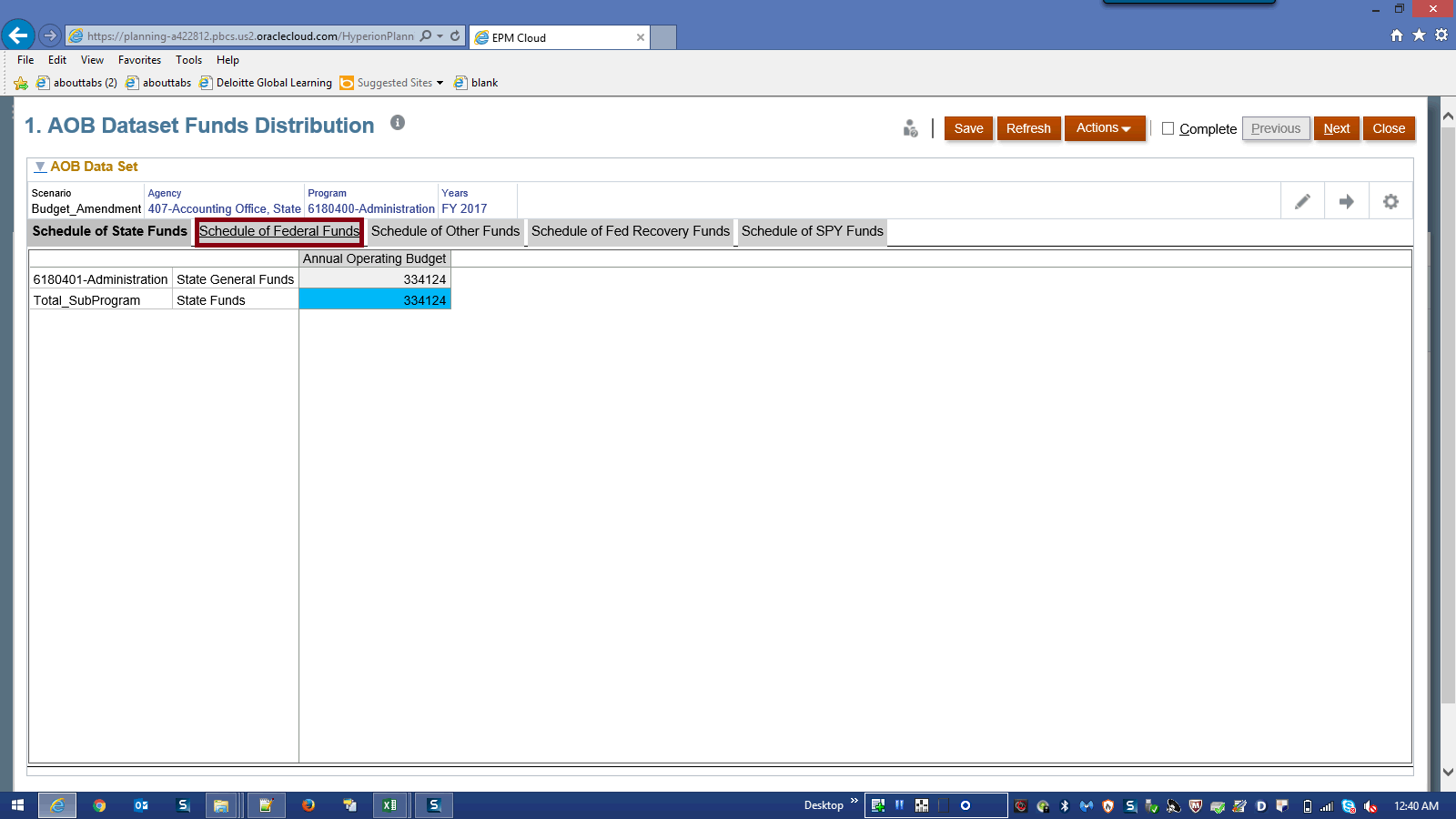
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **FY 2017** list item. |  |



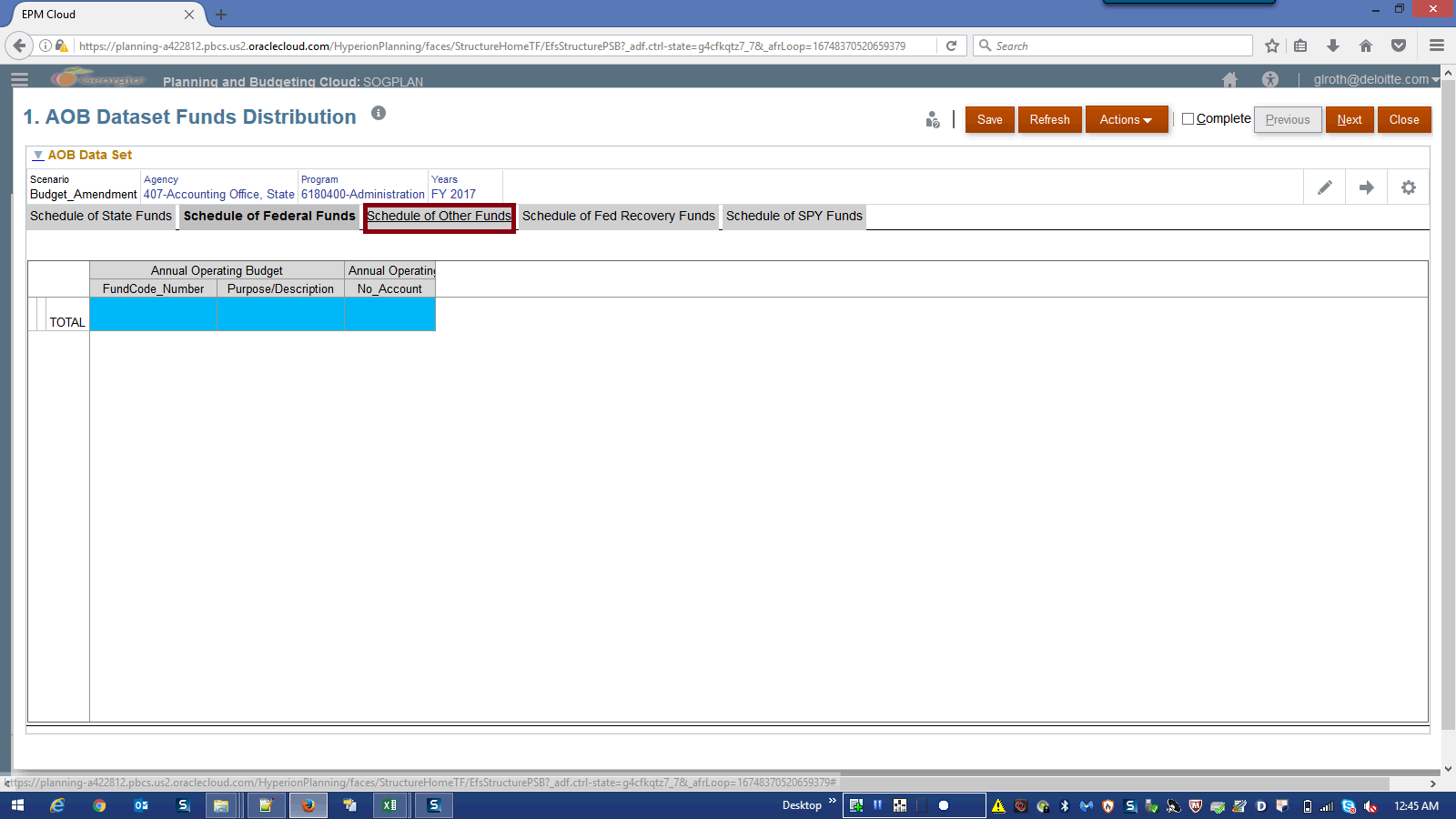
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Apply** button. |  |



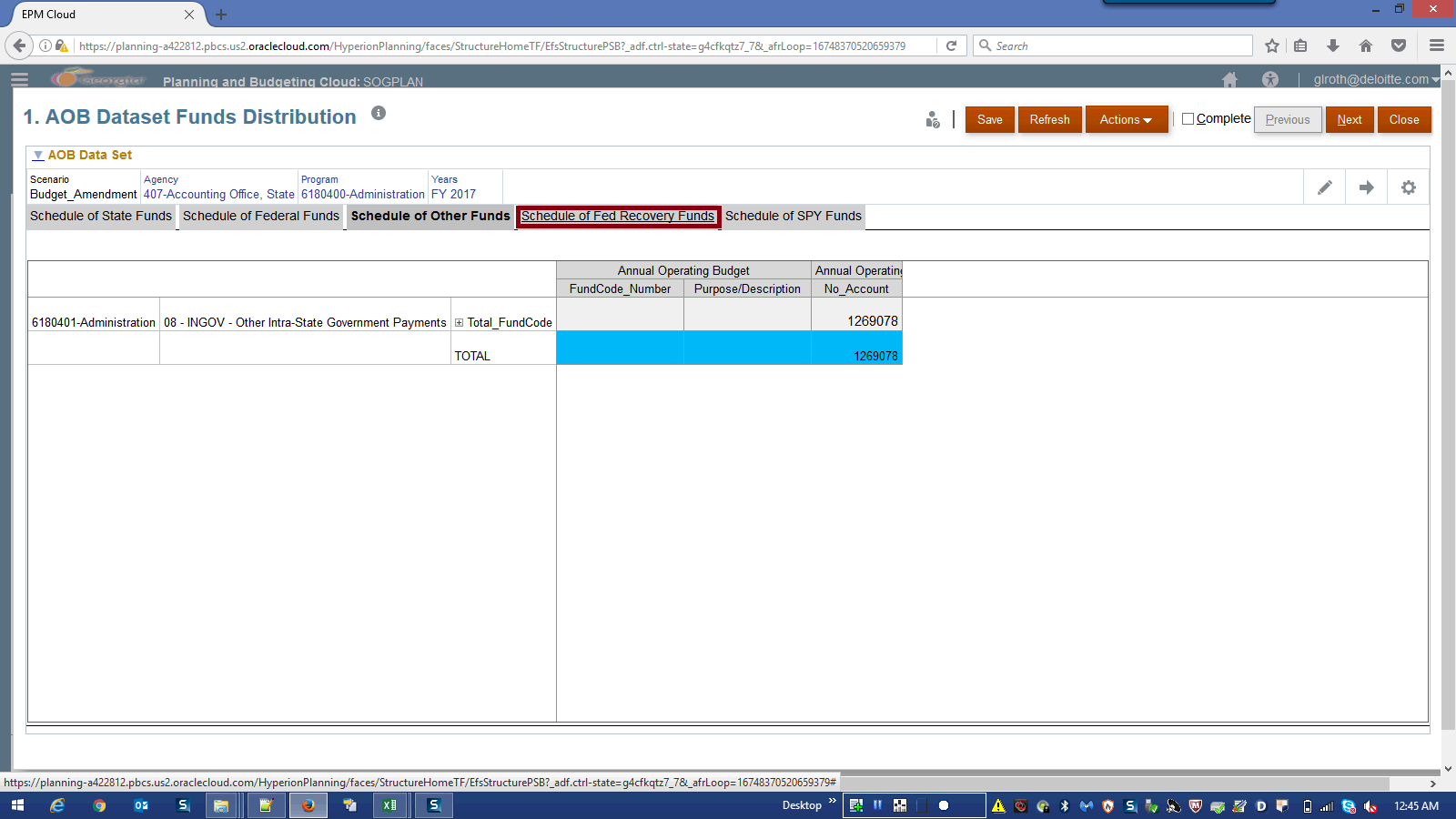
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Schedule of State Funds** link. |  |



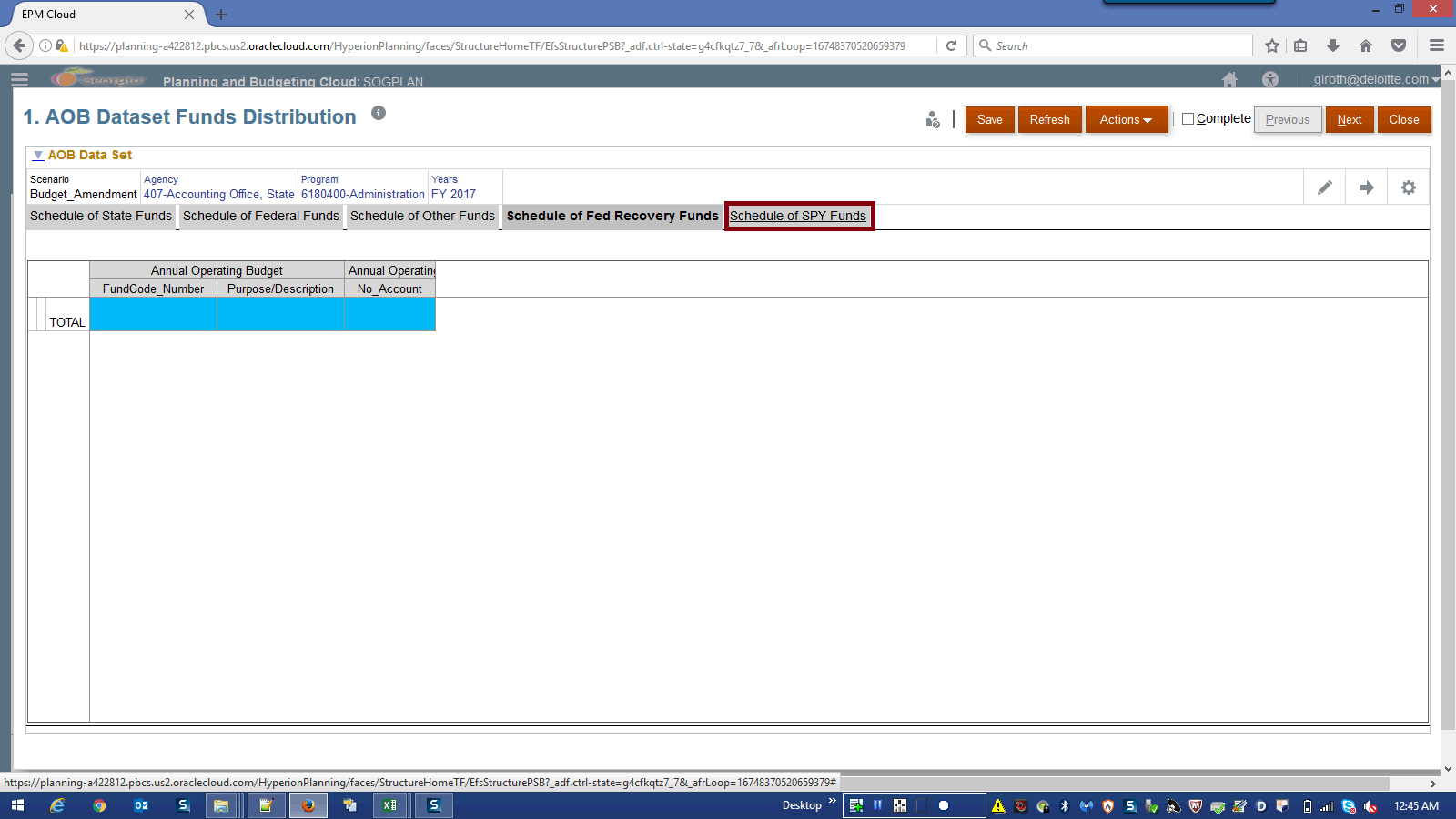
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Schedule of Federal Funds** link. |  |



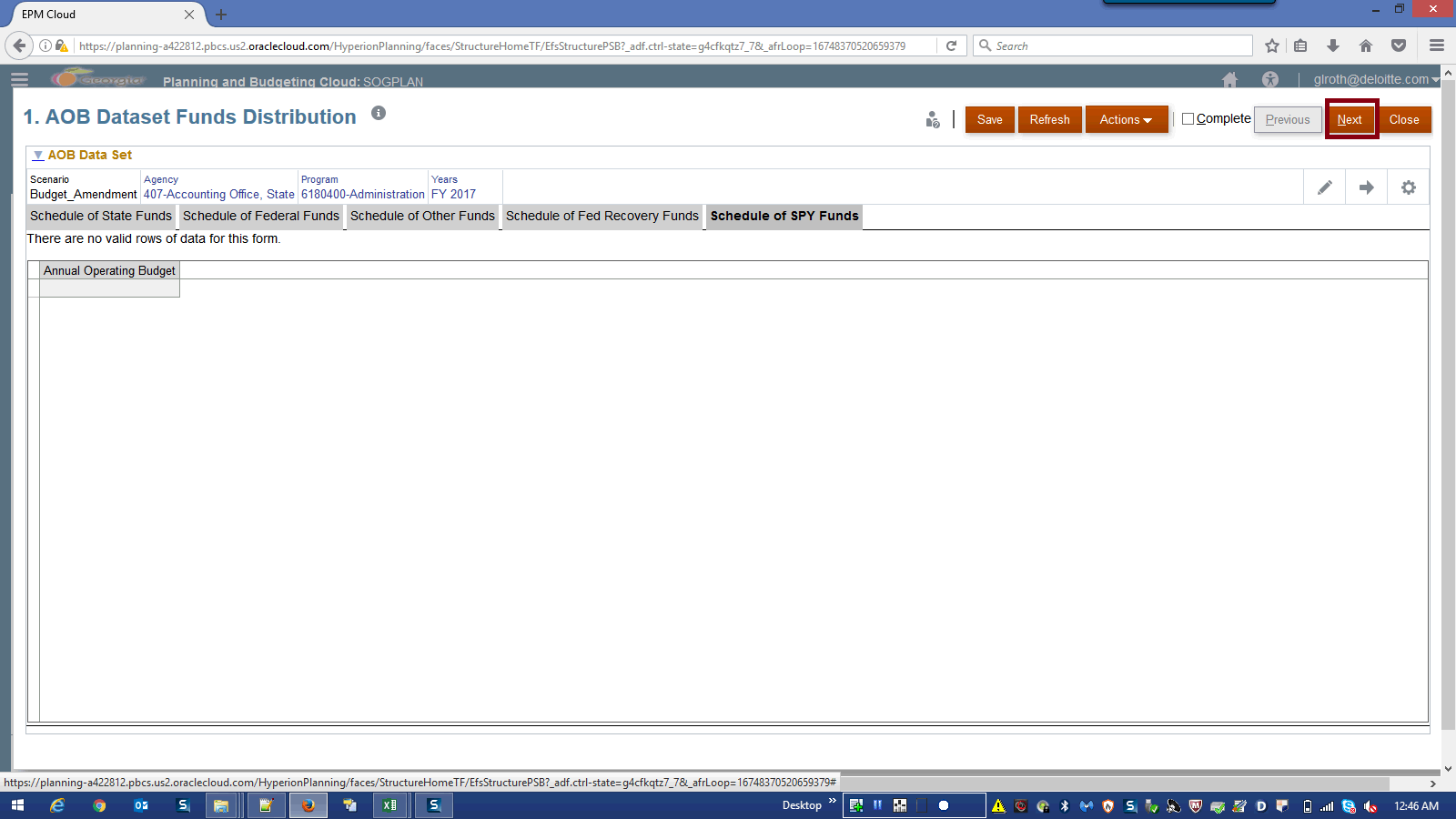
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Schedule of Other Funds** link. |  |



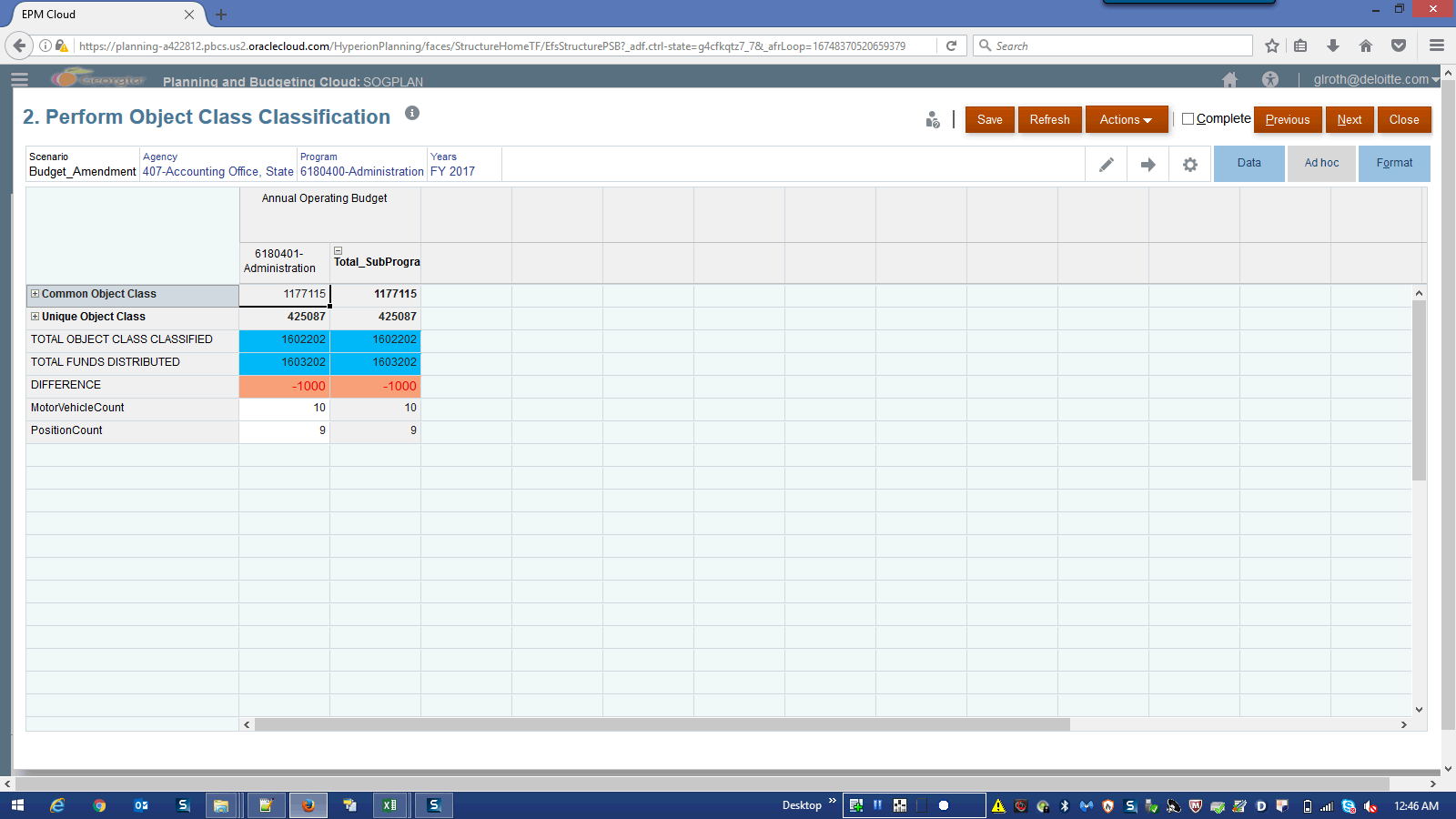
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Schedule of Fed Recovery Funds** link. |  |



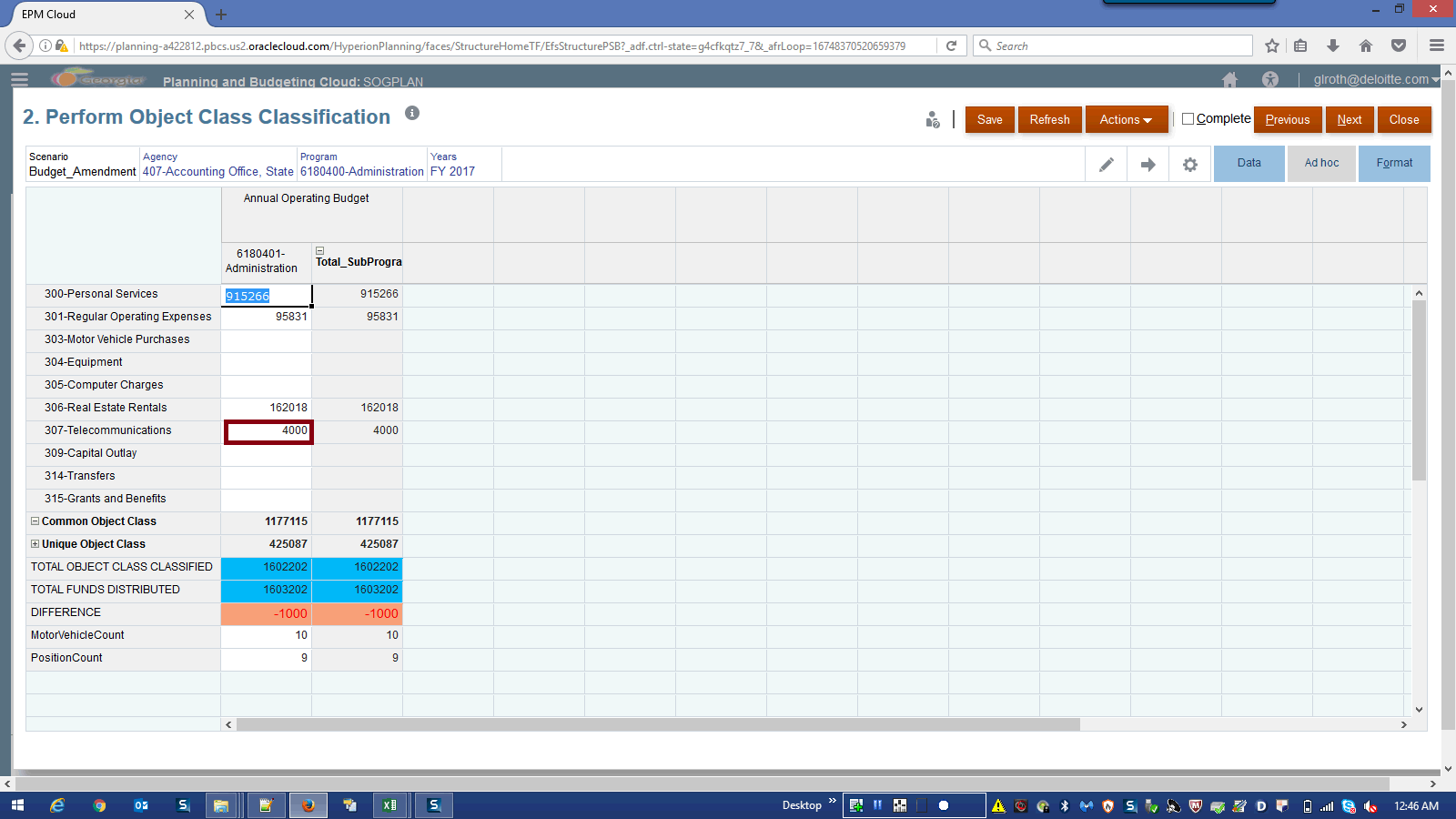
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Schedule of SPY Funds** link.  **NOTE:** Repeat Step 12 to Step 26 by selecting program by program and review the AOB data. |  |



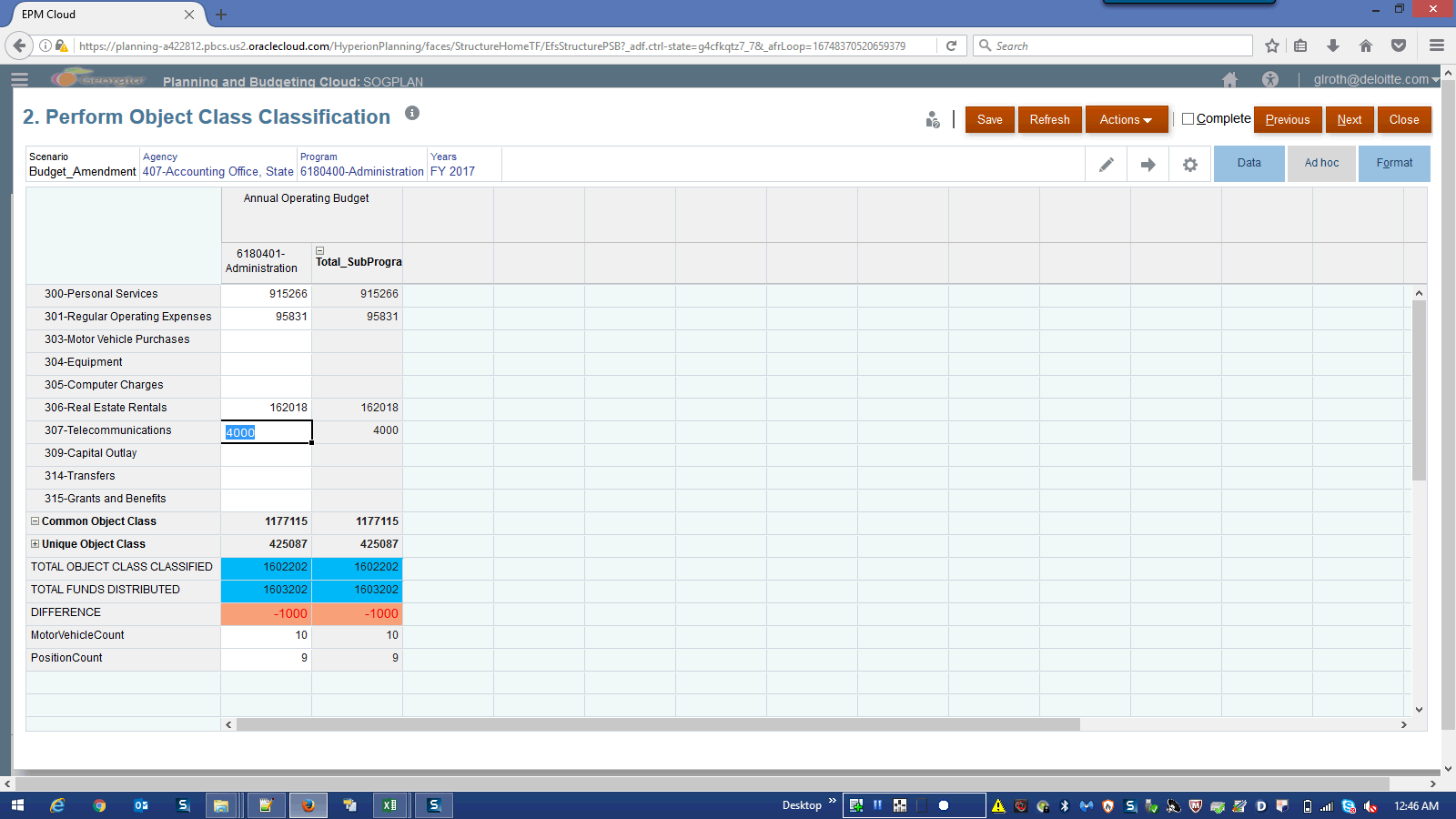
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Next** field. |  |



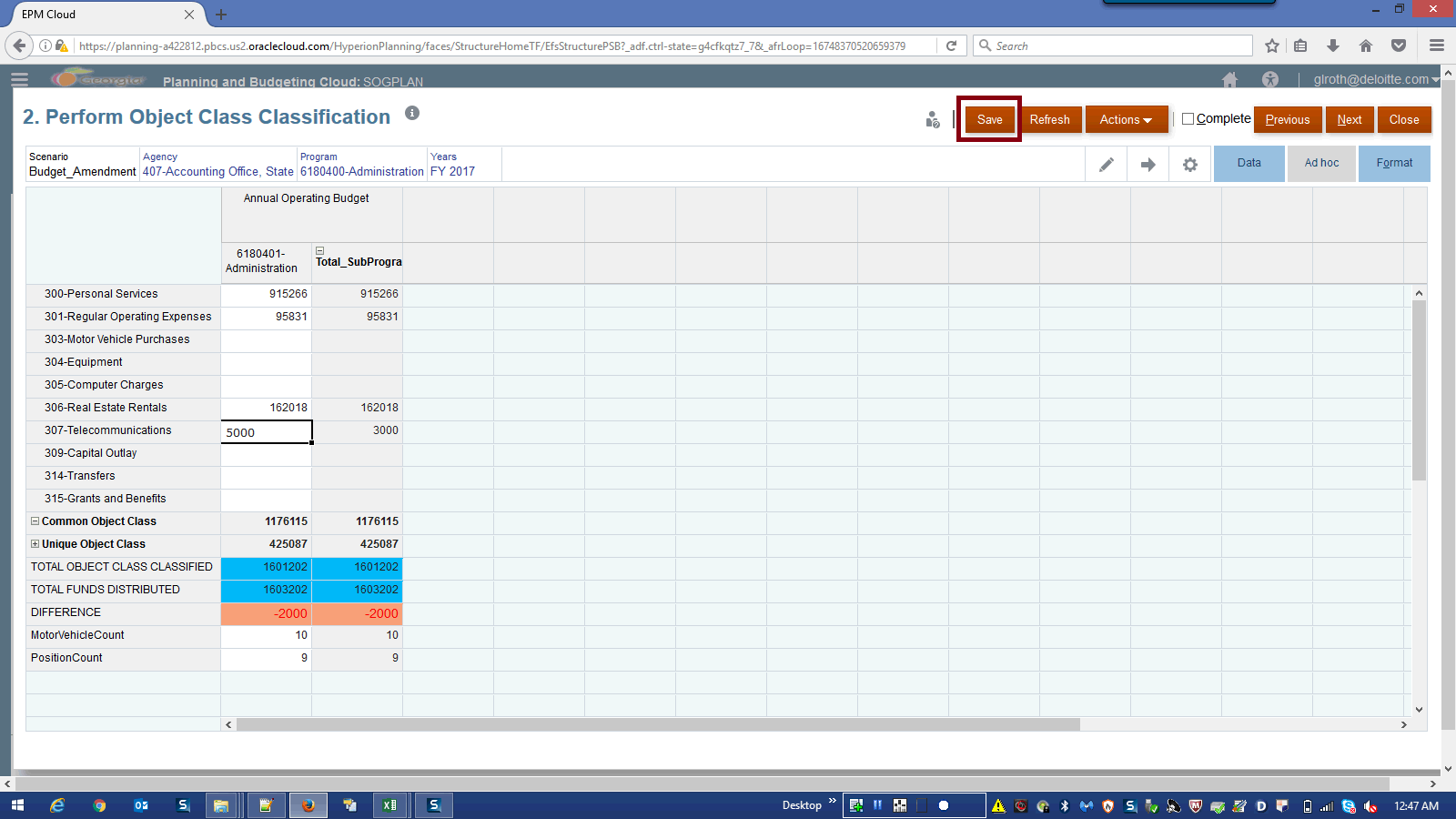
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click **+ icon** to **expand.** |  |



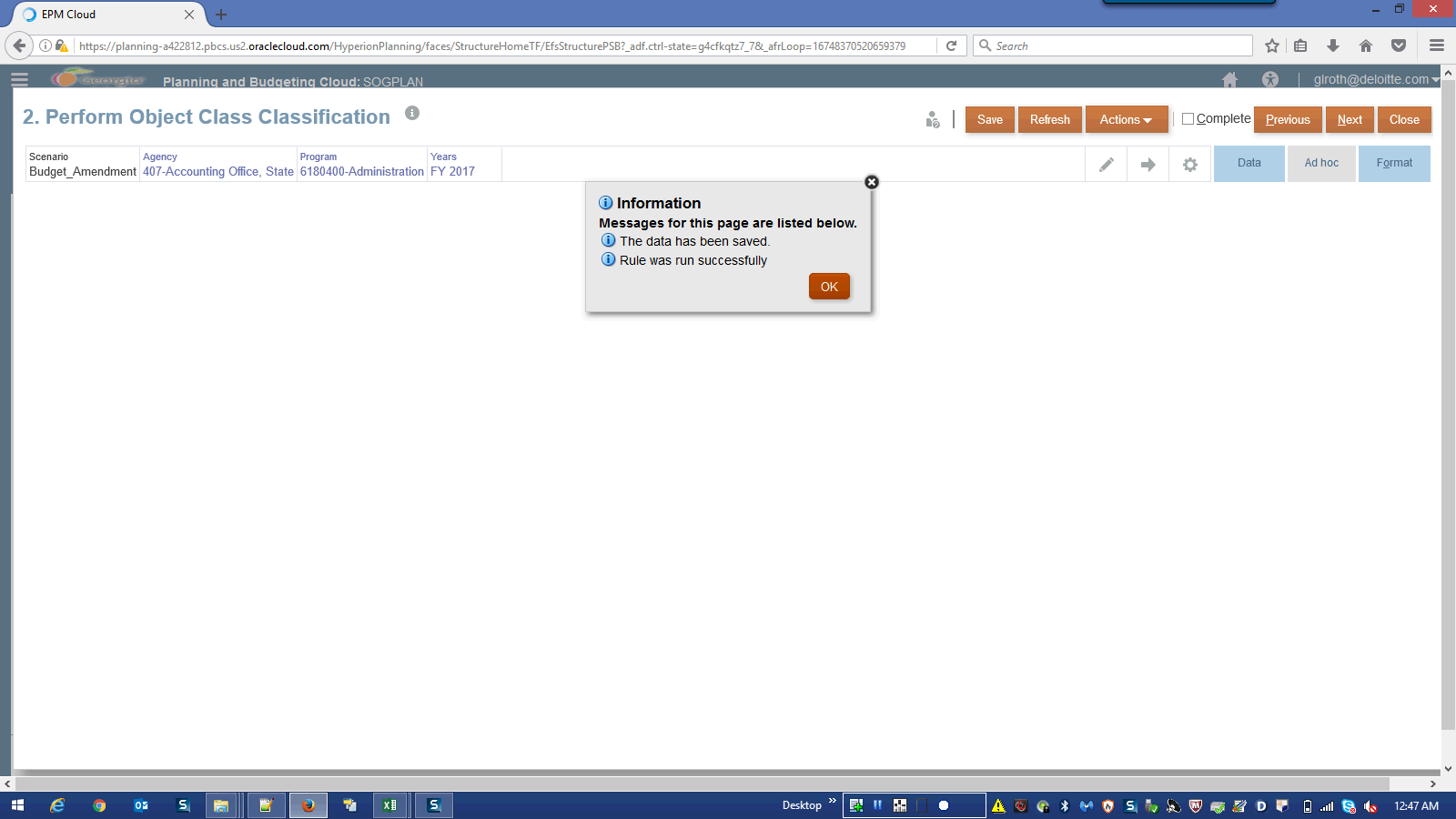
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **highlighted** field. |  |



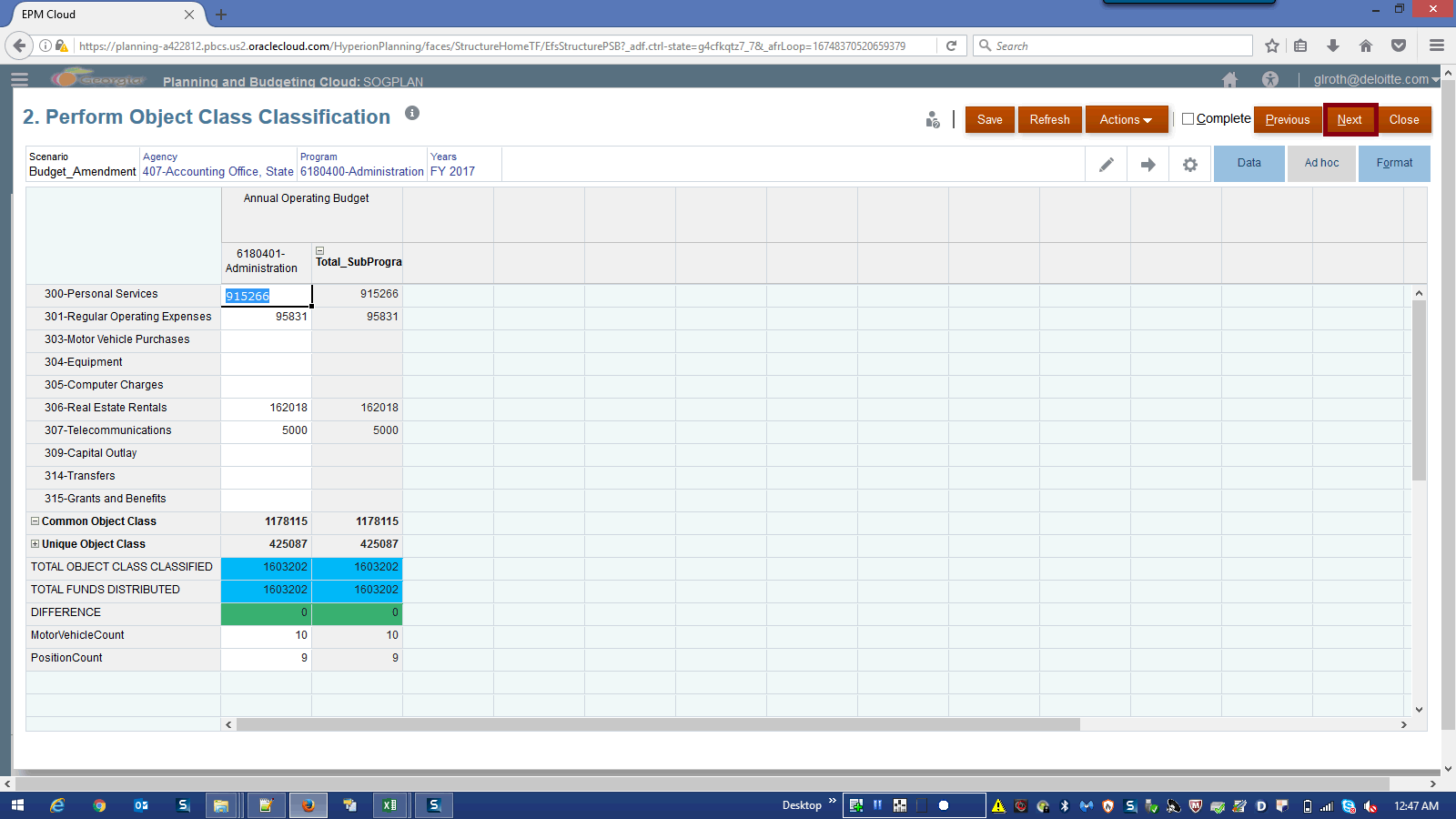
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Enter the desired information into the field. Enter a valid value e.g. "**5000**". |  |



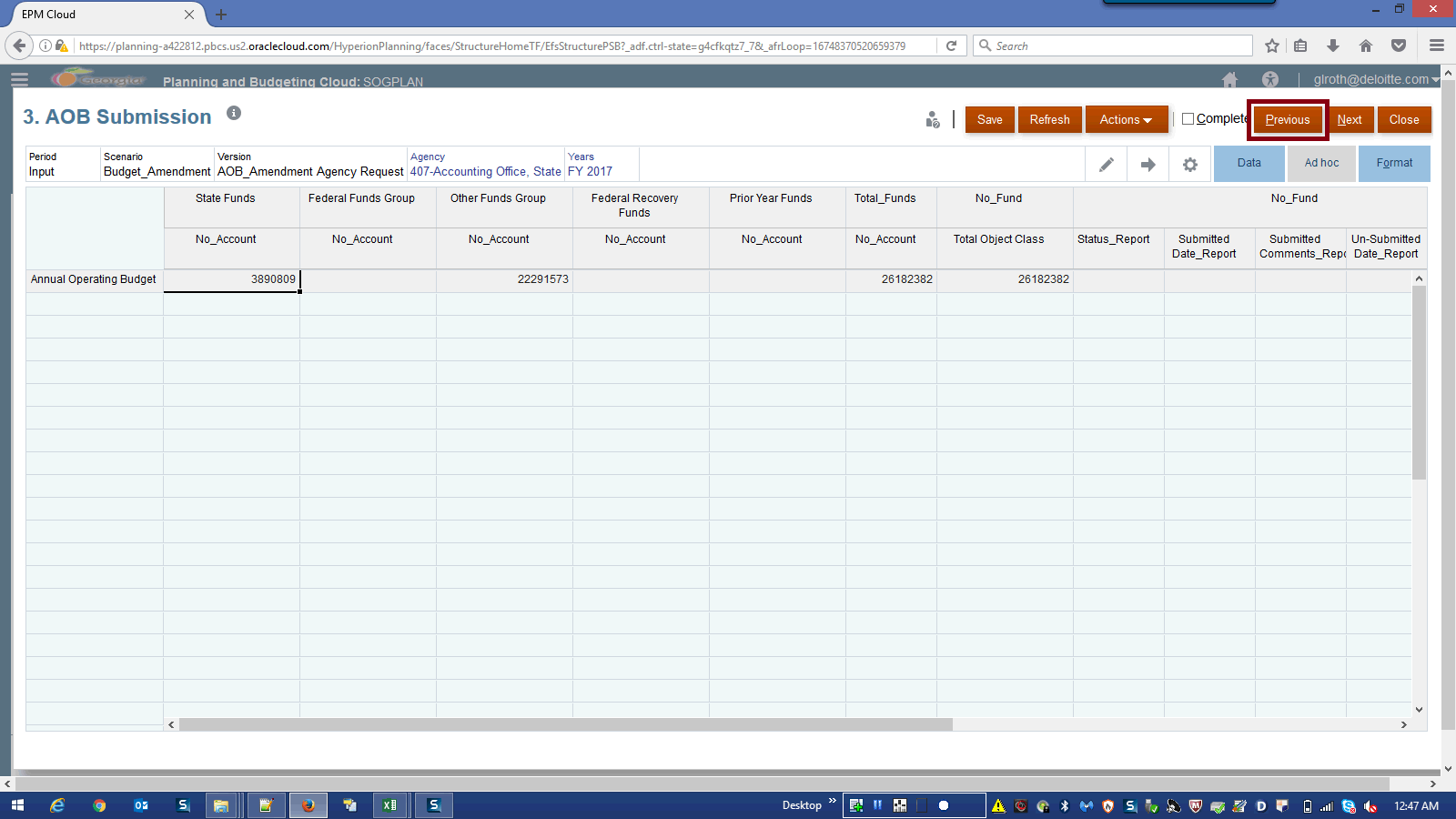
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Save** button. |  |



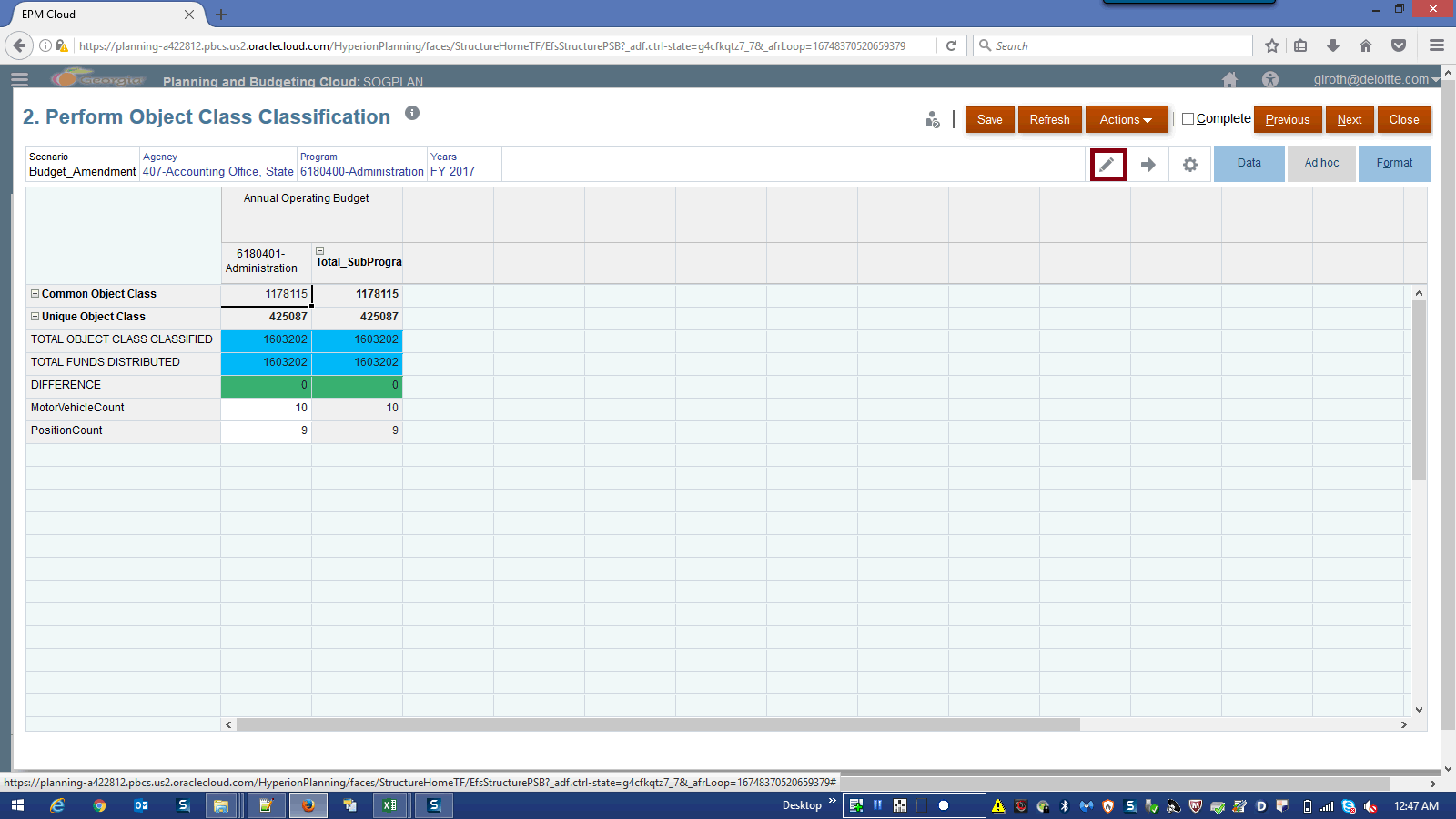
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **OK** button. |  |



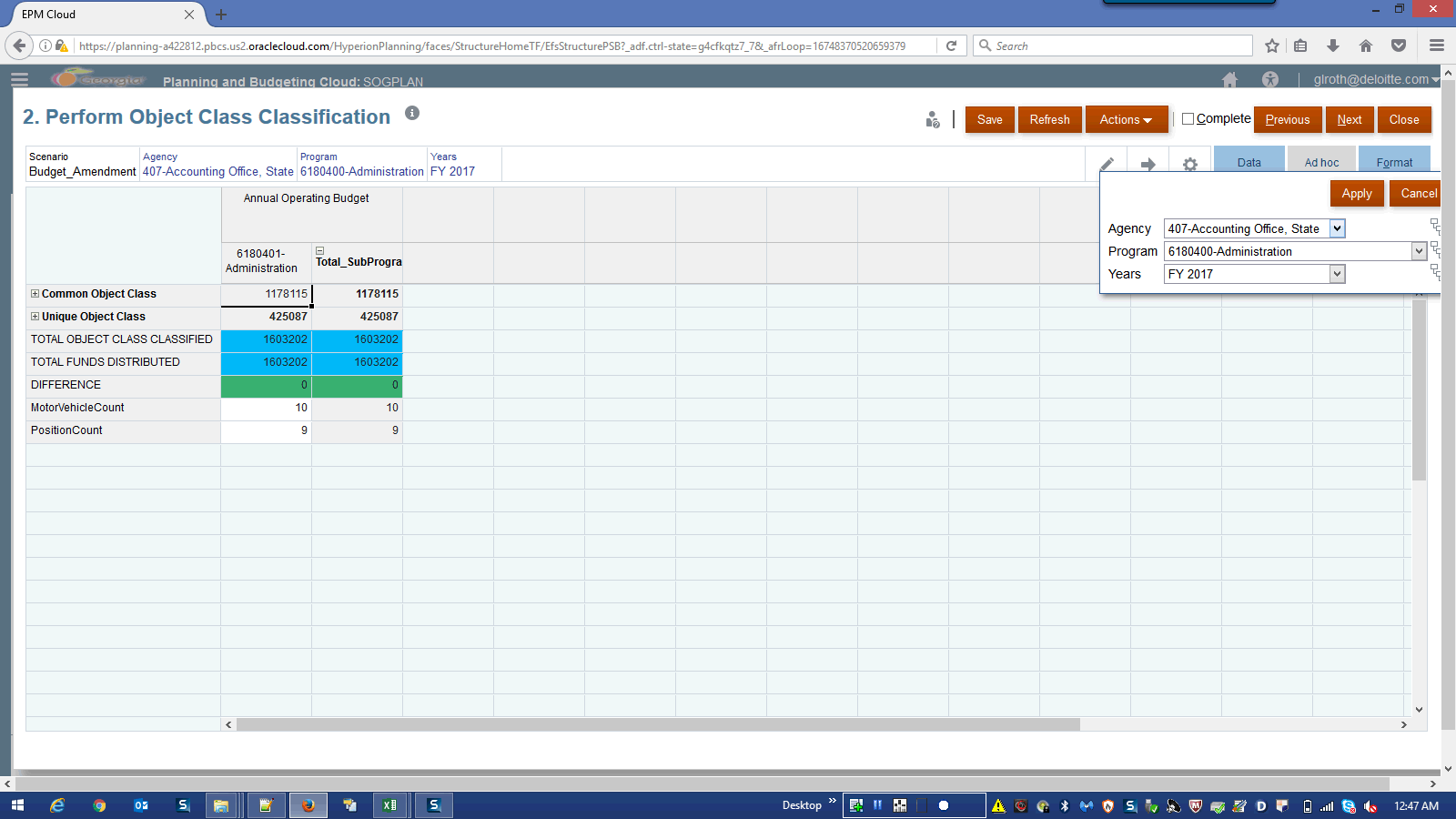
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Next** button. |  |



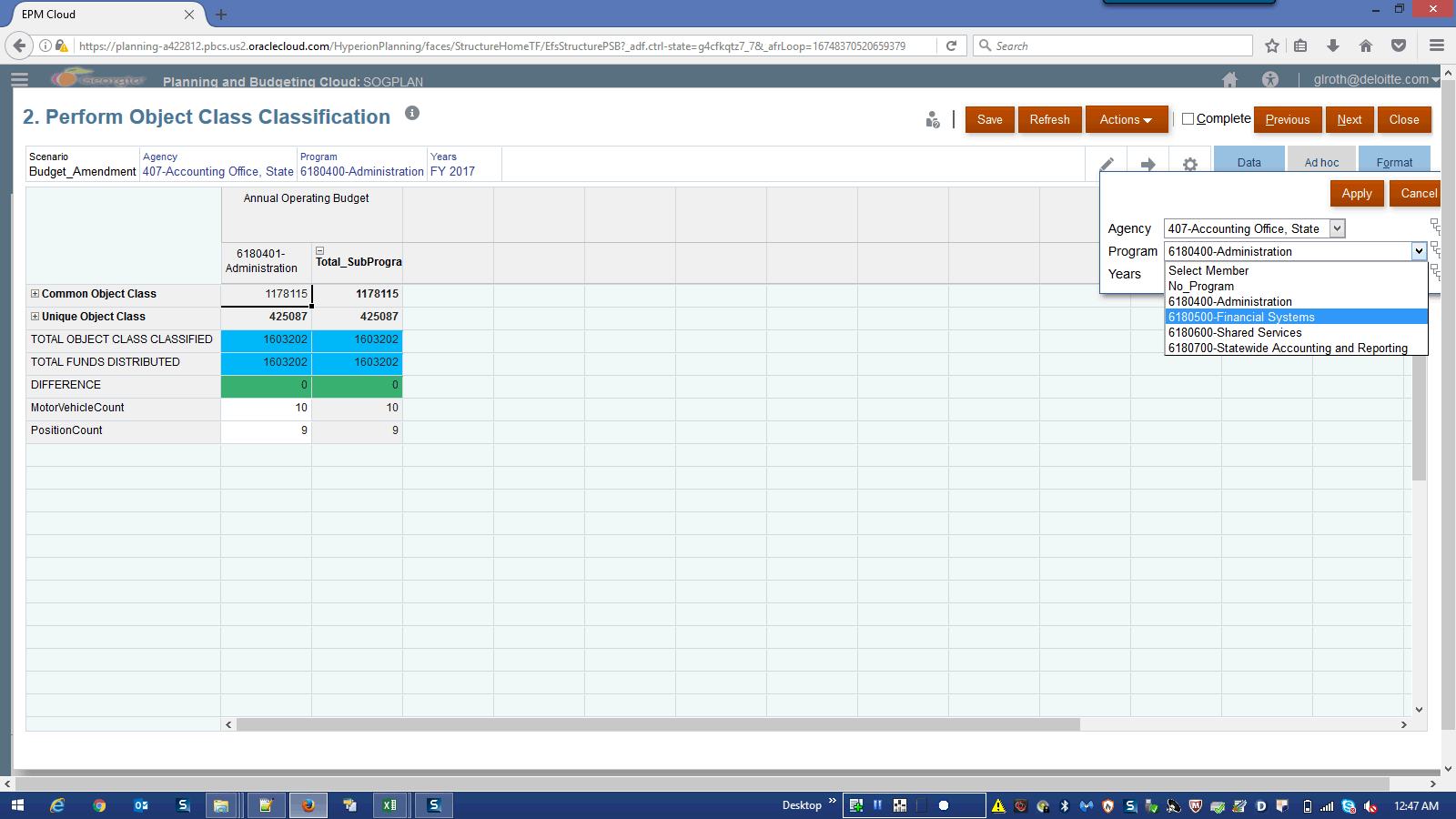
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Previous** field. |  |



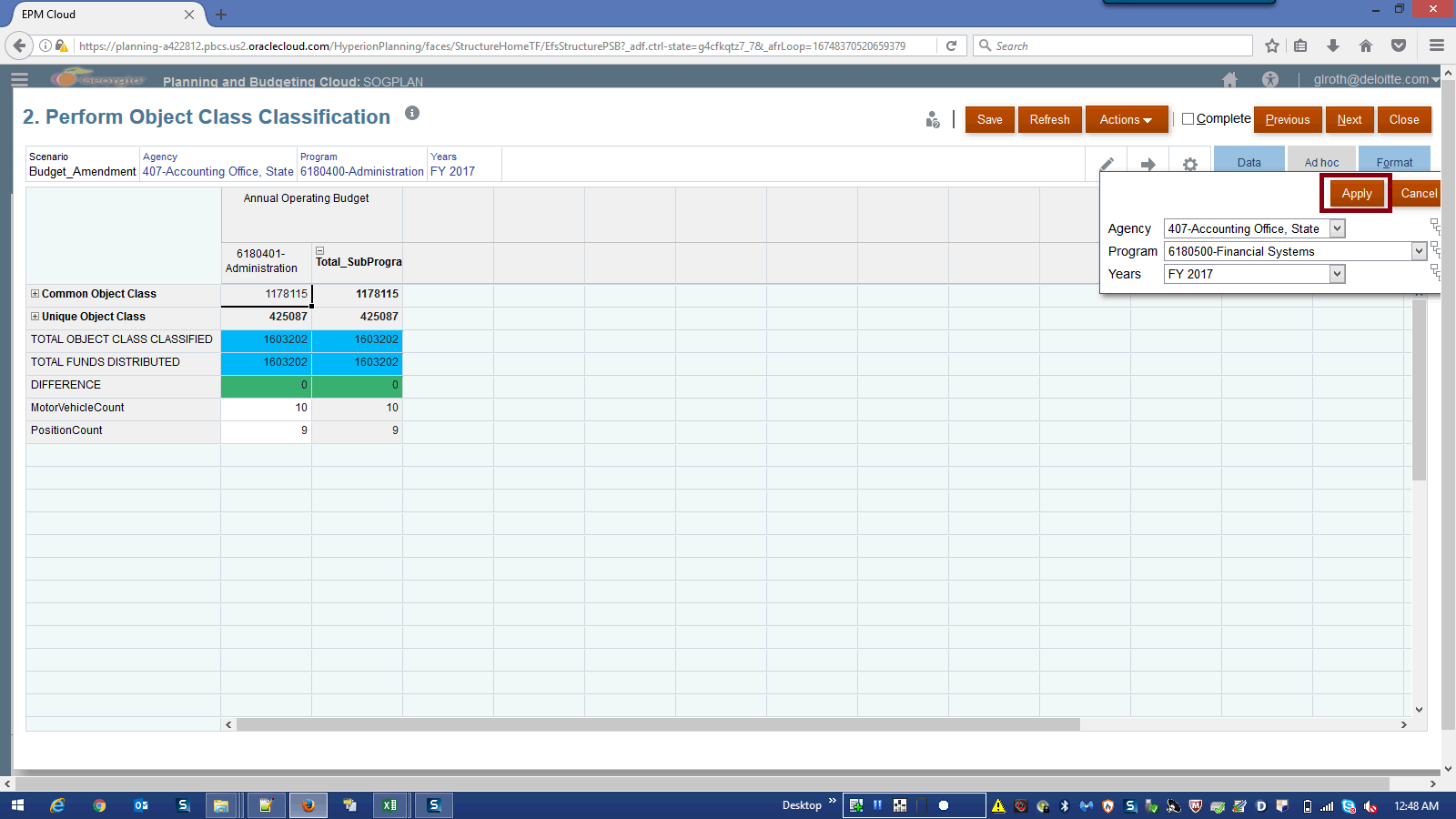
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Edit Members** graphic. |  |



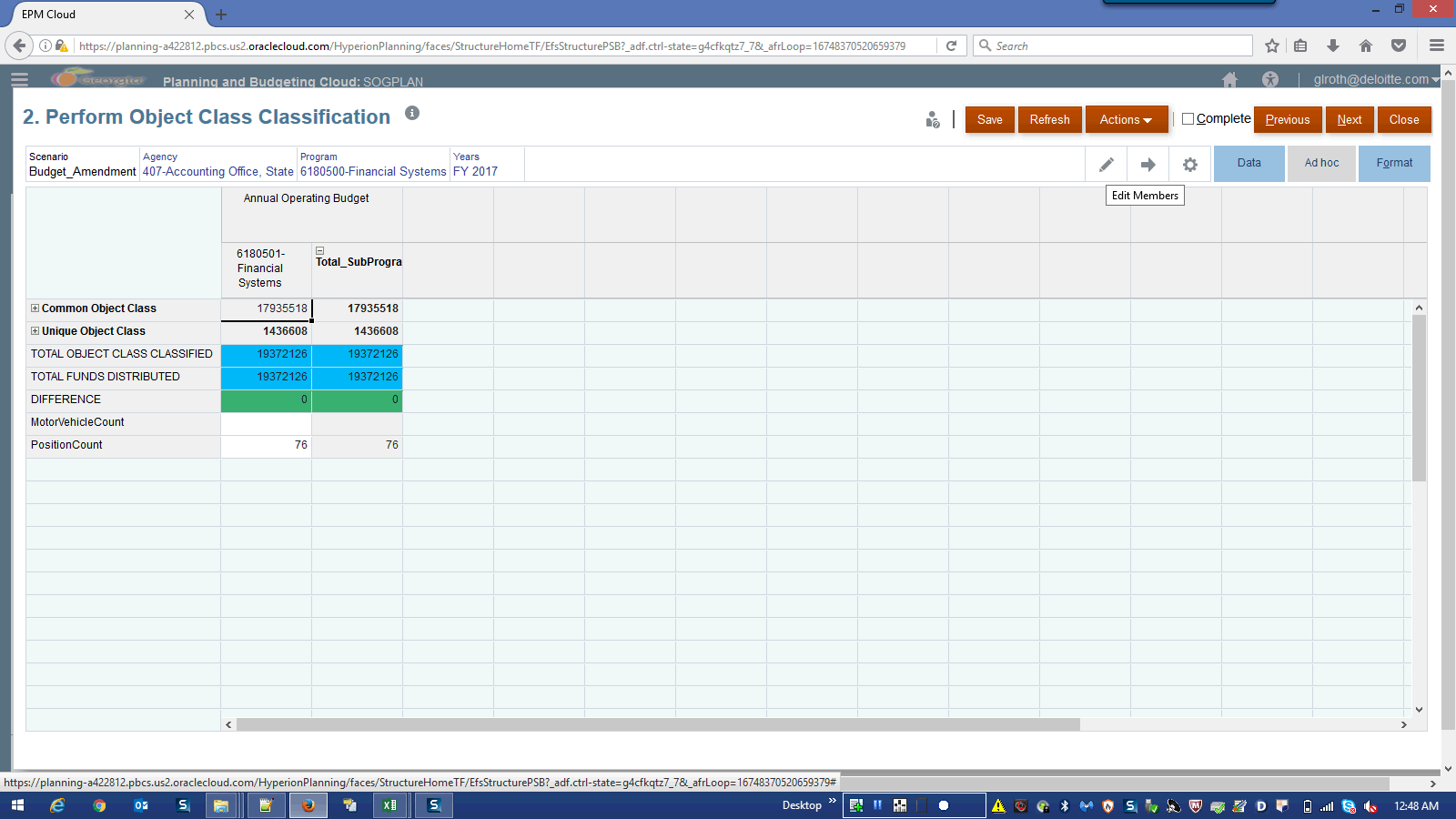
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Program** list. |  |



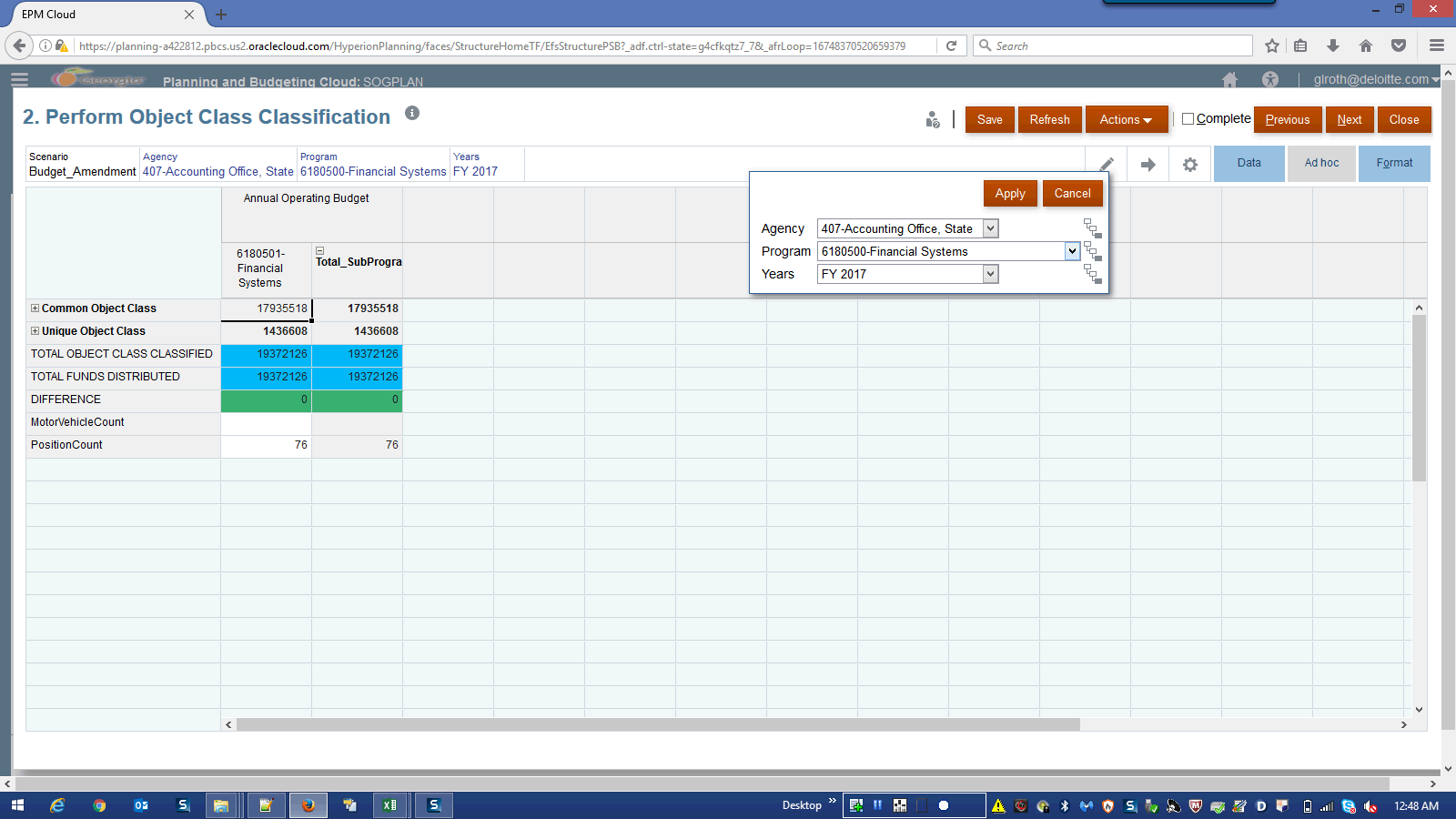
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **6180500-Financial Systems** list item. |  |



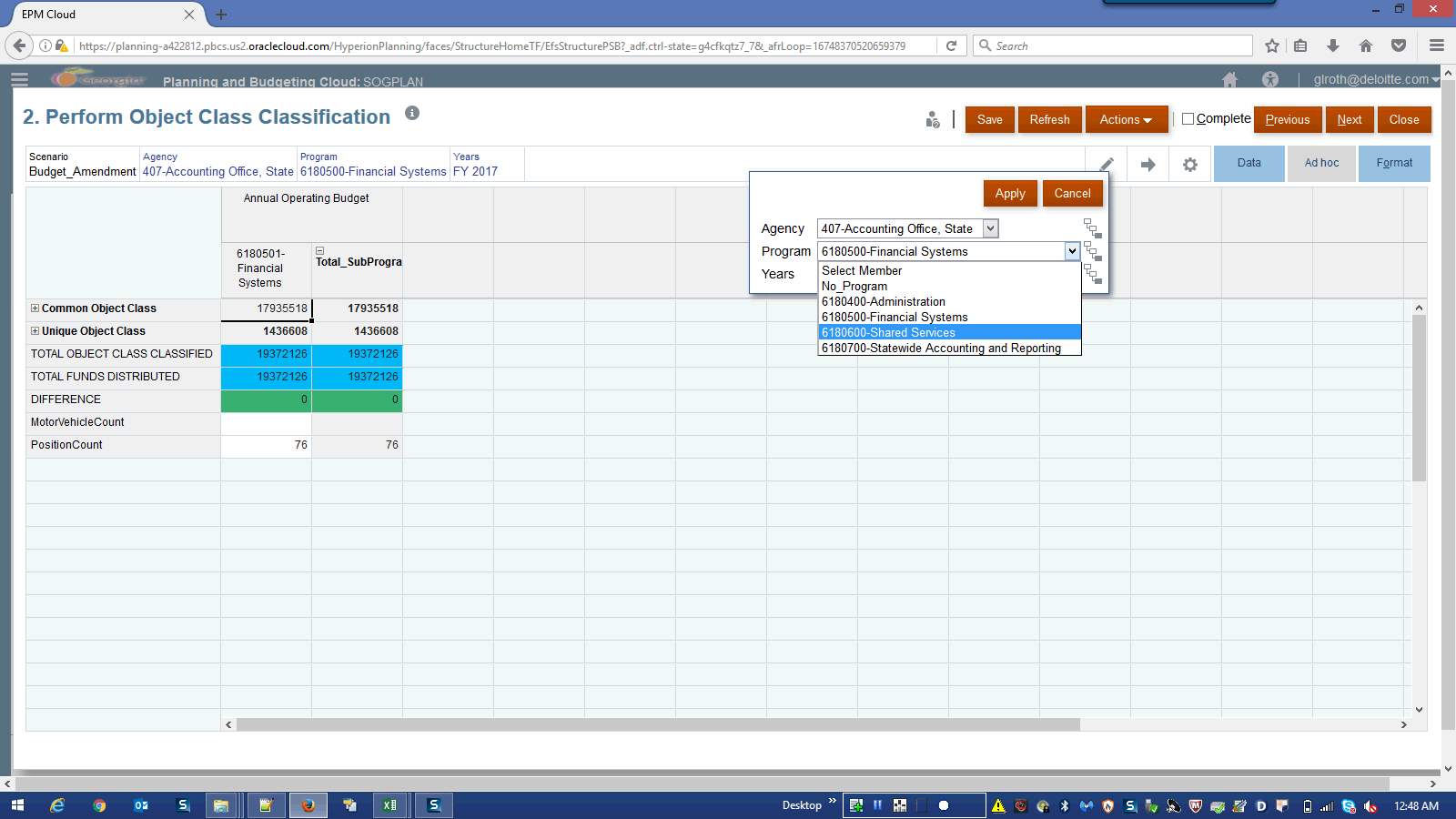
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Apply** button.  **NOTE:**  For each Program, DIFFERENCE of TOTAL OBJECT CLASS CLASSIFIED and TOTAL FUNDS DISTRIBUTED should be zero. DIFFERENCE row should show as Green. |  |



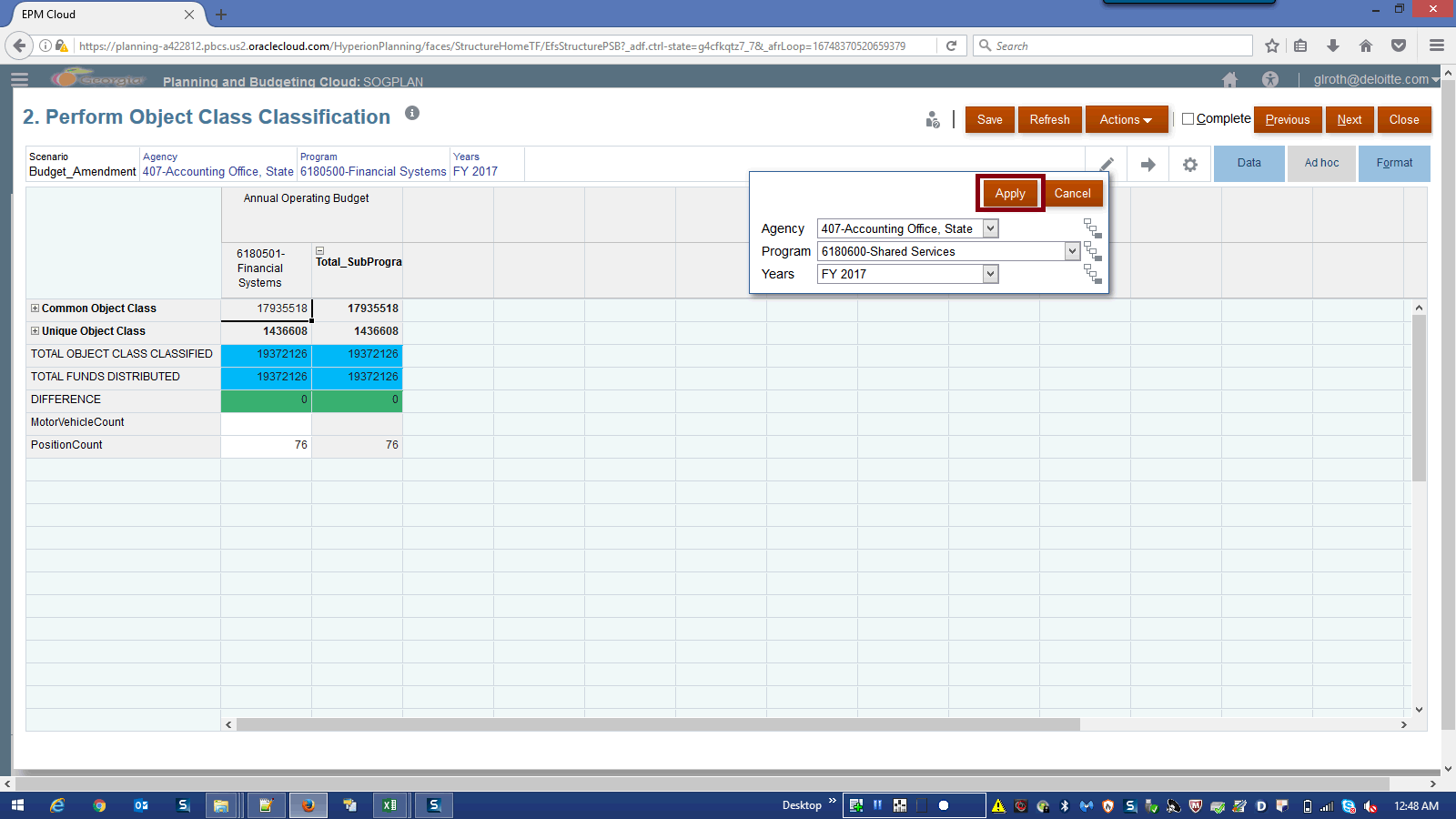
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Edit Members** graphic. |  |



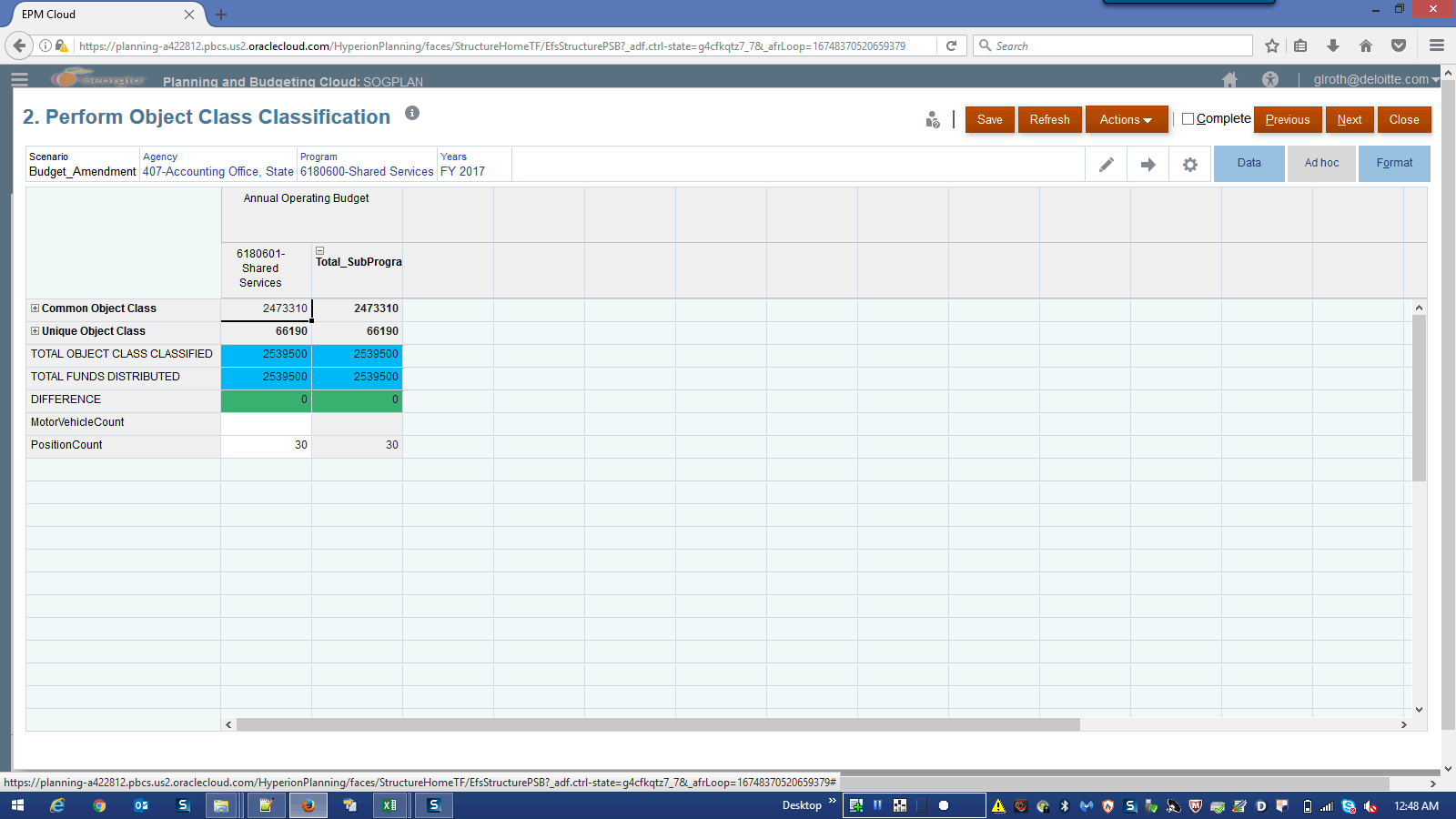
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Program** list. |  |



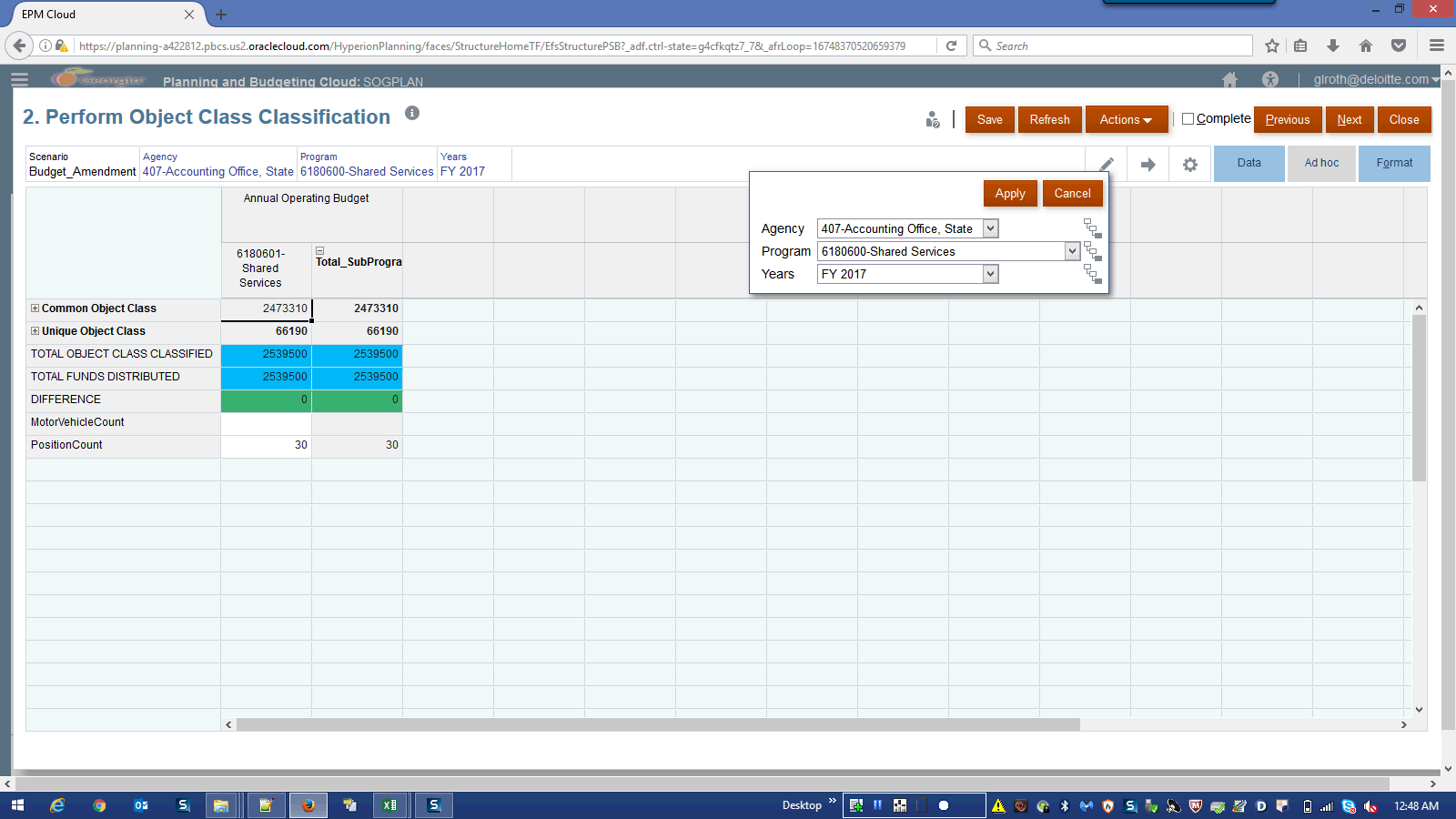
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **6180600-Shared Services** list item. |  |



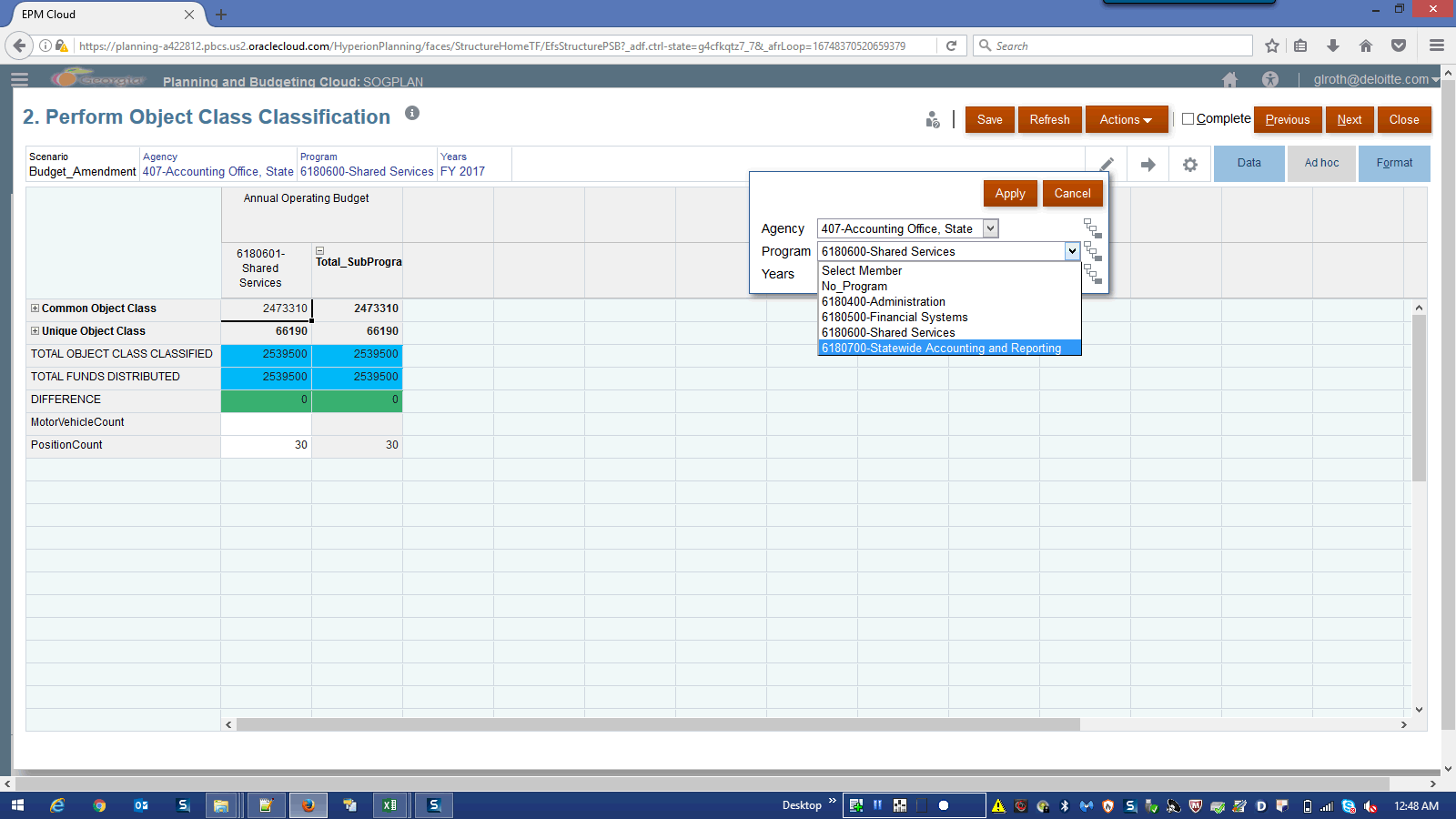
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Apply** button. |  |



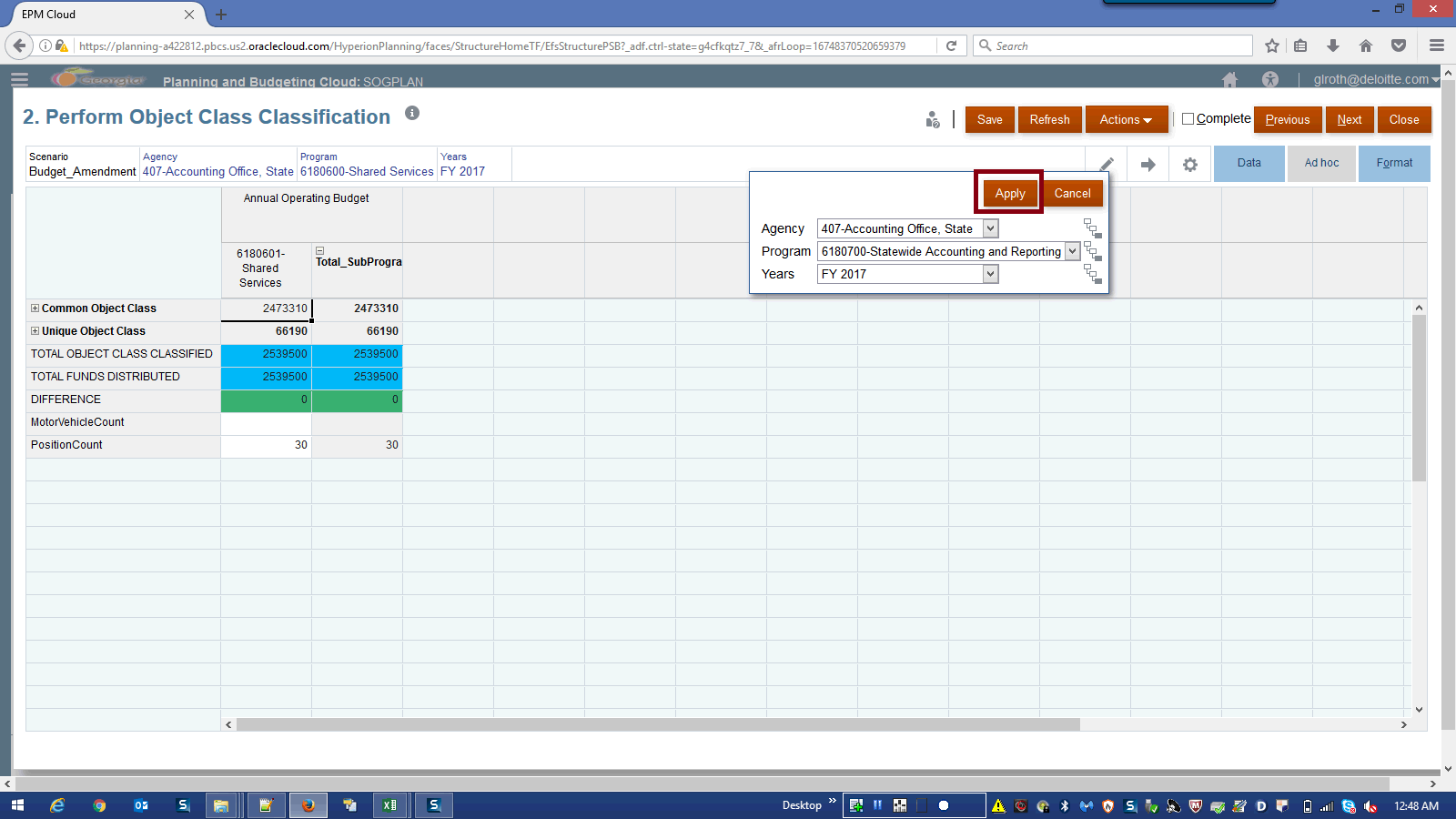
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Edit Members** graphic. |  |



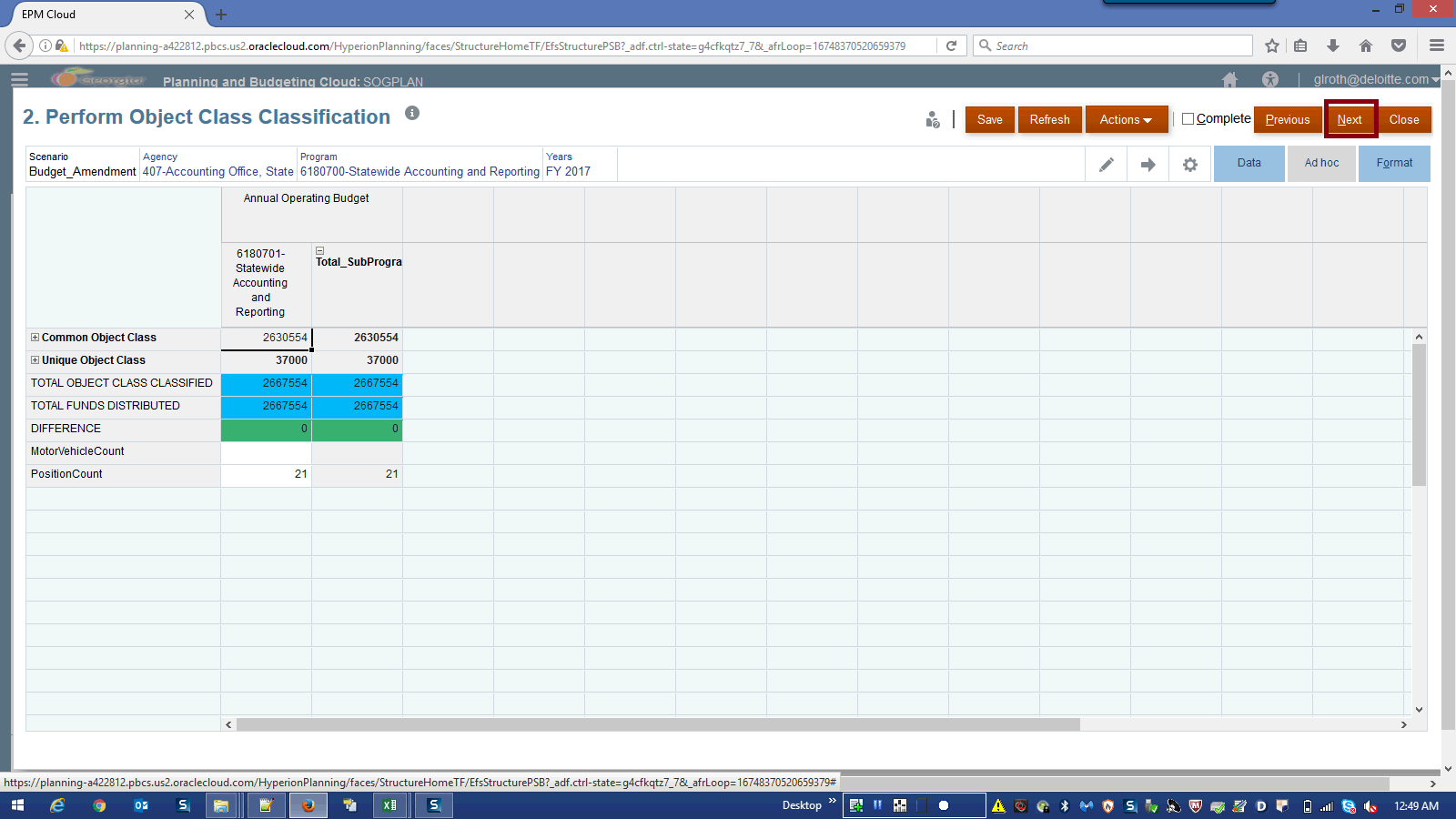
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Program** list. |  |



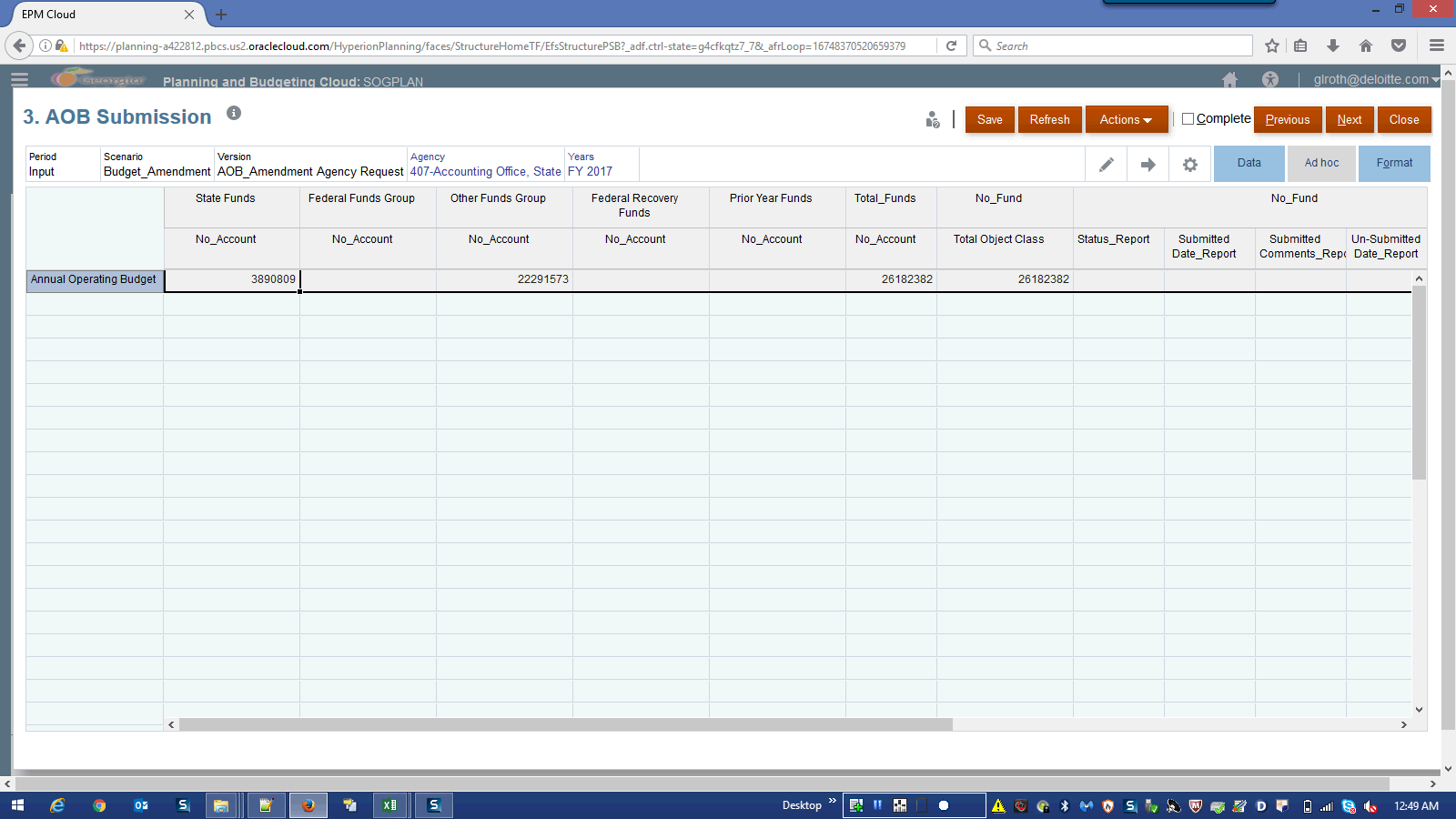
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **6180700-Statewide Accounting and Reporting** list item. |  |



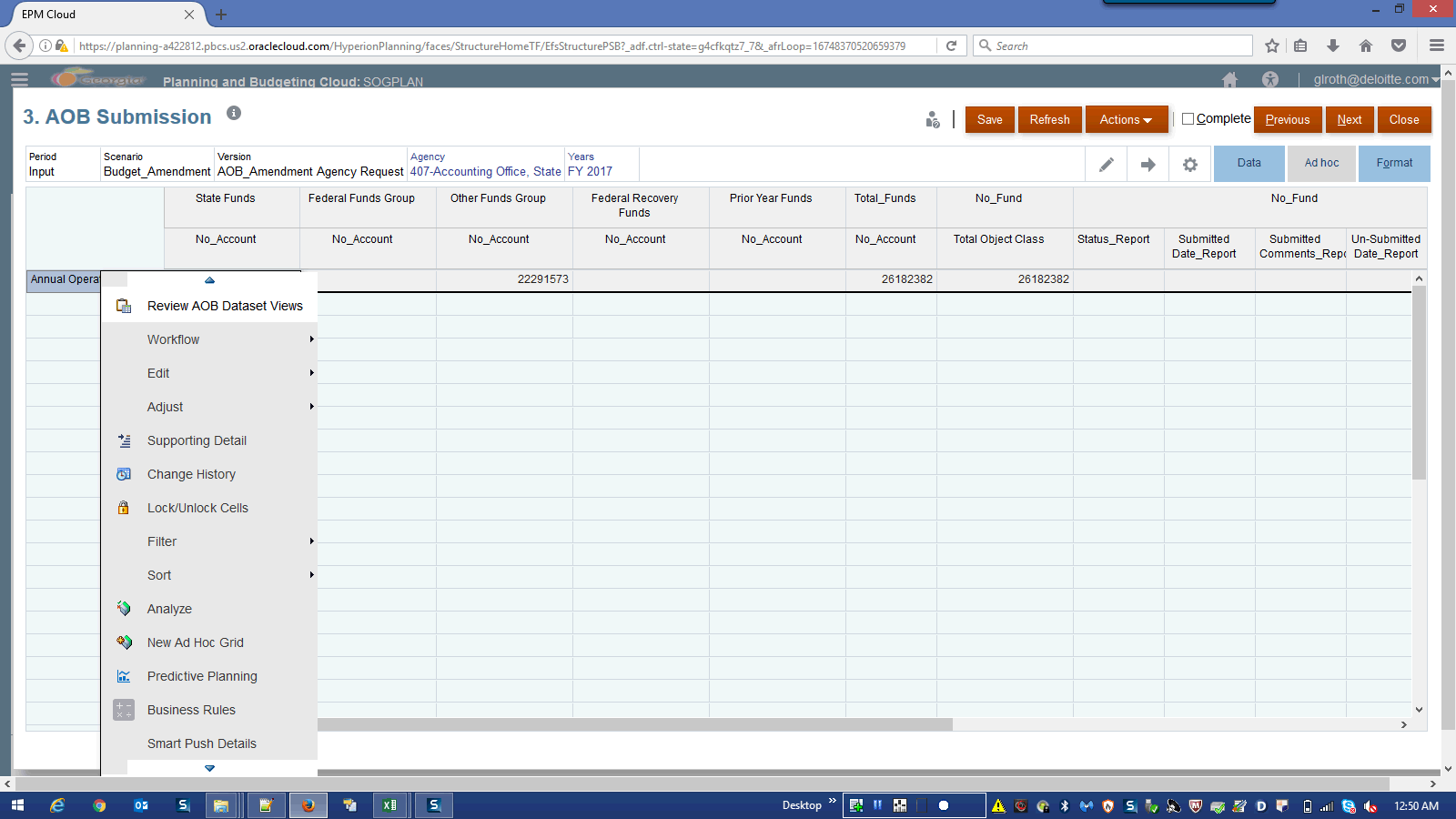
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Apply** button. |  |



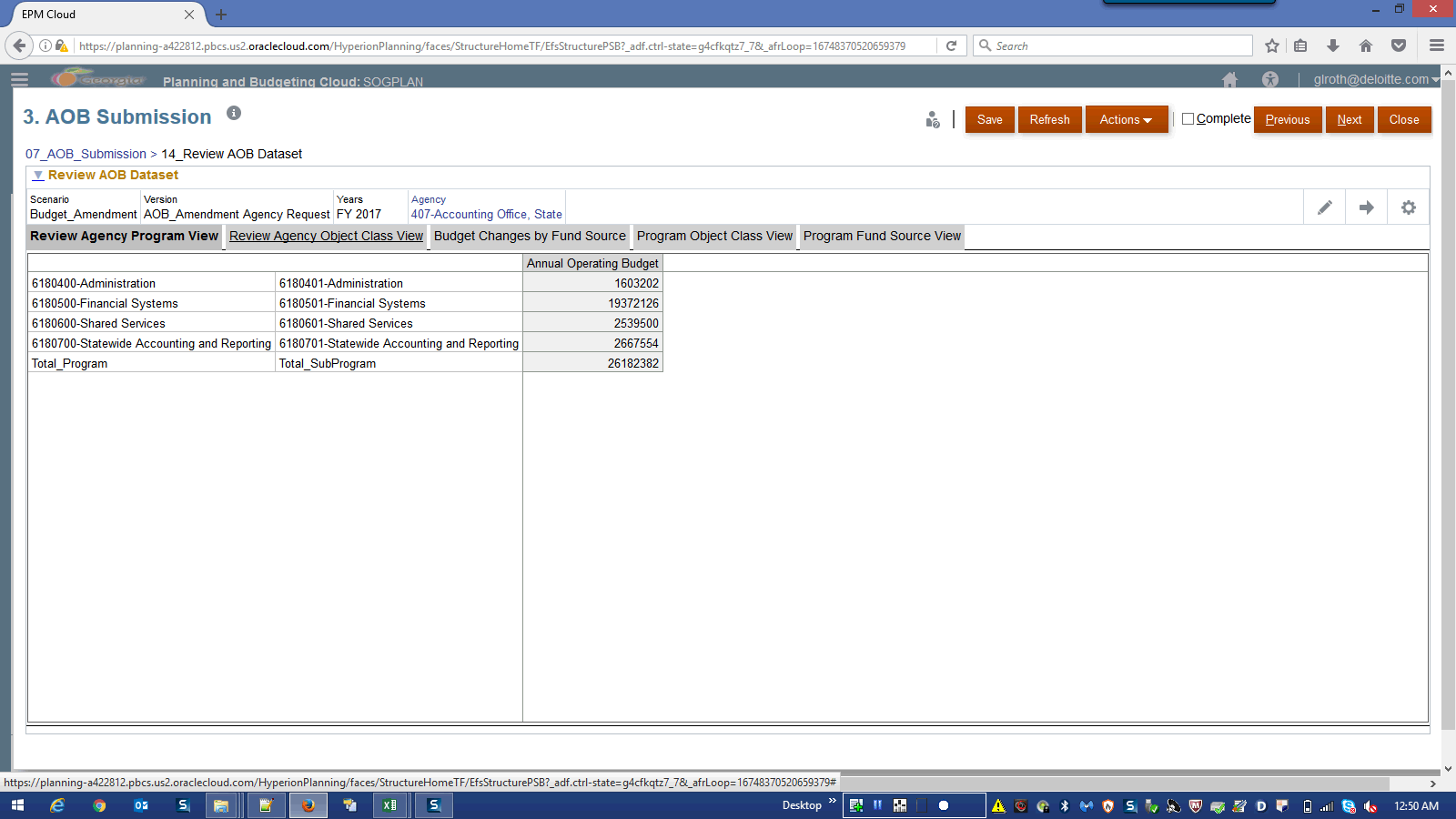
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Next** field. |  |



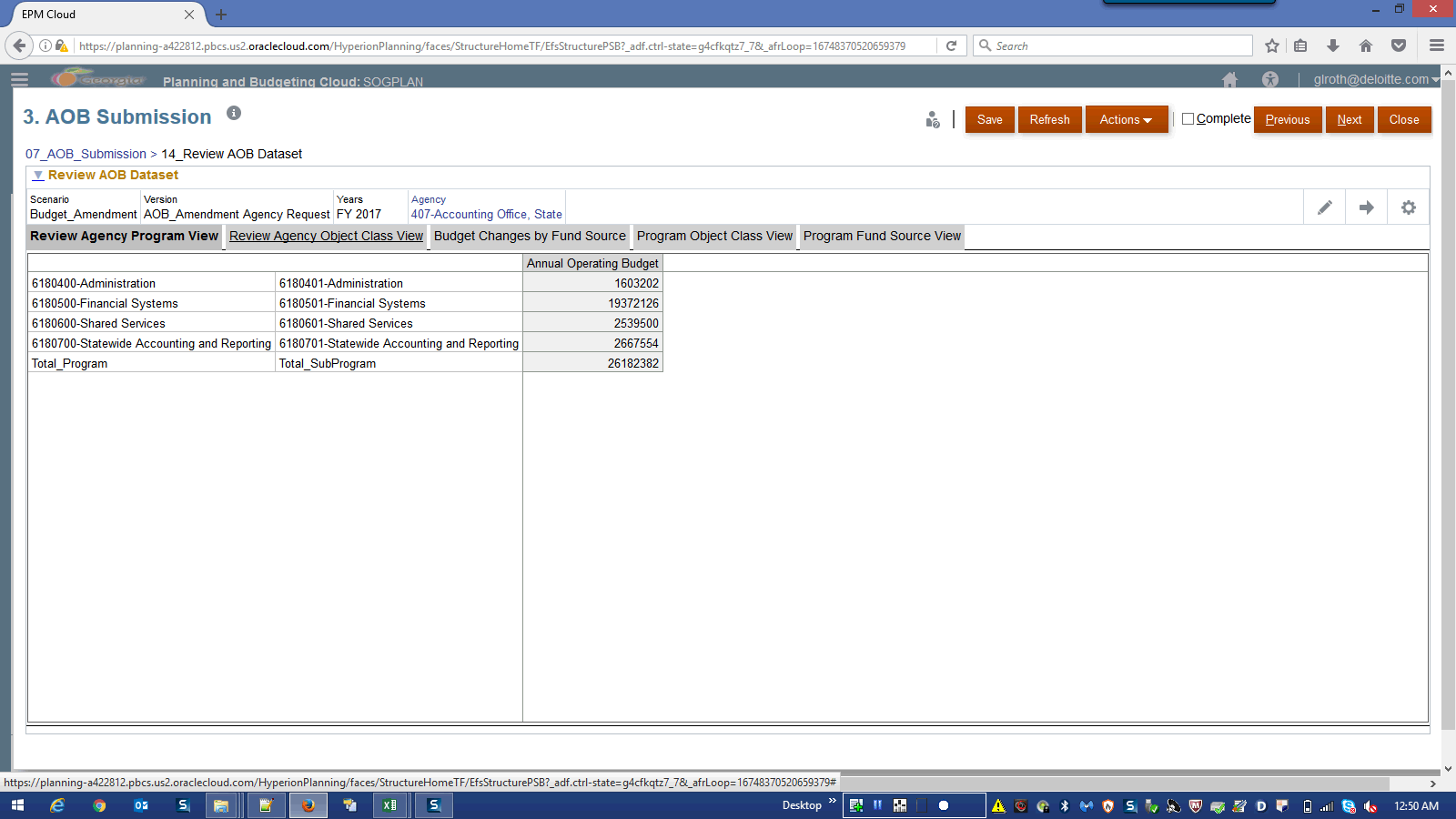
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Right-click in the **Annual Operating Budget** field. |  |



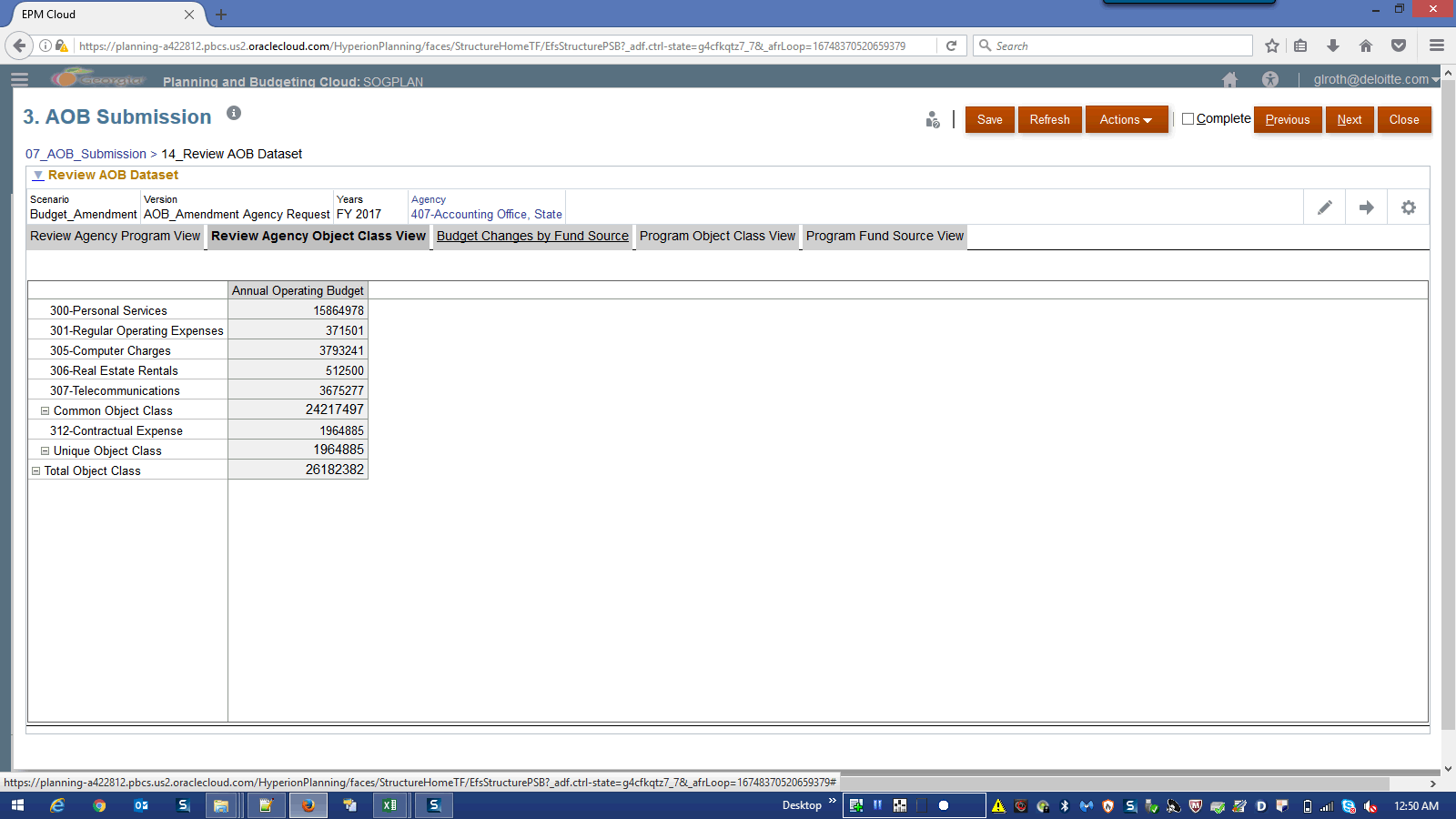
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Review AOB Dataset Views** field. |  |



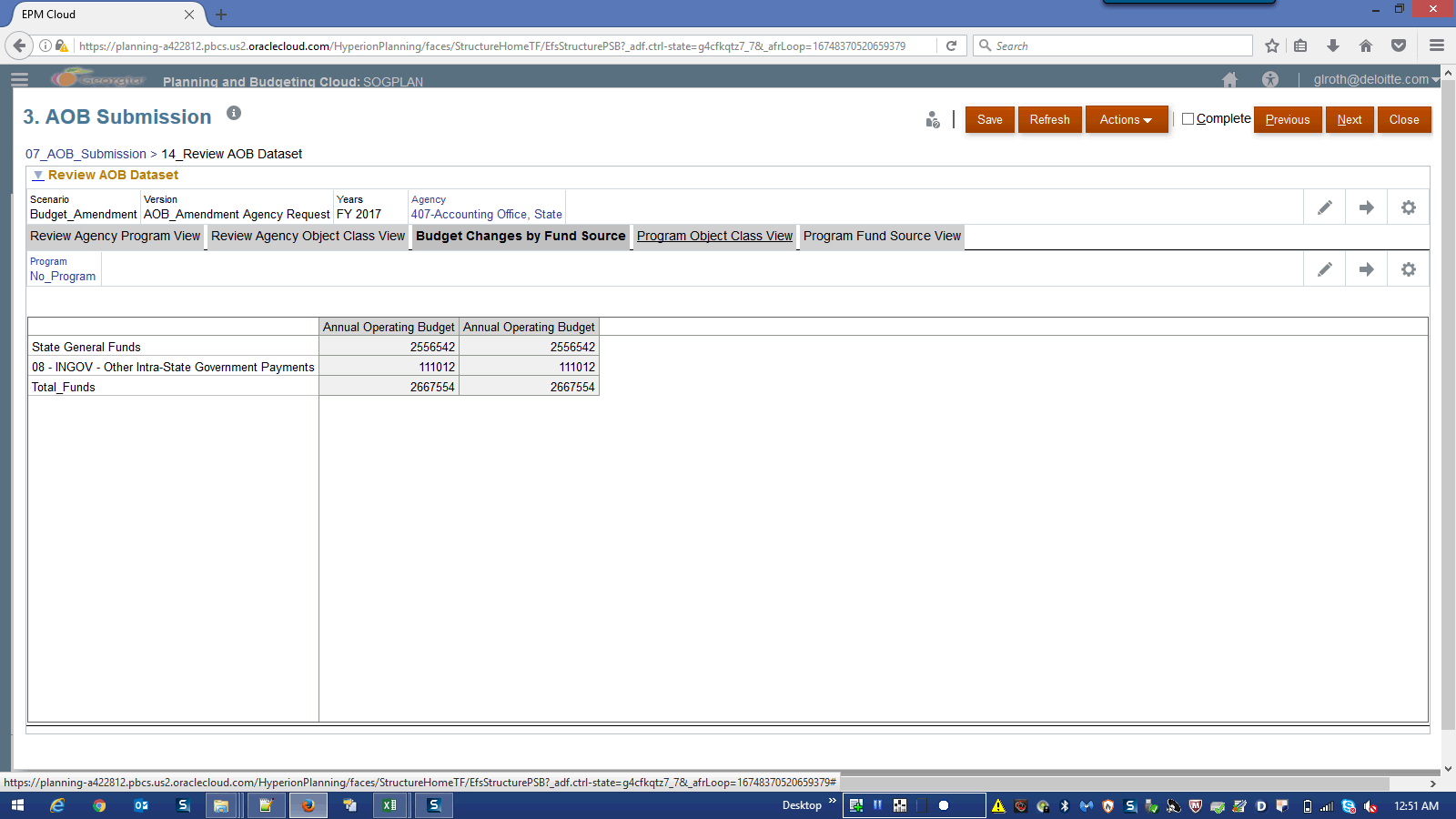
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Review Agency Program View** link. |  |



| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Review Agency Object Class View** link. |  |



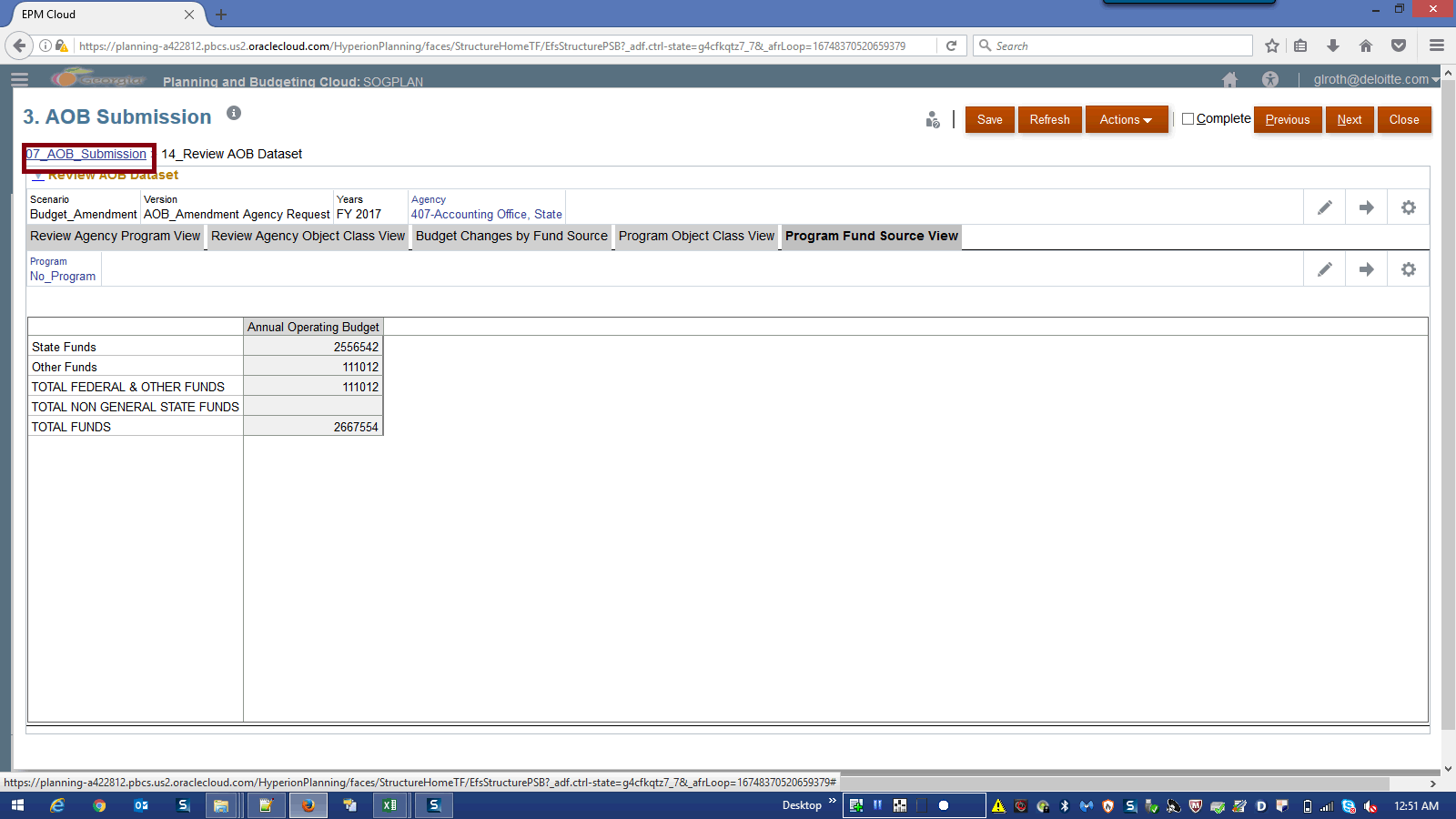
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Budget Changes by Fund Source** link.  NOTE: Select own Program by Program to review the data using pencil dropdown. |  |



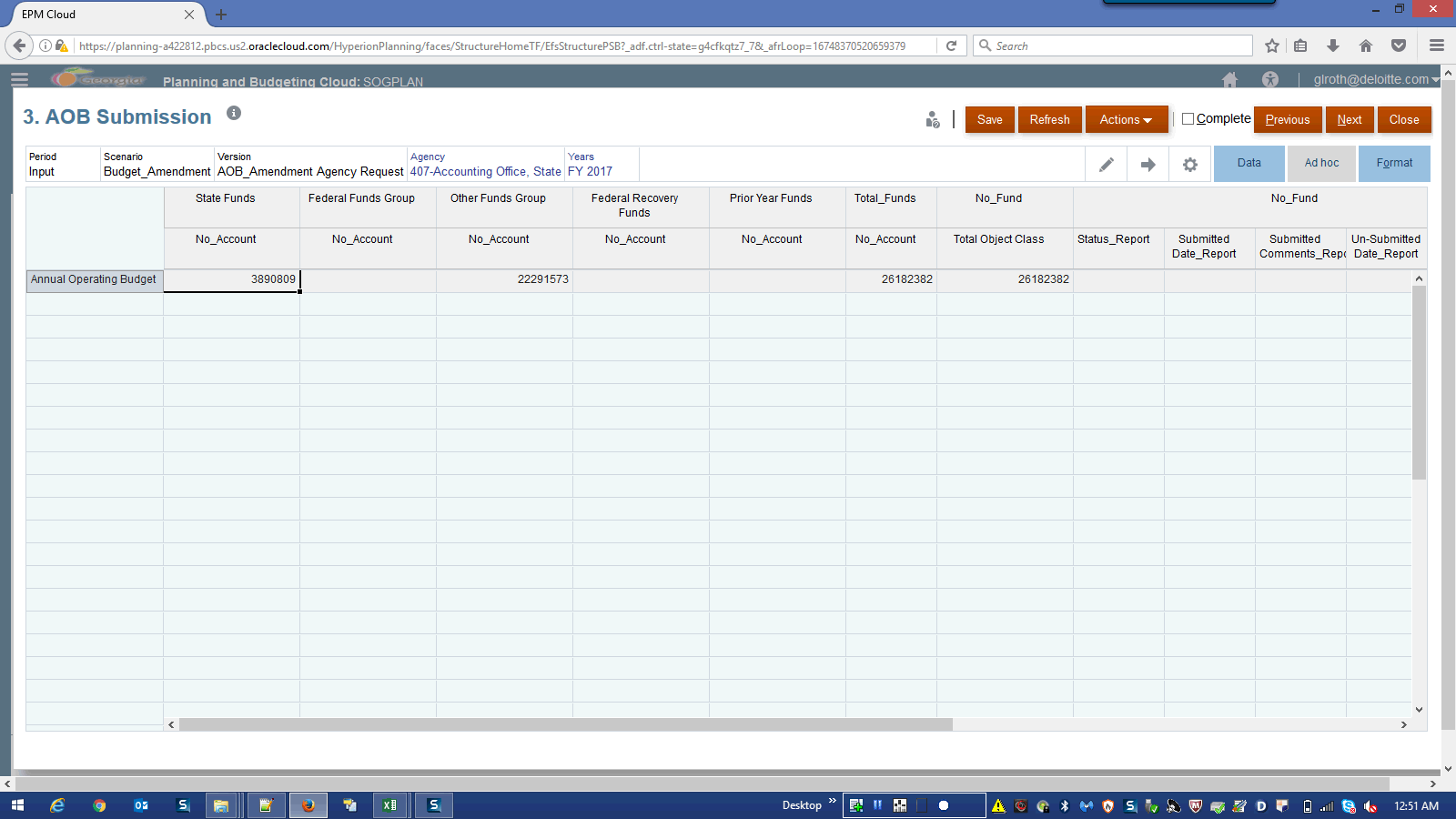
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Program Object Class View** link.  NOTE: Select own Program by Program to review the data using pencil dropdown. |  |



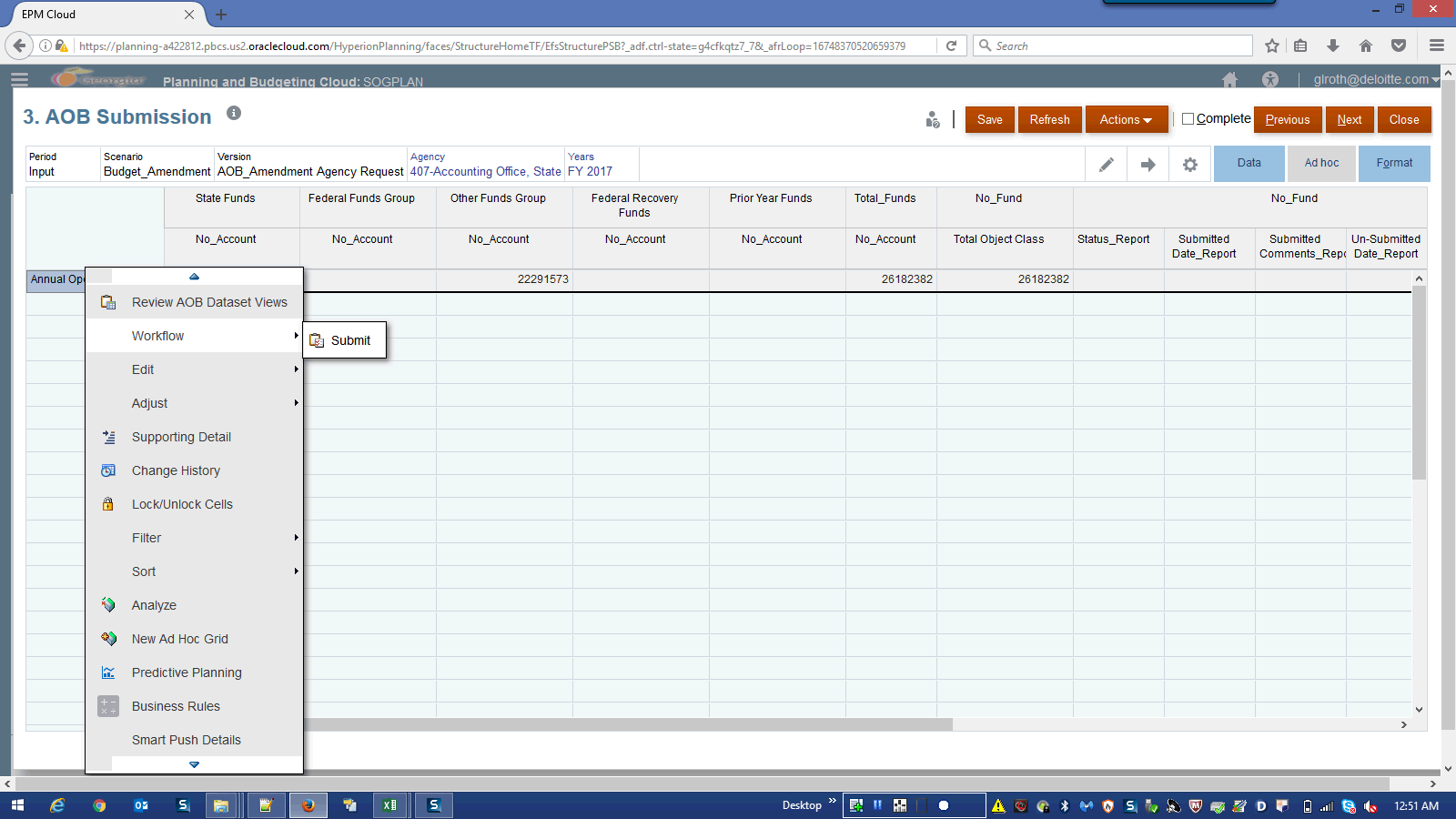
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Program Fund Source View** link. |  |



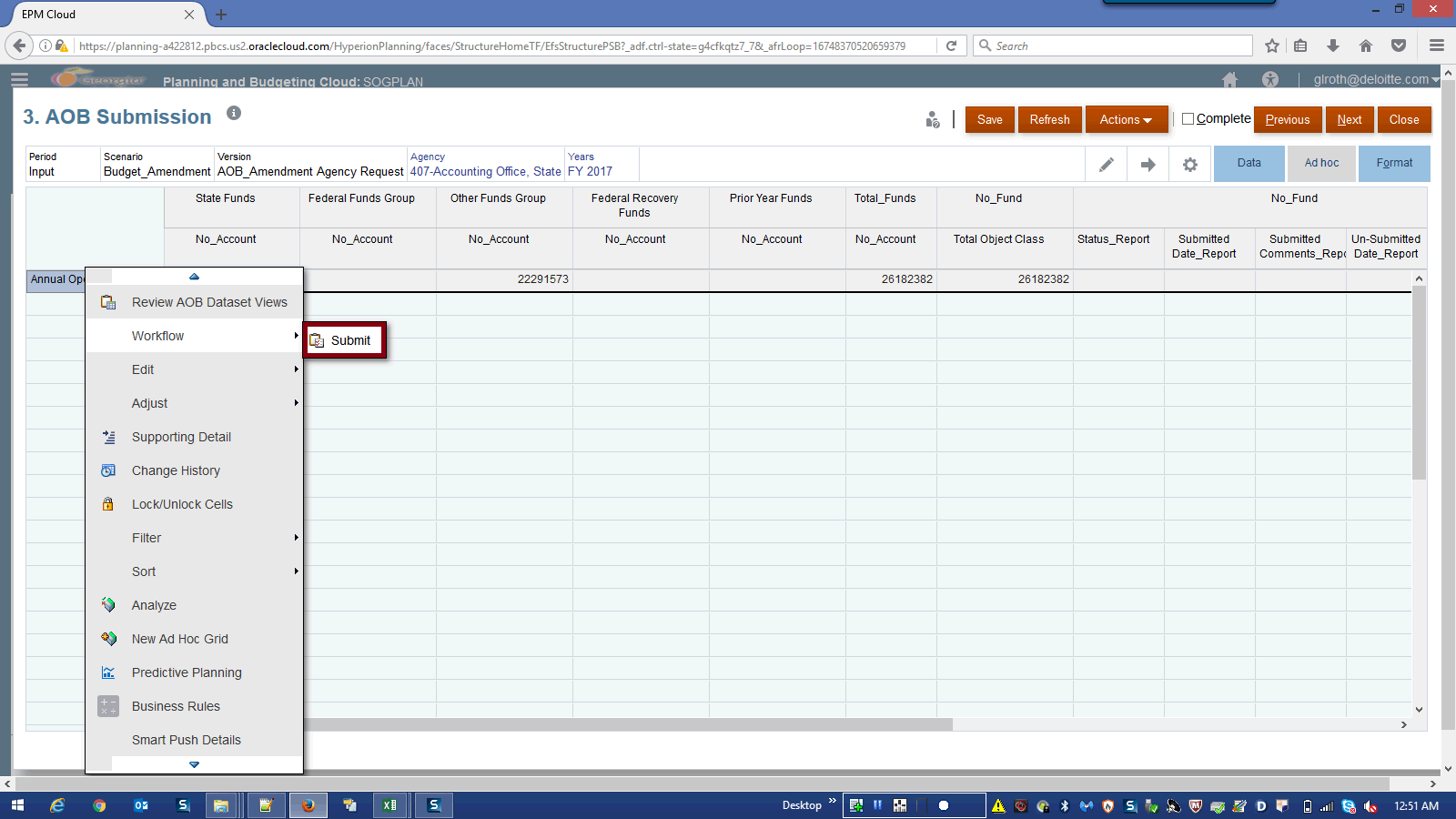
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **07\_AOB\_Submission** link. |  |



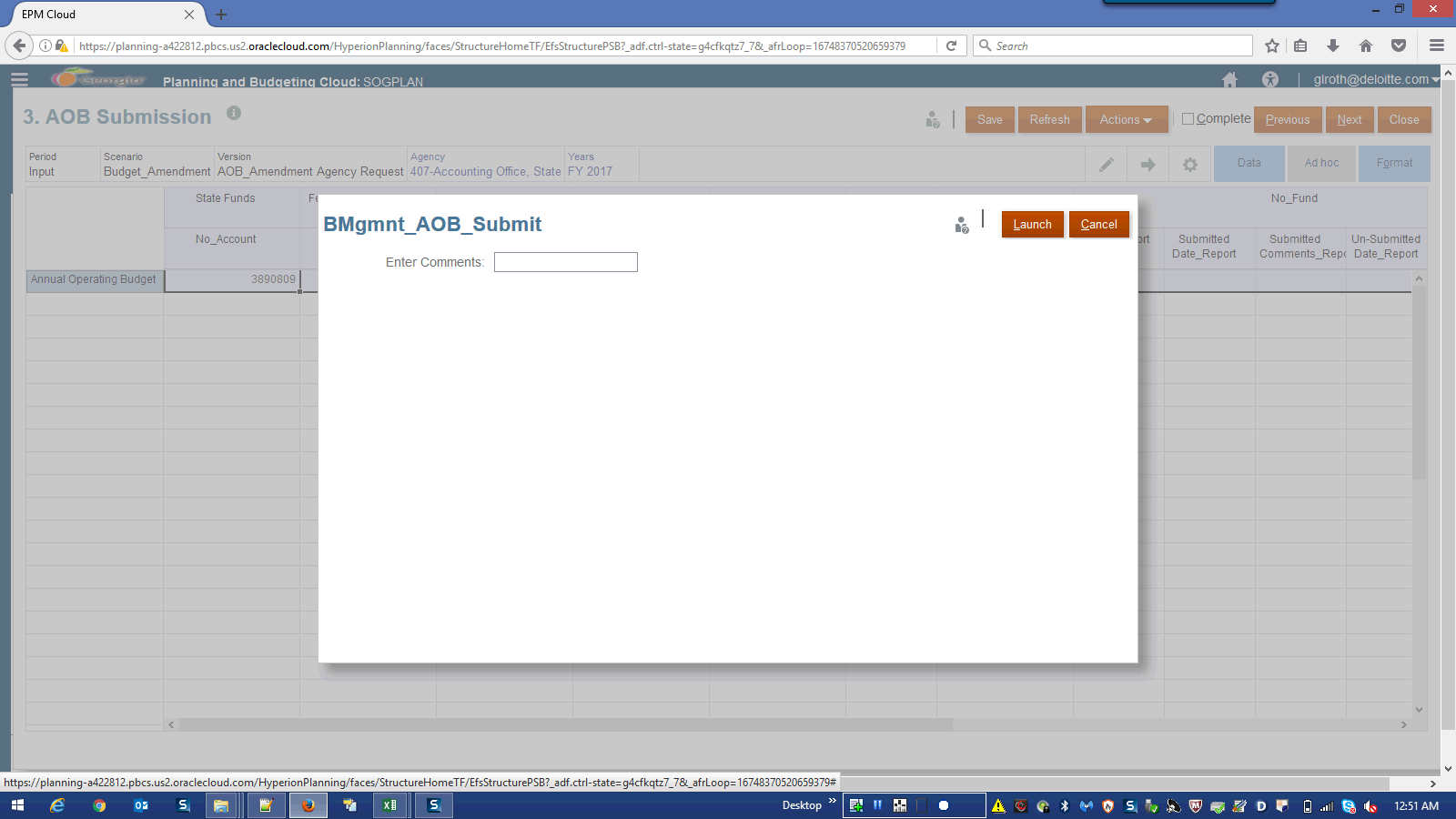
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Right-click in the **Annual Operating Budget** field. |  |



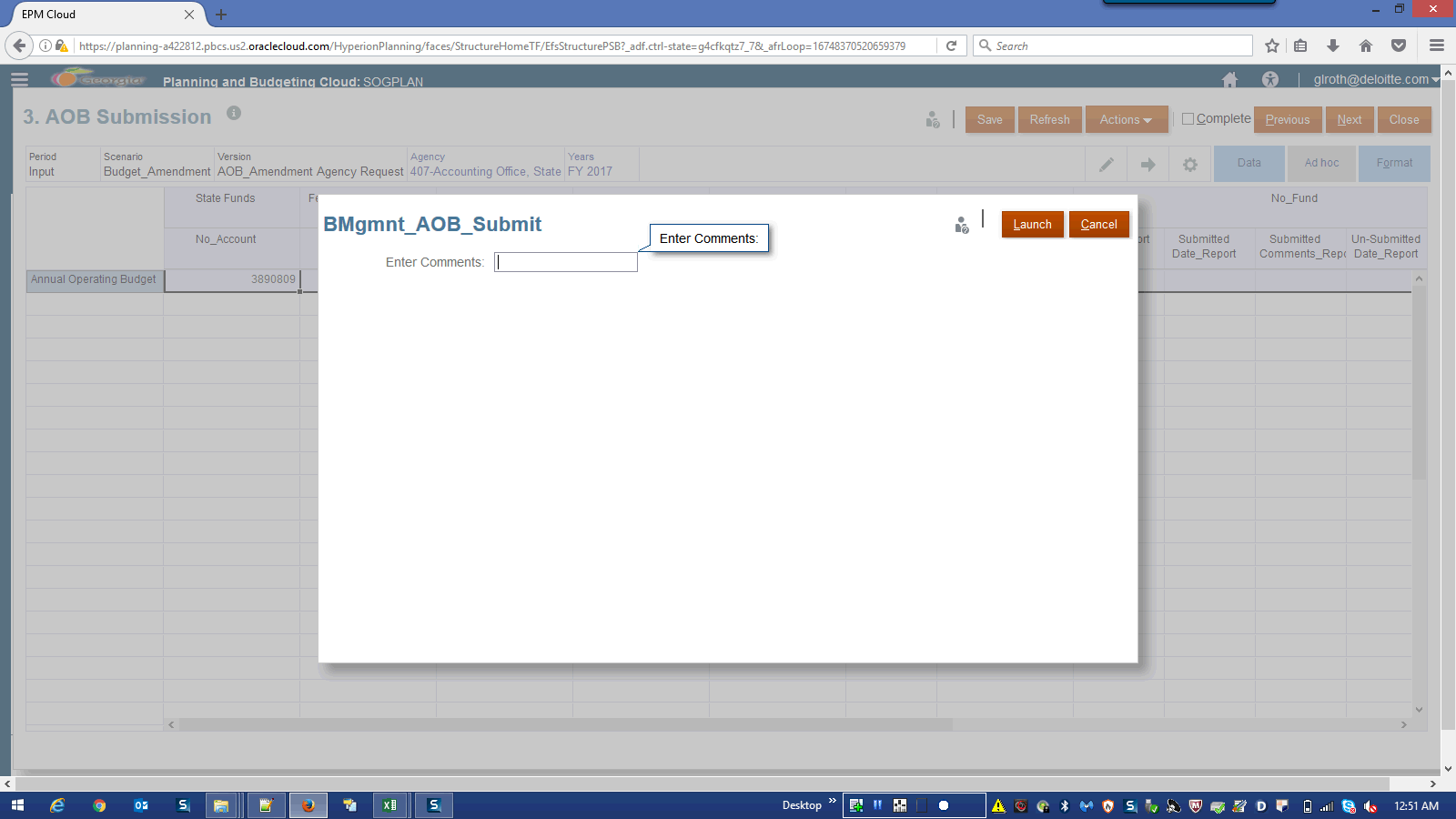
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Workflow** graphic. |  |



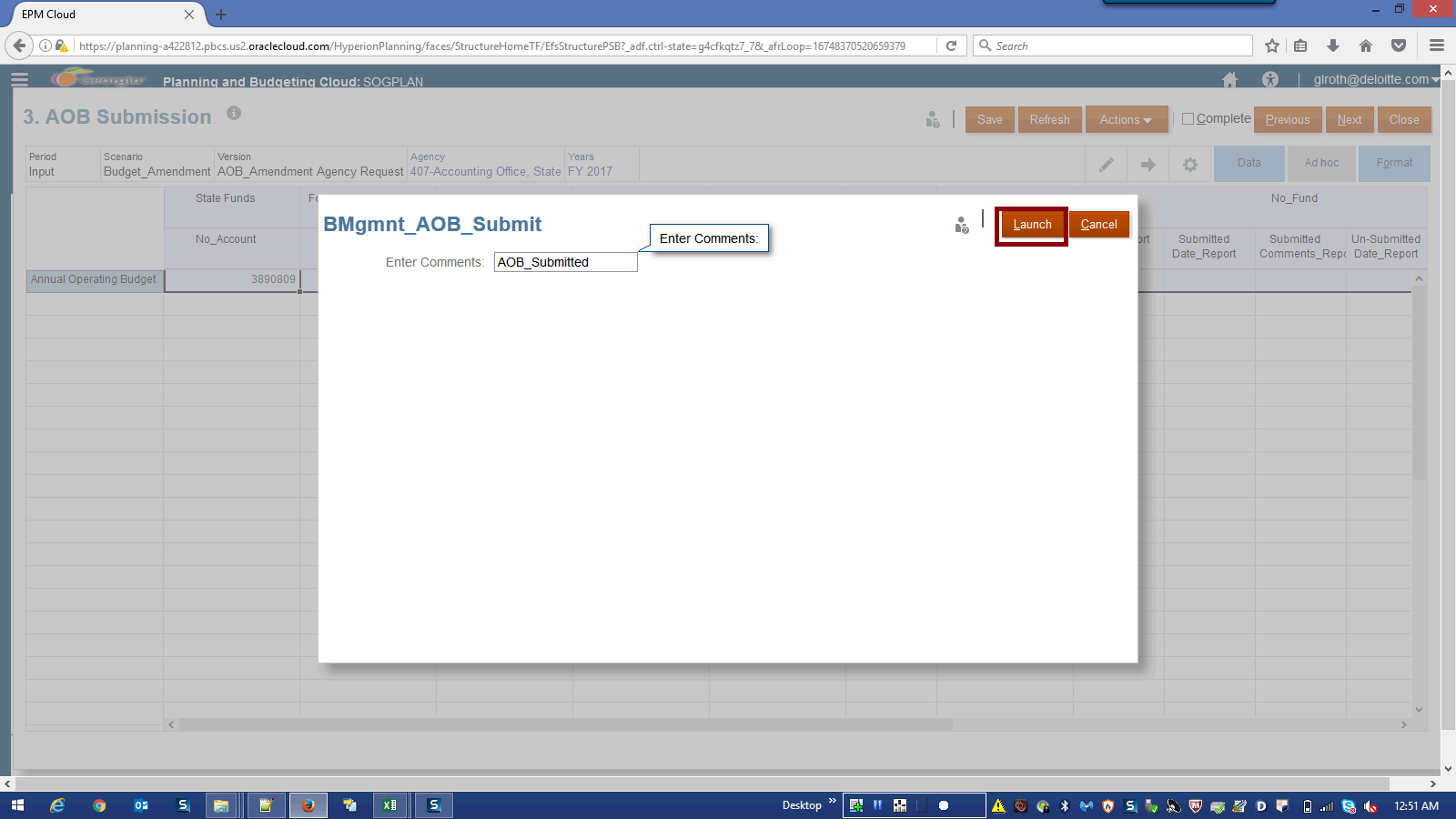
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Submit** graphic. |  |



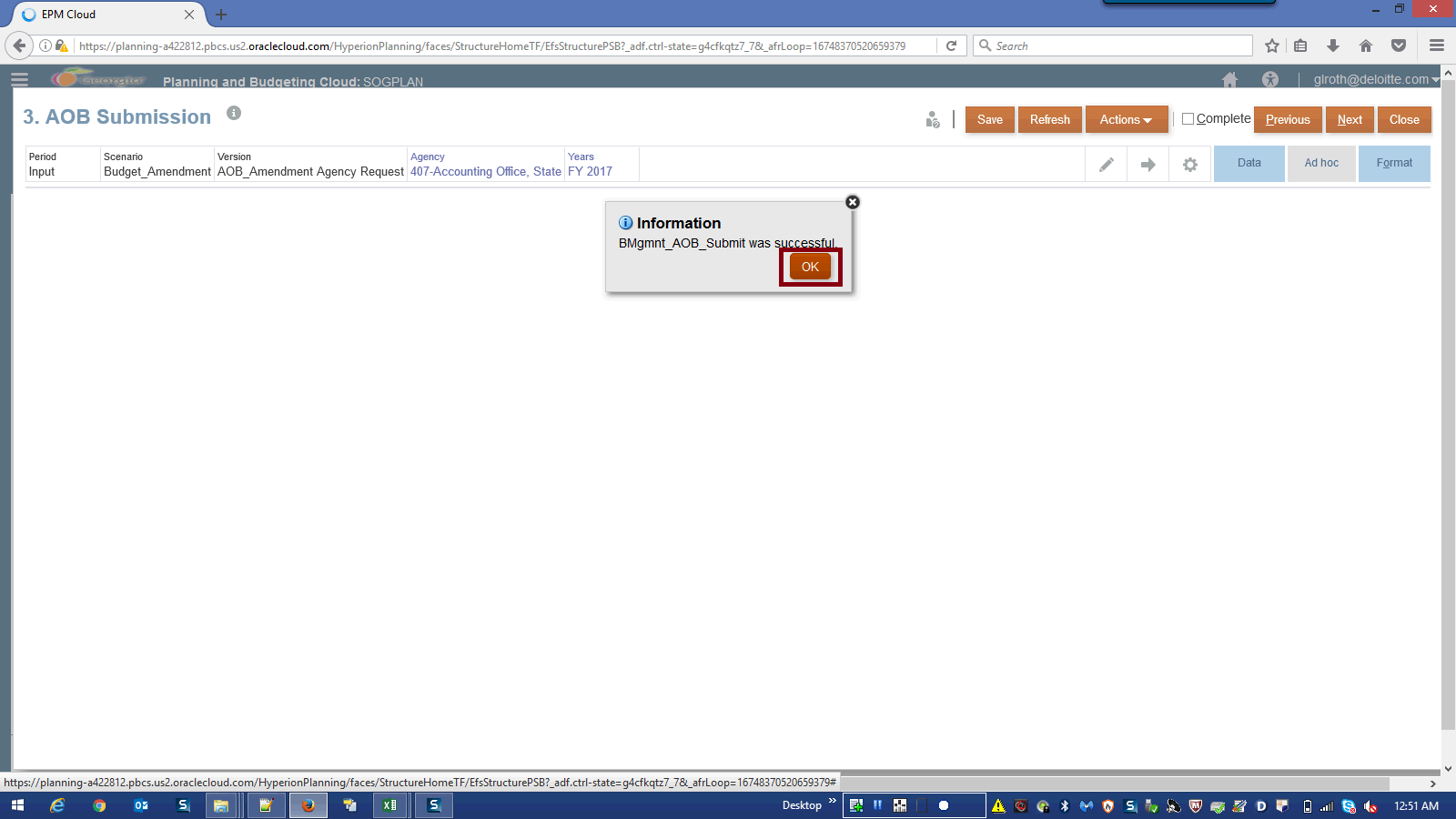
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Enter Comments:** field. |  |



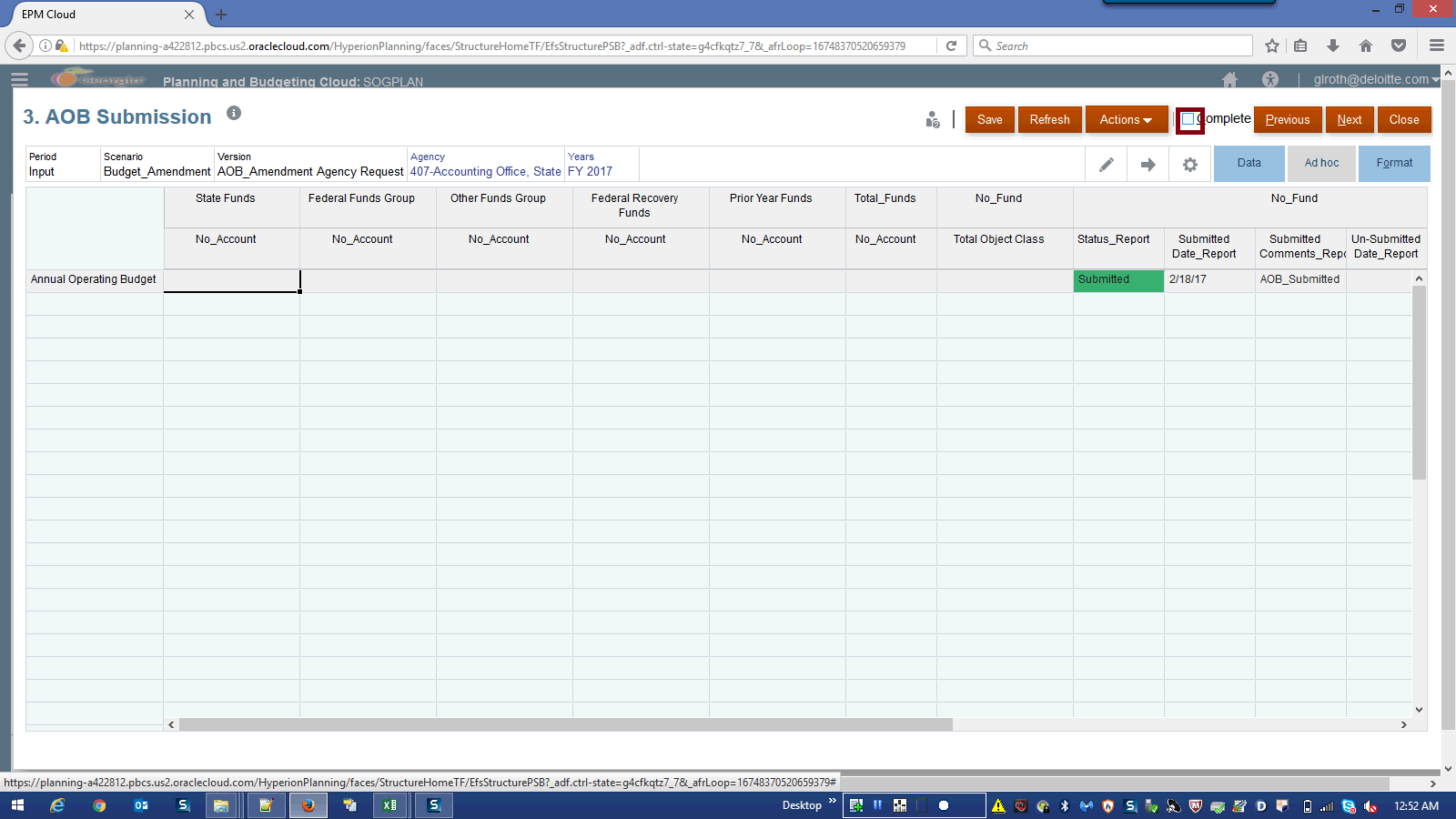
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Enter the desired information into the **Enter Comments:** field. Enter a valid value e.g. "**AOB\_Submitted**". |  |



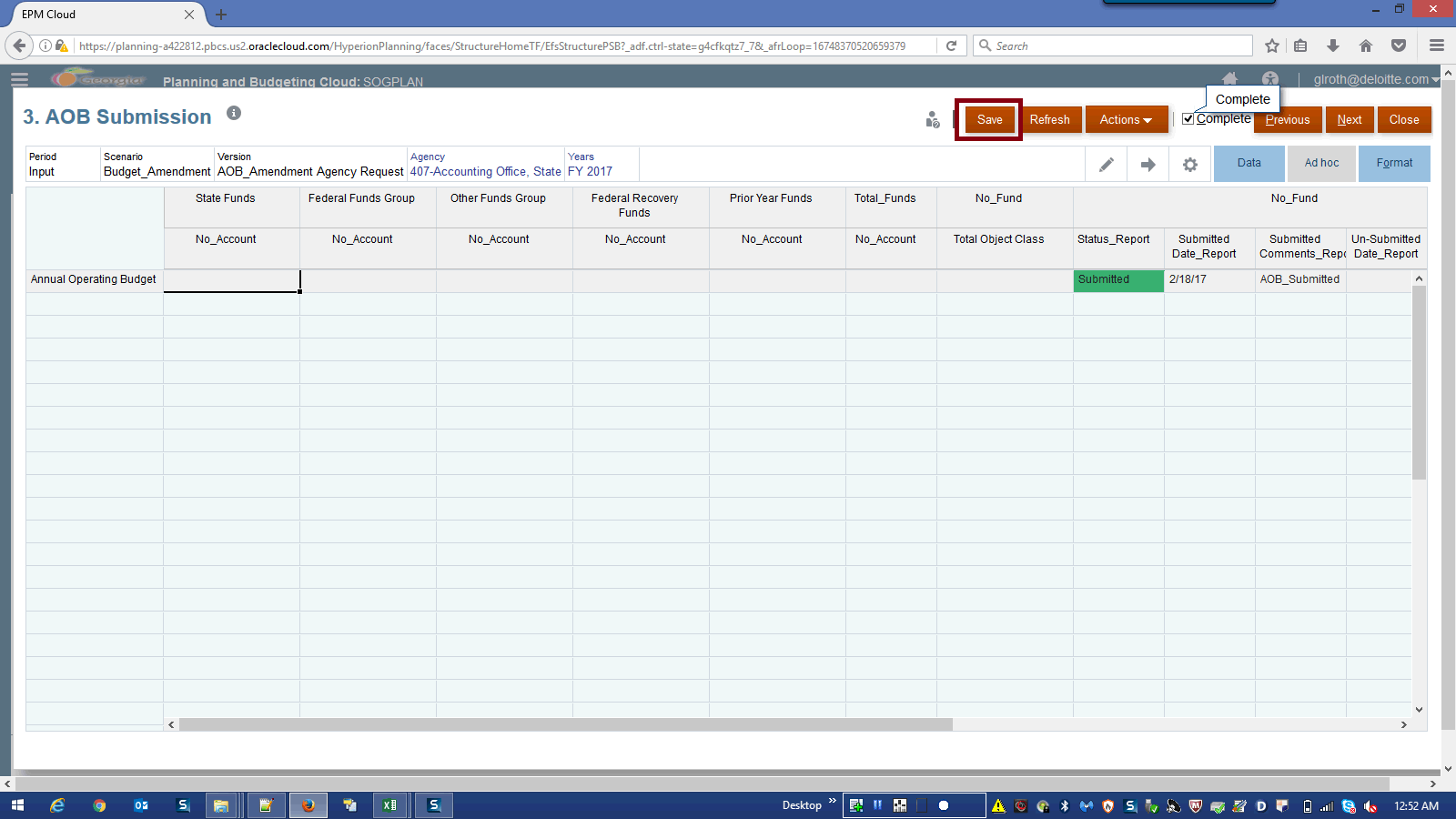
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Launch** field. |  |



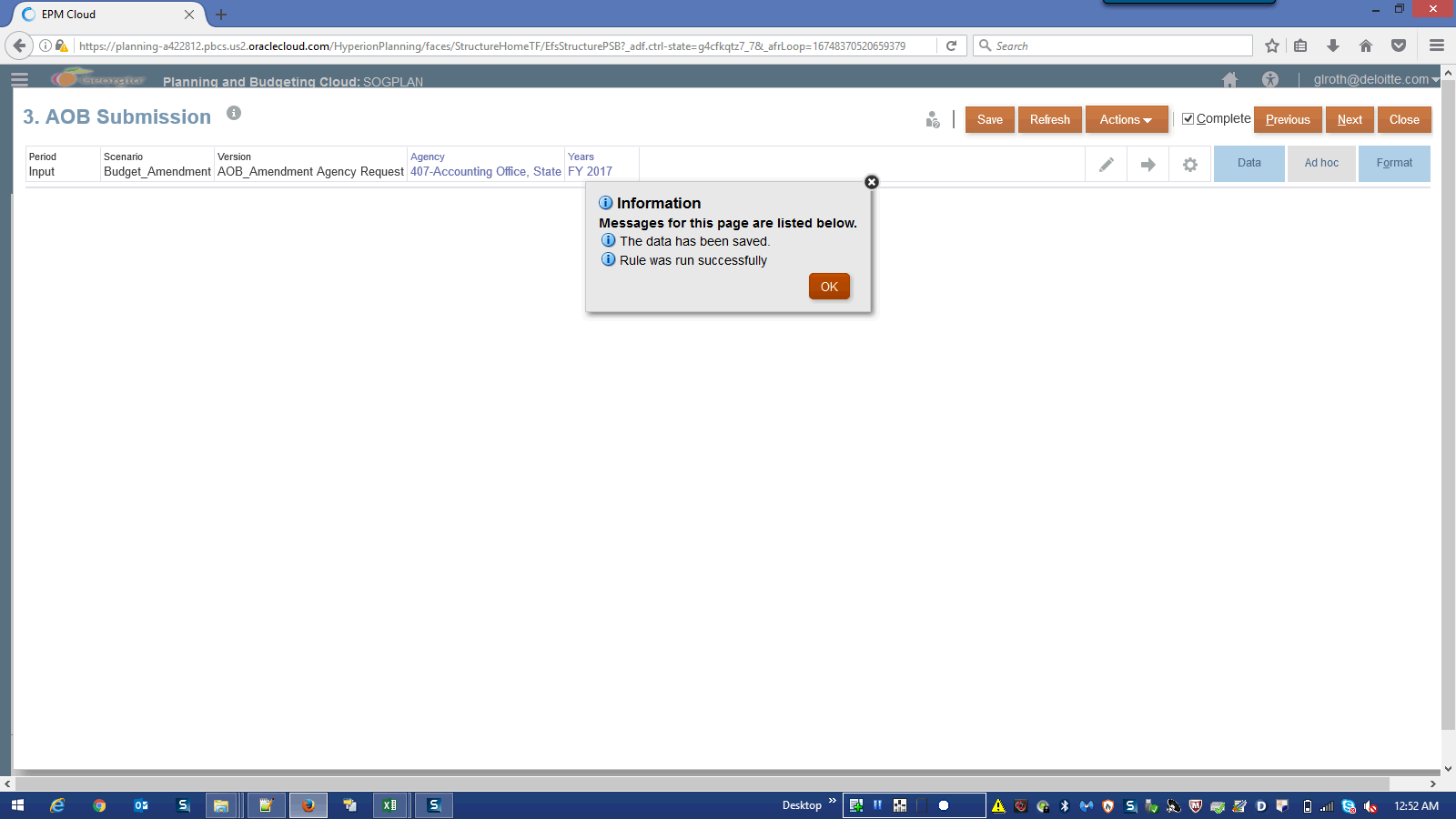
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **OK** button. |  |



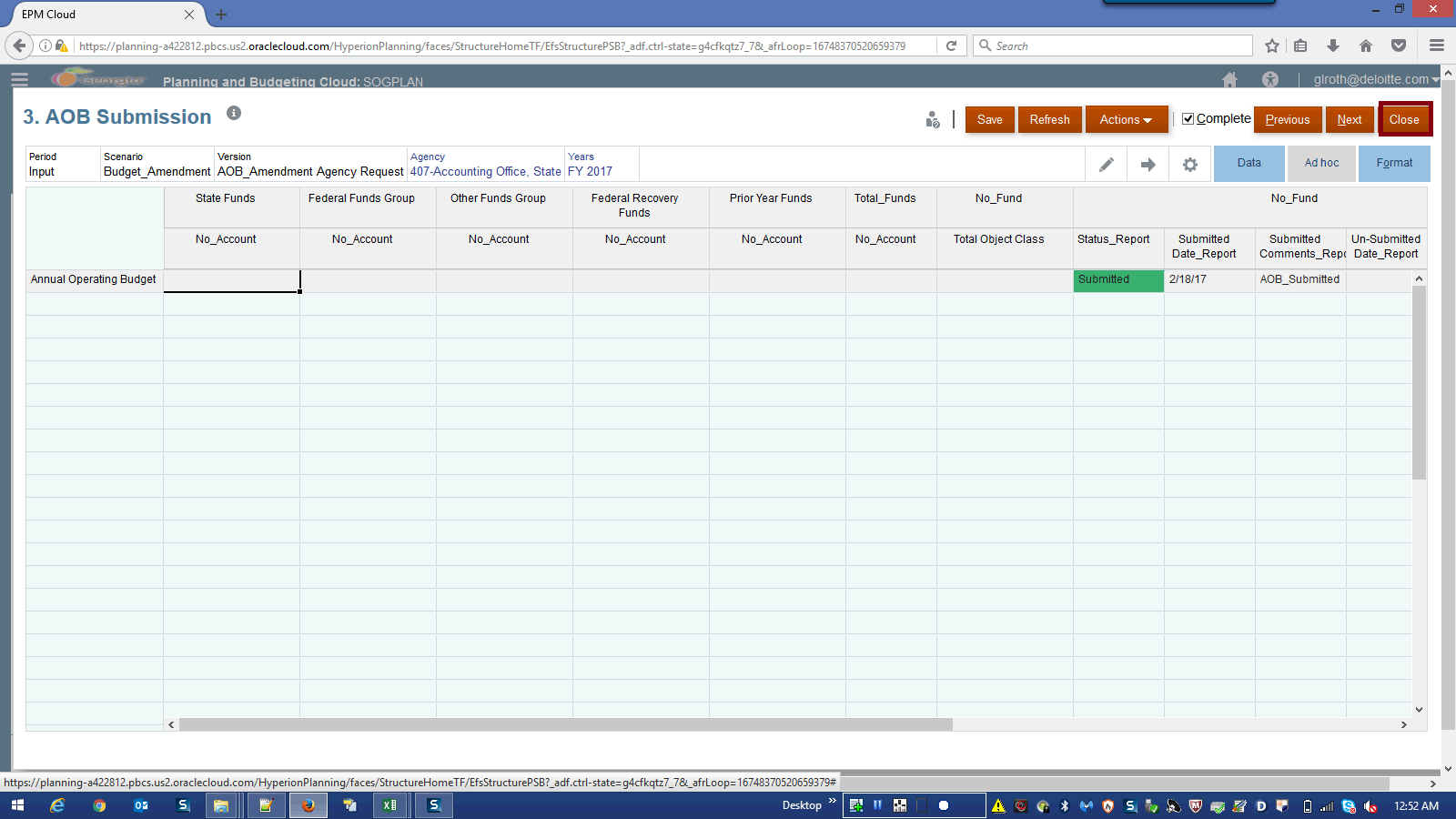
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Complete** option. |  |



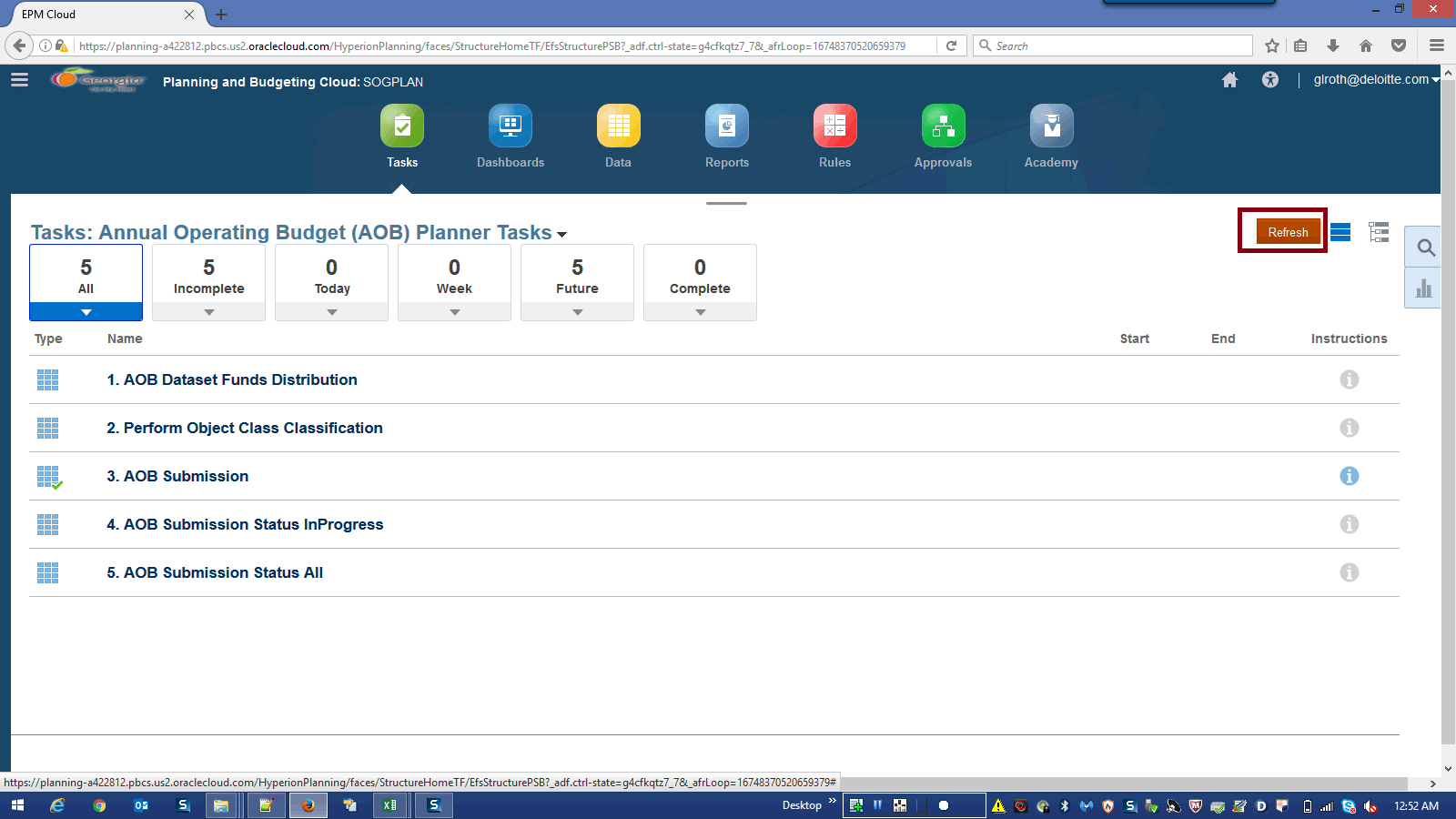
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Save** button. |  |



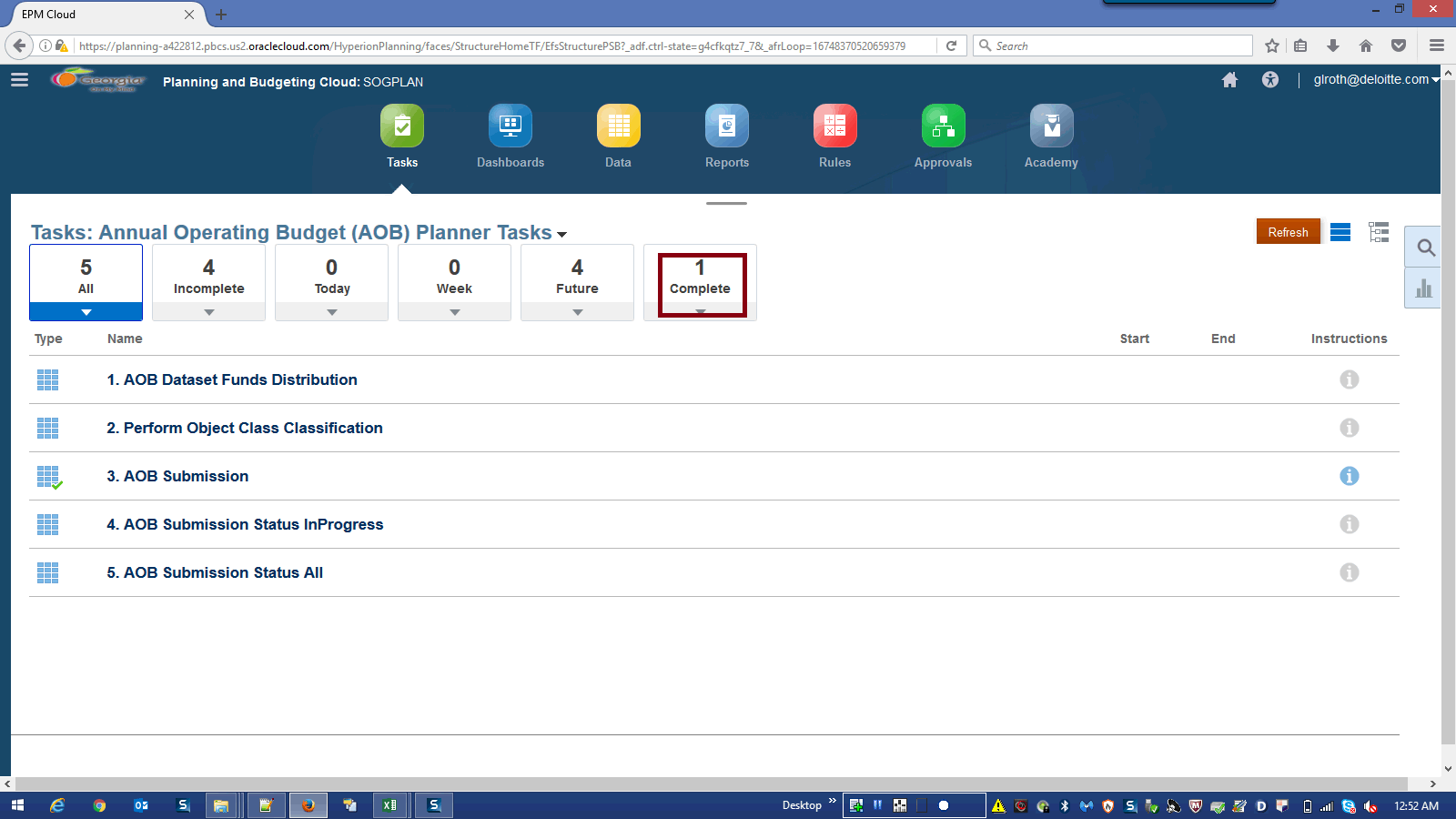
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **OK** button. |  |



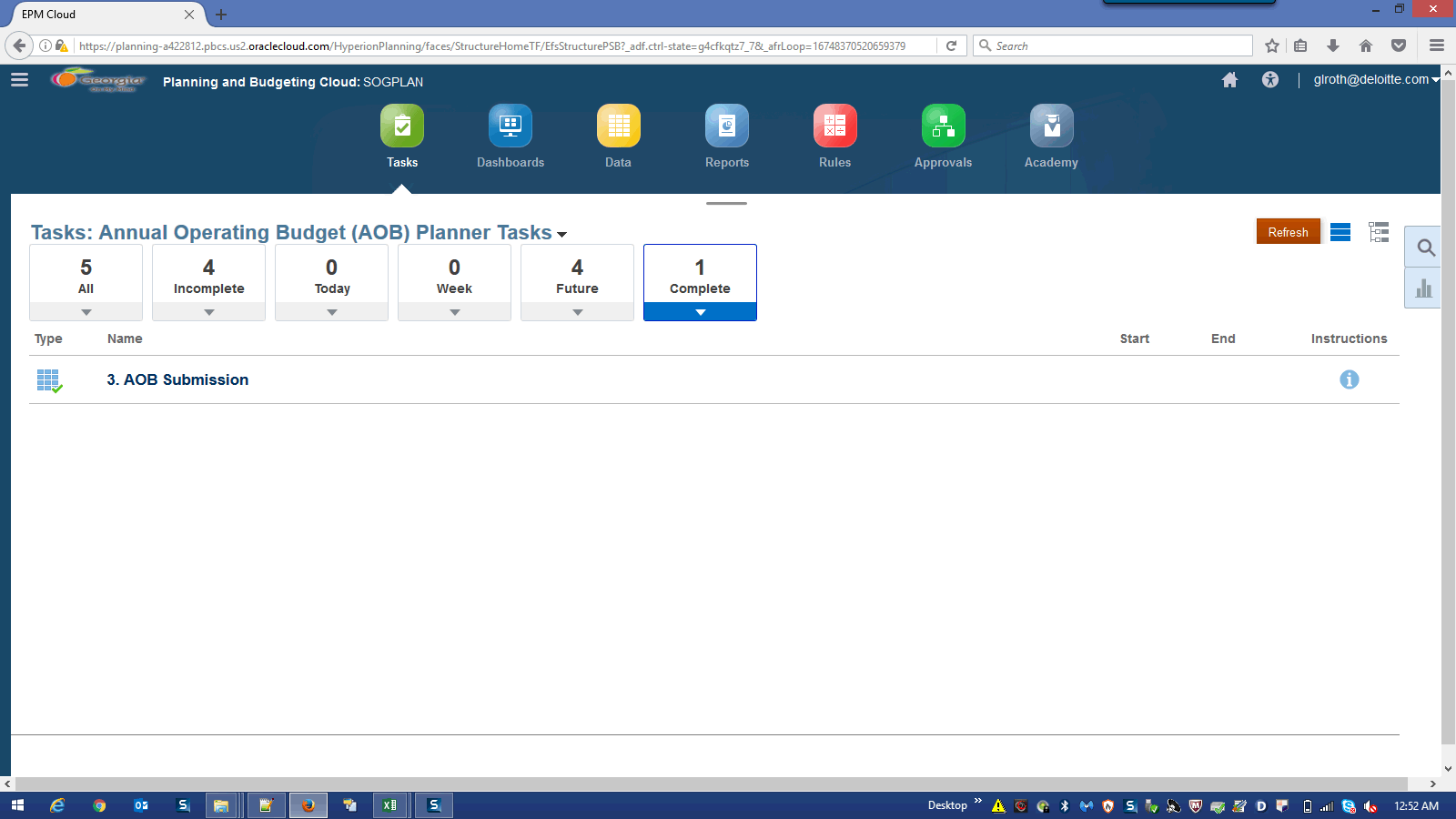
| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Close** button. |  |



| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click the **Refresh** button. |  |



| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | Click in the **Complete** field. |  |



| **Step** | **Action** | **Author Notes** |
| --- | --- | --- |
|  | **End of Procedure.** |  |