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:
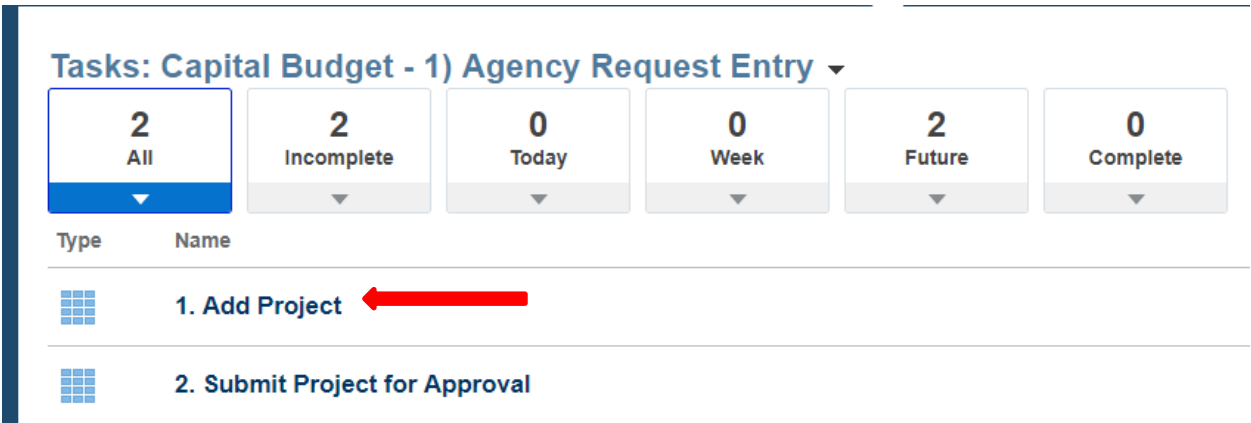
1. Click on the green Tasks button.

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

3. Click on Capital Budget – 1) Agency Request Entry on the menu that appears under All Task Lists.
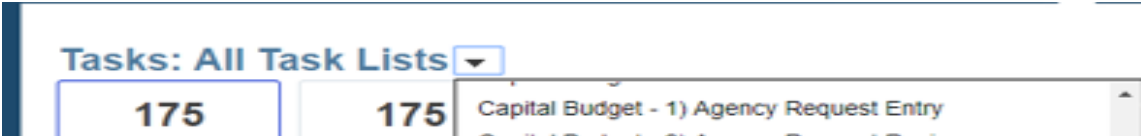
4. To enter a new project, select Task: **1. Add Project**.

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.

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**.

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.

<u>Examples of MOP Projects:</u>

- 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**.
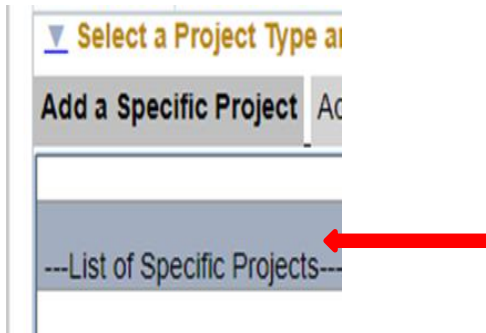
2. Click the orange Actions button and select **Add a Specific Project** from the drop down menu.
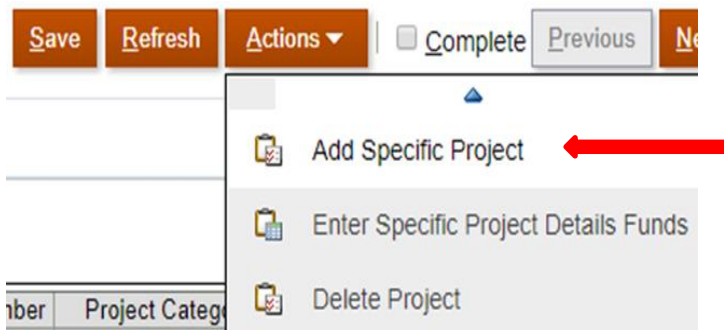
3. A dialog box will appear stating that your project was added successfully. Click ok.

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

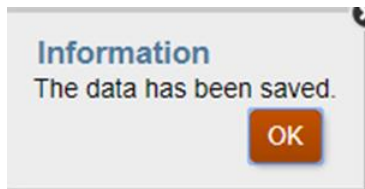Enter appropriate contact information.

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.
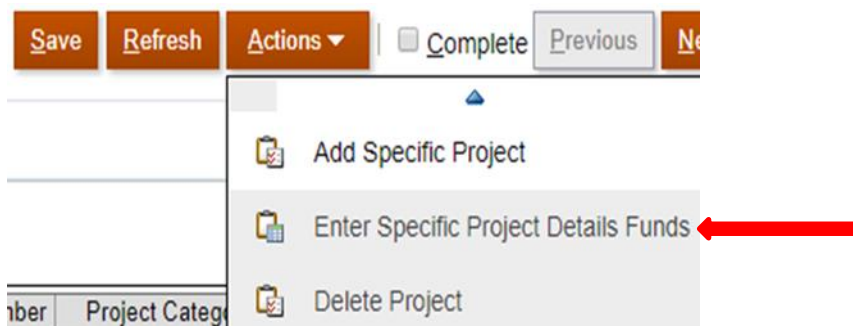

6. Click ok.

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.

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 ⓘ

01_Project Information By Project Type > 02_Project Funding for Specific Project

Agency	Project	Scenario
402-Agriculture, Department of	SProject_1	Budget

▼ Specific Project Details

Years	
FY19	

	Project Title	Project Number	Agency Priority	Location of Project (City)	Location of Project (Cour
Input	New State Building	40220190000101	1	Atlanta	Fulton County

▼ Specific Project Details

Enter Project Justifications   Enter Project Funding

	FY19
---------ENTER JUSTIFICATIONS---------	
Project Title	New State Building
Project Type	Specific Project

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. Add Project ⓘ

01_Project Information By Project Type > 02_Project Funding for Specific Project

Agency	Project	Scenario
402-Agriculture, Department of	SProject_1	Budget

▼ Specific Project Details

Years	
FY19	

	Project Title	Project Number	Agency Priority
Input	New State Building	40220190000101	1

▼ Specific Project Details

Enter Project Justifications   Enter Project Funding

	FY19
---------ENTER JUSTIFICATIONS---------	
Project Title	New State Building
Project Type	Specific Project
Project Description & Scope	
Is Site State Owned ?	
If No, describe Acquisition Plan	
Private Activity Use	
If Yes, describe Private Use	
⊟ Priority Consideration and Justification for funding	
Urgency	
Importance	

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 style="color:red">must be 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.
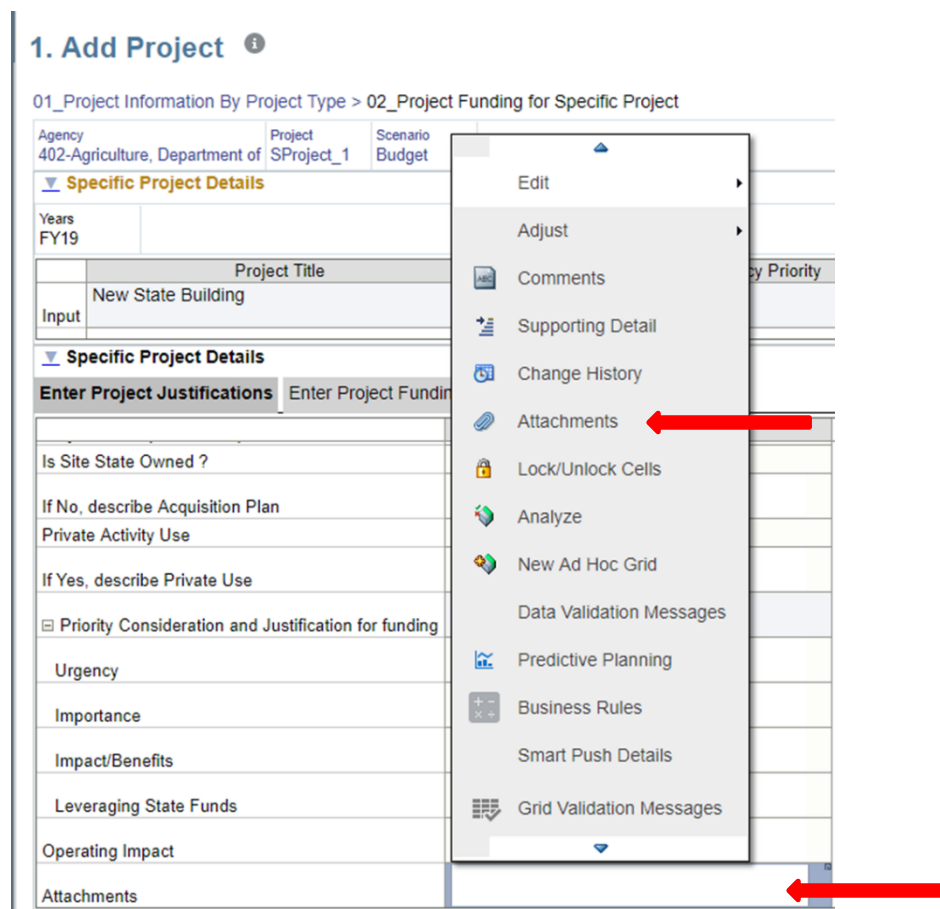
> **At a minimum**, agencies must submit to OPB the detailed supporting documentation of <u>analyses</u>, <u>assumptions</u>, and <u>calculations</u> made to develop and compile the **Total Construction Cost** and the **Loose Equipment & Furniture** cost. *Unsupported narrative statements that only state 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.

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 01_Project Information By Project Type.

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

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

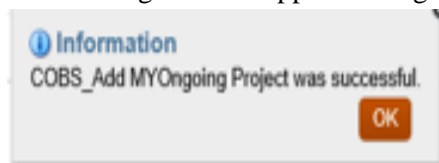1. To add a MultiYear Ongoing Project, select the **Add a MultiYear Ongoing Project** tab then click **List of MultiYear Ongoing Projects**.

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

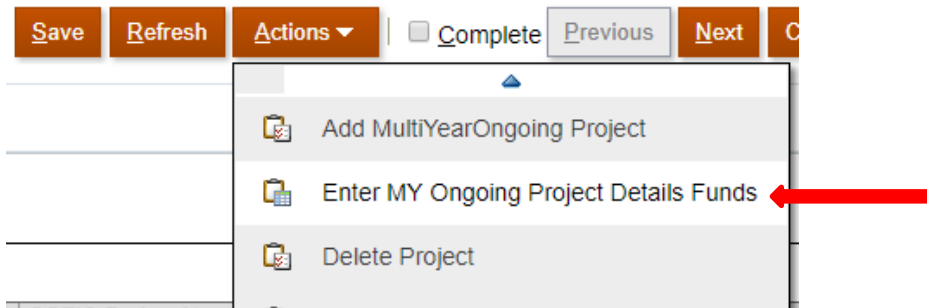3. A dialog box will appear stating that your project was added successfully. Click ok.

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 MultiYear Ongoing Project						
	Project Number	Project Title	Project Type	Agency Priority	Institution Name	Location of Project (City)	Loca
----List 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.

| Save | Refresh | Actions ▼ | ☐ Complete | Previous | Next | C |

- 🗋 Add MultiYearOngoing Project
- 📋 Enter MY Ongoing Project Details Funds
- 🗋 Delete Project

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

1. Add Project ⓘ

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

Agency	Project	Scenario
402-Agriculture, Department of	MYOProject_1	Budget

▼ Multi-Year Ongoing Project Details

Years
FY19

	Project Title	Project Number	Agency Priority
	Statewide MRR		1
Input		40220190000102	

▼ Multi-Year Ongoing Project Details

Enter Justifications | MY Ongoing Project Funding

	FY19
---------ENTER JUSTIFICATIONS---------	
	Statewide MRR
Project Title	
Project Type	MultiYear Ongoing Project

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. Add Project ⓘ

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

Agency	Project	Scenario
402-Agriculture, Department of	MYOProject_1	Budget

▼ **Multi-Year Ongoing Project Details**

Years
FY19

	Project Title	Project Number	Agency Priority
	Statewide MRR		1
Input		40220190000102	

▼ **Multi-Year Ongoing Project Details**

| Enter Justifications | MY Ongoing Project Funding |

	FY19
----------ENTER JUSTIFICATIONS---------	
	Statewide MRR
Project Title	
Project Type	MultiYear Ongoing Project

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

1. Add Project ⓘ

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

Agency	Project	Scenario
402-Agriculture, Department of	MYOProject_1	Budget

▼ **Multi-Year Ongoing Project Details**

Years
FY19

	Project Title	Project Number	Agency Priority	Location of Project (City)	Location of Project (Cou...
	Statewide MRR		1	Atlanta	
Input		40220190000102			Fulton County

▼ **Multi-Year Ongoing Project Details**

| Enter Justifications | **MY Ongoing Project Funding** |

		Activity Title	No_OC		No_OC			------
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS							
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							

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. Add Project ⓘ

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

Agency	Project	Scenario	
402-Agriculture, Department of	MYOProject_1	Budget	

▼ **Multi-Year Ongoing Project Details**

Years
FY19

	Project Title	Project Number	Agency Priority	Location of Project (City)	Location of Project (Cour
	Statewide MRR		1	Atlanta	
Input		40220190000102			Fulton County

▼ **Multi-Year Ongoing Project Details**

Enter Justifications | **MY Ongoing Project Funding**

		Activity Title	No_OC		No_OC			------
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS	⬅						
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							

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

1. Add Project ⓘ

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

Agency	Project	Scenario	
402-Agriculture, Department of	MYOProject_1	Budget	

▼ **Multi-Year Ongoing Project Details**

Years
FY19

	Project Title	Project Nu
	Statewide MRR	
Input		4022019

▼ **Multi-Year Ongoing Project Details**

Enter Justifications | **MY Ongoing Project Funding**

RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS
Total Non-State Funds	

- 🗋 Add Activity
- 🗋 Update Activity

14. Select **Add Activity.**

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.

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

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

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 ⓘ

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

Agency	Project	Scenario
402-Agriculture, Department of	MYOProject_1	Budget

▼ **Multi-Year Ongoing Project Details**

Years	
FY19	

	Project Title	Project Number	Agency Priority	Location of Project (City)	Location of Project (Cou...
Input	Statewide MRR	40220190000102	1	Atlanta	Fulton County

▼ **Multi-Year Ongoing Project Details**

Enter Justifications | **MY Ongoing Project Funding**

		Activity Title	No_OC	No_OC			-------
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS							
Total_Project_Costs		Roof Repair						
	Activity_1				10000			10000
	⊟ Total Project Costs - MY Ongoing Activities				10000			10000
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			10000

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

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

▼ **Multi-Year Ongoing Project Details**

Enter Justifications | **MY Ongoing Project Funding**

		Activity Title	No_OC	No_OC			-------
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS							
Total_Project_Costs		Roof Repair						
	Activity_1 ⬅				10000			10000
	⊟ Total Project Costs - MY Ongoing Activities				10000			10000
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			10000

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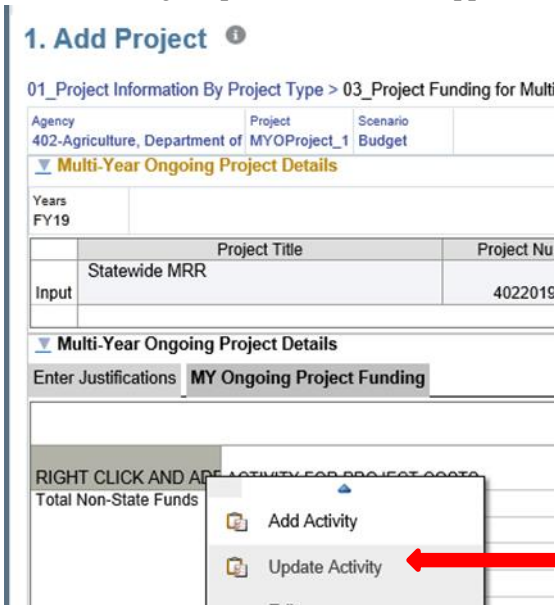
23. The following screen will appear.

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.

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 Number	Agency Priority	Location of Project (City)	Location of Project (Cou
Input	Statewide MRR		40220190000102	1	Atlanta	Fulton County

▼ Multi-Year Ongoing Project Details

Enter Justifications | **MY Ongoing Project Funding**

		Activity Title	No_OC	No_OC			------
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS							
Total_Project_Costs		Roof Repair						
	Activity_1				10000	2500		10000
	⊟ Total Project Costs - MY Ongoing Activities				10000			10000
Total Non-State Funds	Private Contribution for C and E							
	Agency_Fund				5000			
	Local_Fund							
	Federal_Fund							
	Foundations							
	Others					2500		
	⊟ Total Non State Funds - MYOngoing Projects							
Total State Funds	Total State Funds - MY Ongoing Projects				10000			10000

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

ⓘ Information
Messages for this page are listed below.
ⓘ The data has been saved.
ⓘ Rule was run successfully

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_OC			------
		FY 2019	Prior Years	FY 2018	FY 2019	FY 2020	FY 2021	Total
RIGHT CLICK AND ADD	ACTIVITY FOR PROJECT COSTS							
Total_Project_Costs		Roof Repair						
	Activity_1				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 01_Project Information By Project Type.

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

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 Approv**al.

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.

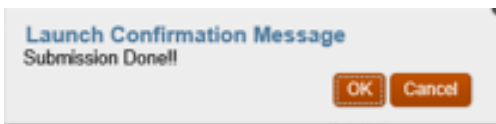5. Click in the Project Approval Status box.

6. Click the orange Actions button and select **Workflow** from the drop down menu.
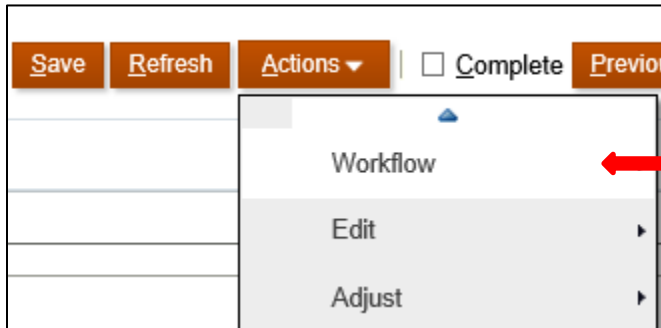
7. Select Submit.
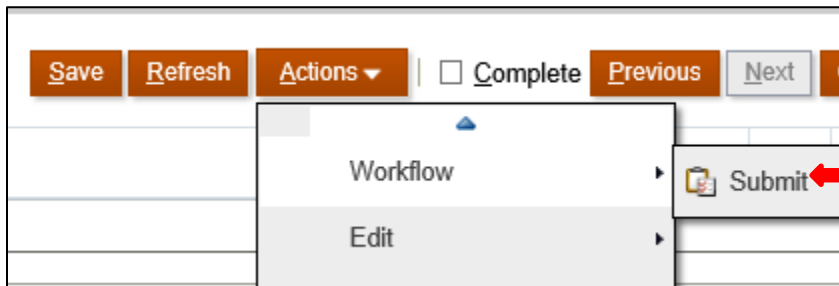
8. Click ok.

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

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

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

2. Submit Project for Approval ⓘ

Period	Scenario	Years	Agency
Input	Budget	FY19	402-Agriculture, Department of

Project Approval Status	Project Submiss	Project Submission Comments	Project Un-Submission Date	Project Un-Submission Commen
Submitted	7/27/17		7/26/17	

	Project Number	Project Title	Project Type	No_OC	
	No_Activity	No_Activity	No_Activity	Total State Funds - Specific Projects	Total State Funds - MY Ongoing Projects
	No_Fund	No_Fund	No_Fund	Total State Funds	Total State Funds
----LIST OF SPECIFIC PROJECTS----					
SProject_1	40220190000101	New State Building	Specific Project	15000	
----LIST OF MULTI-YEAR ONGOING PROJECTS----					
MYOProject_1	40220190000102	Statewide MRR	MultiYear Ongoing Project		5000

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.
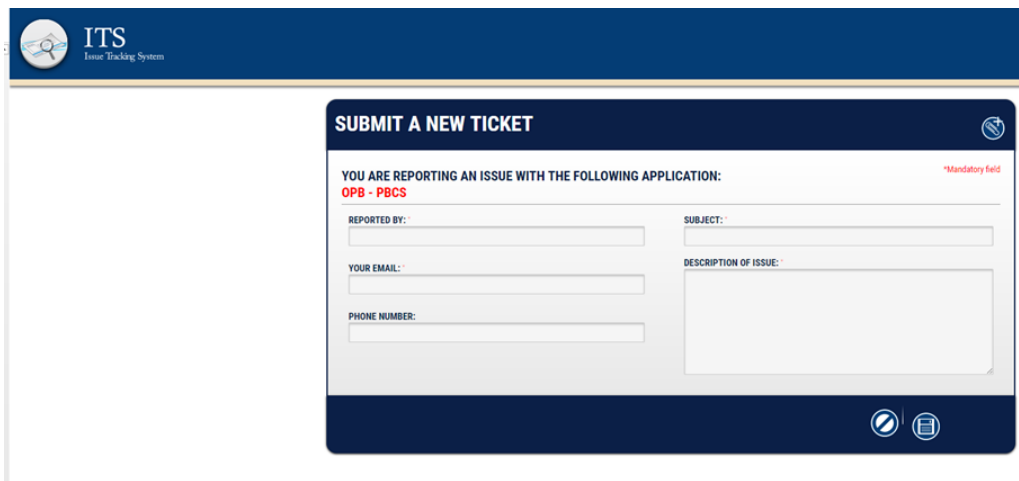

2. On the left hand side of the screen is a gray box for announcements. Under the header **Report An Issue**, scroll down until you see a highlighted link that says "Right click Here."
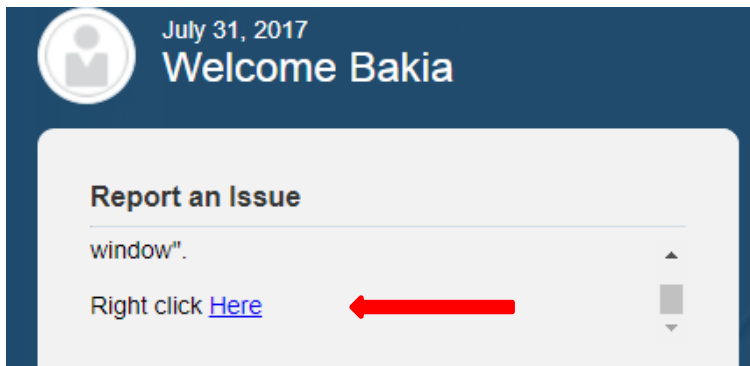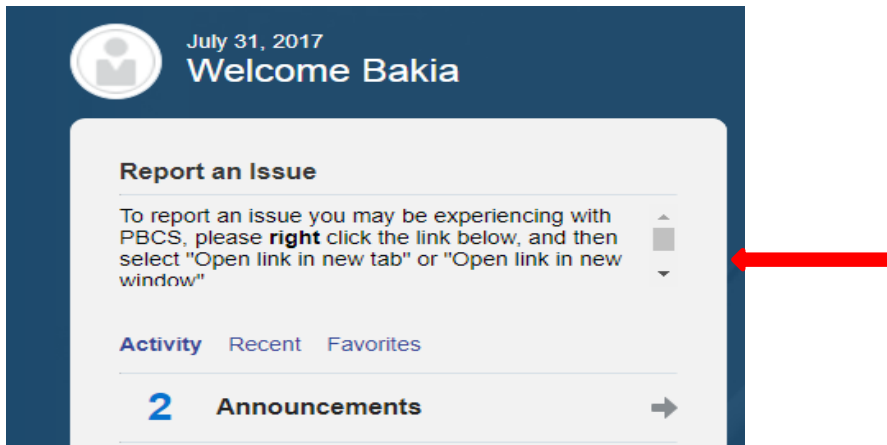
3. Right click the highlighted blue link and select "Open link in new tab" on the popup menu.
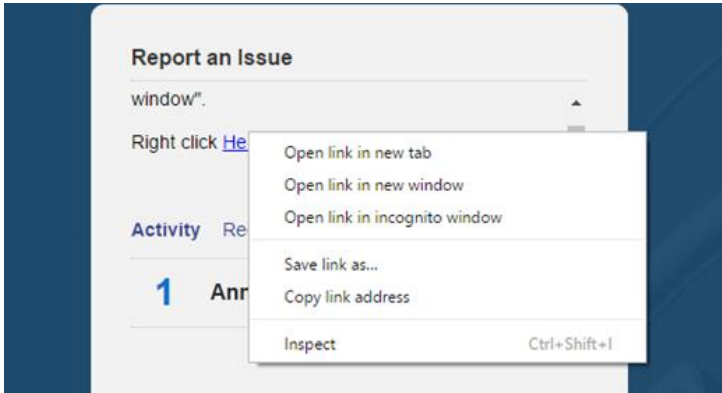
4. A new tab will appear at the top of your browser. Click on the new tab to view the ticket submission screen.

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.