

# Performance Budgeting 3.11 – On Demand Training

**Class Title:** Highlights of Changes from Performance  
Budgeting (PB) 3.8

Creation Date: 04/20/2018

Revised Date: N/A

# Goal & Objectives

**Goal:** After taking this class, students will know the highlights of changes from PB 3.8.

**Objectives:**

- Show students the new layout presentation
- Show students navigation options
- Show students updates to budget forms
- Show students the use of queries to access budget and SBFS data

# New Layout Presentation

**CGI Advantage PB 3.11.1 SH1** Welcome, admin ! The System is currently Locked | Messages(0) | Home | Help | Preferences | Edit Password | Logout

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Site Map > Tucson Advantage Performance Budgeting

Tucson Advantage Performance Budgeting

Categories			
<p><b>Reference Data</b> - This contains links to all the reference data in the system.</p> <p><a href="#">Consolidations</a> - This contains all the consolidation links.</p> <p><a href="#">Dimensions</a> - This contains all the dimension links.</p> <p><a href="#">Budget Forms</a> - This contains all the Budget Form links.</p> <p><a href="#">Performance Budgeting</a> - This contains all the Performance Budgeting definition links.</p> <p><a href="#">Budget Ranking</a> - This contains all the Budget Ranking definition links.</p> <p><a href="#">Queries</a> - This contains links to Queries.</p> <p><a href="#">Workflow</a> - The following are Workflow-specific links.</p>	<p><b>SBFS</b> - This contains links to all the SBFS data in the system.</p> <p><a href="#">Positions, Employees and Assignments</a> - This contains links to Positions, Employees and Assignments.</p> <p><a href="#">Benefits and Supplemental</a> - This contains links to Benefits and Supplemental.</p> <p><a href="#">Class, Category and Other</a> - This contains links to Class, Category and Other.</p> <p><a href="#">Salary Tables</a> - This contains links to Salary Tables.</p> <p><a href="#">Salary Projections</a> - This contains links to Salary Projection.</p>	<p><b>Projection/Allocation</b> - Links to Projection/Allocation.</p> <p><a href="#">Allocations</a></p> <p><a href="#">Projections</a></p>	<p><b>Security</b> - Links to Security .</p>
<p><b>Utilities</b> - Links to utilities.</p> <p><a href="#">Import / Export</a> - This contains links to all Import / Export data.</p> <p><a href="#">Rollover</a> - This contains links to rollover.</p> <p><a href="#">ECM</a> - This contains links to all ECM Integration data.</p>	<p><b>Budget Tasks</b> - This contains links to independent Views.</p>	<p><b>Dashboards</b> - This contains dashboards.</p> <p><a href="#">Budget Financial</a> - Budget Financial.</p> <p><a href="#">HR Position</a> - HR Position.</p> <p><a href="#">Performance Management</a> - Performance Management.</p>	<p><b>Integration</b> - This contains links to Integration tasks.</p> <p><a href="#">Interface Layouts</a> - This contains links for transferring Data Layout data to Financial System.</p> <p><a href="#">Budget</a> - This contains links for transferring Budget data to Financial System.</p> <p><a href="#">Actuals</a> - This contains links for transferring and reviewing Actuals data from Financial System to Perf Budgeting System.</p> <p><a href="#">Dimensions</a> - This contains links for transferring and reviewing Dimensions data from Financial System to Perf Budgeting System.</p> <p><a href="#">SBFS</a> - This contains links for transferring and reviewing SBFS data from HRM System to Perf Budgeting System.</p>

# Navigation Options

- **Access from Preferences / Usability Settings**
- **Expert User Option**
  - Defines which fields will be included in the tabbing order
  - If selected, tab from field to field will only include editable fields
  - If not selected, tab from field to field will include each and every element on a page (e.g. links, images, icons, read-only fields)

# Navigation Options

- **Access from Preferences / Usability Settings**
- **StartPage Reset**
- Click “StartPage Reset” at bottom of Usability Settings
- When on the screen you want as your new Start Page click on the House icon located on right side of screen

## Enter Key Used as Hot Key

- Searching for budget forms, click Enter on keyboard or click Search button in application
- Searching for queries, click Enter on keyboard or click Search button in application

## Cache Refresh

- Centrally located option with administrator
- Still available to all users independent of administrator located under Utilities

# Capital Project Template

- Ward locations no longer free-form text field entry
- Ward locations for each capital project now selected from new dropdown options

# Save Budget Forms as Draft

- If user begins a request but does not have all the required information, he or she can choose to input fields as desired and choose the Save As Draft option.
- The form is in draft so it does not post the data to the database.
- Requests in draft mode will not be available in other functional areas of the application (e.g. Workflow Inbox, Advance Budget Request Stage, Budget Request Filter View.)
- Cannot Submit, Approve or Reject form while in draft mode.

# Budget Forms

- Sort feature up to three categories/columns on forms

[Print](#)
[View as CSV](#)

Summary			
<input type="checkbox"/>	Request Code	Name	
<input type="checkbox"/>	13624	FY17_3311_YMONTIJ1	4
<input type="checkbox"/>	13628	FY17_1433_Ispain1	4
<input type="checkbox"/>	13629	fy17_21UD_jsilvyn	4
<input type="checkbox"/>	13632	fy17_rshull1_7457gitech	4
<input type="checkbox"/>	13633	FY17_rshull1_SEAto7433	4
<input type="checkbox"/>	17146	FY17_4964_plane1	4
<input type="checkbox"/>	13070	FY17_9115_srco1	4
<input type="checkbox"/>	13074	fy17_21UN_jsilvyn	4
<input type="checkbox"/>	13086	FY17_1432_tbullin1	4
<input type="checkbox"/>	13123	FY17_174A_tbullin1	4
<input type="checkbox"/>	13124	fy17_21VW_jsilvyn	4

Sort by

Organization   Ascending  Descending

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Then by

Request Code   Ascending  Descending

---

Then by

Workflow Status   Ascending  Descending

# Budget Queries

- Queries are now actually called “Queries” ...no longer titled FSQs
- Ability to set default Consolidation Tables for each dimension in Query Maintenance

Selection Dimensions 

Display Section Heading:

Selection Dimension Code: Required

*Organization*

Organization:  Default Consolidation:  Code: ALL\_ORGS  Default Dimension Code:  Code:

*Department*

Department:  Default Consolidation:  Code: ALL\_DEPTS  Default Dimension Code:  Code:

*Fund*

Fund:  Default Consolidation:  Code: ALL\_FUNDS  Default Dimension Code:  Code:

# Budget Queries

- In query maintenance the listed dimensions must now be separated by commas rather than spaces

Columns 

*Column 1*

\* Dimension:  

\* Headings:  

*Column Elements*

Dimensions:   

# Budget Queries

- Manually adjust query column width while in results using double arrow similar to Excel
- Manually move a column by dragging it (must first Unfreeze Panes by right clicking in Query Results header)

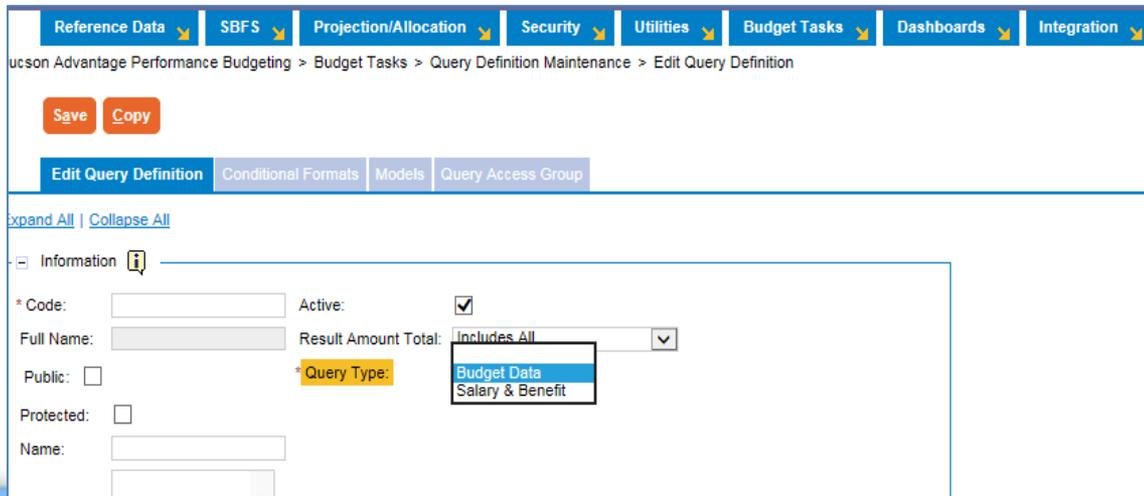
Export Tab Send Link Print Display 50 Items Row Label: Column

Query Results	
	FY 2016 Adopted Budget
101 - Regular Time	
107 - Second Language Pay	<u>788.00</u>
108 - Downtown Employee Allowance	<u>1,320.00</u>
113 - TSRS Pension Contribution	<u>112,110.00</u>

Freeze  
Unfreeze

# Queries - Accessing Budget and SBFS Data

- Access budget data as in 3.8
- Now can also access SBFS pay projection data in the query similar to an infoAdvantage report
- Select Budget Data or Salary & Benefit when creating the Query



Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Tucson Advantage Performance Budgeting > Budget Tasks > Query Definition Maintenance > Edit Query Definition

Save Copy

Edit Query Definition Conditional Formats Models Query Access Group

[Expand All](#) | [Collapse All](#)

Information ⓘ

\* Code:  Active:

Full Name:  Result Amount Total: Includes All ▾

Public:  \* Query Type: Budget Data  
Salary & Benefit

Protected:

Name:

# Queries for Budget or SBFS data

- Determine Query Type: Budget Data or Salary and Benefit Data
- Budget Data = Row Groups
- Salary and Benefit = Information from specific salary projection (projection code, COA, pcn, employee id, base salary, benefits, etc..)

# Queries for SBFS data

**CGI Advantage PB 3.11.1 SH1**

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾

Tucson Advantage Performance Budgeting > Budget Tasks > Query Definition Maintenance > Edit Query Definition

**Save** **Copy**

**Edit Query Definition**

[Expand All](#) | [Collapse All](#)

**Information** ⓘ

\* Code:  Active:

User Name: ⓘ  
Full Name:

\* Query Type:  ▾

Public:  \* Salary Projection Code:

Protected:  \* Salary Projection List:

Name:

Description:

**Columns**

*COA Elements*

Organization: <input checked="" type="checkbox"/>	Project: <input type="checkbox"/>
Department: <input checked="" type="checkbox"/>	User Defined Dimension 1: <input type="checkbox"/>
Fund: <input checked="" type="checkbox"/>	User Defined Dimension 2: <input type="checkbox"/>
Program: <input type="checkbox"/>	User Defined Dimension 3: <input type="checkbox"/>

*Position & Employee*

Position Number: <input checked="" type="checkbox"/>	Position Fiscal Year: <input type="checkbox"/>	Position Function Type: <input type="checkbox"/>
Employee Number: <input type="checkbox"/>	Employee Fiscal Year: <input type="checkbox"/>	Employee Function Type: <input type="checkbox"/>
Employee First Name: <input checked="" type="checkbox"/>	Classification: <input checked="" type="checkbox"/>	FTE Entered: <input type="checkbox"/>
Employee Last Name: <input checked="" type="checkbox"/>	Category: <input type="checkbox"/>	FTE Calculated: <input type="checkbox"/>
Step: <input type="checkbox"/>	Grade: <input type="checkbox"/>	Count: <input type="checkbox"/>

# Queries for SBFS data

Browser: <https://azcot-npd-temp.hostams.com/SH1APB2J1/Controller> | Edit Query Definition | CGI Solutions Support Center

File Edit View Favorites Tools Help

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**Salary & Benefits Filters**

Classification:	<input checked="" type="checkbox"/> <a href="#">Default Classification:</a>	<input type="text" value="0236"/>	Period:	<input type="checkbox"/> <a href="#">Default Period:</a>	<input type="text"/>
Category:	<input type="checkbox"/> <a href="#">Default Category:</a>	<input type="text"/>	First Name:	<input type="checkbox"/> <a href="#">Default First Name:</a>	<input type="text"/>
Scenario:	<input type="checkbox"/> <a href="#">Default Scenario:</a>	<input type="text"/>	Last Name:	<input type="checkbox"/> <a href="#">Default Last Name:</a>	<input type="text"/>
Position Fiscal Year:	<input type="checkbox"/> <a href="#">Default Position Fiscal Year:</a>	<input type="text"/>	Employee Fiscal Year:	<input type="checkbox"/> <a href="#">Default Employee Fiscal Year:</a>	<input type="text"/>
Position Function Type:	<input type="checkbox"/> <a href="#">Default Position Function Type:</a>	<input type="text"/>	Employee Function Type:	<input type="checkbox"/> <a href="#">Default Employee Function Type:</a>	<input type="text"/>
Position:	<input type="checkbox"/> <a href="#">Default Position Group:</a>	<input type="text"/>	Employee:	<input type="checkbox"/> <a href="#">Active/Inactive Employees:</a>	<input type="checkbox"/>
Position Group:	<input type="checkbox"/> <a href="#">Default Position:</a>	<input type="text"/>	Active/Inactive Positions:	<input type="checkbox"/> <a href="#">Default Employee:</a>	<input type="text"/>

Position Number:

Fiscal Year:

Function Type:

Employee Number:

Fiscal Year:

Function Type:

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**Selection Dimensions** ⓘ

Display Section Heading:

Selection Dimension Code:

**Organization**

Organization:  [Default Consolidation:](#)  [Default Dimension Code:](#)

**Department**

Department:  [Default Consolidation:](#)  [Default Dimension Code:](#)

**Fund**

Fund:  [Default Consolidation:](#)  [Default Dimension Code:](#)

**Program**

Program:  [Default Consolidation:](#)  [Default Dimension Code:](#)

# Queries for SBFS data

Export Tab Send Link **Sort** Print

Summary

<input type="checkbox"/>	Salary Projection	Position Number	Last Name	First Name	Organization	Fund	Department	Classification	Base Salary	Benefits
<input checked="" type="checkbox"/>	FY19_SBFS				9100	070	114			20,021
<input type="checkbox"/>	FY19_SBFS				8860	015	800			35,941
<input type="checkbox"/>	FY19_SBFS				7327	081	710			33,844
<input type="checkbox"/>	FY19_SBFS				2720	001	201			39,278
<input type="checkbox"/>	FY19_SBFS				7420	081	710			39,558
<input type="checkbox"/>	FY19_SBFS				7417	081	710			36,164
<input type="checkbox"/>	FY19_SBFS				4601	002	460			20,033
<input type="checkbox"/>	FY19_SBFS				7420	081	710			36,118
<input type="checkbox"/>	FY19_SBFS				9100	122	114			5,908
<input type="checkbox"/>	FY19_SBFS				9100	025	114			3,776
<input type="checkbox"/>	FY19_SBFS				9100	070	114			2,684
<input type="checkbox"/>	FY19_SBFS				2025	001	201			5,850
<input type="checkbox"/>	FY19_SBFS				4601	002	460			2,684
<input type="checkbox"/>	FY19_SBFS				8870	081	800			2,602
<input type="checkbox"/>	FY19_SBFS				8860	015	800			5,651
<input type="checkbox"/>	FY19_SBFS				4910	015	491			3,845
<input type="checkbox"/>	FY19_SBFS				9100	070	114			5,982
<input type="checkbox"/>	FY19_SBFS				1638	001	161			3,905
<input type="checkbox"/>	FY19_SBFS				8860	015	800			3,021

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**Zoom**

Zoom Sort Print View as CSV

Summary

Code	Name	Amount
<input type="radio"/> DN1EREO	Cigna Dental HMO	226
<input type="radio"/> EAPER	Employee Assistance Pro	16
<input type="radio"/> HMOEREO	Cigna HMO Emp only	6,394
<input type="radio"/> LIFE B	Life Insurance	39
<input type="radio"/> LTDER	Long-Term Disab	19
<input type="radio"/> TSR2R	TSRS Hired After 7/1/11	13,333

Page 1 of 1 Show 20 rows per page View

Thank You!

This concludes the training for  
highlights of changes from PB 3.8