

Advantage 3.11- On Demand Training

Class Title: How to Navigate in Advantage Performance Budgeting (PB) 3.11

Creation Date: 02/19/2018

Revised Date:

Goal & Objectives

Goal: After taking this class, students will know how navigate in Advantage PB 3.11.

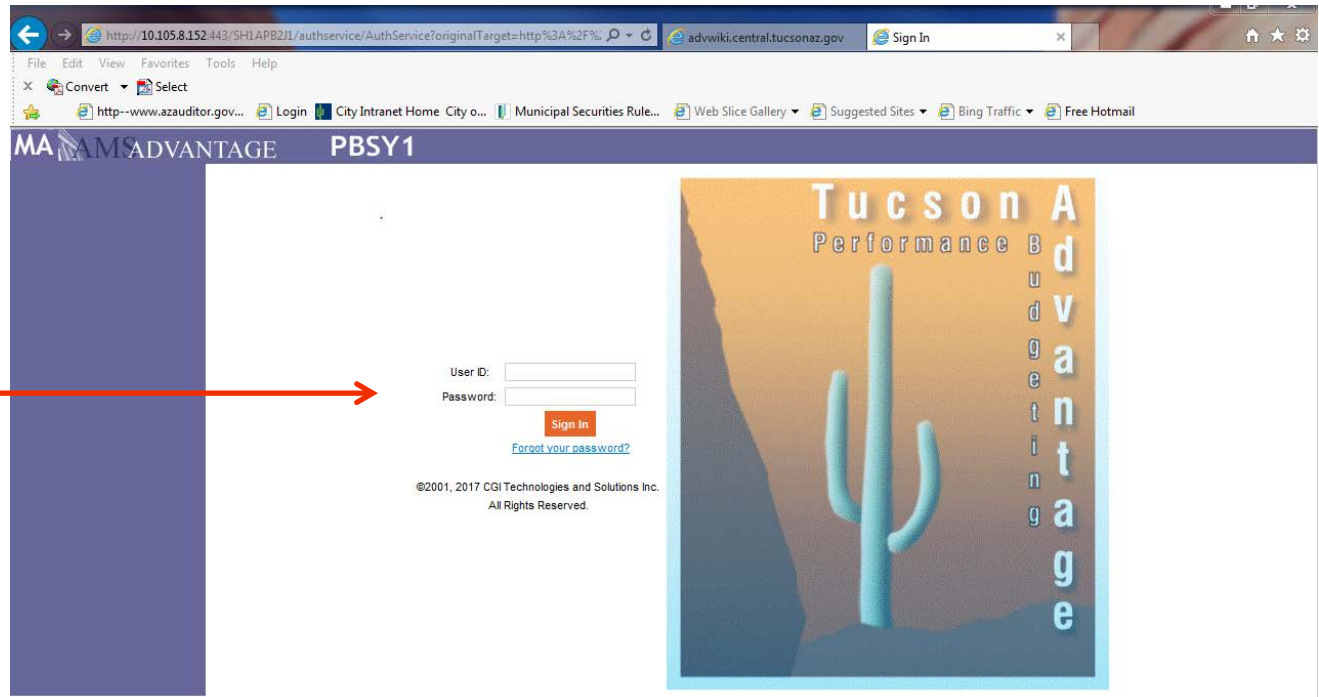
Objectives:

- Show students how to log into Advantage PB 3.11
- Show students how to navigate in Advantage PB 3.11
- Show students how to sign out of Advantage PB 3.11

How to log into Advantage PB 3.11

1. Enter the web address for PB in your internet browser.

2. Enter your **User ID** and **Password** and select **Sign In** to begin your session.



MA MAMS ADVANTAGE PBSY1

Tucson Advantage Performance

User ID:

Password:

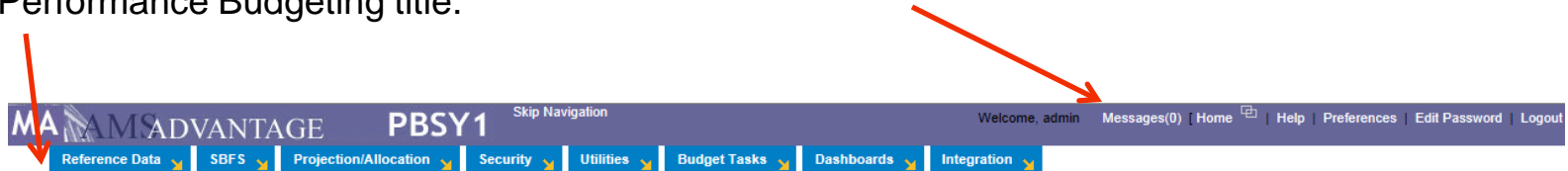
[Sign In](#)

[Forgot your password?](#)

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How to navigate in Advantage PB 3.11

The **Home** page, by default, is the first page visible after logging into PB. The **Home** page contains two navigational tool bars: one at the very top right and one directly below the Performance Budgeting title.



MAAMS ADVANTAGE PBSY1 Skip Navigation

Welcome, admin 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

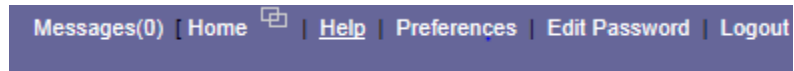
Tucson Advantage Performance Budgeting

Categories

Reference Data - This contains links to all the reference data in the system.	SBFS - This contains links to all the SBFS data in the system.	Projection/Allocation - Links to Projection/Allocation.	Security - Links to Security .
Consolidations - This contains all the consolidation links. Dimensions - This contains all the dimension links. Budget Forms - This contains all the Budget Form links. Performance Budgeting - This contains all the Performance Budgeting definition links. Budget Ranking - This contains all the Budget Ranking definition links. Queries - This contains links to Queries. Workflow - The following are Workflow-specific links.	Positions, Employees and Assignments - This contains links to Positions, Employees and Assignments. Benefits and Supplemental - This contains links to Benefits and Supplemental. Class, Category and Other - This contains links to Class, Category and Other. Salary Tables - This contains links to Salary Tables. Salary Projections - This contains links to Salary Projection.	Allocations Projections	
Utilities - Links to utilities.	Budget Tasks - This contains links to independent Views.	Dashboards - This contains dashboards.	Integration - This contains links to Integration tasks.

How to navigate in Advantage PB 3.11

The top right navigation bar allows the user to return to the **Home** page, view the Site Map, change **Preferences**, search for **Help**, or **Logout** of PB.



MA **ADVANTAGE** PBSY1 Skip Navigation Welcome, admin 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

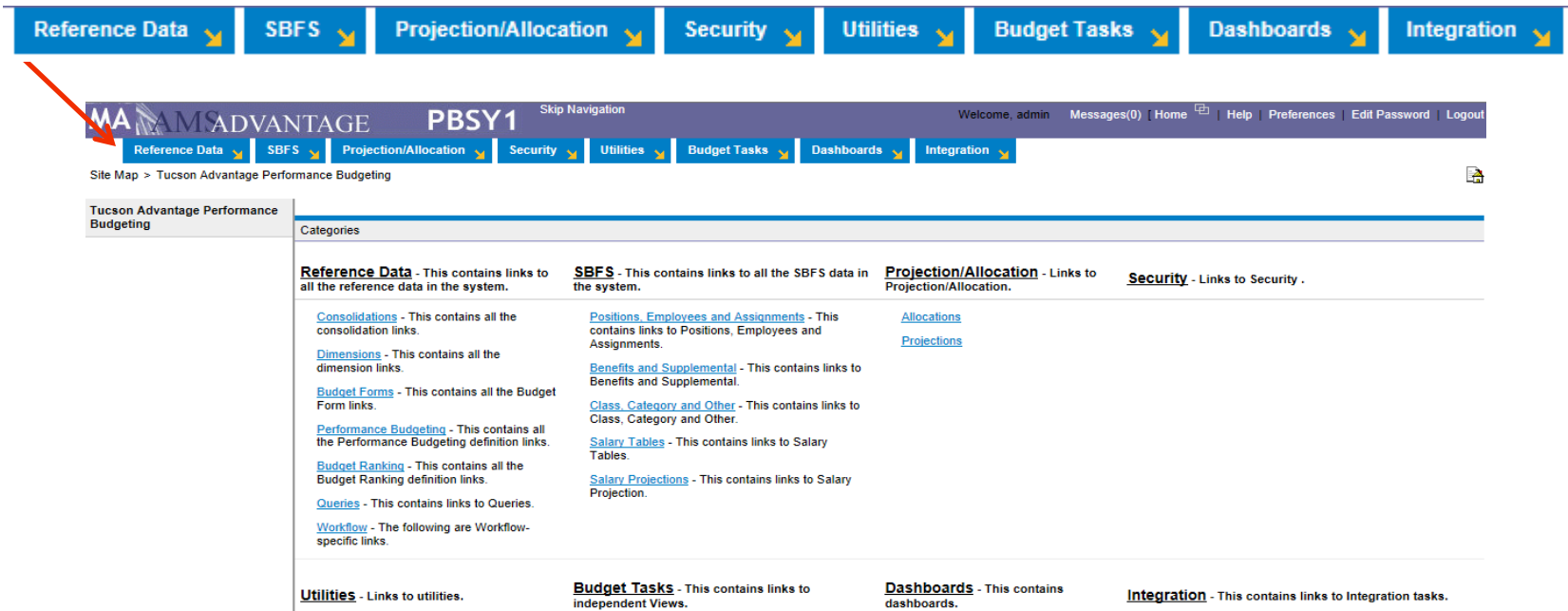
Tucson Advantage Performance Budgeting

Categories

<p>Reference Data - This contains links to all the reference data in the system.</p> <ul style="list-style-type: none"> Consolidations - This contains all the consolidation links. Dimensions - This contains all the dimension links. Budget Forms - This contains all the Budget Form links. Performance Budgeting - This contains all the Performance Budgeting definition links. Budget Ranking - This contains all the Budget Ranking definition links. Queries - This contains links to Queries. Workflow - The following are Workflow-specific links. 	<p>SBFS - This contains links to all the SBFS data in the system.</p> <ul style="list-style-type: none"> Positions, Employees and Assignments - This contains links to Positions, Employees and Assignments. Benefits and Supplemental - This contains links to Benefits and Supplemental. Class, Category and Other - This contains links to Class, Category and Other. Salary Tables - This contains links to Salary Tables. Salary Projections - This contains links to Salary Projection. 	<p>Projection/Allocation - Links to Projection/Allocation.</p> <ul style="list-style-type: none"> Allocations Projections 	<p>Security - Links to Security .</p>
<p>Utilities - Links to utilities.</p>	<p>Budget Tasks - This contains links to independent Views.</p>	<p>Dashboards - This contains dashboards.</p>	<p>Integration - This contains links to Integration tasks.</p>

How to navigate in Advantage PB 3.11

The main navigation bar allows access to other locations within the PB system. Within each of the eight categories listed in the main navigation bar are drop-down menus that list more specific options to the chosen category.



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

MA ADVANTAGE PBSY1 Skip Navigation Welcome, admin 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

Reference Data - This contains links to all the reference data in the system.

SBFS - This contains links to all the SBFS data in the system.

Projection/Allocation - Links to Projection/Allocation.

Security - Links to Security .

[Consolidations](#) - This contains all the consolidation links.

[Positions, Employees and Assignments](#) - This contains links to Positions, Employees and Assignments.

[Allocations](#)

[Projections](#)

[Dimensions](#) - This contains all the dimension links.

[Benefits and Supplemental](#) - This contains links to Benefits and Supplemental.

[Budget Forms](#) - This contains all the Budget Form links.

[Class, Category and Other](#) - This contains links to Class, Category and Other.

[Performance Budgeting](#) - This contains all the Performance Budgeting definition links.

[Salary Tables](#) - This contains links to Salary Tables.

[Budget Ranking](#) - This contains all the Budget Ranking definition links.

[Salary Projections](#) - This contains links to Salary Projection.

[Queries](#) - This contains links to Queries.

[Workflow](#) - The following are Workflow-specific links.

Utilities - Links to utilities.

Budget Tasks - This contains links to independent Views.

Dashboards - This contains dashboards.

Integration - This contains links to Integration tasks.

How to navigate in Advantage PB 3.11

The site map available in the application provides hyperlinks to all functional areas within the application. The user who logs into the system is displayed only hyperlinks in the site map for functional areas to which they have view permissions or view permission to at least one of the underlying functional areas.

MAAMS ADVANTAGE PBSY1 Skip Navigation Welcome, admin 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

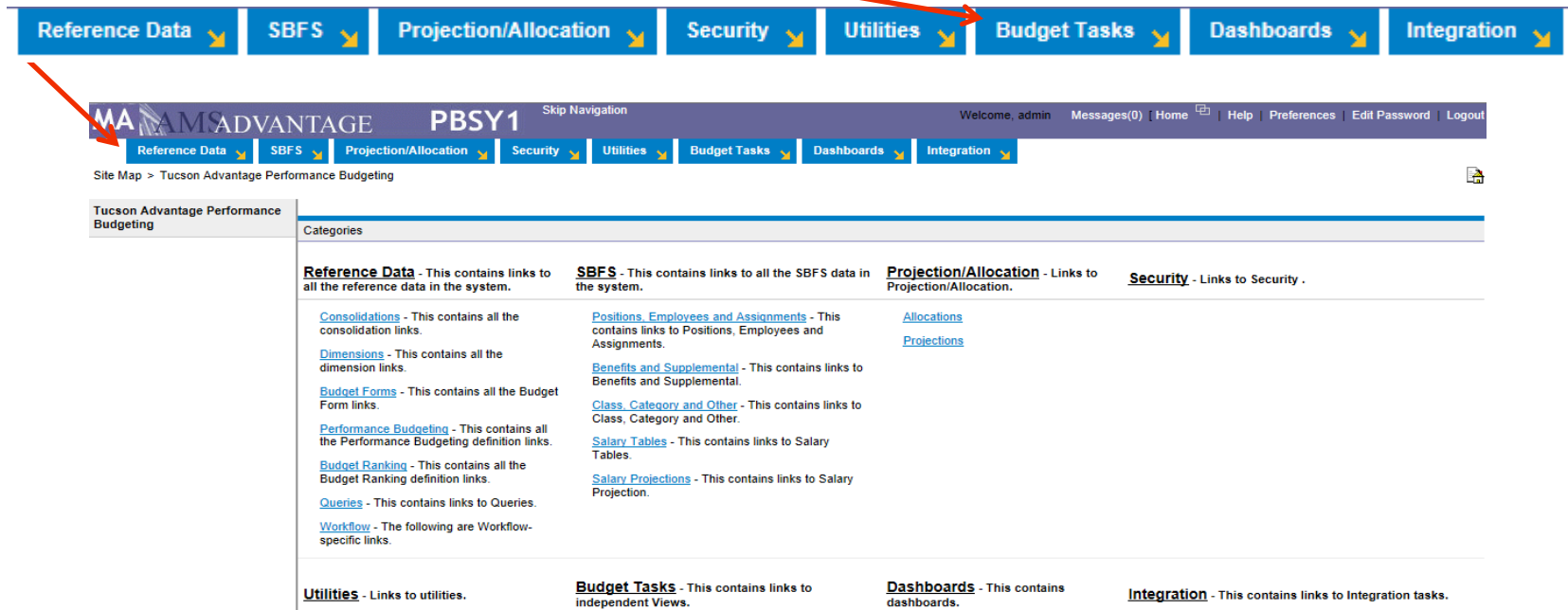
Tucson Advantage Performance Budgeting

Categories

<p>Reference Data - This contains links to all the reference data in the system.</p> <p>Consolidations - This contains all the consolidation links.</p> <p>Dimensions - This contains all the dimension links.</p> <p>Budget Forms - This contains all the Budget Form links.</p> <p>Performance Budgeting - This contains all the Performance Budgeting definition links.</p> <p>Budget Ranking - This contains all the Budget Ranking definition links.</p> <p>Queries - This contains links to Queries.</p> <p>Workflow - The following are Workflow-specific links.</p>	<p>SBFS - This contains links to all the SBFS data in the system.</p> <p>Positions, Employees and Assignments - This contains links to Positions, Employees and Assignments.</p> <p>Benefits and Supplemental - This contains links to Benefits and Supplemental.</p> <p>Class, Category and Other - This contains links to Class, Category and Other.</p> <p>Salary Tables - This contains links to Salary Tables.</p> <p>Salary Projections - This contains links to Salary Projection.</p>	<p>Projection/Allocation - Links to Projection/Allocation.</p> <p>Allocations</p> <p>Projections</p>	<p>Security - Links to Security .</p>
<p>Utilities - Links to utilities.</p>	<p>Budget Tasks - This contains links to independent Views.</p>	<p>Dashboards - This contains dashboards.</p>	<p>Integration - This contains links to Integration tasks.</p>

How to navigate in Advantage PB 3.11

During testing, you will be working with various forms and queries, which are accessed from the **Budget Tasks** tab.



The screenshot shows the navigation interface for Advantage PB 3.11. At the top is a blue navigation bar with the following tabs: Reference Data, SBFS, Projection/Allocation, Security, Utilities, Budget Tasks, Dashboards, and Integration. Below this is a purple header bar with the text 'MAMS ADVANTAGE PBSY1' and 'Skip Navigation'. To the right of the header bar are links for 'Welcome, admin', 'Messages(0)', 'Home', 'Help', 'Preferences', 'Edit Password', and 'Logout'. Below the header bar is a secondary navigation bar with the same tabs as the top bar. Below this is a 'Site Map' section for 'Tucson Advantage Performance Budgeting'. The site map is organized into a grid of sections, each with a title and a brief description of the links it contains. The sections are: Reference Data, SBFS, Projection/Allocation, Security, Utilities, Budget Tasks, Dashboards, and Integration.

Reference Data - This contains links to all the reference data in the system.

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Salary Tables - This contains links to Salary Tables.

Salary Projections - This contains links to Salary Projection.

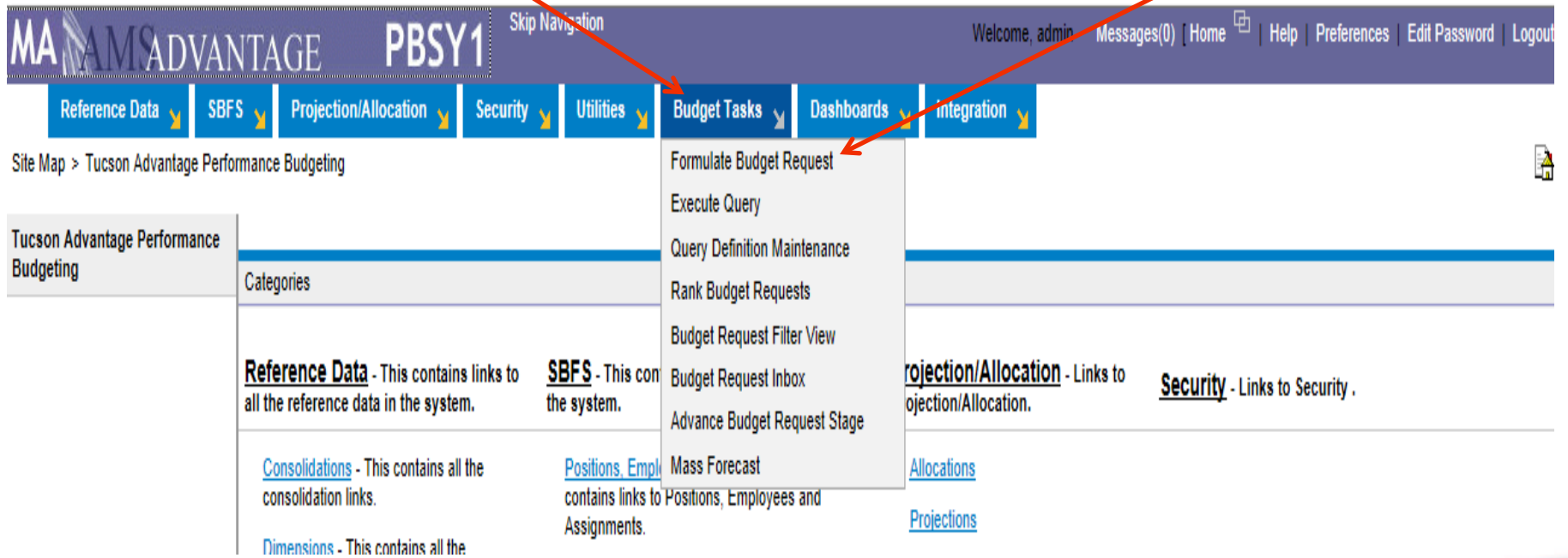
Allocations

Projections

How to navigate in Advantage PB 3.11

1. Hover the cursor over the **Budget Tasks** tab to display the tasks that are available for use.

2. To create forms in PB, select **Formulate Budget Request** to view the budget layout selection.



The screenshot shows the Advantage PB 3.11 interface. At the top, there is a navigation bar with the following tabs: Reference Data, SBFS, Projection/Allocation, Security, Utilities, Budget Tasks, Dashboards, and Integration. The 'Budget Tasks' tab is highlighted, and a dropdown menu is open, showing the following options: Formulate Budget Request, Execute Query, Query Definition Maintenance, Rank Budget Requests, Budget Request Filter View, Budget Request Inbox, Advance Budget Request Stage, and Mass Forecast. The 'Formulate Budget Request' option is selected, as indicated by a red arrow. Below the navigation bar, there is a sidebar with the text 'Tucson Advantage Performance Budgeting' and a main content area with various links and descriptions. The 'Budget Tasks' dropdown menu is also highlighted with a red arrow.

Site Map > Tucson Advantage Performance Budgeting

Tucson Advantage Performance Budgeting

Categories

Reference Data - This contains links to all the reference data in the system.

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Security - Links to Security.

Consolidations - This contains all the consolidation links.

Positions, Employees and Assignments - This contains links to Positions, Employees and Assignments.

Allocations

Projections

Formulate Budget Request

Execute Query

Query Definition Maintenance

Rank Budget Requests

Budget Request Filter View

Budget Request Inbox

Advance Budget Request Stage

Mass Forecast

How to navigate in Advantage PB 3.11

From this view, you can select the form layout that you will work on.

MAAMS ADVANTAGE PBSY1 Skip Navigation Welcome, admin Messages(0) Home Help Preferences Edit Password Logout

Reference Data STIF 5 Projection/Allocation Security Utilities Budget Tasks Dashboards Integration

Tucson Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

Budget Layout Selection

Code: Name:


Layout Type:

Code	Name	Layout Type
BUDGET_LIMIT_T1	Budget Limit Test-1	Transfer
TRANS_BCB	FY16 Operating Budget Change Request	Transfer
BUDGET_LIMIT_T3	Budget Limit Test-3	Transfer
CIP_DETAIL	Project Detail - Capital	Generic
CIP_OM	CIP O&M Impact	Generic
FY16_BCB	FY16 Operating Budget Change Request	Generic
FY16_EXPENSE_BUDGET	FY16 Expense Budget Request	Generic
FY16_GRANT_TRANSFERR	FY16 Transfer Form for Operating Grants	Transfer
FY16_QPRO_ADJUST_CAP	FY16 QPRO Capital Adjustments Expenditures	Generic
FY16_QPRO_ADJUST_REVS	FY16 QPRO Adjustment Revenues	Generic
FY16_REVENUE_BUDGET	FY16 Revenue Budget Request	Generic
FY16_TRANS_EXPENSES	FY16 Transfer Form for Operating	Transfer
FY17_BCB	FY17 Operating Budget Change Request	Generic
FY17_BCB_CAPITAL	FY17 Budget Change Requests for Capital	Generic
FY17_BCB_REVS	FY17 Revenue Budget Change Requests	Generic
FY17_EXPENSE_BUDGET	FY17 Expense Budget Request	Generic
FY17_GRANT_TRANSFERR	FY17 Transfer Form for Operating Grants	Transfer
FY17_QPRO_ADJUST	FY17 QPRO Adjustments Expenditures	Generic

How to navigate in Advantage PB 3.11

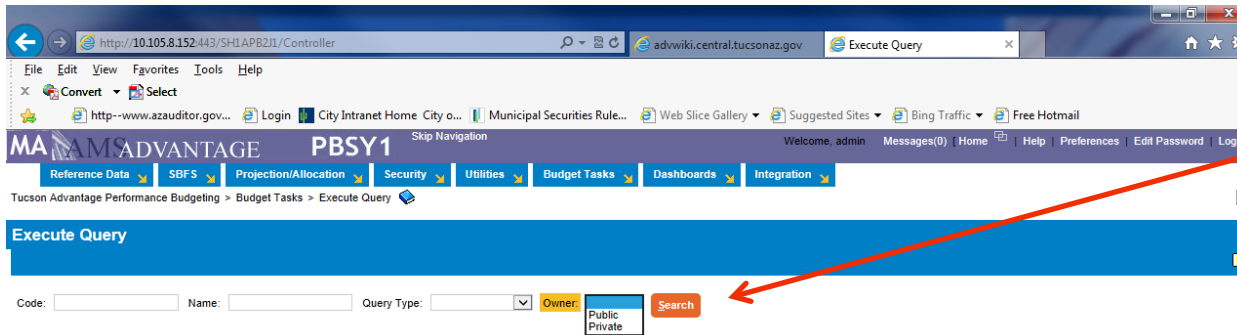
1. To run a query, hover the cursor over the **Budget Tasks** tab to display the tasks that are available for use.

2. Select **Execute Query** to view the existing queries.

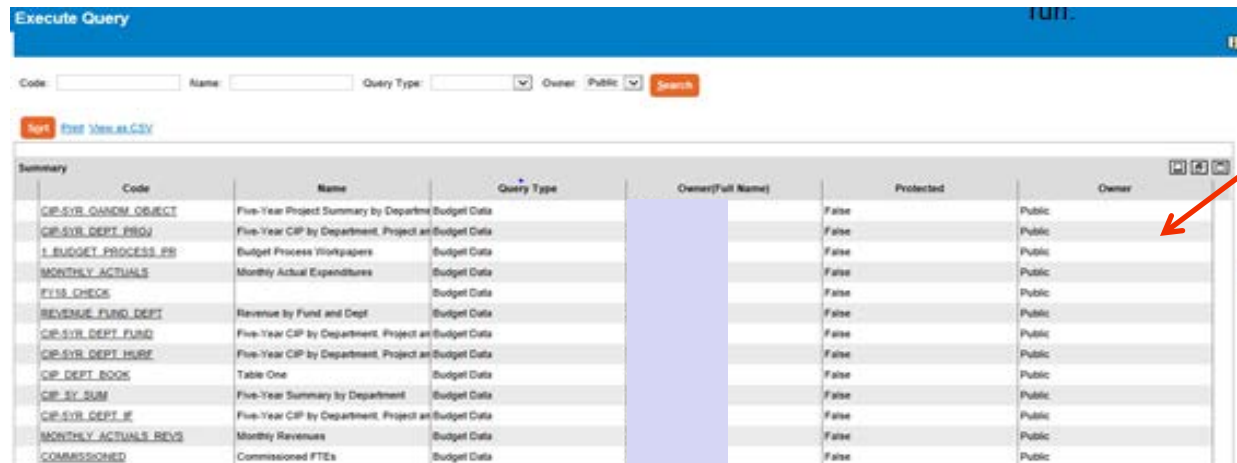


The screenshot displays the navigation bar of the Advantage PB 3.11 system. The 'Budget Tasks' tab is active, and its dropdown menu is open, showing the following options: Formulate Budget Request, Execute Query, Query Definition Maintenance, Rank Budget Requests, Budget Request Filter View, Budget Request Inbox, Advance Budget Request Stage, and Mass Forecast. The 'Execute Query' option is highlighted. Below the navigation bar, the breadcrumb trail reads 'Tucson Advantage Performance Budgeting > Budget Tasks > Execute Query'. The main content area is titled 'Execute Query' and contains input fields for 'Code:', 'Name:', and 'Query Type:'.

How to navigate in Advantage PB 3.11



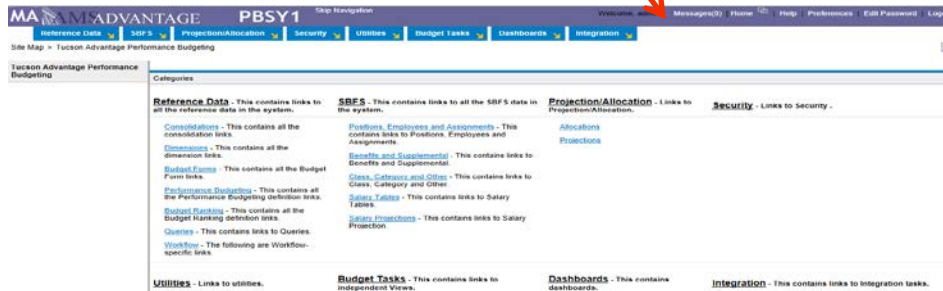
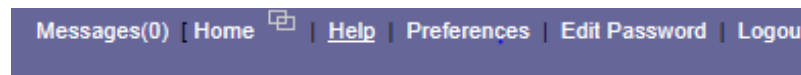
1. To view a list of available queries, select **Public** from the **Owner** dropdown and select **Search**.



2. From this view, you can select the query that you will want to run.

How to sign out of Advantage PB 3.11

1. To sign out of PB, navigate to the **Home** page and select **Logout**.



2. This will return you to the **Sign In** page.



Thank You!

This concludes the navigational
training for Advantage Performance
Budgeting 3.11