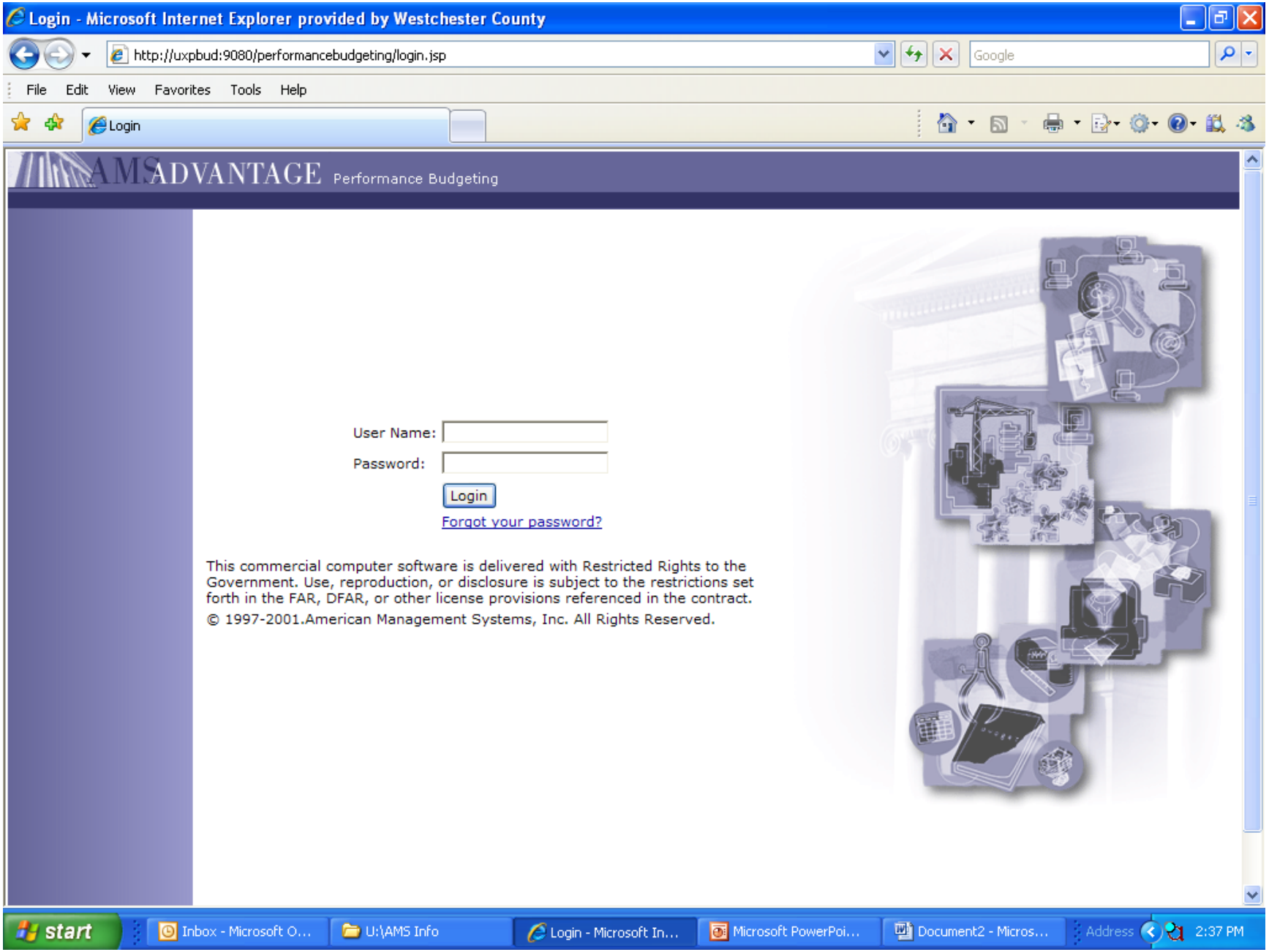
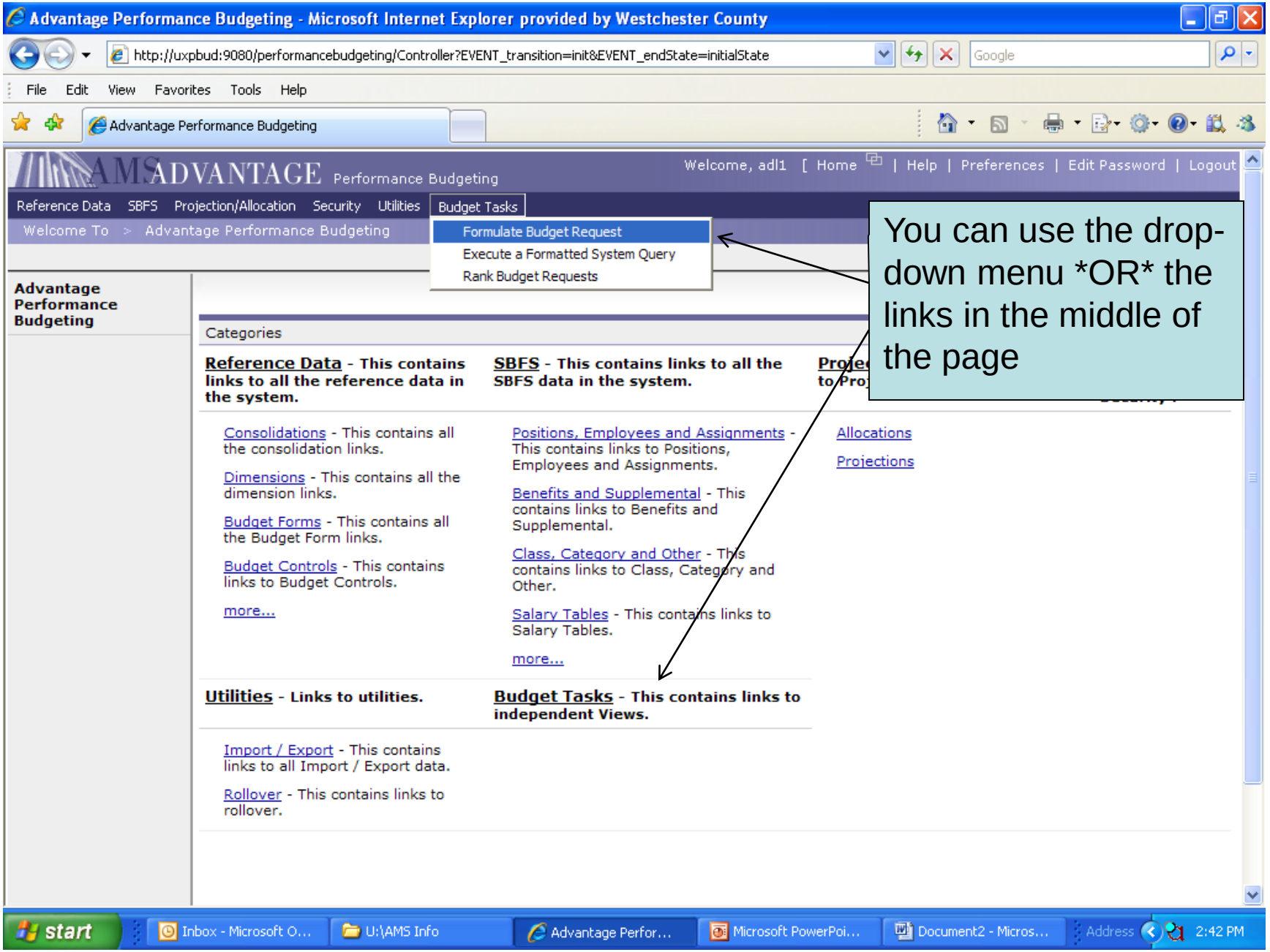
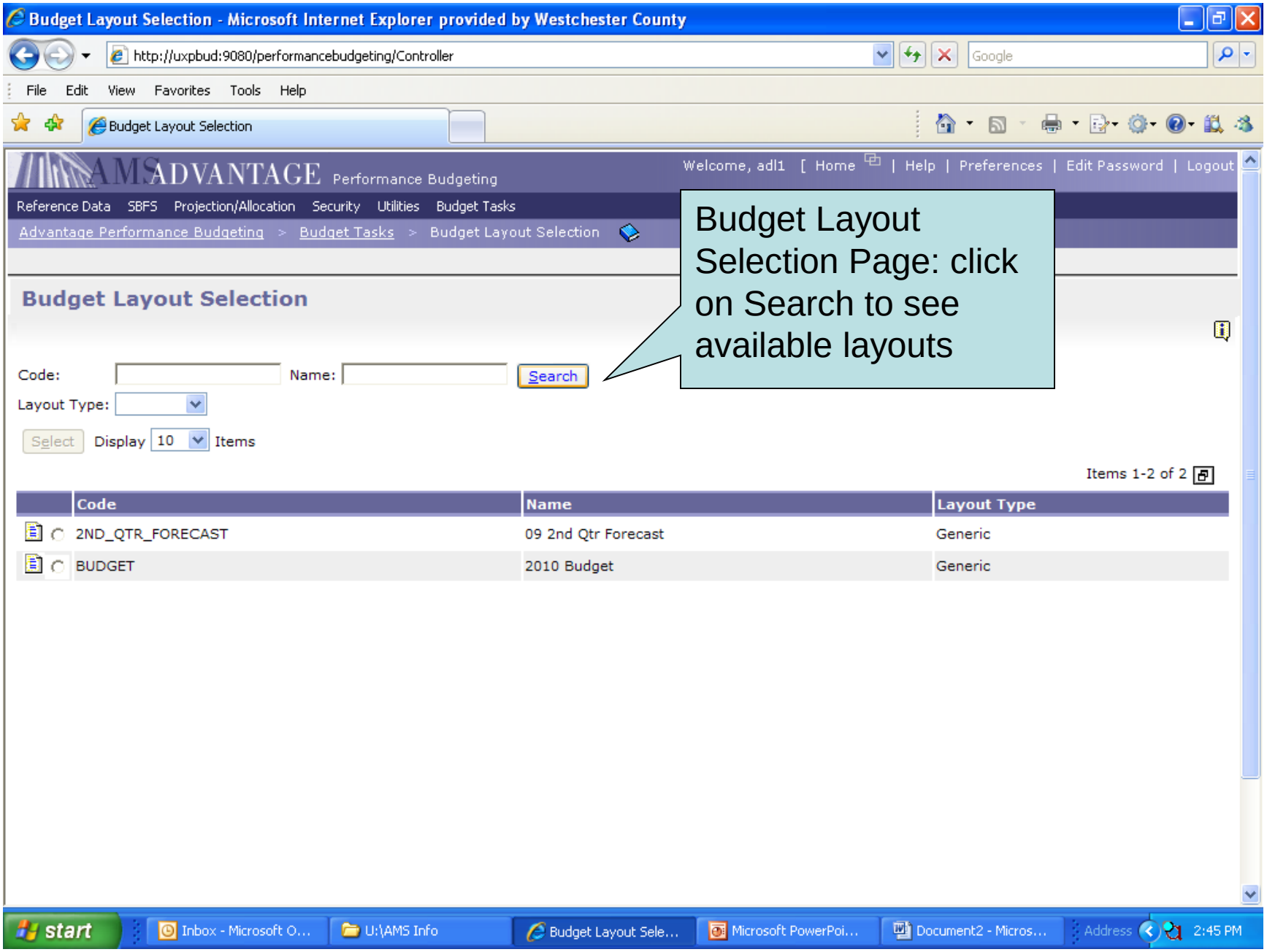
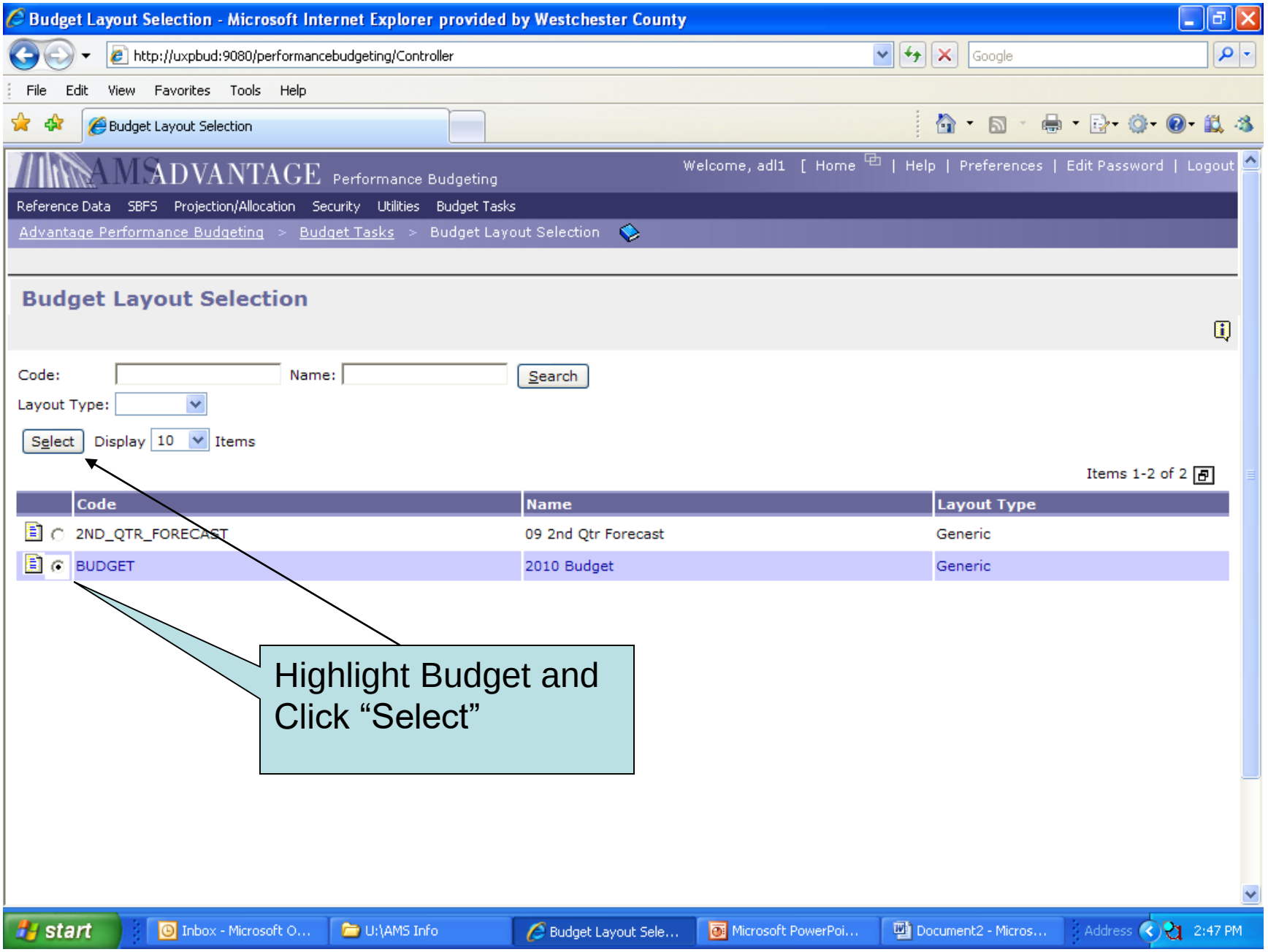
PB Link is http://uxpbud:9080/performancebudgeting/login.jsp

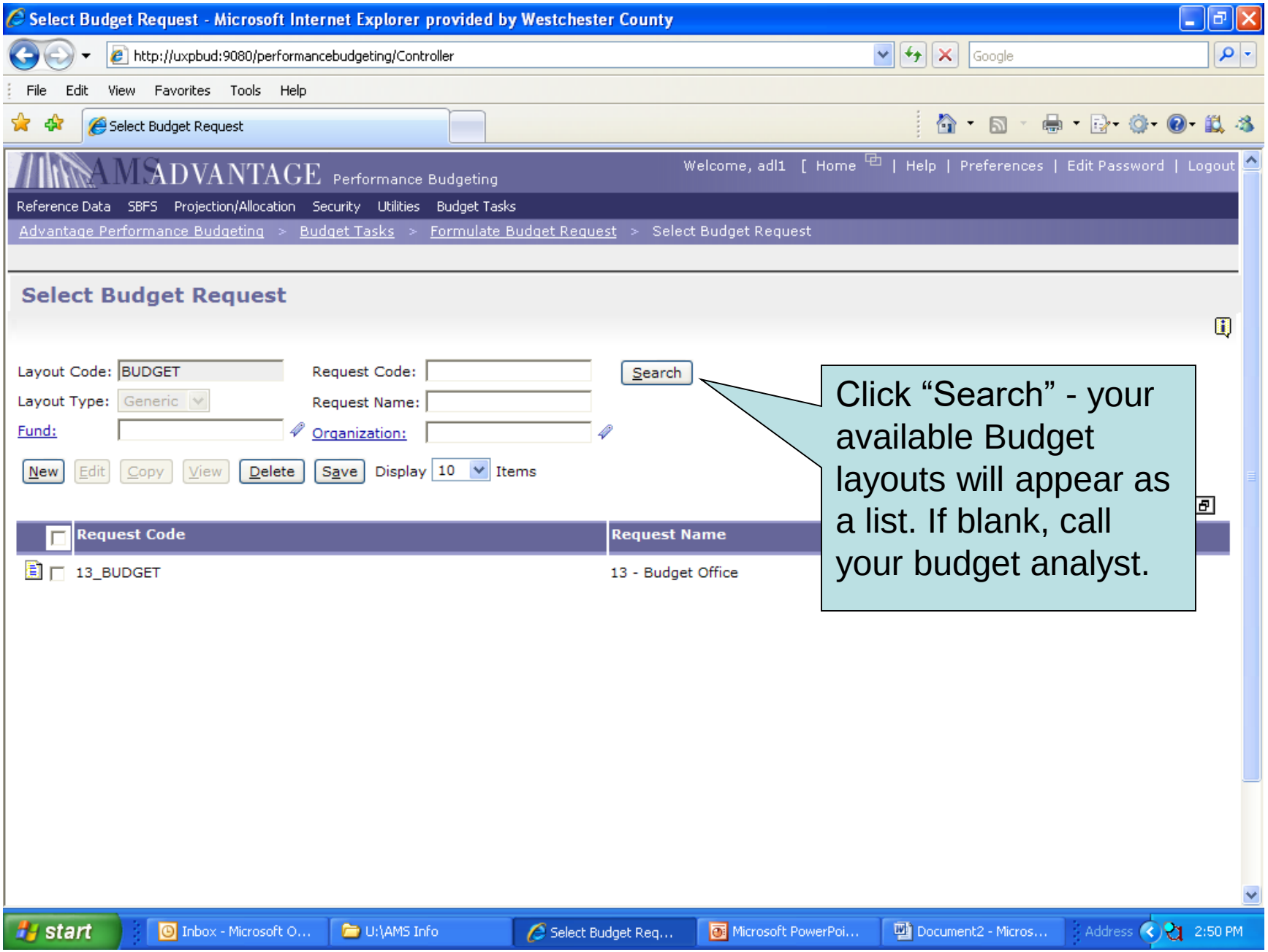


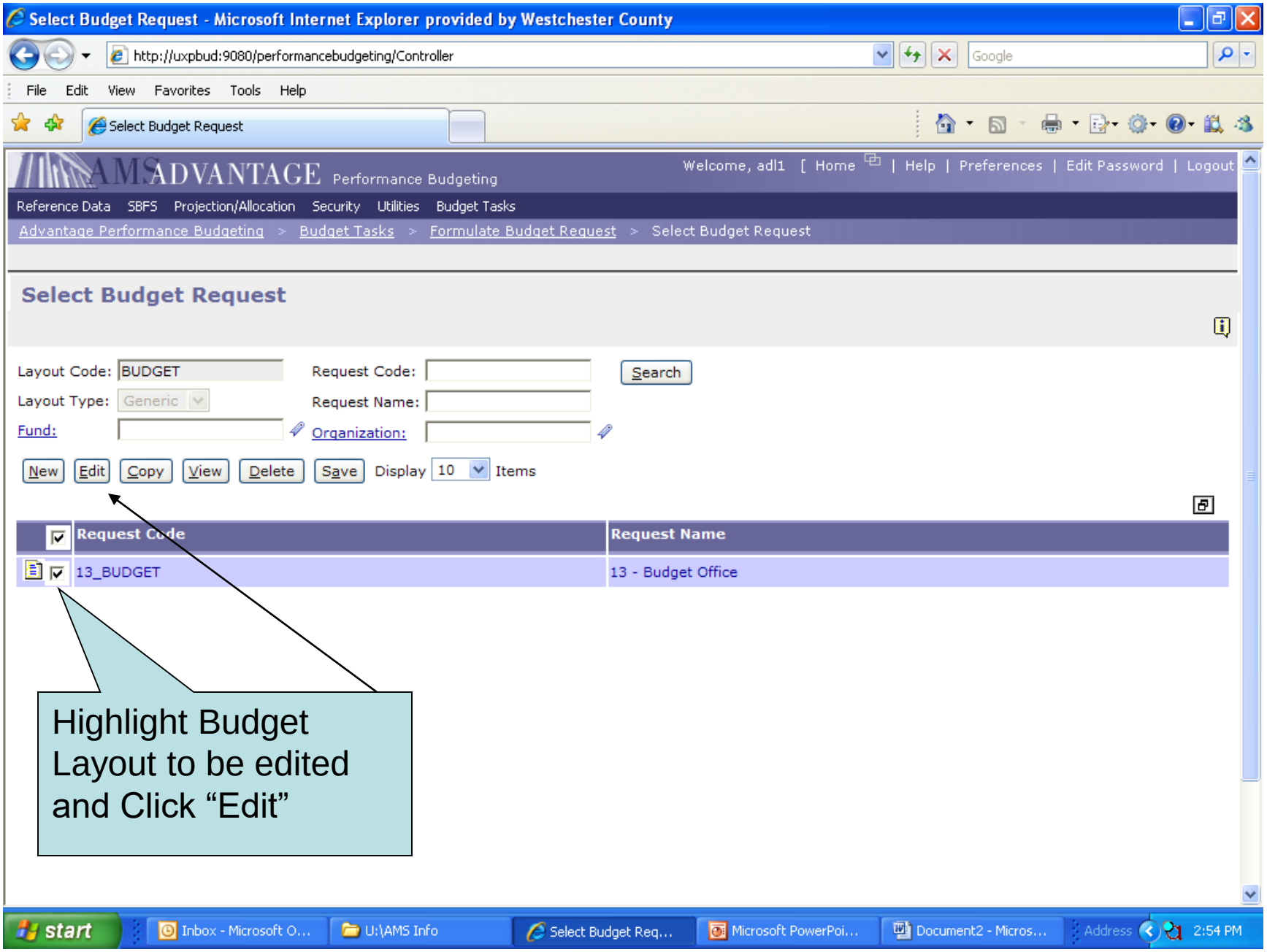
Select Budget Tasks, then Formulate a Budget Request

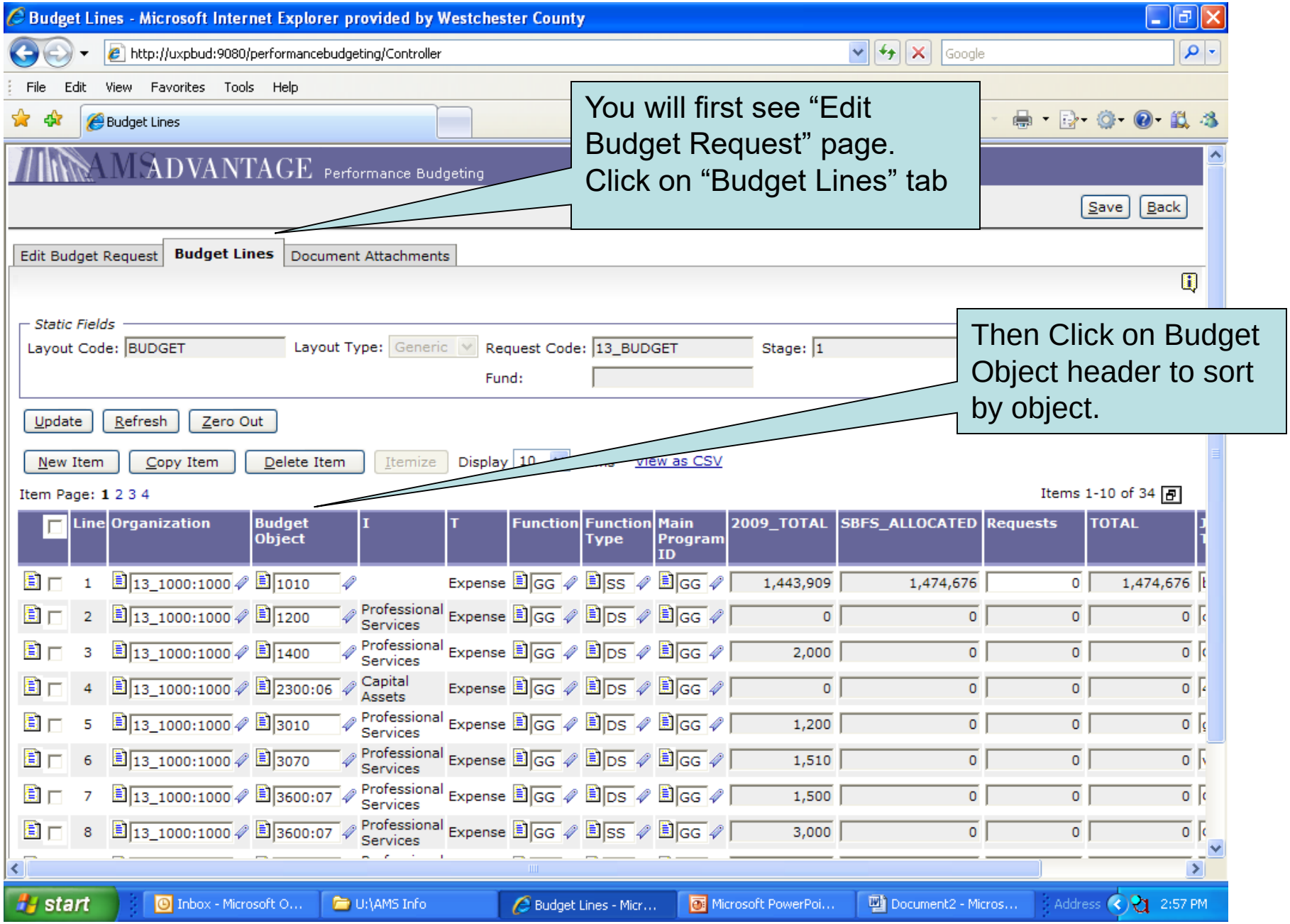



Budget Layout Selection - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Layout Selection
AMS ADVANTAGE Performance Budgeting
Welcome, adl1 [Home | Help | Preferences | Edit Password | Logout
Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks
Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection
Budget Layout Selection
Code:
Name:
Search
Layout Type:
Select Display 10 Items
Items 1-2 of 2
Code
Name
Layout Type
2ND_QTR_FORECAST
09 2nd Qtr Forecast
Generic
BUDGET
2010 Budget
Generic
Budget Layout Selection Page: click on Search to see available layouts
start
Inbox - Microsoft O...
U:\AMS Info
Budget Layout Sele...
Microsoft PowerPoi...
Document2 - Micros...
Address
2:45 PM

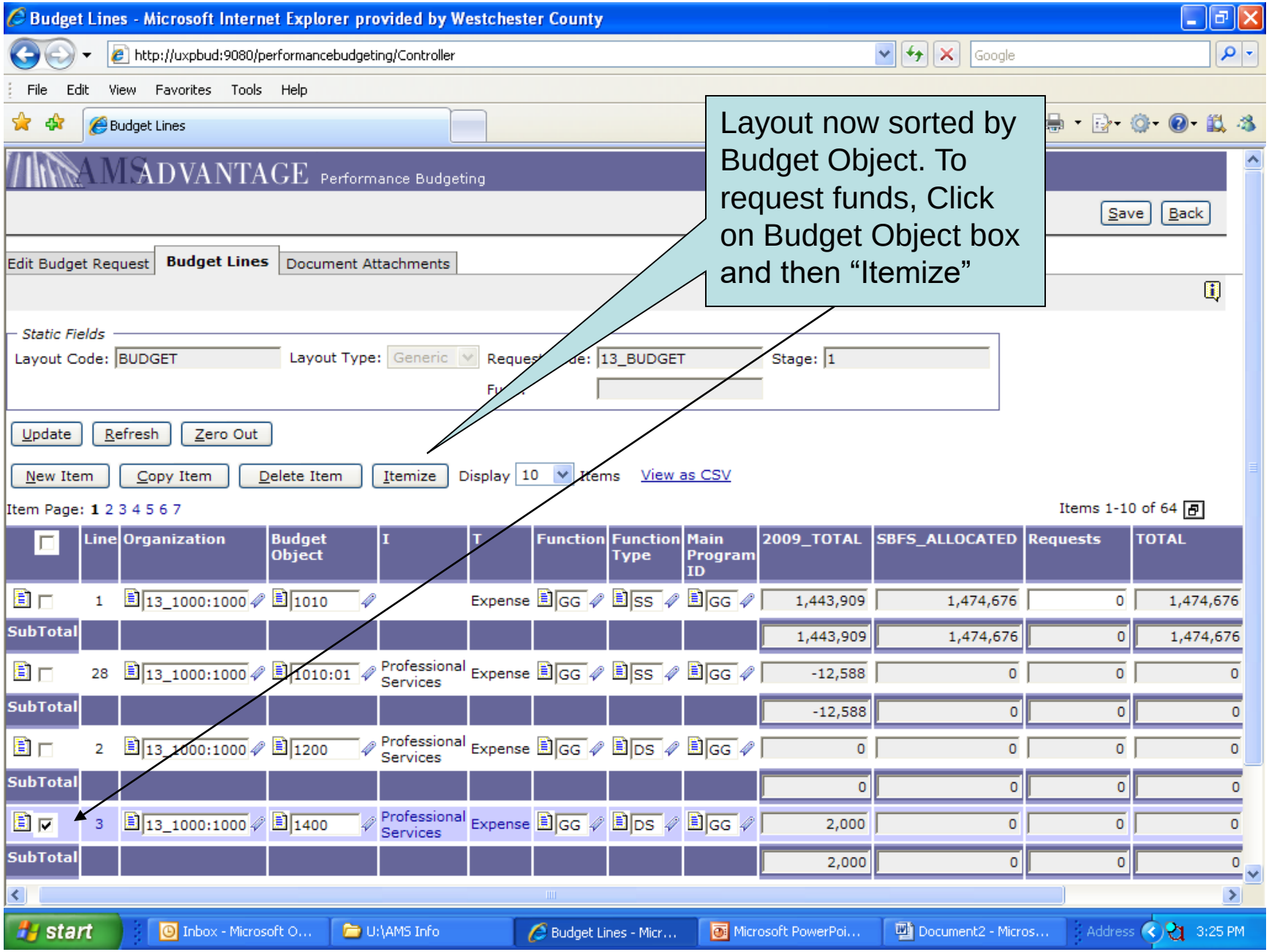

Budget Layout Selection - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Layout Selection
AMS ADVANTAGE Performance Budgeting
Welcome, adl1 [Home | Help | Preferences | Edit Password | Logout
Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks
Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection
Budget Layout Selection
Code:
Name:
Search
Layout Type:
Select
Display 10 Items
Items 1-2 of 2
Code
Name
Layout Type
2ND_QTR_FORECAST
09 2nd Qtr Forecast
Generic
BUDGET
2010 Budget
Generic
Highlight Budget and Click “Select”
start
Inbox - Microsoft O...
U:\AMS Info
Budget Layout Sele...
Microsoft PowerPoi...
Document2 - Micros...
Address
2:47 PM


Select Budget Request - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Select Budget Request
AMS ADVANTAGE Performance Budgeting
Welcome, adl1 [Home | Help | Preferences | Edit Password | Logout
Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks
Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > Select Budget Request
Select Budget Request
Layout Code: BUDGET
Request Code:
Search
Layout Type: Generic
Request Name:
Fund:
Organization:
New Edit Copy View Delete Save Display 10 Items
Request Code
Request Name
13_BUDGET
13 - Budget Office
Click "Search" - your available Budget layouts will appear as a list. If blank, call your budget analyst.
start
Inbox - Microsoft O...
U:\AMS Info
Select Budget Req...
Microsoft PowerPoi...
Document2 - Micros...
Address
2:50 PM


Select Budget Request - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Select Budget Request
AMS ADVANTAGE Performance Budgeting
Welcome, adl1 [Home | Help | Preferences | Edit Password | Logout
Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks
Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > Select Budget Request
Select Budget Request
Layout Code: BUDGET
Request Code:
Search
Layout Type: Generic
Request Name:
Fund:
Organization:
New Edit Copy View Delete Save Display 10 Items
Request Code
Request Name
13_BUDGET
13 - Budget Office
Highlight Budget Layout to be edited and Click "Edit"
start
Inbox - Microsoft O...
U:\AMS Info
Select Budget Req...
Microsoft PowerPoi...
Document2 - Micros...
Address
2:54 PM



Line	Organization	Budget Object	I	T	Function	Function Type	Main Program ID	2009_TOTAL	SBFS_ALLOCATED	Requests	TOTAL
1	13_1000:1000	1010		Expense	GG	SS	GG	1,443,909	1,474,676	0	1,474,676
2	13_1000:1000	1200	Professional Services	Expense	GG	DS	GG	0	0	0	0
3	13_1000:1000	1400	Professional Services	Expense	GG	DS	GG	2,000	0	0	0
4	13_1000:1000	2300:06	Capital Assets	Expense	GG	DS	GG	0	0	0	0
5	13_1000:1000	3010	Professional Services	Expense	GG	DS	GG	1,200	0	0	0
6	13_1000:1000	3070	Professional Services	Expense	GG	DS	GG	1,510	0	0	0
7	13_1000:1000	3600:07	Professional Services	Expense	GG	DS	GG	1,500	0	0	0
8	13_1000:1000	3600:07	Professional Services	Expense	GG	SS	GG	3,000	0	0	0


Budget Lines - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Lines
AMS ADVANTAGE Performance Budgeting
Save Back
Edit Budget Request Budget Lines Document Attachments
Static Fields
Layout Code: BUDGET Layout Type: Generic Stage: 1
Update Refresh Zero Out
New Item Copy Item Delete Item Itemize Display 10 Items View as CSV
Item Page: 1 2 3 4 5 6 7
Items 1-10 of 64
Line Organization Budget Object I T Function Function Type Main Program ID 2009_TOTAL SBFS_ALLOCATED Requests TOTAL
1 13_1000:1000 1010 Expense GG SS GG 1,443,909 1,474,676 0 1,474,676
SubTotal 1,443,909 1,474,676 0 1,474,676
28 13_1000:1000 1010:01 Professional Services Expense GG SS GG -12,588 0 0 0
SubTotal -12,588 0 0 0
2 13_1000:1000 1200 Professional Services Expense GG DS GG 0 0 0 0
SubTotal 0 0 0 0
3 13_1000:1000 1400 Professional Services Expense GG DS GG 2,000 0 0 0
SubTotal 2,000 0 0 0
Layout now sorted by Budget Object. To request funds, Click on Budget Object box and then “Itemize”
start
Inbox - Microsoft O...
U:\AMS Info
Budget Lines - Micr...
Microsoft PowerPoi...
Document2 - Micros...
Address
3:25 PM

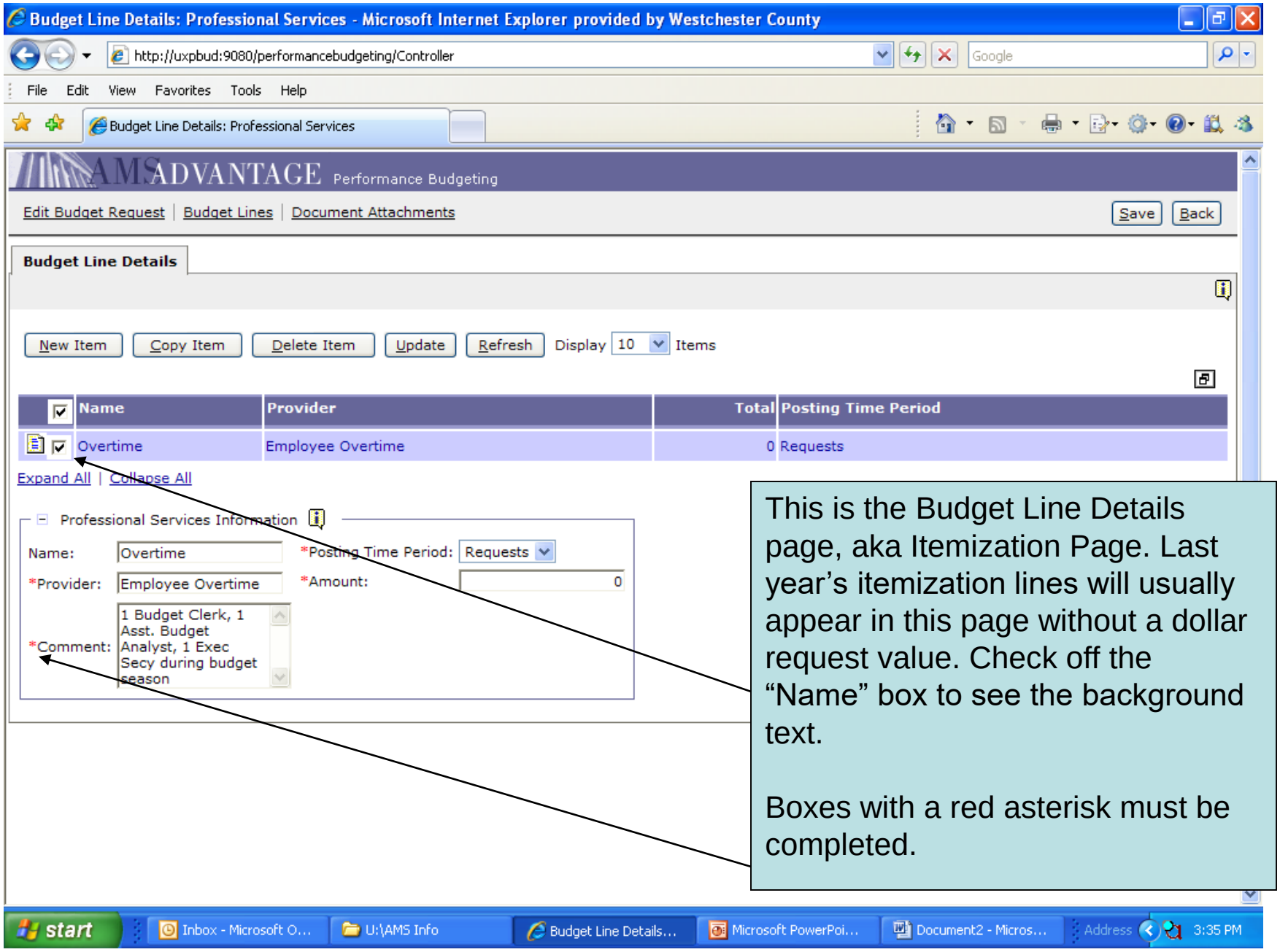
A budget line has five identifiers that make it unique: Organization, Budget Object, Function, Function Type (aka Mandate), and Main Program.

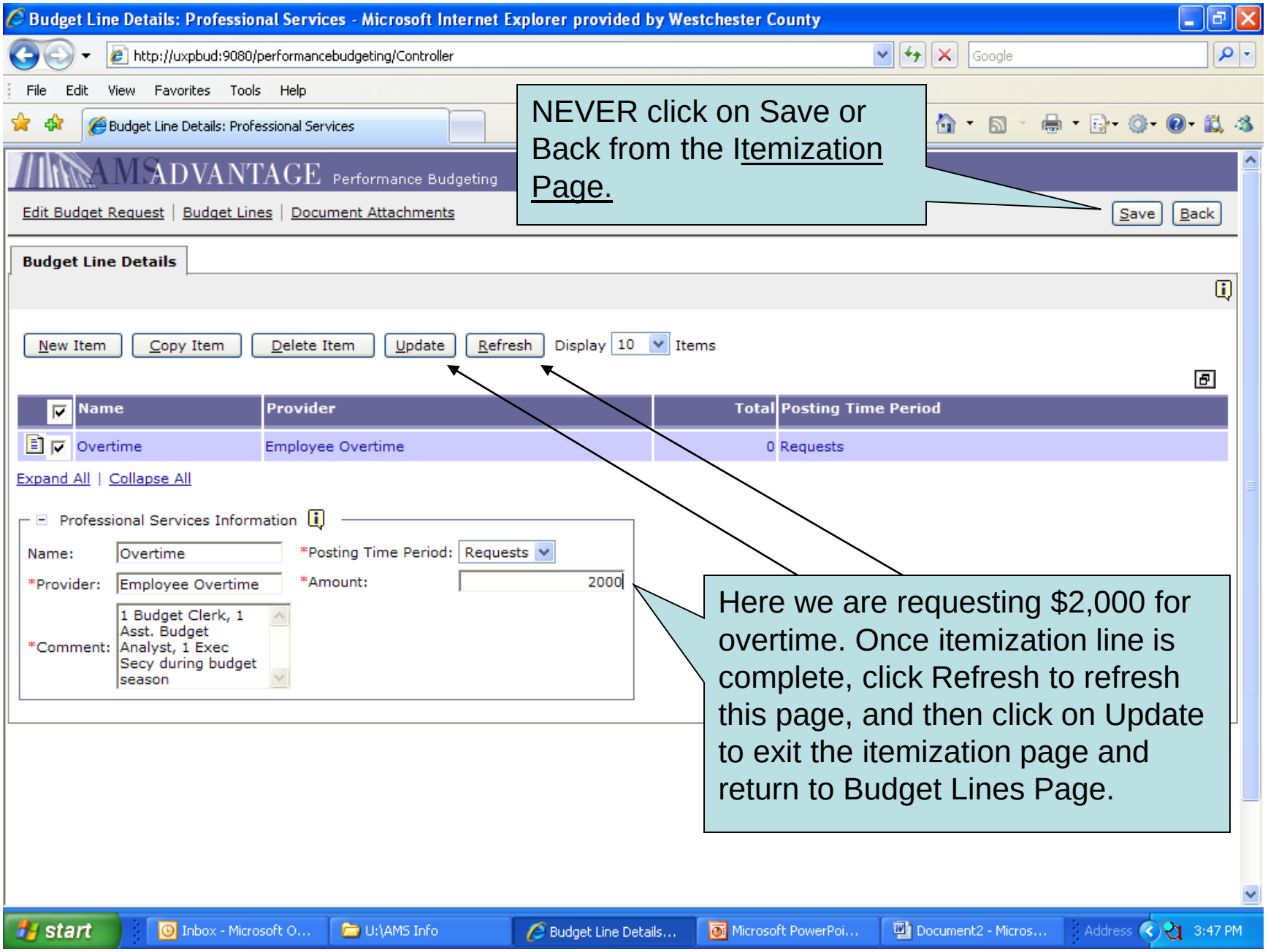
Funding for 1010 Annual Regular will already be populated when you open your budget request. Fringe benefit object codes will also be populated for those departments with internal fringe budgeting.

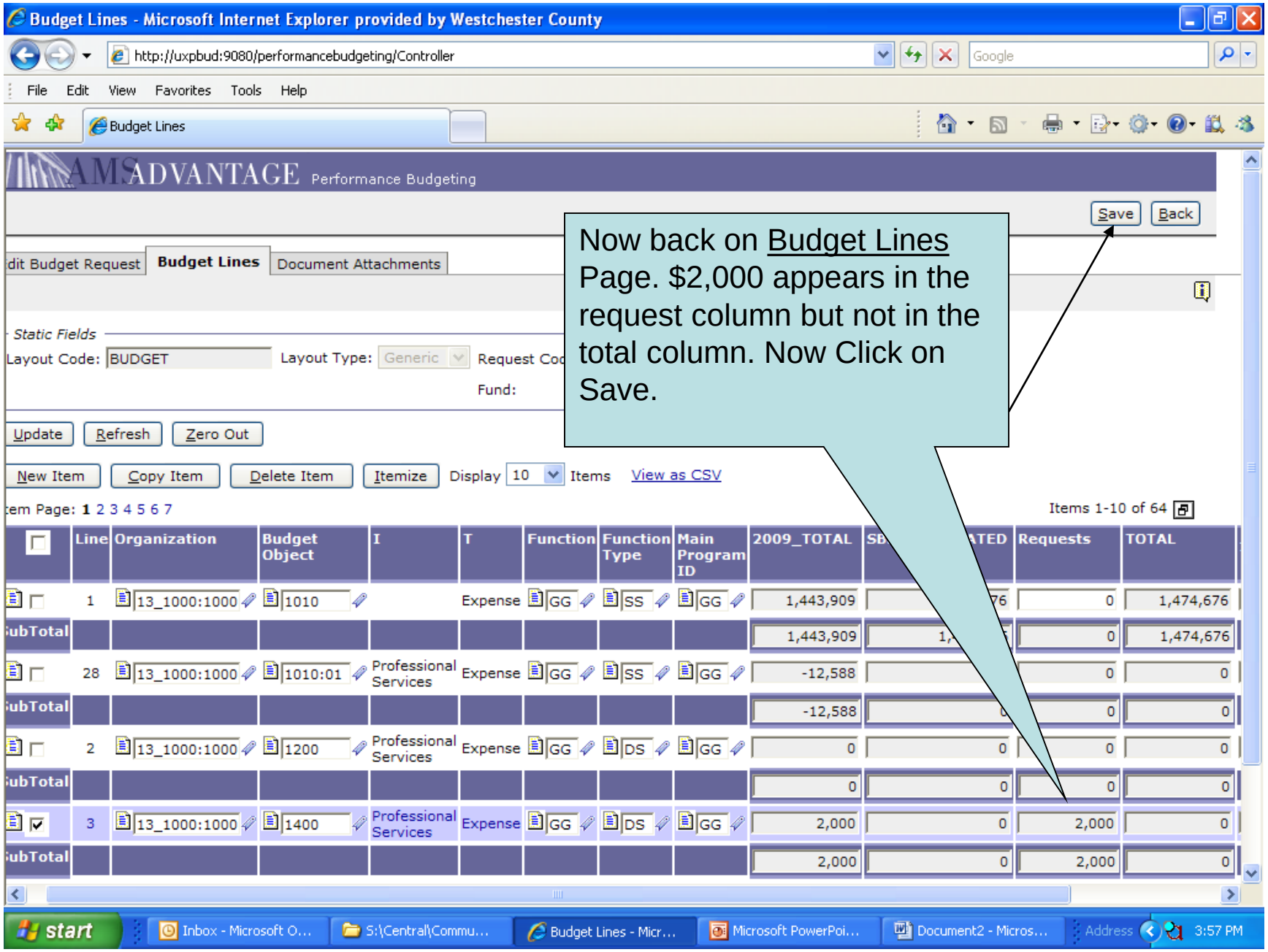
The only way to request or change funding is to **itemize**.

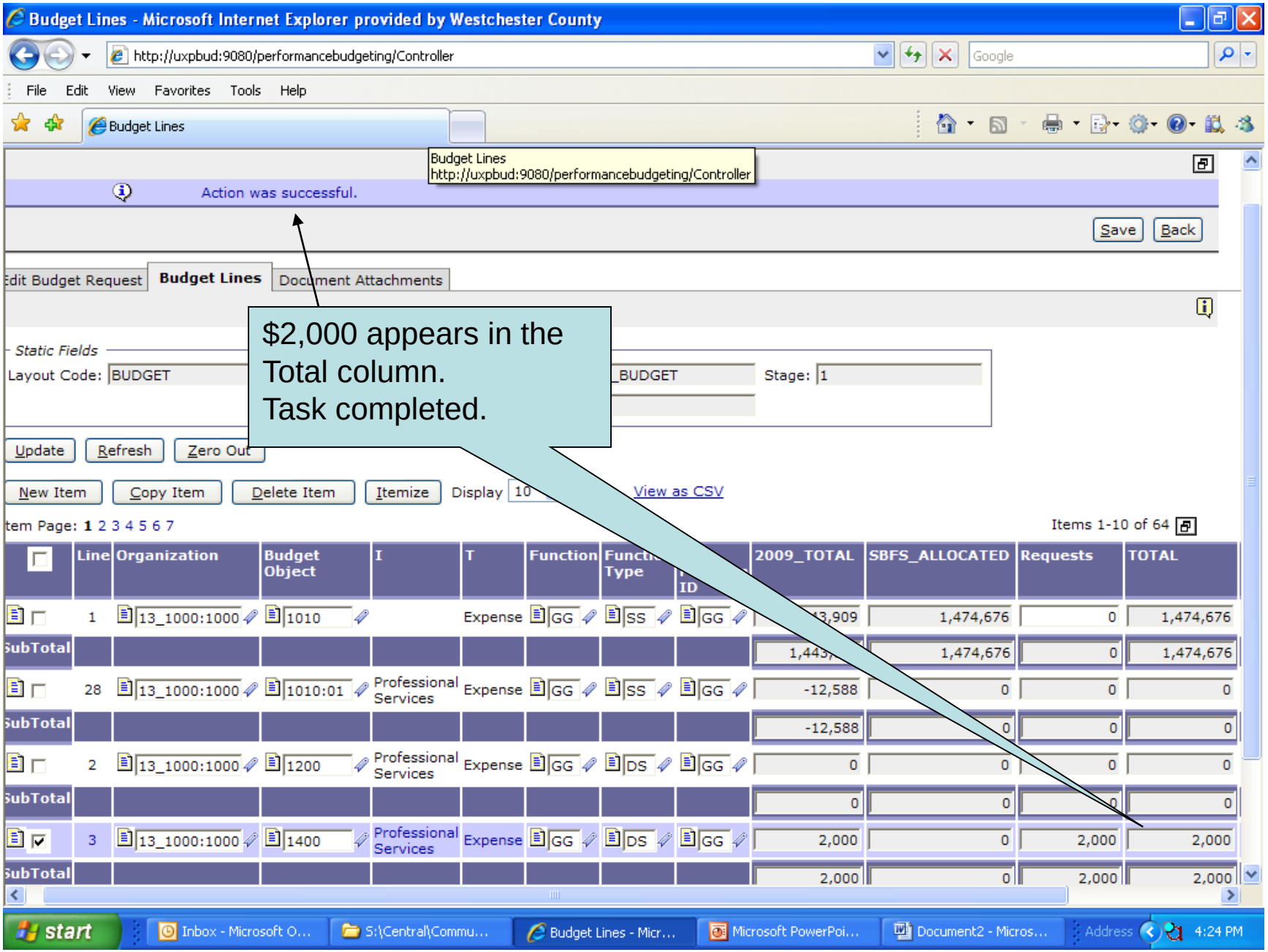
Certain budget objects cannot be itemized: 1010 Annual Regular and the fringe benefit codes (1650, 1651, 1680, 1720, 4937, and 4945). Using 1010 as an example, to add to or decrease funding requires use of a 1010:01 budget line. In most cases, this line will appear in your budget layout. If not, additional instructions will show you how to add a line to a Budget Layout.

Note in the previous slide the column titled Request. All boxes will be grayed out except the box for 1010 and fringe benefits. NEVER ENTER A DOLLAR AMOUNT IN THIS BOX. To change 1010 Annual Regular funding, you must use a 1010:01 budget line and itemize.


Budget Line Details: Professional Services - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Line Details: Professional Services
AMS ADVANTAGE Performance Budgeting
Edit Budget Request | Budget Lines | Document Attachments
Save Back
Budget Line Details
New Item Copy Item Delete Item Update Refresh Display 10 Items
Name Provider Total Posting Time Period
Overtime Employee Overtime 0 Requests
Expand All | Collapse All
Professional Services Information
Name: Overtime
*Posting Time Period: Requests
*Provider: Employee Overtime
*Amount: 0
*Comment: 1 Budget Clerk, 1 Asst. Budget Analyst, 1 Exec Secy during budget season
This is the Budget Line Details page, aka Itemization Page. Last year's itemization lines will usually appear in this page without a dollar request value. Check off the "Name" box to see the background text.
Boxes with a red asterisk must be completed.
start
Inbox - Microsoft O...
U:\AMS Info
Budget Line Details...
Microsoft PowerPoi...
Document2 - Micros...
Address
3:35 PM


Budget Line Details: Professional Services - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Line Details: Professional Services
AMS ADVANTAGE Performance Budgeting
Edit Budget Request | Budget Lines | Document Attachments
Save Back
NEVER click on Save or Back from the Itemization Page.
Budget Line Details
New Item Copy Item Delete Item Update Refresh Display 10 Items
Name Provider Total Posting Time Period
Overtime Employee Overtime 0 Requests
Expand All | Collapse All
Professional Services Information
Name: Overtime
*Posting Time Period: Requests
*Provider: Employee Overtime
*Amount: 2000
*Comment: 1 Budget Clerk, 1 Asst. Budget Analyst, 1 Exec Secy during budget season
Here we are requesting $2,000 for overtime. Once itemization line is complete, click Refresh to refresh this page, and then click on Update to exit the itemization page and return to Budget Lines Page.
start
Inbox - Microsoft O...
U:\AMS Info
Budget Line Details...
Microsoft PowerPoi...
Document2 - Micros...
Address
3:47 PM


Budget Lines - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Lines
AMS ADVANTAGE Performance Budgeting
Save
Back
dit Budget Request
Budget Lines
Document Attachments
Static Fields
Layout Code: BUDGET
Layout Type: Generic
Request Coc
Fund:
Update
Refresh
Zero Out
New Item
Copy Item
Delete Item
Itemize
Display 10 Items
View as CSV
tem Page: 1 2 3 4 5 6 7
Items 1-10 of 64
Line
Organization
Budget Object
I
T
Function
Function Type
Main Program ID
2009_TOTAL
SB
ATED
Requests
TOTAL
1 13_1000:1000 1010 Expense GG SS GG 1,443,909 76 0 1,474,676
SubTotal 1,443,909 1, 0 1,474,676
28 13_1000:1000 1010:01 Professional Services Expense GG SS GG -12,588 0 0
SubTotal -12,588 0 0
2 13_1000:1000 1200 Professional Services Expense GG DS GG 0 0 0 0
SubTotal 0 0 0 0
3 13_1000:1000 1400 Professional Services Expense GG DS GG 2,000 0 2,000 0
SubTotal 2,000 0 2,000 0
Now back on Budget Lines Page. $2,000 appears in the request column but not in the total column. Now Click on Save.
start
Inbox - Microsoft O...
S:\Central\Commu...
Budget Lines - Micr...
Microsoft PowerPoi...
Document2 - Micros...
Address
3:57 PM


Budget Lines - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Lines
Budget Lines
http://uxpbud:9080/performancebudgeting/Controller
Action was successful.
Save
Back
Edit Budget Request
Budget Lines
Document Attachments
$2,000 appears in the Total column.
Task completed.
Static Fields
Layout Code: BUDGET
_BUDGET
Stage: 1
Update
Refresh
Zero Out
New Item
Copy Item
Delete Item
Itemize
Display 10
View as CSV
tem Page: 1 2 3 4 5 6 7
Items 1-10 of 64
Line
Organization
Budget Object
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Function
Funct... Type
... ID
2009_TOTAL
SBFS_ALLOCATED
Requests
TOTAL
1 13_1000:1000 1010 Expense GG SS GG 3,909 1,474,676 0 1,474,676
SubTotal 1,443, 1,474,676 0 1,474,676
28 13_1000:1000 1010:01 Professional Services Expense GG SS GG -12,588 0 0 0
SubTotal -12,588 0 0 0
2 13_1000:1000 1200 Professional Services Expense GG DS GG 0 0 0 0
SubTotal 0 0 0 0
3 13_1000:1000 1400 Professional Services Expense GG DS GG 2,000 0 2,000 2,000
SubTotal 2,000 0 2,000 2,000
start
Inbox - Microsoft O...
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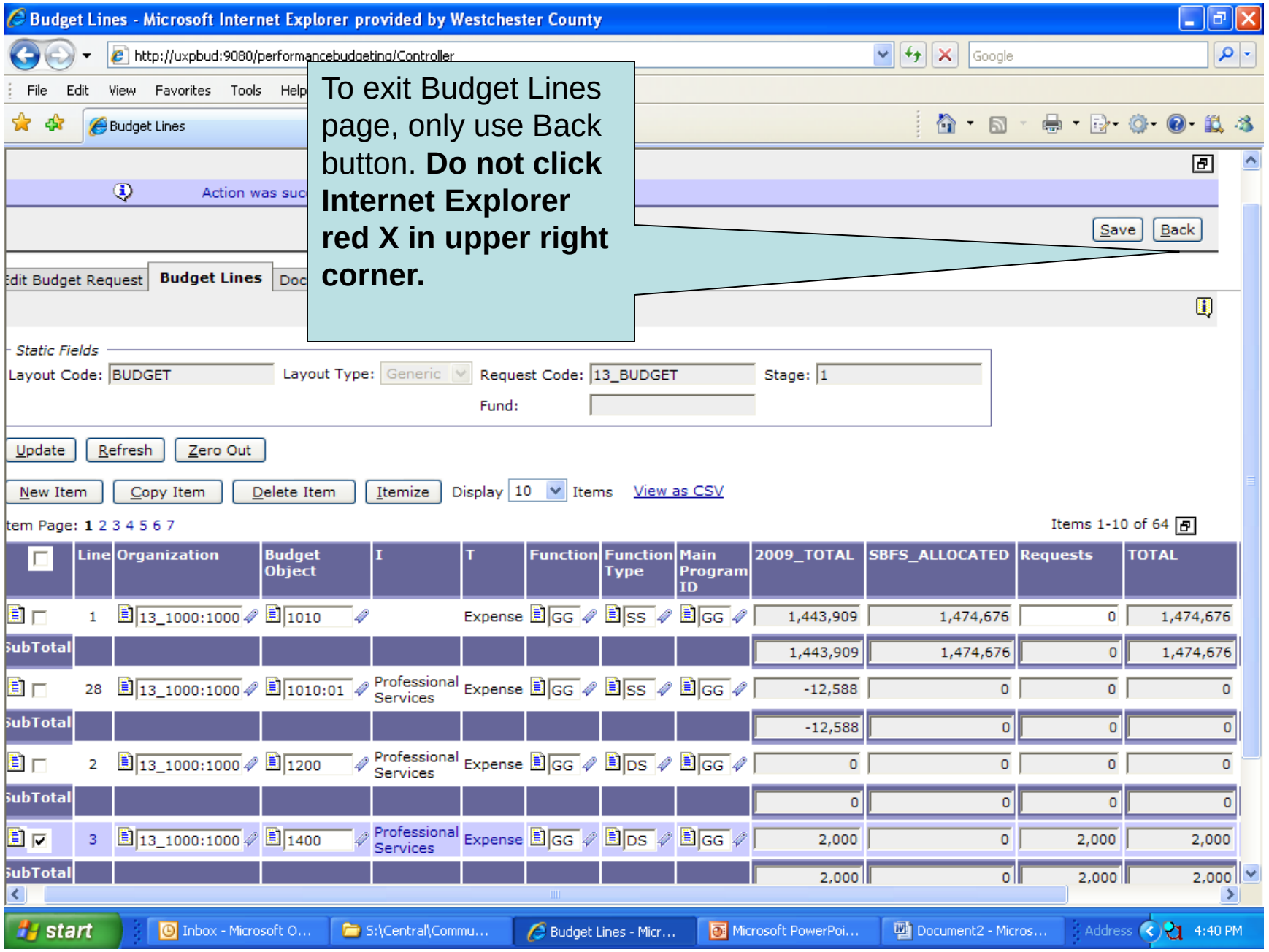
Budget Lines - Micr...
Microsoft PowerPoi...
Document2 - Micros...
Address
4:24 PM


Budget Lines - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Budget Lines
Action was suc
Save
Back
Edit Budget Request
Budget Lines
Doc
To exit Budget Lines page, only use Back button. Do not click Internet Explorer red X in upper right corner.
Static Fields
Layout Code: BUDGET
Layout Type: Generic
Request Code: 13_BUDGET
Stage: 1
Fund:
Update
Refresh
Zero Out
New Item
Copy Item
Delete Item
Itemize
Display 10 Items
View as CSV
tem Page: 1 2 3 4 5 6 7
Items 1-10 of 64
Line
Organization
Budget Object
I
T
Function
Function Type
Main Program ID
2009_TOTAL
SBFS_ALLOCATED
Requests
TOTAL
1 13_1000:1000 1010 Expense GG SS GG 1,443,909 1,474,676 0 1,474,676
SubTotal 1,443,909 1,474,676 0 1,474,676
28 13_1000:1000 1010:01 Professional Services Expense GG SS GG -12,588 0 0 0
SubTotal -12,588 0 0 0
2 13_1000:1000 1200 Professional Services Expense GG DS GG 0 0 0 0
SubTotal 0 0 0 0
3 13_1000:1000 1400 Professional Services Expense GG DS GG 2,000 0 2,000 2,000
SubTotal 2,000 0 2,000 2,000
start
Inbox - Microsoft O...
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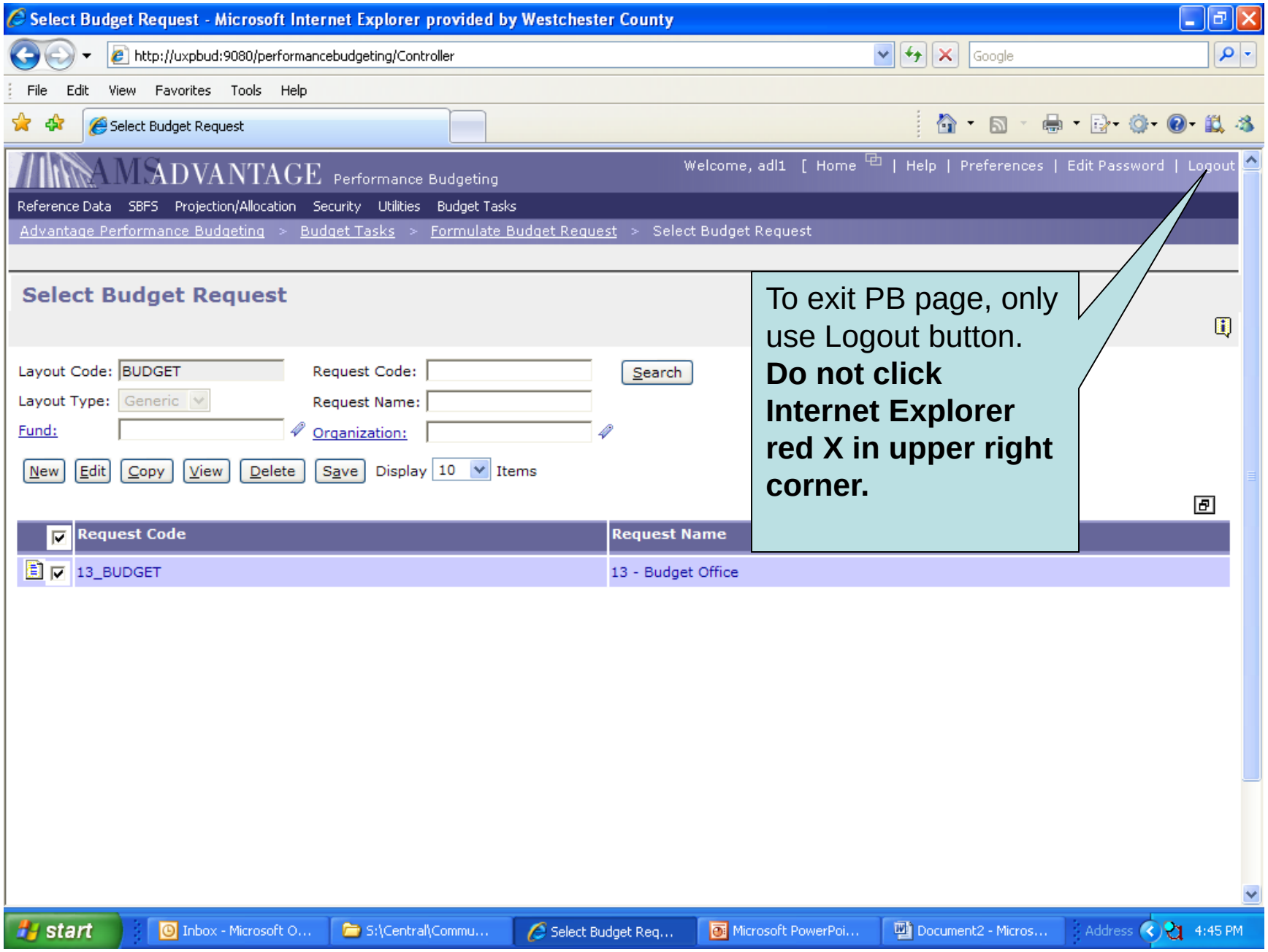
Budget Lines - Micr...
Microsoft PowerPoi...
Document2 - Micros...
Address
4:40 PM


Select Budget Request - Microsoft Internet Explorer provided by Westchester County
http://uxpbud:9080/performancebudgeting/Controller
File Edit View Favorites Tools Help
Select Budget Request
AMS ADVANTAGE Performance Budgeting
Welcome, adl1 [Home | Help | Preferences | Edit Password | Logout
Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks
Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > Select Budget Request
Select Budget Request
Layout Code: BUDGET
Request Code:
Search
Layout Type: Generic
Request Name:
Fund:
Organization:
New Edit Copy View Delete Save Display 10 Items
Request Code
Request Name
13_BUDGET
13 - Budget Office
To exit PB page, only use Logout button.
Do not click Internet Explorer red X in upper right corner.
start
Inbox - Microsoft O...
S:\Central\Commu...
Select Budget Req...
Microsoft PowerPoi...
Document2 - Micros...
Address
4:45 PM

Miscellany

- Include detailed description of funding request in Itemization Page's Comment box.
- Enter revenue increases as positive values. PB will convert entry to a tax levy reduction.
- Try to complete PB work in one uninterrupted time period.
- If PB times out due to inactivity while you are "in" a Budget Layout, or if you exit a Budget layout incorrectly, the next time you try to access that Layout, you will receive a "Write Lock" error. Call you budget analyst (or any budget analyst) to release the lock.

Mamx

3/30/2021