

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

Login - Microsoft Internet Explorer provided by Westchester County

http://uxpbud:9080/performancebudgeting/login.jsp

File Edit View Favorites Tools Help

Login

AMS ADVANTAGE Performance Budgeting

User Name:

Password:

Login

[Forgot your password?](#)

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start | Inbox - Microsoft O... | U:\AMS Info | Login - Microsoft In... | Microsoft PowerPoi... | Document2 - Micros... | Address | 2:37 PM

Select Budget Tasks, then Formulate a Budget Request

Advantage Performance Budgeting - Microsoft Internet Explorer provided by Westchester County

http://uxpbud:9080/performancebudgeting/Controller?EVENT_transition=init&EVENT_endState=initialState

File Edit View Favorites Tools Help

Advantage Performance Budgeting

AMS ADVANTAGE Performance Budgeting

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

Welcome To > Advantage Performance Budgeting

Formulate Budget Request
Execute a Formatted System Query
Rank Budget Requests

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.

Project to Project

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

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

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

[Budget Controls](#) - This contains links to Budget Controls.

[more...](#)

[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.

[more...](#)

[Allocations](#)

[Projections](#)

Utilities - Links to utilities.

Budget Tasks - This contains links to independent Views.

[Import / Export](#) - This contains links to all Import / Export data.

[Rollover](#) - This contains links to rollover.

You can use the drop-down menu *OR* the links in the middle of the page

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Budget Layout Selection - Microsoft Internet Explorer provided by Westchester County

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Budget Layout Selection

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Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks

Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

Budget Layout Selection

Code: Name:

Layout Type:

Display 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

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Budget Layout Selection - Microsoft Internet Explorer provided by Westchester County

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Budget Layout Selection

AMS ADVANTAGE Performance Budgeting

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Reference Data SBFS Projection/Allocation Security Utilities Budget Tasks

Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

Budget Layout Selection

Code: Name:

Layout Type:

Display 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

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Select Budget Request

AMS ADVANTAGE Performance Budgeting

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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.

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Select Budget Request - Microsoft Internet Explorer provided by Westchester County

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File Edit View Favorites Tools Help

Select Budget Request

AMS ADVANTAGE Performance Budgeting

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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

<input checked="" type="checkbox"/>	Request Code	Request Name
<input checked="" type="checkbox"/>	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

Budget Lines - Microsoft Internet Explorer provided by Westchester County

http://uxpbud:9080/performancebudgeting/Controller

File Edit View Favorites Tools Help

Budget Lines

AM ADVANTAGE Performance Budgeting

Save Back

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 view as CSV

Item Page: 1 2 3 4 Items 1-10 of 34

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

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You will first see "Edit Budget Request" page. Click on "Budget Lines" tab

Then Click on Budget Object header to sort by object.

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

Edit Budget Request **Budget Lines** Document Attachments

Static Fields

Layout Code: BUDGET Layout Type: Generic Request Code: 13_BUDGET 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
<input type="checkbox"/>	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
<input type="checkbox"/>	28	13_1000:1000	1010:01		Professional Services Expense	GG	SS	GG	-12,588	0	0	0
SubTotal									-12,588	0	0	0
<input type="checkbox"/>	2	13_1000:1000	1200		Professional Services Expense	GG	DS	GG	0	0	0	0
SubTotal									0	0	0	0
<input checked="" type="checkbox"/>	3	13_1000:1000	1400		Professional Services Expense	GG	DS	GG	2,000	0	0	0
SubTotal									2,000	0	0	0

start | Inbox - Microsoft O... | U:\AMS Info | Budget Lines - Micr... | Microsoft PowerPoi... | Document2 - Micros... | Address | 3:25 PM

Layout now sorted by Budget Object. To request funds, Click on Budget Object box and then "Itemize"

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

<input checked="" type="checkbox"/>	Name	Provider	Total	Posting Time Period
<input checked="" type="checkbox"/>	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.

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

AM 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

<input checked="" type="checkbox"/>	Name	Provider	Total	Posting Time Period
<input checked="" type="checkbox"/>	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 Aast. 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

AMSADVANTAGE Performance Budgeting

Save Back

edit Budget Request **Budget Lines** Document Attachments

Static Fields

Layout Code: BUDGET Layout Type: Generic Request Code: Fund:

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	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

start | Inbox - Microsoft O... | S:\Central\Comm... | Budget Lines - Micr... | Microsoft PowerPoi... | Document2 - Micros... | Address | 3:57 PM

Now back on Budget Lines Page. \$2,000 appears in the request column but not in the total column. Now Click on Save.

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

Static Fields

Layout Code: BUDGET BUDGET Stage: 1

Update Refresh Zero Out

New Item Copy Item Delete Item Itemize Display 10 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	ID	2009_TOTAL	SBFS_ALLOCATED	Requests	TOTAL
1	13_1000:1000	1010		Expense	GG	SS	GG	13,909	1,474,676	0	1,474,676
SubTotal								1,443,767	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

\$2,000 appears in the Total column.
Task completed.

start

Inbox - Microsoft O... S:\Central\Comm... 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

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

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	2,000	2,000
SubTotal								2,000	0	2,000	2,000

start | Inbox - Microsoft O... | S:\Central\Commu... | Budget Lines - Micr... | Microsoft PowerPoi... | Document2 - Micros... | Address | 4:40 PM

Select Budget Request - Microsoft Internet Explorer provided by Westchester County

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File Edit View Favorites Tools Help

Select Budget Request

AMS ADVANTAGE Performance Budgeting

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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

<input checked="" type="checkbox"/>	Request Code	Request Name
<input checked="" type="checkbox"/>	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