Navigating URI Planning and Budgeting
Accessing
URI Planning and Budgeting
Planning and Budgeting is cloud-based and can be accessed via any computer with internet access.

To access, you must use one of the supported browsers below:

Google Chrome 42+
Mozilla Firefox 38+
Apple Safari 8.x and 7.x

NOTE: Chrome is the recommended browser. Internet Explorer is NOT recommended.
To log into Planning and Budgeting:
1. Enter your User Name (set as URI email address)
2. Enter your Password
Planning and Budgeting
Home Page
Once logged in, the Planning and Budgeting Home Page is displayed.
The Planning and Budgeting \textit{Home Page} consists of three main regions:

- Navigator
- Activity Pane
- Navigation Flows
Navigation Flows are a grouping of related content such as forms and reports which support the completion of a particular business process.

- The navigation flows provide you with a very simple and streamlined outline and order to each step in the budgeting process.
The Navigation Flow is made up of clusters and cards:

- **Cards** represent the different objects in Planning and Budgeting, such as forms, reports, and dashboards
- **Clusters** are a grouping of cards. Each cluster groups like business processes
The Navigator shows all forms, tools, and preferences available within Planning and Budgeting.

- While you have access to the Navigator, it is recommended to use the Navigation Flows to carry out all budgeting tasks.
The Activity Pane shows a list of recent activity and favorited objects.

- To favorite an object, click ⭐
The Planning & Budgeting Home Page

Return to the Home Page by:
- Clicking the Oracle logo
- Clicking Home
Setting Preferences
Setting Preferences

To access Preferences, click the **Tools** cluster, then select the **User Preferences** card.
Setting Preferences

In General, select the following options and click Save:

Profile:
- Time Zone: (UTC-05:00) New York - Eastern Time

Alias Setting:
- Alias Table: Default
- Display Member Label as: Alias
In **Display**, select the following options and click Save:

**Number Formatting:**
- Thousands Separator: Comma
- Decimal Separator: Dot
- Negative Sign: Parentheses
- Negative Color: Red
Setting User Variables
Setting User Variables

User Variables act as filters in forms, enabling users to only see data and information that are relevant to them.

- When you open a form, the members you set as user variables will already be set in the form.

To access Preferences, click the Tools cluster, then select the User Preferences card.
**User Variables** act as filters in forms, enabling users to only see data and information that are relevant to them.

- When you open a form, the members you set as user variables will already be set in the form.

**User Variables** generally only need to be set once, but they can be changed at any time.

A User Variable table is available on BFPO website for further guidance.
When setting User Variables, select members for all applicable dimensions (departments and funds) for your area. Members can be selected for each dimension by clicking Member Selector. Remember to click Save.

It is recommended that User Variables are set at the highest level (college/unit) so the various departments in your college/unit can be selected in the Point of View (POV) on input forms as the allocation is built.
Members can be selected in two ways from the Member Selection window:

- Search Bar
- Hierarchy
When selecting members through a Hierarchy, click on the member so it is highlighted blue and a blue check mark appears to the left of the member name.

To select a member, click **OK**

- Note that you are only able to select one member at a time – it is advised you select members at the highest level (ie – Arts & Sciences, not department 2006)
Types of Forms
There are two primary types of forms in Planning and Budgeting:

- **Data Forms**: Forms where budget data will be entered into the 0 level members.
- **Review Forms**: Read-only summary of the Budget the user has generated to provide a real-time look at the total budget by the selected organization.
Data Forms

3.1 Unrestricted Funds Input

<table>
<thead>
<tr>
<th>Funds 100 - Unrestricted Funds</th>
<th>Department 2006 - Landscape Architecture</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Actuals</td>
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<tr>
<td>CY Baseline</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocation Budget</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Final</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final Working</td>
<td></td>
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</tr>
<tr>
<td>Working</td>
<td></td>
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</tr>
<tr>
<td>YearTotal</td>
<td></td>
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<td>YearTotal</td>
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<td>YearTotal</td>
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<tr>
<td>YearTotal</td>
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</tr>
</tbody>
</table>

Data forms have cells where budget data can be entered (white cells)

THINK BIG WE DO

THE UNIVERSITY OF RHODE ISLAND
Review forms have been set to read-only (grey cells) and no data can be entered.
Forms
Access forms by clicking on any of the budgeting clusters and then selecting the desired card.
Forms in Planning and Budgeting have the following structure:

- Navigation Toolbar
- Instructions
- Rows
- Columns
- Point of View (POV)
- Data Entry Area
When a form is opened, the navigation toolbar is displayed above the form. The navigation toolbar allows you to navigate to the other cards in that cluster.
Click **Instructions** 

![Instructions icon](image)

**Instructions**

Click **Instructions** to display additional information and instructions on the form.
The **Point of View (POV)** defines the section of data in the URI_Plan Planning and Budgeting database you are viewing. You select the desired members for each dimension to determine the context for the pages, rows, and columns.

**NOTE:** The Departments in the POV or Rows are defined by your user variable (BM Department) (example Arts & Sciences)
Access forms by clicking on any of the budgeting **Clusters** and then selecting the desired **Card**.
To edit the **POV**, click **Edit Members**
The **Edit Members** window is displayed.

To select different members for the dimension, click the **Dropdown** next to each dimension.
Select the desired member from the list of available members.
Alternatively, members can be selected for each dimension by clicking **Member Selector**.
Use the **Search Bar** or **Hierarchy** to locate and select the desired member. Be sure to click the blue check mark next to the desired member, click **OK**.
Once the desired member is selected, click **Apply**.
Data is entered into the grid area. Remember, data can only be entered into Level 0 cells (POV by fund/dept) which will be white.
Cell colors indicate the cell’s status:

- **White**: default; data can be entered into these cells
- **Yellow**: "dirty" cells, whose values changed but are not yet saved
- **Grey**: read-only cells
- **Grey with a Lock Symbol**: locked cells
To save a form, click **Save**.
An information box will display indicating that the data has been successfully saved and that the data has been “pushed” to the database.

If a business rule is ran, a notification will also be displayed in this information window.
Advanced Form Features
In addition to entering data, more data entry features are available to you, including attaching supporting documentation. To attach supporting detail, right click on the input cell and select “Attachments”. Choose the file to attach then click upload. See Allocation Training slides to see exactly where to attach supporting documentation.
Drilling Through

Drill Through is a feature in a data cell which allow you to access information and data from the data source.

If a cell contains a drill through symbol located in the top right corner of the cell, you can drill through to the source for additional data.

Drill through is available in the Trails Review forms
To Drill Through:
1. Select the desired cell
2. Click Actions
3. Click Drill Through
4. A Drill Through to source window will display, click the hyperlink in the window
The drill through details are opened in a new tab in your browser.
What-If Versions allows you to change the values in your budget to see how those changes will affect the outcome.

You can model alternative situations to see how different sets of values affect your budget and results in the form.
To create a **What-If Version**:

1. Right click into a cell
2. Select **Copy Working to What-If** from the right-click menu.
The Copy Working to What-If window is displayed.

1. Select What_If_1 in the Select What-If Version 1, 2 or 3 field.

2. Optionally, select a % to increase/decrease each of the values in the columns by.

3. Click Launch.

Must copy What_If_#X back to Working if data is be included in Allocation.
Reports
Reports in Planning and Budgeting connect directly to the database and can be downloaded in a variety of formats (Excel, PDF).

The two broad purposes of any report created in Planning and Budgeting are to:

- Assist users in the system in building their budgets and forecasts
- Help consumer users view budget and forecast development.
Reports can be opened in PDF, HTML and Excel formats.
Once the **Report** and the format is chosen, the user can choose what **POV** to view the report in and press continue to run the report.