

Budget and Project Execution, Ranking and Management (BPERM) Training Manual

Prepared by:



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1 Work Orders

1.1 Browse DM Work Orders

1. Go to Work Orders > DM Work Orders on the menu bar. The DM Work Orders Search and Filter screen is displayed.

DM Work Orders

Search Reset Advanced Search

Search Criteria

Program

Site

Location

Location Description

Work Order Number

Work Order Type

Work Order Status

Work Order Priority

Work Order Classification

Mission Dependency Score

Deficiency Class

Category/Ran

2. Enter any valid search criteria and click the **Search** button. The Search Results are displayed.

DM Work Orders

Previous 1 2 3 4 Next 1 - 25 of 31422 results (page 1 / 1257)

Program	Site	Location	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status	Work Order Priority	Work Order Classification	Mission Dependency Score	Deficiency
None selected	None sele			None selecte	2 selected		None selk	1 selecte			2 selecte	
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB342034	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130416	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130417	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130418	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130419	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130420	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130421	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130422	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130423	DM	WAPPR		Roads		1
General Administration	IA001	AB100949	Shop, Roads	OPERATING	Occupied	AB130424	DM	WAPPR		Roads		1
General Administration	IA001	000950	Shop, Multi-Purpose	OPERATING	Occupied	AB342196	DM	WAPPR		Multi-Purpose		1

3. To view a Work Order's details, click on the hyperlink in its **Work Order Number** field. A pop up will be displayed which contains the work order details.

[Back](#)

Work Order Details	Estimated Costs	Funding	Child Work Orders 2
Work Order: AB153180			
Site: IA002			
Location: AB105572			
Status: COAPPR			
WBS:			
Parent Work Order:			
Description: REPLACE CARPET			
Long Description: REPLACE CARPET			
Structure Number: 1			
Room Number:			
FCI: 0.0500			
API: 60			
CRV: \$3,153,281.79			
Severity:			
Probability:			
RAC: 5			


4. To view the details of a child work order, go to the Child Work Orders tab and click the Work Order Number hyperlink of the work order.

1.2 Bundling DM Work Orders into a new Group

1. Go to Work Orders > DM Work Orders on the menu bar. The DM Work Orders Search and Filter screen is displayed.
2. Select 'No' for the In Pending Group and In POR search fields.
 - **In Pending Group** – indicates if the Work Order record is part of another Work Order bundle. The DM Work Order cannot be associated with more than one DM Work Order Group.
 - **In POR** – indicates if the Work Order record is part of a Project/POR. The DM Work Orders that are already in a Project or a PORs cannot be grouped with other Work Orders.
3. Click the **Search** button. The Search Results are displayed.
4. Click on the rows of the Work Order records that share the same Site, Location, Category/Rank values. The records that have been selected are highlighted.

Note: More than one Work Order must be selected to create a Work Order group.

Program	Site	Location	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status	Work Order Priority	Work Order Classification	Mission Dependency Score	Dependency Class	Category/Rank	FCI
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130425	DM	WAPPR		Multi-Purpose	1	H - 1	0.1000	
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR		Multi-Purpose	1	H - 1	0.1000	
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130428	DM	WAPPR		Multi-Purpose	1	H - 1	0.1000	
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130432	DM	WAPPR		Multi-Purpose	1	S - 1	0.1000	

5. Click on the **Bundle under a new Parent Work Order**  button in the top right corner of the DM Work Order Search Results screen. The Bundle Work Orders form is displayed

Note: To identify the button, hover over each button to view its description.

Bundle Work Orders x

Viewing Work Orders from Maximo Location AB100003.

Work Order Number	Work Order Description	Cost
AB125354	REPLACE METAL RESIDENTIAL GARAGE DOOR	\$3,222.00
AB125355	REPLACE STEEL EXTERIOR DOOR AND HARDWARE, HALF GLASS	\$2,600.00
		\$5,822.00

The work orders above will all be assigned to a new parent work order with the details you specify below:

Description:

Target Completion Date:

Long Description:

Save

6. Enter information about the DM Work Order group and click the **Save** button.
7. A confirmation message is displayed indicating that the new Work Order group was created and the new temporary identification number is displayed. The DM Work Orders group is sent to the BPERM DM Work Orders Groups screen for approval.

Work order bundle saved under a new temporary parent work order: Temp-39.

CURRENT FILTERS > Location IA Status: Occupied, Occupied by Others | Work Order Status: WAPPR | Mission Dependency Score: 1, 2 | Total Cost Estimate: >0 | Parent Work Order: NULL | In Pending Gr

DM Work Orders

Previous
1
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3
4
...
Next
1 - 25 of 343 results (page 1 / 14)


Program	Site	Location	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status	Work Order Priority	Work Order Classification	Mission Dependency Score	Defi
None selected	None sel			None select	2 selected		None sel	1 select			2 select	
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR		Multi-Purpose	2	
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130429	DM	WAPPR		Multi-Purpose	2	
General Administration	IA001	AB100951	Shop, Multi-Purpose	OPERATING	Occupied	AB130434	DM	WAPPR		Multi-Purpose	2	
General Administration	IA001	AB100951	Shop, Multi-Purpose	OPERATING	Occupied	AB130436	DM	WAPPR		Multi-Purpose	2	

1.3 Bundling DM Work Orders into an Approved Existing Group

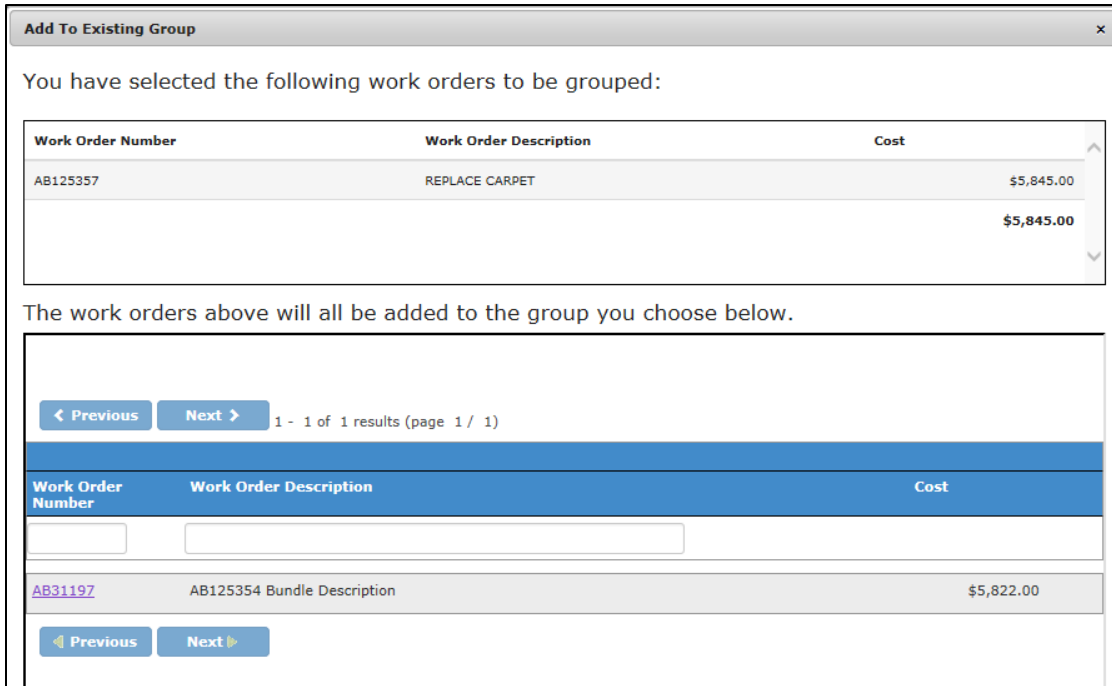
1. Go to Work Orders > DM Work Orders on the menu bar. The DM Work Orders Search and Filter screen is displayed.
2. Select 'No' for the In Pending Group and In POR search fields.
 - **In Pending Group** – indicates if the Work Order record is part of another Work Order bundle. The DM Work Order cannot be associated with more than one DM Work Order Group.
 - **In POR** – indicates if the Work Order record is part of a Project/POR. The DM Work Orders that are already in a Project or a PORs cannot be grouped with other Work Orders.
3. Click the **Search** button. The Search Results are displayed.
4. Click on the rows of the Work Order records that share the same Site, Location, Category/Rank values. The records that have been selected are highlighted.

Note: More than one Work Order must be selected to create a Work Order group.

Program	Site	Location	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status	Work Order Priority	Work Order Classification	Mission Dependency Score	Dependency Class	Category/Rank	FCI
General Administration	IA001	AB100950	hop, Multi-Purpose	OPERATING	Occupied	AB130425	DM	WAPPR		Multi-Purpose	1	H - 1	0.1000	
General Administration	IA001	AB100950	hop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR		Multi-Purpose	1	H - 1	0.1000	
General Administration	IA001	AB100950	hop, Multi-Purpose	OPERATING	Occupied	AB130429	DM	WAPPR		Multi-Purpose	1	H - 1	0.1000	
General Administration	IA001	AB100950	hop, Multi-Purpose	OPERATING	Occupied	AB130433	DM	WAPPR		Multi-Purpose	1	S - 1	0.1000	

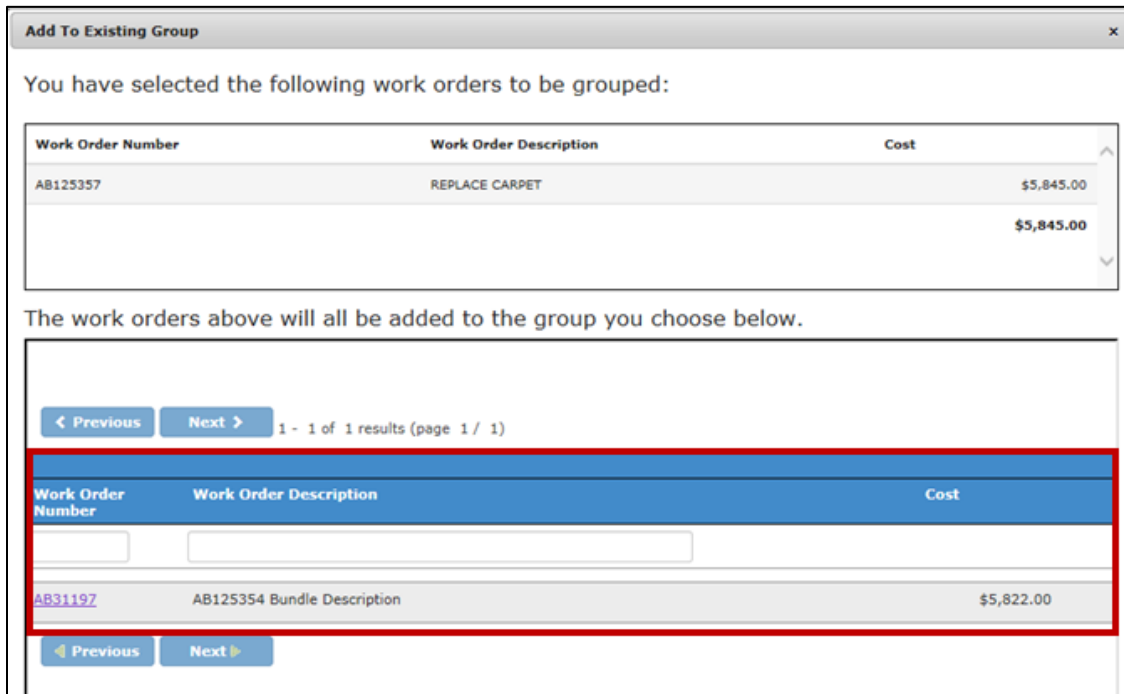
5. Click on the **Add to Existing Group**  button in the top right corner of the DM Work Order Search Results screen. The Add to Existing Group pop-up window is displayed.

Note: To identify the button, hover over each button to view its description.

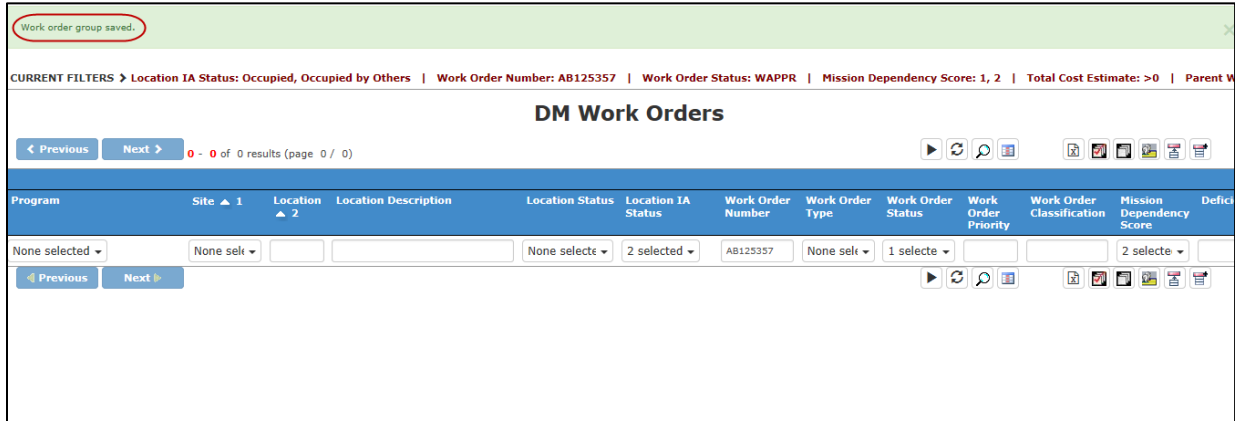


- On the lower half of the Add to Existing Group window, one or more Parent Work Order records (approved DM Work Order Groups) are displayed.

Note: A Parent Work Order record is a DM Work Order group that had been approved. To assign a new Work Order to the group, the approved Work Order group and the new Work Order, must share the same Site, Location, Category/Rank values. In the **Add to Existing Group** window only eligible Parent Work Orders (approved Work Order groups) are displayed.



7. Click on the row of the approved Work Order group (Parent Work Order). The record that has been selected is highlighted.
8. Click on the **Save** button. A confirmation message is displayed indicating that the Work Orders have been successfully added to the specified Parent Work Order (approved Work Order group). The DM Work Orders group is sent to the BPERM DM Work Orders Groups screen for approval.



1.4 Approving DM Work Order Groups


1. Go to Work Orders > DM Work Order Groups on the menu bar. The DM Work Order Groups search screen is displayed.

2. Enter any valid DM Work Order Group search criteria and click the **Search** button. The DM Work Order Group search results are displayed.

Site	Location	Location Description	Parent Work Order Number	Temporary ID	Parent Work Order Description	Pending Child Work Orders	Existing Child Work Orders	Region Approval Status
IA001	AB100949	Shop, Roads	Temp-3	Temp-3	test description 2	AB130419, AB130420		Pending


3. Click on the hyperlink in the **Parent Work Order Number** field for the DM Work Order Group to view the Work Order Group Details.


Note: Temporary Work Order Group numbers (shown as TEMP-###) are displayed for new Work Order Groups. Once the DM Work Order Group is created, a temporary unique number (TEMP-###) is assigned to the Work Order group. Upon approving the newly created DM Work Order group, a unique Parent Work Order number (AB#####) is auto-generated and permanently assigned to the group. If new Work Orders are assigned to the approved DM Work Order Group, the DM Work Order group will require another approval, but the Parent Work Order number of the group will not change.

4. On the DM Work Order Groups search results screen, click on one or more DM Work Order Group records to approve (or reject). The selected rows will be highlighted.
5. To approve the DM Work Order Group(s), click on the **Approve**  button in the top right corner of the screen. A confirmation message will be displayed indicating that the record(s) was approved.

Note: A DM Work Order Group must be approved at both the Region and Central Office level. If the record has been approved at the Central Office level (last level of approval), upon approval, the Work Order groups with temporary numbers are permanently assigned a unique Parent Work Order number.

1.5 Rejecting DM Work Order Groups

1. On the DM Work Order Groups search results screen, click on one or more DM Work Order Group records to reject. The selected rows will be highlighted.
2. To reject the DM Work Order Group(s), click on the **Reject**  button in the top right corner of the screen. The DM Work Order Group Rejection Comment pop-up window is displayed.



DM Work Order Group Rejection Comment

Please provide a comment describing the reason for rejection.

*The comment provided will be applied to each selected group. It should be no longer than 400 characters.


3. Enter the reason for rejection in the text field of the DM Work Order Group Rejection and click the **Save** button. A confirmation message is displayed that the DM Work Order Group record has been rejected.

1.6 Work Order Exercises

1.6.1 Work Orders - Exercise 1: Browsing DM Work Orders

1. Go to Work Orders > DM Work Orders on the menu bar.
2. Under Search Criteria, select the following:
 - **Site:** IA004
 - **Category/Rank:** M – 1 and S – 1
 - **Work Order Description:** %replace%
3. Click the **Search** button.
4. Click on the hyperlink in the **Work Order Number** field for one of the work orders.
5. Review the Work Order Details.
6. Click the **Back** button.

1.6.2 Work Orders - Exercise 2: Bundling DM Work Orders into a new Group

1. Go to Work Orders > DM Work Orders on the menu bar.
2. Under Search Criteria, select the following:
 - **Site:** IA004
 - **Category/Rank:** M – 1
3. Click the **Search** button.
4. Select two work orders that have the same Location.
5. Click on the **Bundle under a new Parent Work Order**  button.
6. In the **Description** field, enter the text 'DM Bundle' followed by your name and the date.
7. Enter a **Target Completion Date**.
8. Click the **Save** button.
9. A confirmation message is displayed indicating the **Temporary ID**.

Write down the temporary ID _____.

2 PORs

A Program of Requirements (POR) is a bundle of DM Work Orders equal to or greater than \$2500, which are linked to the same location or the same site. The POR is used to determine the scope of work on a project, costs associated with it, and priority. The approved PORs with highest priority are turned into projects to start the work.

2.1 Creating PORs Manually

2.1.1 Adding DM Work Orders to a new POR

1. Go to PORs > Create PORs Manually on the menu bar.

Manually Create PORs

Search
Advanced Search |

▼ Search Criteria

Program	None selected ▼
Site	None selected ▼
Location	<input type="text"/> ...
Location Description	<input type="text"/> ...
Work Order Number	<input type="text"/> ...
Work Order Type	None selected ▼
Work Order Status	None selected ▼
Work Order Priority	<input type="text"/> ...
Work Order Classification	<input type="text"/> ...
Mission Dependency Score	2 selected ▼
Deficiency Class	<input type="text"/> ...
Category/Rank	None selected ▼
FCI	<input type="text"/> ...
Work Order Description	<input type="text"/> ...
Total Cost Estimate	<input type="text"/> ...
Number of Children	<input type="text"/> ...

Search

▼ Display Options

Number of Rows per Page:	<input type="text" value="25"/>
First Sort Column:	Site ▼ ASC ▼
Second Sort Column:	Location ▼ ASC ▼
Third Sort Column:	<input type="text"/> ▼ ASC ▼

Modify Returned Fields

Available Fields

- Long Description
- Structure Number
- Structure Use
- Room Number
- API
- CRV
- Age of Location in Years
- Severity

Selected Fields to be Displayed in Results

- Program
- Site
- Location
- Location Description
- Location Status
- Location IA Status
- Work Order Number
- Work Order Type

2. Enter any valid DM Work Order search criteria for the DM Work Orders and click on the **Search** button.

Note: To create a POR, the selected DM Work Orders must share either the same site or same location, thus one cannot bundle Work Orders from different sites.

Manually Create PORs

< Previous Next > 1 - 2 of 2 results (page 1 / 1)


Program	Site ▲ 1	Location ▲ 2	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status
None selected ▼	None selk ▼			None selecte ▼	2 selected ▼		None selk ▼	None selk ▼
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130429	DM	WAPPR

- Click on the rows of the Work Order records that share the same site or the same location. The selected rows will be highlighted.

Manually Create PORs

< Previous Next > 1 - 2 of 2 results (page 1 / 1)

Prog	Site ▲ 1	Location ▲ 2	Location	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status
None selected ▼	None selk ▼			None selecte ▼	2 selected ▼		None selk ▼	None selk ▼
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130429	DM	WAPPR

- On the top right corner of the screen, click on the **New POR**  button. The Create New POR form is displayed.

Create New POR x

You have selected the following work orders to create a new POR:

Work Order Number	Work Order Description	Cost
AB125358	REPLACE STANDING SEAM METAL ROOF (300 SF AND OVER)	\$54,194.00
AB31197	AB125354 Bundle Description	\$5,822.00
		\$60,016.00

Please enter the new POR's details below:

Title:

Project Type:

Planning Fiscal Year:

Design Fiscal Year:

Save

- On the Create New POR form, enter information about the POR and click on the **Save** button.
Note: Values must be entered for all of the required fields (red text and asterisk) before the POR can be saved.
- The POR record is sent to the queue for pending approval PORs.

2.2.2 Adding DM Work Orders to an Existing POR

- Go to PORs > Create PORs Manually on the menu bar.

Manually Create PORs

Search
Advanced Search |

▼ Search Criteria

Program	None selected ▼
Site	None selected ▼
Location	<input type="text"/> ...
Location Description	<input type="text"/> ...
Work Order Number	<input type="text"/> ...
Work Order Type	None selected ▼
Work Order Status	None selected ▼
Work Order Priority	<input type="text"/> ...
Work Order Classification	<input type="text"/> ...
Mission Dependency Score	2 selected ▼
Deficiency Class	<input type="text"/> ...
Category/Rank	None selected ▼
FCI	<input type="text"/> ...
Work Order Description	<input type="text"/> ...
Total Cost Estimate	<input type="text"/> ...
Number of Children	<input type="text"/> ...

Search

▼ Display Options

Number of Rows per Page:	<input type="text" value="25"/>
First Sort Column:	Site ▼ ASC ▼
Second Sort Column:	Location ▼ ASC ▼
Third Sort Column:	<input type="text"/> ▼ ASC ▼

Modify Returned Fields

Available Fields

- Long Description
- Structure Number
- Structure Use
- Room Number
- API
- CRV
- Age of Location in Years
- Severity

Selected Fields to be Displayed in Results

- Program
- Site
- Location
- Location Description
- Location Status
- Location IA Status
- Work Order Number
- Work Order Type

Position

-
-
-
-

- Enter any valid DM Work Order search criteria for the DM Work Orders and click on the **Search** button.

Note: To create a POR, the selected DM Work Orders must share either the same site or same location, thus one cannot bundle Work Orders from different sites.

Manually Create PORs

< Previous Next > 1 - 2 of 2 results (page 1 / 1)


Program	Site ▲ 1	Location ▲ 2	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status
None selected ▼	None sel ▼			None select ▼	2 selected ▼		None sel ▼	None sel ▼
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130429	DM	WAPPR

- Click on the rows of the Work Order records that share the same site or the same location. The selected rows will be highlighted.

Manually Create PORs

< Previous Next > 1 - 2 of 2 results (page 1 / 1)

Prog	Site ▲ 1	Location ▲ 2	Location	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status
None selected ▼	None sel ▼			None select ▼	2 selected ▼		None sel ▼	None sel ▼
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130427	DM	WAPPR
General Administration	IA001	AB100950	Shop, Multi-Purpose	OPERATING	Occupied	AB130429	DM	WAPPR

- On the top right corner of the screen, click on the **Add to POR**  button. The Add to POR pop-up window is displayed.

Add To POR

You have selected the following work orders to add to a POR:

Work Order Number	Location	Work Order Description	Cost
AB125362	AB100004	REPLACE LIGHTING IN SHOP 2010@ A01-01 REPLACE LIGHTING (DETARIORATED) IN ROADS S	\$19,989.00
			\$19,989.00

The work orders above will all be added to the POR you choose below.

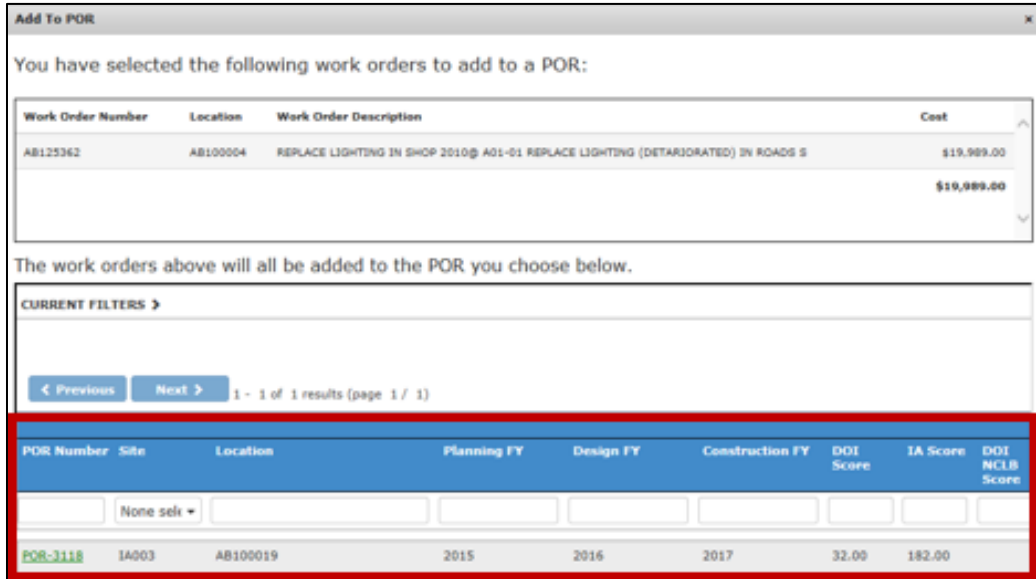
CURRENT FILTERS >

< Previous Next > 1 - 1 of 1 results (page 1 / 1)

POR Number	Site	Location	Planning FY	Design FY	Construction FY	DOI Score	IA Score	DOI NCLB Score
None sel ▼	None sel ▼							
POR-3118	IA003	AB100019	2015	2016	2017	32.00	182.00	

- On the bottom half of the **Add to POR** window, PORs eligible for specified Work Orders are listed.


Note: PORs are made up of DM Work Orders associated with either single location or a single site (multiple locations). The DM Work Orders can only be added to PORs that have a common location or site. If the specified Work Order records are for a single site at different locations, only the site-level PORs are displayed.




6. Click on the POR record that the work orders will be added to. The row will be highlighted.
7. Click the **Save** button. A confirmation message is displayed indicating that the work orders have been successfully added to the specified POR.

2.2 Approving (and Rejecting) Manually Created PORs

Manually created PORs require approval by the Regional Manager, an authorized user from the Central Office, and Capital Planning. BPERM allows any of the following BPERM users to approve at the Central Office level: Program Manager, Deputy Directory, or Budget Officer. The BPERM System Administrator user can also mark any POR record as approved or rejected.

1. Go to PORs > PORs Pending Approval on the menu bar. The PORs Pending Approval search screen is displayed.
2. Enter any valid POR search criteria and click on the **Search** button.
3. Select one or more PORs to approve or reject. The selected row(s) will be highlighted.
4. To approve the POR(s), click the **Approve**  button on the top right corner of the screen. A confirmation message is displayed that the POR is successfully approved and the POR is ready for the next level of approval.

Note: Upon approval by Capital Planning (the final approval), the POR is sent to the queue for approved PORs and is no longer displayed on the PORs Pending Approval screen.

5. To reject the POR(s), click the **Reject**  button on the top right corner of the screen. A confirmation message is displayed that the POR is rejected.

Note: When a POR is rejected the record will be counted as rejected and will no longer require approval at the next level.

2.3 POR Details

2.3.1 Viewing the POR Details

1. Go to PORs > Browse PORs.
2. Enter any valid search criteria and click the **Search** button.
3. Click the hyperlink in the POR number field to view that POR's details.

Note: The POR Details screen is accessible through any screen where POR identification number is displayed. To access the POR Details screen, click on the hyperlinked POR number of the desired POR record.

✕ POR-287 Site Replacement: IE090
▼

General

Status: **Proposed**
 Project Type: **Site Replacement**
 Program Funding Type:
 DOI Score: **1719.36**
 IA Score: **1672.63**
 Total Cost: **\$11,074,611.00**
 Total Work Orders: **26**
[View Log of Work Order Changes](#)

Location Data

Location: ▼
 Site: **IE090**
 Description: **School, Elementary, Boarding**
 Structure Use: **Building / School / Elementary / Boarding**
 Program: **BIA Education**
 Portable: **Yes**
 API: **100**
 Mission Dependency Score: **1 - Critical**
 CRV: **\$77,603.31**
 FCI: **0.0000**
 Grades:
 State: **NM**
 Congressional District: **03**
 County: **MCKINLEY**
 Closest City: **CROWNPOINT**
 Gross Sq. Ft.: **896.00**
 Cost Center: **AADD34N120**
 Ownership of Asset: **BIA**
 Top Level Location: **AB900147**
 Top Level Cost Center: **AADD34N120**

Indicators

In 5 Year Plan: **No**
 Emergency Project: **No**
 Qualifies for NCLB: **No**
 Potential Site Replacement POR: **Yes**
 Potential Location Replacement POR: **No**

Planned Fiscal Year

Planning: **2015**
 Design: **2016**
 Construction: **2017**

Scoring Parameter Values

Scope of Benefits:
 Investment Strategy:
 Consequences of Failure to Act:


Description:
 Need/Benefit:

Work Orders

▼

Work Order Number	Description	Category/Rank	Cost	DOI Weighted Score	IA Weighted Score

2.3.2 Editing POR Details

1. On the POR Details window, click the **Edit**  button in the top-left corner of the screen. The POR Details Edit screen is displayed.

POR-287

General

Title:*

Program Funding Type:

Project Type:*

Status: **Proposed**
 DOI Score: **1719.36**
 IA Score: **1672.63**
 Total Cost: **\$11,074,611.00**
 Total Work Orders: **26**

Location Data

Location:
 Site: **IE090**
 Description: **School, Elementary, Boarding**
 Structure Use: **Building / School / Elementary / Boarding**
 Program: **BIA Education**
 Portable: **Yes**
 API: **100**
 Mission Dependency Score:
 CRV: **\$77,603.31**
 FCI: **0.0000**
 Grades:
 State: **NM**
 Congressional District: **03**
 County: **MCKINLEY**
 Closest City: **CROWNPOINT**
 Gross Sq. Ft.: **896.00**
 Cost Center: **AADD34N120**
 Ownership of Asset: **BIA**
 Top Level Location: **AB900147**
 Top Level Cost Center: **AADD34N120**

Planned Fiscal Year

Planning Fiscal Year:

Design Fiscal Year:

Construction Fiscal Year:

Scoring Parameter Values

Scope of Benefits:*

100.0 - Project clearly demonstrates a major and measurable contribution to established goals and objectives of the Department and the Bureau, aligning with specific outputs and outcomes detailed in the strategic plans.

50.0 - Project demonstrates a moderate contribution to established goals and objectives of the Department and the Bureau.

0.0 - Project contribution to established goals and objectives of the Department and Bureau is minimal or not demonstrated.

Investment Strategy:*

2. On the POR Details Edit screen, enter and/or modify POR data details.
3. In the Scoring Parameter Values section of the POR Details Edit screen, specify the project scoring parameters.
4. Click the **Save** button. The POR Details screen is displayed with the confirmation message that the POR has been saved/updated.

2.3.3 Uploading Files in Support of PORs

1. On the POR Details screen, click the **Upload** button in the Attached Documents section. The Upload File window is displayed.

The screenshot shows the 'Upload File' window with the following components:

- File*:** A text input field with a 'Browse...' button.
- Document Name*:** A text input field.
- Classification:** A dropdown menu showing '777' with an 'Add New Classification' link below it.
- File Access Rights:** A section with two dropdown menus: 'Read*' set to 'All' and 'Write*' set to 'Owner'.
- Message:** A yellow box stating 'Either the Project Number or User Access Region(s) must be specified.'
- POR Number:** A text input field containing 'POR-3118'.
- User Access Region(s):** A list of regions with checkboxes: CENTRAL OFFICE, EASTERN, EASTERN OKLAHOMA, GREAT PLAINS (checked), MIDWEST, NAVAJO, NORTHWEST, ROCKY MOUNTAIN, SOUTHERN PLAINS, SOUTHWEST, Test Region, and WESTERN.
- Author Name*:** A text input field.
- Document Description*:** A text input field with '500 characters left' below it.
- Buttons:** 'Save' and 'Reset' buttons at the bottom.

2. Click the **Browse/Choose File** button next to the File field.
3. Select the file to upload.
4. Enter values in all of the required fields.
5. Click the **Save** button. A confirmation message is displayed indicating that the ELibrary document was saved.

2.3.4 Adding Work Orders to a POR

1. On the POR Details screen, click the **Add** button in the Work Orders section. The Add Work Orders search window is displayed.

Choose work orders to add to the POR below.

Advanced Search |

▼ Search Criteria

Program	<input type="text" value="None selected"/>	
Site	<input type="text" value="None selected"/>	
Location	<input type="text"/>	...
Location Description	<input type="text"/>	...
Work Order Number	<input type="text"/>	...
Work Order Type	<input type="text" value="None selected"/>	
Work Order Status	<input type="text" value="None selected"/>	
Work Order Priority	<input type="text"/>	...
Work Order Classification	<input type="text"/>	...
Mission Dependency Score	<input type="text" value="None selected"/>	
Deficiency Class	<input type="text"/>	...
Category/Rank	<input type="text" value="None selected"/>	
FCI	<input type="text"/>	...
Work Order Description	<input type="text"/>	...
Total Cost Estimate	<input type="text" value=">0"/>	...
Number of Children	<input type="text"/>	...

▼ Display Options

2. Enter any valid Work Order search criteria and click on the **Search** button. The DM Work Order search results are displayed.

Choose work orders to add to the POR below.

1 - 12 of 12 results (page 1 / 1)

Program	Site ▲ 1	Location ▲ 2	Location Description	Location Status	Location Status
None selected ▼	None sel ▼	<input type="text"/>	<input type="text"/>	None select ▼	2 selected
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied
BIA Education	IE011	AB101004	BUILDING / DORM / SCHOOL	OPERATING	Occupied

3. Select the work order(s) to add to the POR. The selected work order(s) will be highlighted.
4. Click the **Save** button. A confirmation message is displayed indicating that the selected work orders were added to the POR. The selected work orders are now displayed on the POR Details screen under the Work Orders section.

2.3.5 Removing Work Orders from a POR

1. On the POR Details screen, click the **Remove** button in the Work Orders section.

POR-3113 POR with Work Order RAC 1 2 or 3

Select the work orders you would like to remove from the POR.

Remove	Work Order Number	Description	Cost
<input checked="" type="checkbox"/>	AB130686	INSTALL NEW HANDICAPPED WATER COOLER	\$10,718.00
<input type="checkbox"/>	AB130689	MODIFY/REPLACE AN EXISTING SHOWER WITH A TRANSFER TYPE SHOWER TO ACCOMMODATE ADA REQUIREMENTS	\$14,522.00

2. Click on one or more checkboxes adjacent to the work order records to specify them for removal.


Note: At least one work order record must reside in the POR record at all times, so you must not select all available work order records.

3. Click the **Save** button. A confirmation message is displayed indicating that the selected Work Orders were removed from the POR record.

2.4 Cancelling a POR Request












1. Go to PORs > Browse PORs.
2. Enter any valid search criteria and click the **Search** button.
3. Select the POR records to cancel by clicking on their row. The selected POR(s) will be highlighted.

CURRENT FILTERS > Status: **Converted**




PORs

< Previous Next > 1 - 7 of 7 results (page 1 / 1)














Site ▼ 2	Location	POR Number	Title	Status	Project Number	DOI Score ▼ 1	IA Score	DOI NCLB Score	IA NCLB Score
None sel				1 selected ▼					
IA013	AB108263,AB108265,AB108266	POR-5	Improvement and Repair: IA013	Converted	E05PP1310100001	62.00	474.27		
IA005	AB105601	POR-11	test manual por	Converted	E01SS7810100001	62.00	519.42		
IA005	AB105601,AB105602	POR-12	Improvement and Repair: IA005	Converted	E01SS7810100002	62.00	522.17		
IA012	AB102004	POR-8	Location Replacement: ▲▼	Converted	G10HH6461300002	32.00	219.95		
IA004	AB104250	POR-9	Close - incomplete test	Converted	Q05NN3561300001	32.00	336.57		

4. On the top right corner of the screen, click on the **Cancel**  button. A warning message is displayed indicating that the selected PORs will be cancelled.
5. Click the **OK** button. A confirmation message is displayed indicating that the approved POR record is cancelled.

2.5 POR Exercises

2.5.1 PORs – Exercise 1: Creating a POR Manually


1. Go to PORs > Create PORs Manually on the menu bar.
2. Under Search Criteria, select the following:
 - **Site:** IA004
 - **Category/Rank:** M – 1
3. Click the **Search** button.
4. Select two work orders.
5. Click the **New POR**  button.
6. For the **Title**, enter the text 'New POR' followed by your name and the date.
7. Select a **Project Type:** _____.
8. Select a **Program Funding Type:** _____.
9. Select a value for **Scope of Benefits:** _____.
10. Select a value for **Investment Strategy:** _____.
11. Select a value for **Consequences of Failure to Act:** _____.
12. Click the **Save** button.
13. A confirmation message is displayed indicating the **POR Number**.
Write down the POR Number _____.

3 Projects

3.1 Converting a POR to a Project

1. Go to PORs > Browse PORs.
2. Enter any valid search criteria and click the **Search** button.
3. Select the POR to convert to a Project by clicking on its row. The selected POR will be highlighted.

PORs													
Site	Location	POR Number	Title	Status	Project Number	DOI Score	IA Score	DOI NCLB Score	IA NCLB Score	Planning FY	Design FY	Construction FY	Description
None sel				1 selected									
IA003	AB107915	POR-349	John M and PC UAT	Proposed		1350.00	1287.00						
IE169	AB103863	POR-454	Improvement and Repair:	Proposed		900.00	900.00			2015	2016	2017	
IE005	AB102989	POR-1212	Improvement and Repair:	Proposed		900.00	837.00			2016	2017	2018	
IE086	AB104354,AB104355,AB104357	POR-370	Site Replacement:	Proposed		838.90	790.75			2016	2017	2018	
IE005	AB107565	POR-1296	Improvement	Proposed		832.20	826.93			2016	2017	2018	

4. Click the **Convert to Project**  button in the top right corner of the screen. A prompt will appear verifying that one would like to convert the POR to a Project.
5. Click the **OK** button. If all of the necessary fields on the POR are populated, a confirmation message will be displayed indicating that the POR has been converted.

Note: On the POR Details, the Program Funding Type, Scope of Benefits, Investment Strategy, and Consequences of Failure to Act fields must all be populated before the POR can be converted to a Project.

3.2 Viewing Project Details

1. Go to Projects > Browse Projects on the menu bar.
2. Enter any valid search criteria and click the **Search** button.

Projects							
Site	Location	Project Number	Title	Status	Phase	DOI Score	IA Score
None sel				2 selected	None selected		
IA013	AB108263,AB108266,AB108265	E05PP1310100001	Improvement and Repair: IA013	New	Pre-Planning	62.00	474.27
IA001	AB100949,AB100950,AB100951,AB100952	G05CC5161300001	Kaylie's first test	New	Pre-Planning	32.00	410.10

3. Click on the hyperlink in the **Project Number** field to view the Project Details.

Note: The Project Details screen is accessible through any screen, where Project identification number is displayed.

E05DD32N1700001 Improvement and Repair: AB107565

General

Work Order #: **AB352948**
 Status: **New**
 Phase: **Pre-Planning**
 Project Type: **Improvement and Repair**
 Program Funding Type: **E05 Education - M&R**
 DOI Score: **80.00**
 IA Score: **836.93**
 Total Cost: **\$165,045.00**
 Capital Budget: **\$0.00**
 Total Work Orders: [7 View](#)
[View Log of Work Order Changes](#)
[View Log of Budget Changes](#)

Location Data

Location: **AB107565**
 Site: **IE005**
 Description: **Cafeteria/Dining Hall**
 Structure Use: **Building / Cafeteria/Dining Hall**
 Program: **Grant Education**
 Portable: **Yes**
 API: **100**
 Mission Dependency Score: **1 - Critical**
 CRV: **\$333,884.79**
 FCI: **0.5300**
 Grades:
 State:
 Congressional District:
 County:
 Closest City:
 Gross Sq. Ft.: **3855.00**
 Cost Center:
 Ownership of Asset: **BIA**
 Top Level Location: **AB900062**
 Top Level Cost Center: **AADD032N170**
 WBS:

Indicators

Pending Changes: **No**
 Emergency Project: **No**
 Qualifies for NCLB: **No**
 Potential Site Replacement Project: **No**
 Potential Location Replacement Project: **No**

Scoring Parameter Values

Scope of Benefits: **100.0**
 Investment Strategy: **100.0**
 Consequences of Failure to Act: **50.0**

Planned Fiscal Year

Planning: **2016**
 Design: **2017**
 Construction: **2018**

FA Budget Programs

[Add FA Budget Program](#)

No FA Budget Programs.

Milestones


[Add Milestone](#) [Add Task](#)

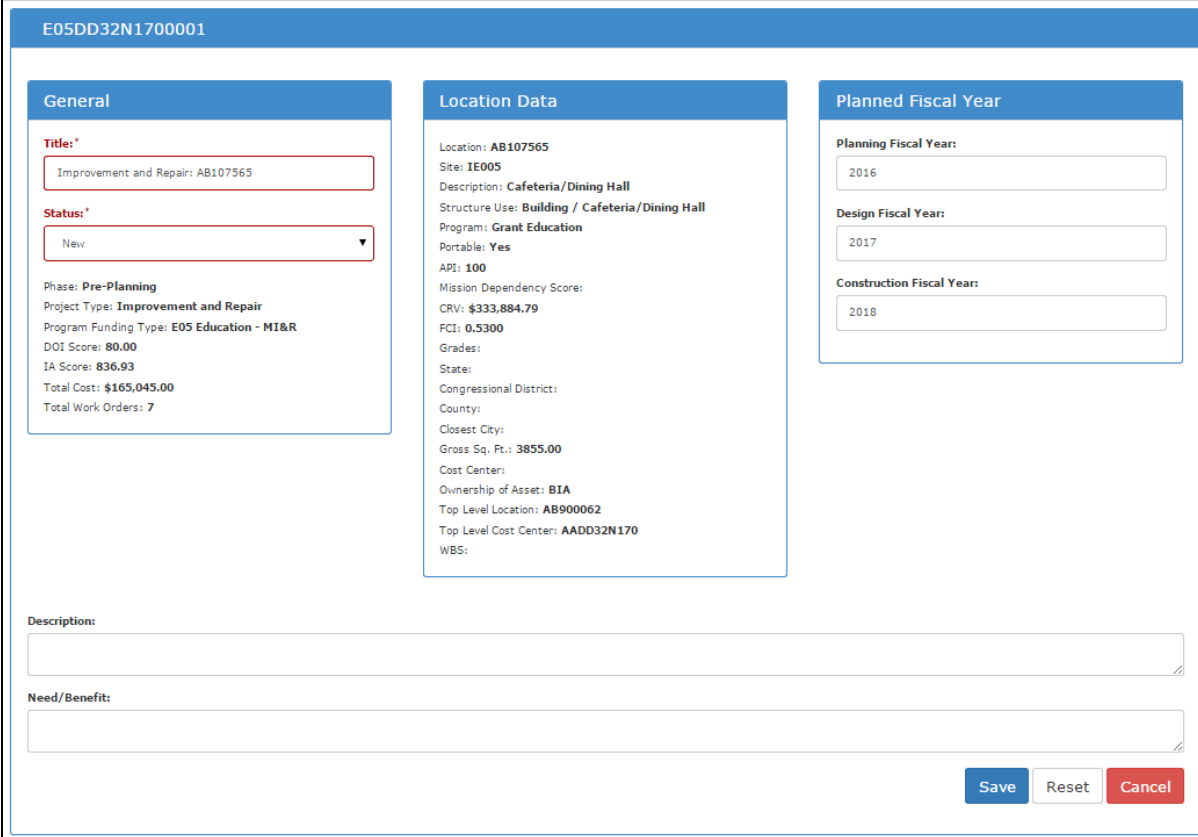
* = Required

Pre-Planning
Planning
Pre-Design
Design
Pre-Construction
Construction
Post-Construction

Milestone/Task	Scheduled Start Date	Scheduled End Date	Scheduled Total Cost	Revised Start Date	Revised End Date	Revised Total Cost	Actual Start Date	Actual End Date	Actual Total Cost	Physical Percent Complete	Status
Consultation with Bureau of Indian			\$0.00			\$0.00			\$0.00	0%	New

3.3 Editing Project Details

1. On the Project Details screen, click the **Edit**  button in the top left corner of the screen.

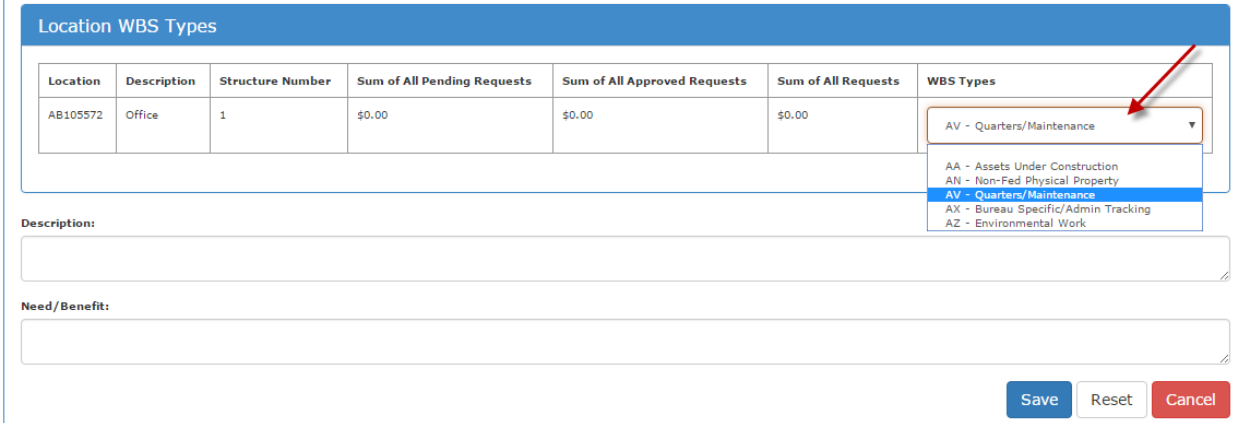


The screenshot shows a web form for editing project details. At the top, the project ID 'E05DD32N1700001' is displayed. The form is divided into three main sections: 'General', 'Location Data', and 'Planned Fiscal Year'. The 'General' section includes fields for 'Title' (with the value 'Improvement and Repair: AB107565') and 'Status' (with a dropdown menu set to 'New'). Below these are project statistics such as 'Phase: Pre-Planning', 'Project Type: Improvement and Repair', 'Program Funding Type: E05 Education - MI&R', 'DOI Score: 80.00', 'IA Score: 836.93', 'Total Cost: \$165,045.00', and 'Total Work Orders: 7'. The 'Location Data' section lists various identifiers and metrics like 'Location: AB107565', 'Site: IE005', 'Description: Cafeteria/Dining Hall', 'Structure Use: Building / Cafeteria/Dining Hall', 'Program: Grant Education', 'Portable: Yes', 'API: 100', 'Mission Dependency Score', 'CRV: \$333,884.79', 'FCI: 0.5300', 'Grades:', 'State:', 'Congressional District:', 'County:', 'Closest City:', 'Gross Sq. Ft.: 3855.00', 'Cost Center:', 'Ownership of Asset: BIA', 'Top Level Location: AB900062', 'Top Level Cost Center: AADD32N170', and 'WBS:'. The 'Planned Fiscal Year' section has three input fields for 'Planning Fiscal Year' (2016), 'Design Fiscal Year' (2017), and 'Construction Fiscal Year' (2018). At the bottom of the form, there are two text areas for 'Description' and 'Need/Benefit', and three buttons: 'Save' (blue), 'Reset' (white), and 'Cancel' (red).

2. Modify or enter new information for any of the available fields.
3. Click the **Save** button to save the updated Project Details.

3.3.1 Selecting a Location WBS Type

1. On the Project Details screen, click the Edit  button in the top left corner of the screen.



Location	Description	Structure Number	Sum of All Pending Requests	Sum of All Approved Requests	Sum of All Requests	WBS Types
AB105572	Office	1	\$0.00	\$0.00	\$0.00	AV - Quarters/Maintenance

Description:

Need/Benefit:

Save Reset Cancel

2. A user with the Capital Planning user role will see the Location WBS Types section on the Project Details Edit screen.
3. Select the Location WBS Type from the dropdown.
4. Click the **Save** button.

3.4 Adding Work Orders to a Project

1. In the General section of the Project Details screen, click the **View** hyperlink next to the **Total Work Orders** field.

E05DD32N1700001 Improvement and Repair: AB107565

General

Work Order #: **AB352948**
 Status: **New**
 Phase: **Pre-Planning**
 Project Type: **Improvement and Repair**
 Program Funding Type: **E05 Education - MI&R**
 DOI Score: **80.00**
 IA Score: **836.93**
 Total Cost: **\$165,045.00**
 Capital Budget: **\$0.00**
 Total Work Orders: **7 View** (highlighted with red arrow)
[View Log of Work Order Changes](#)
[View Log of Budget Changes](#)

Location Data

Location: **AB107565**
 Site: **IE005**
 Description: **Cafeteria/Dining Hall**
 Structure Use: **Building / Cafeteria/Dining Hall**
 Program: **Grant Education**
 Portable: **Yes**
 API: **100**
 Mission Dependency Score: **1 - Critical**
 CRV: **\$333,884.79**
 FCI: **0.5300**
 Grades:
 State:
 Congressional District:
 County:
 Closest City:
 Gross Sq. Ft.: **3855.00**
 Cost Center:
 Ownership of Asset: **BIA**
 Top Level Location: **AB900062**
 Top Level Cost Center: **AADD32N170**
 WBS:

Planned Fiscal Year

Planning: **2016**
 Design: **2017**
 Construction: **2018**

2. Click the **Add to Project** button in the top right corner of the **Work Orders in Project** screen. The **Add Work Order to Project** search screen is displayed.

Work Orders in Project Q11CC5110100002

[Back to Project](#)

1 - 5 of 5 results (page 1 / 1)

Program	Site	Location	Location Description	Location Status	Location IA Status	Work Order Number	Work Order Type	Work Order Status	Work Order Priority	Work Order Classification	Mission Dependency Score	Defi
None selected	None sel			None select	2 selected		None sel	None sel			None sel	
General Administration	IA001	AB100962	Quarters, Single-Family	OPERATING	Occupied	AB30923	DM	APPR		Single-Family	1285	
General Administration	IA001	AB100963	Quarters, Single-Family	OPERATING	Occupied	AB130489	DM	APPR		Single-Family	1285	
General Administration	IA001	AB100963	Quarters, Single-Family	OPERATING	Occupied	AB130490	DM	APPR		Single-Family	1575	
General Administration	IA001	AB100967	Quarters, Single-Family	OPERATING	Occupied	AB130500	DM	APPR		Single-Family	1284	
General Administration	IA001	AB100968	Museum	OPERATING	Occupied	AB130508	DM	APPR		Museum	6622	

3. Enter any valid search criteria and click the **Search** button to search for work order records to add to a project. The Add Work Order to Project search results screen is displayed with new work order records that are eligible to be added to the project

Choose work orders to add to the project below.

< Previous Next > 1 - 1 of 1 results (page 1 / 1)

Program	Site ▲ 1	Location ▲ 2	Location Description	Location Status	Location IA Status	Work Order Number
None selected ▼	None select ▼			None select ▼	2 selected ▼	
General Administration	IA001	AB100963	Quarters, Single-Family	OPERATING	Occupied	AB130488

Please provide a comment describing the reason for addition to the Project.

Save

4. Click one or more Work Order Group records that you wish to add to a project. The selected records are highlighted.
5. In the text field of the Add Work Orders to Project screen, enter the reason for adding the work orders and click the **Save** button. A confirmation message indicates that the work order is added to the project.

3.5 Removing Work Orders from a Project

1. In the General section of the Project Details screen, click the **View** hyperlink next to the **Total Work Orders** field.

E05DD32N1700001 Improvement and Repair: AB107565

General

Work Order #: **AB352948**
 Status: **New**
 Phase: **Pre-Planning**
 Project Type: **Improvement and Repair**
 Program Funding Type: **E05 Education - MI&R**
 DOI Score: **80.00**
 IA Score: **836.93**
 Total Cost: **\$165,045.00**
 Capital Budget: **\$0.00**
 Total Work Orders: **7** [View](#)
[View Log of Work Order Changes](#)
[View Log of Budget Changes](#)

Location Data


Location: **AB107565**
 Site: **IE005**
 Description: **Cafeteria/Dining Hall**
 Structure Use: **Building / Cafeteria/Dining Hall**
 Program: **Grant Education**
 Portable: **Yes**
 API: **100**
 Mission Dependency Score: **1 - Critical**
 CRV: **\$333,884.79**
 FCI: **0.5300**
 Grades:
 State:
 Congressional District:
 County:
 Closest City:
 Gross Sq. Ft.: **3855.00**
 Cost Center:
 Ownership of Asset: **BIA**
 Top Level Location: **AB900062**
 Top Level Cost Center: **AADD32N170**
 WBS:

Planned Fiscal Year

Planning: **2016**
 Design: **2017**
 Construction: **2018**

2. On the Work Orders in Project screen, click one or more work order records to remove from the project. The selected records are highlighted.

Note: At least one work order record must reside in the project record at all times, so do not select all available work order records.

3. Click the **Remove from Project**  button in the top right corner of the Work Orders in Project screen. The Remove Work Order From Project search screen is displayed.

Remove Work Order From Project

The following work orders will be removed from the project.

Work Order Number	Description	Cost
AB130488	CLEAN COMMERCIAL BUILDING DUCT SYSTEM	\$4,138.00

Please provide a comment describing the reason for removal from the Project.

Save

4. Enter the reason for removal of the work order(s) and click the **Save** button. A confirmation message indicates that the work order(s) is removed from the project.

3.6 Approving (or Rejecting) Added/Removed Work Orders

1. In the General section of the Project Details screen, click the **View Log of Work Order Changes** hyperlink.

E05DD32N1700001 Improvement and Repair: AB107565

General

Work Order #: **AB352948**
 Status: **New**
 Phase: **Pre-Planning**
 Project Type: **Improvement and Repair**
 Program Funding Type: **E05 Education - MI&R**
 DOI Score: **80.00**
 IA Score: **836.93**
 Total Cost: **\$165,045.00**
 Capital Budget: **\$0.00**
 Total Work Orders: **7** [View](#)
[View Log of Work Order Changes](#)
[View Log of Budget Changes](#)

Location Data

Location: **AB107565**
 Site: **IE005**
 Description: **Cafeteria/Dining Hall**
 Structure Use: **Building / Cafeteria/Dining Hall**
 Program: **Grant Education**
 Portable: **Yes**
 API: **100**
 Mission Dependency Score: **1 - Critical**
 CRV: **\$333,884.79**
 FCI: **0.5300**
 Grades:
 State:
 Congressional District:
 County:
 Closest City:
 Gross Sq. Ft.: **3855.00**
 Cost Center:
 Ownership of Asset: **BIA**
 Top Level Location: **AB900062**
 Top Level Cost Center: **AADD32N170**
 WBS:

Planned Fiscal Year

Planning: **2016**
 Design: **2017**
 Construction: **2018**

2. The **Project Work Order Modifications** screen is displayed, listing work order records that have been selected for removal.
3. Click one or more DM Work Order Group records that you wish to add to the project. The selected records are highlighted.

Project Q11CC5110100002 Work Order Modifications

[Back to Project](#)

◀ Previous Next ▶ 1 - 1 of 1 results (page 1 / 1)

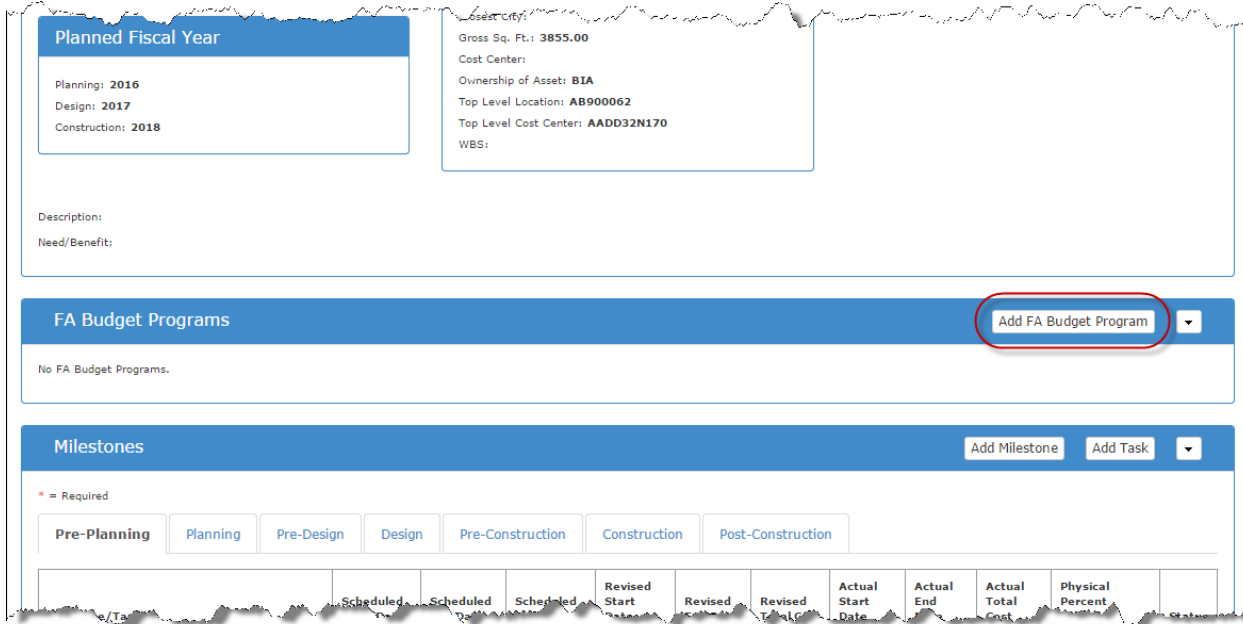
Project	Status	Site	Location	Location Description	Work Order Number	Change	Justification	Previous DOI Score	New DOI Score	Previous IA Score	New IA Score	Requested By	Requ Date
Q11CC5110100002	Pending	IA001	AB100963	Quarters, Single-Family	AB130488	Removed	Removal reason.	210.93	32.00	157.50	148.84	cwadey	04/03

◀ Previous Next ▶

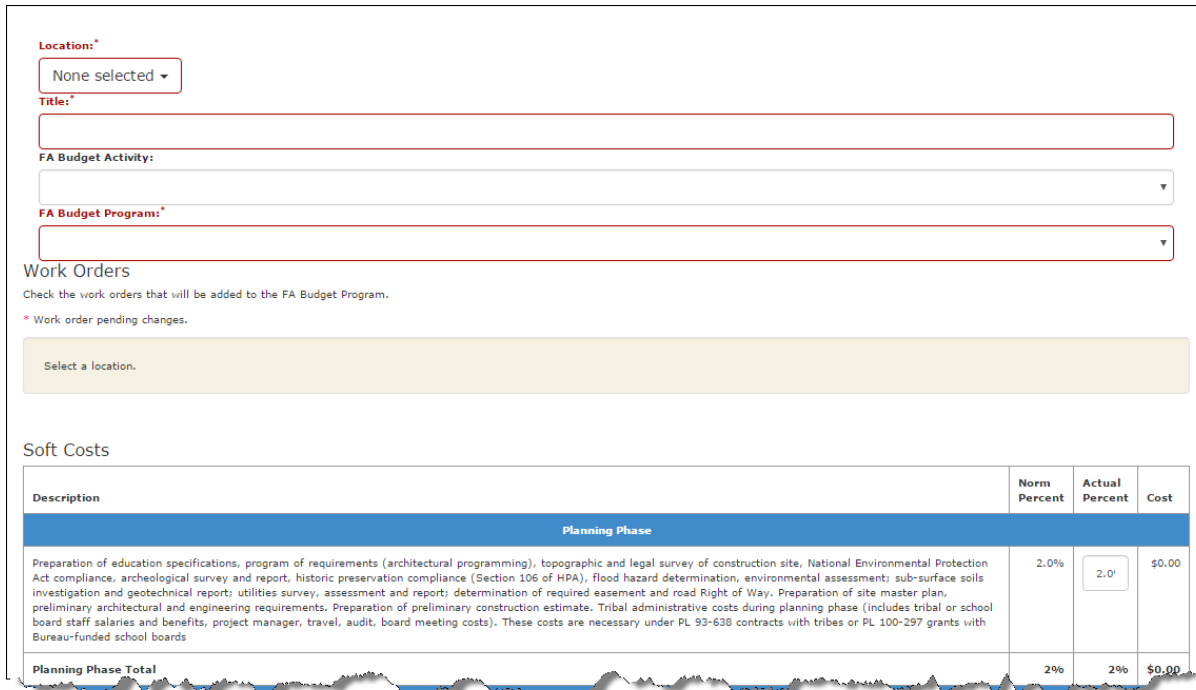
4. To approve the addition or removal of the work order, click the **Approve** button.
5. To reject the addition or removal of the work order, click the **Reject** button.

3.7 Adding a Functional Area Budget Program to a Project

1. Go to the Project Details screen for the project.



2. Click the **Add FA Budget Program** button. The FA Budget Program (FABP) screen is displayed.



3. Choose one or more locations from the **Location** drop-down list.

Location:
 All selected (1) ▾
 Select all
 AB105572 - Office

FA Budget Activity:
 ▾

FA Budget Program:
 ▾

Work Orders
 Check the work orders that will be added to the FA Budget Program.
 * Work order pending changes.

	Location	Work Order Number	Description	Cost
<input type="checkbox"/>	AB105572	AB153175	REPLACE EXTERIOR STUCCO WALL	\$27,861.00

Soft Costs

Description	Norm Percent	Actual Percent	Cost
Planning Phase			
Preparation of education specifications, program of requirements (architectural programming), topographic and legal survey of construction site, National Environmental Protection Act compliance, archeological survey and report, historic preservation compliance (Section 106 of HPA), flood hazard determination, environmental assessment; sub-surface soils investigation and geotechnical report; utilities survey, assessment and report; determination of required easement and road Right of Way. Preparation of site master plan, preliminary architectural and engineering requirements. Preparation of preliminary construction estimate. Tribal administrative costs during planning phase (includes tribal or school board staff salaries and benefits, project manager, travel, audit, board meeting costs). These costs are necessary under PL 93-638 contracts with tribes or PL 100-297 grants with	2.0%	2.0'	\$0.00

- In the **Title** field, enter a description of this FA Budget Program.
- In the **FA Budget Program** drop-down field, select an FA Budget Program from the list of available options.
- On the left side of the work order record, click the checkboxes of the work order records that you want to add to the selected FA Budget Program.

Note: All work orders in the project must be added to one or more FA Budget Programs in order to effectively close the project.

Work Orders
 Check the work orders that will be added to the FA Budget Program.
 * Work order pending changes.

	Work Order Number	Description	Cost
<input type="checkbox"/>	AB283811	REPLACE 12blank X 12blank VINYL FLOOR TILE	\$7,167.00
<input checked="" type="checkbox"/>	AB283812	REPLACE FURNACE, HOT AIR HEATING, GAS-FIRED, OVER 125 TO 150MBH	\$4,816.00
<input type="checkbox"/>	AB283813	REPLACE 2 X 2 OR 2 X 4 WOOD FIBER ACOUSTIC CEILING TILES, NO GRID	\$7,672.00
<input type="checkbox"/>	AB283814	REPLACE SHEET VINYL FLOOR COVERING	\$10,877.00
<input type="checkbox"/>	AB283815	REPLACE COMMERCIAL WATER HEATER, GAS, 73 UP TO 110 GPH	\$6,371.00
<input type="checkbox"/>	AB283816	Connect fire alarm to new system.	\$61,830.00
<input type="checkbox"/>	AB283817	Fire alarm system not connected to the central dispatch station.	\$66,312.00

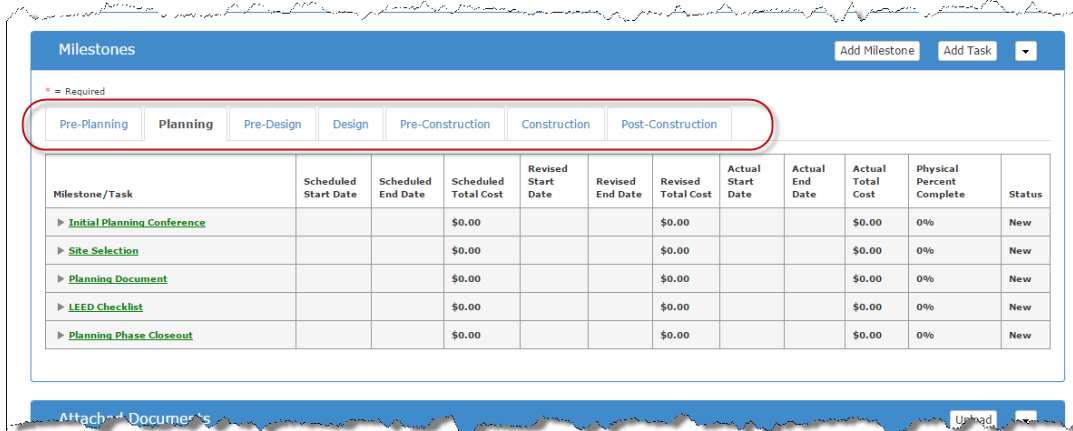
Soft Costs

Description	Norm Percent	Actual Percent	Cost
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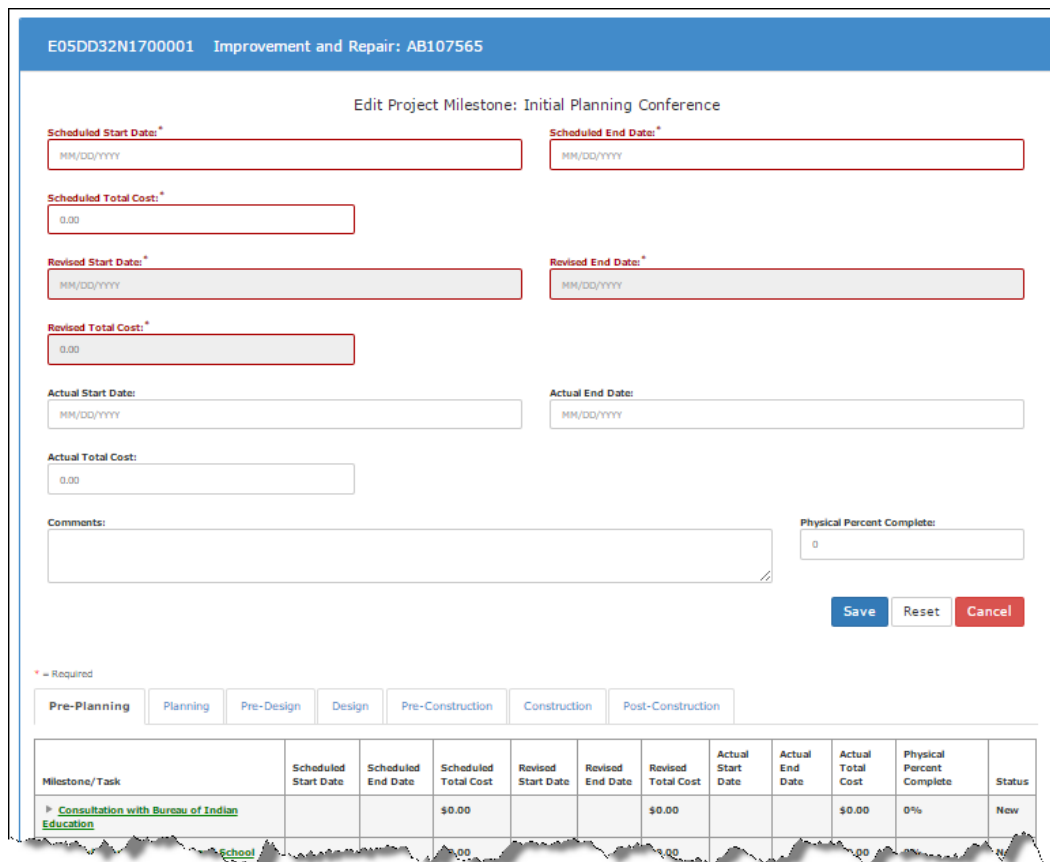
- If necessary, the soft costs percentages can be adjusted in the Soft Costs section.
- Click the **Save** button.

3.8 Entering Data for Project Milestones

1. Go to the Project Details screen.
2. In the **Milestones** section of the **Project Details** screen, click the tab of the desired phase (**Pre-Planning, Planning, Pre-Design, Design, Pre-Construction, Construction, or Post-Construction**). A list of milestones for the selected phase is displayed. Each phase is populated by default with milestones commonly associated with that phase.



3. From the list of available Milestones, click the hyperlink of the one to be edited. If applicable, click the triangular drop-down icon to expand milestones that include subtasks. The **Edit Project Milestone** screen is displayed with the applicable data entry fields.



- Make any desired data entries or click the **N/A** button (only the Capital Planning user role will see the **N/A** button) to indicate that the milestone or task is not applicable.

Note: An asterisk next to the name of a milestone or task indicates that the milestone or task is required and cannot be marked as N/A.

- The **Revised Start Date** and **Revised End Date** fields only become editable after you have completed the **Scheduled Start Date** and **Scheduled End Date** fields and saved the milestone or task.
- After you complete the **Actual Start Date** field and save the milestone or task, the status of the milestone or task, visible on the **Project Details** screen, becomes **In Progress**.

The screenshot shows the 'Milestones' interface with a table of milestones. The first milestone, 'Confirm Completion of NEPA and Associated Compliance', is highlighted in yellow and has its status set to 'In Progress'. A red box highlights the 'In Progress' status cell. The other milestones are 'New'.

Milestone/Task	Scheduled Start Date	Scheduled End Date	Scheduled Total Cost	Revised Start Date	Revised End Date	Revised Total Cost	Actual Start Date	Actual End Date	Actual Total Cost	Physical Percent Complete	Status
▶ Confirm Completion of NEPA and Associated Compliance	06/08/2015	09/30/2015	\$0.00	06/08/2015	09/30/2015	\$0.00	06/08/2015		\$0.00	0%	In Progress
▶ Design Acquisition Package			\$0.00			\$0.00			\$0.00	0%	New
▶ Execute Facility or Building Disposition Plan			\$0.00			\$0.00			\$0.00	0%	New
▶ Pre-Design Phase Closeout			\$0.00			\$0.00			\$0.00	0%	New

- After you complete the **Actual End Date** field and save the milestone or task, the status of the milestone or task, visible on the **Project Details** screen, becomes **Complete**.
- You can also update the status of the milestone or task by editing the **Physical Percent Complete** field.

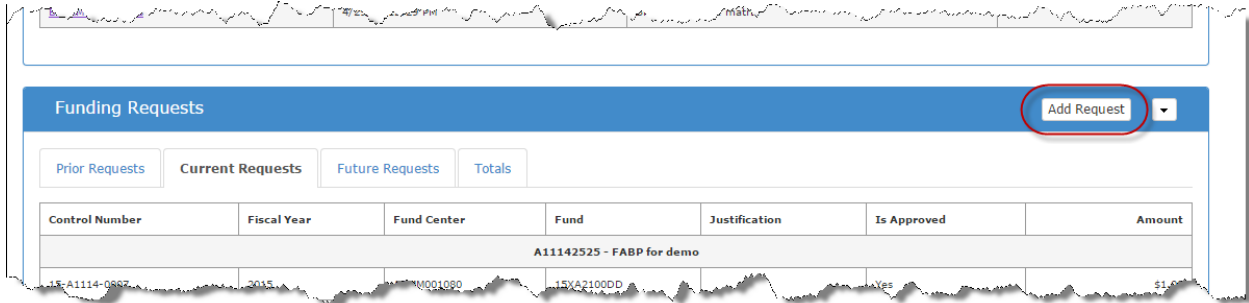
The screenshot shows the same 'Milestones' interface. A red box highlights the 'Physical Percent Complete' column for all milestones, which currently shows 0% for each. The status of the first milestone remains 'In Progress'.

Milestone/Task	Scheduled Start Date	Scheduled End Date	Scheduled Total Cost	Revised Start Date	Revised End Date	Revised Total Cost	Actual Start Date	Actual End Date	Actual Total Cost	Physical Percent Complete	Status
▶ Confirm Completion of NEPA and Associated Compliance	06/08/2015	09/30/2015	\$0.00	06/08/2015	09/30/2015	\$0.00	06/08/2015		\$0.00	0%	In Progress
▶ Design Acquisition Package			\$0.00			\$0.00			\$0.00	0%	New
▶ Execute Facility or Building Disposition Plan			\$0.00			\$0.00			\$0.00	0%	New
▶ Pre-Design Phase Closeout			\$0.00			\$0.00			\$0.00	0%	New

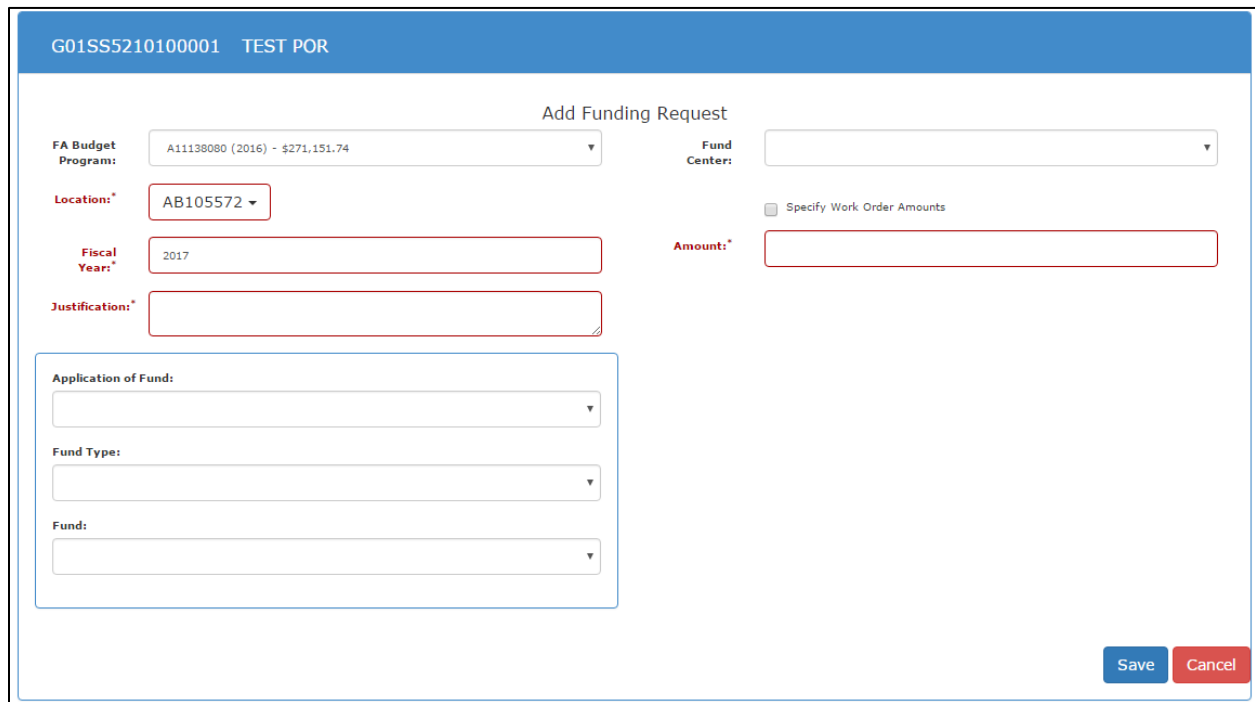
- Click the **Save** button. A confirmation message indicates that the milestone is saved, or that the milestone and associated tasks are marked as not applicable.

3.9 Requesting Funding for a Project

1. Go to the Project Details screen.



2. Click the **Add Request** button in the Funding Requests section.



3. On the **Add Funding Request** screen, populate the following data entry fields with details about the type of funding you want to request:

- FA Budget Program
- Location*
- Fiscal Year*
- Justification*
- Application of Fund
- Fund Type
- Fund (must be specified before the request can be approved)
- Fund Center (must be specified before the request can be approved)
- Amount*

Note: The amount you enter cannot exceed the amount displayed in the FA Budget Program drop-down field.

4. Typically, Funding Requests are made against work orders (rather than just against the FABP). To make the Funding Request against one or more work orders, check the Specify Work Order Amounts checkbox.

5. A popup will appear with available work orders for the specified FABP(s). Check the checkbox next to work orders you would like to make a Funding Request against.

Include	Location	Work Order Number	Description	Amount (with soft costs applied)
<input checked="" type="checkbox"/>	AB105572	AB153179	REBUILD FLUSH VALVE	3928.54

Total Amount: \$3,928.54

6. By default, the estimated costs for the work order will be populated in the Amount field. This amount can be adjusted by the user.
7. Click the **Save** button. The Amount field on the Funding Request screen will be populated with the sum of all work order Funding Request amounts.

Add Funding Request

FA Budget Program: A11138080 (2016) - \$271,151.74

Location: AB105572

Fiscal Year: 2017

Justification:

Fund Center:

Specify Work Order Amounts

Amount: 3928.54 Edit Amount

Location	Work Order Number	Description	Amount
AB105572	AB153179	REBUILD FLUSH VALVE	\$3,928.54

Application of Fund:

Fund Type:

Fund:

Save Cancel

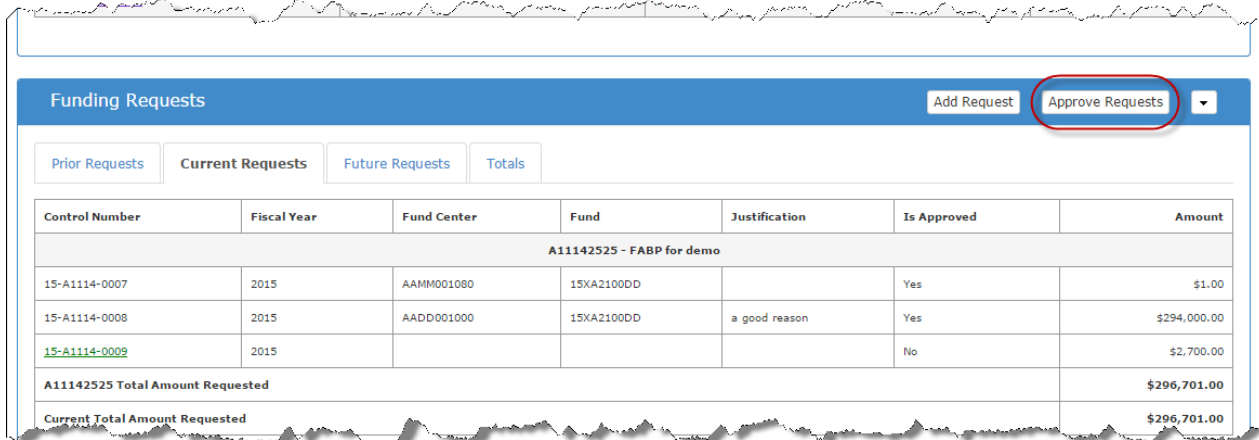
8. Click the **Save** button. The new funding request now appears in the Funding Request section of the Project Details screen. The listing of the new funding request includes its Control Number and other information.

3.10 Approving (or Rejecting) a Funding Request

Funding requests first require approval by an authorized user from the Central Office and then by a Capital Planning user. BPERM allows any of the following BPERM users to approve and reject at the Central Office level: Program Manager, Deputy Director, and Budget Officer. The BPERM System Administrator user can also approve and reject funding requests.

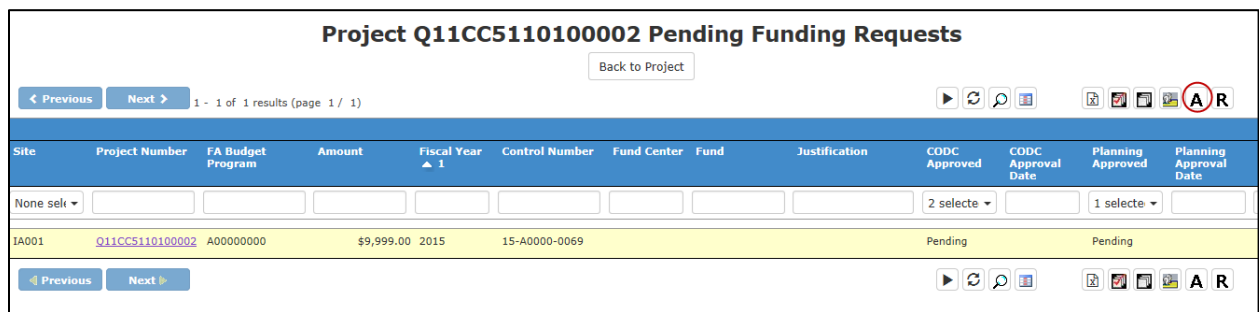
Note: If a funding request was added by a Capital Planning user, the request does not need to go through the approval process.

1. Go to the Project Details screen.



2. Click the **Approve Request** button in the Funding Requests section. The Pending Funding Request screen is displayed.

Note: The Pending Funding Requests screen can also be accessed by going to Budget > Funding Requests Pending Approval > Project Funding Requests on the menu bar.

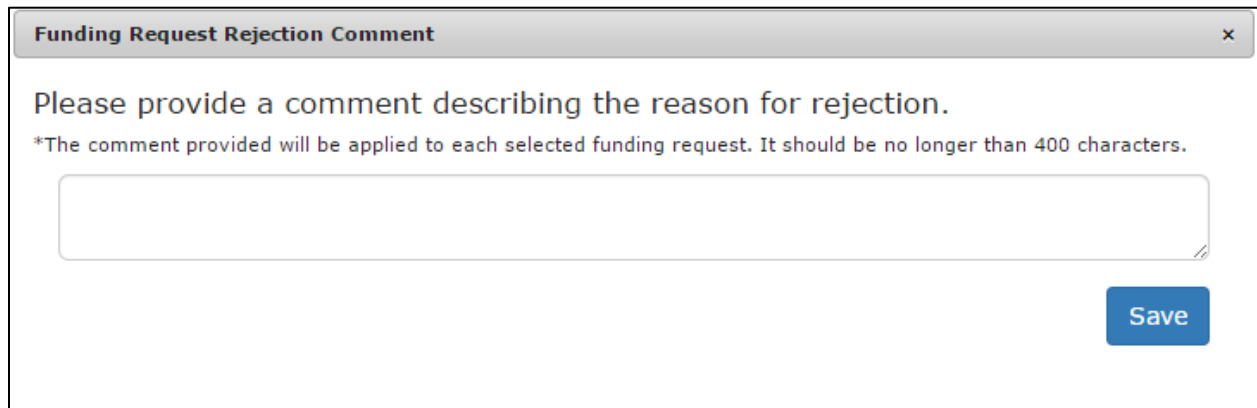


3. Click the record with the Control Number of the new funding request. The selected record is highlighted.

4. To approve the funding request, click the **Approve**  button in the top right corner of the screen. A confirmation message is displayed indicating that the request was approved.

Note: If you are approving at the Capital Planning level, the Funding Request will no longer appear in the Pending Funding Requests list.

- To reject the funding request, click the **Reject**  button in the top right corner of the screen. A prompt will be displayed to enter a reason for rejection.



Funding Request Rejection Comment x

Please provide a comment describing the reason for rejection.


*The comment provided will be applied to each selected funding request. It should be no longer than 400 characters.

Save

- Enter a reason for rejection in the text field and click the **Save** button. A confirmation message is displayed indicating that the request was rejected. The funding request will no longer appear in the Pending Funding Requests list.

3.11 Closing a Project

3.11.1 Closing a Project as Complete

1. Go to the Project Details screen.
2. In the **Milestones** section of the **Project Details** screen, set Milestones and Tasks to **Complete Status** or mark as **N/A**. All milestones and tasks must have **Complete Status** before the project’s status can be set to **Closed – Complete**.
3. On the Project Details screen, click the **Edit**  button in the top left corner of the screen.

The screenshot shows the 'Project Details' screen for project E01CC5110100001. The 'Edit' button is highlighted in the top left corner. The 'Status' dropdown menu is open, showing 'Closed - Complete' as the selected option. The 'Location Data' section shows various project details, and the 'Planned Fiscal Year' section shows the years 2015 for Planning, Design, and Construction. The 'Location WBS Types' section shows two locations with dropdown menus for selecting WBS types. The 'Description' and 'Need/Benefit' fields are empty. The 'Save', 'Reset', and 'Cancel' buttons are at the bottom right.


4. In the **Status** drop-down field, select **Closed – Complete**.
5. Adjust the Work Breakdown Schedule (WBS) types to match the locations listed in the **Location WBS Types** section. If more than one WBS type is available to choose from for a location, you can select the WBS type you want from a drop-down menu.

The screenshot shows a form titled "Location WBS Types" with a blue header. Below the header, there is a list of location IDs and their corresponding WBS types. The second location, AB100950, has its dropdown menu open, showing "AV - Quarters/Maintenance" selected. A red box highlights this dropdown menu.

Location ID	WBS Type
Location AB100949:	AX - Bureau Specific/Admin Tracking
Location AB100950:	AV - Quarters/Maintenance
Location AB100951:	AV - Quarters/Maintenance
Location AB100952:	AA - Assets Under Construction
Location AB100953:	AX - Bureau Specific/Admin Tracking
Location AB100954:	AV - Quarters/Maintenance
Location AB100956:	AA - Assets Under Construction
Location AB100957:	AN - Non-Fed Physical Property
Location AB100955:	

6. Click the **Save** button. If the project includes open work orders, an error message indicates that there are open work orders in the project that must be set to complete or cancelled.
7. Identify the work order records you want to complete and click the radio button under the **COMP** column heading in the rows associated with those work order records. The remainder of the work order records will have the **CAN** radio button automatically selected and will be automatically cancelled.
8. Identify the work order records you want to duplicate for new projects to be used in the future and click the empty checkbox under the Create Duplicate Work Order column heading in the rows associated with those work order records. The remainder of the work order records will not be duplicated for new projects.
9. Click the **Save** button. The Project Details screen is displayed with a confirmation message that the project record is updated. The project status is now set to **Closed-Complete** in the Status field of the Project Details screen.

3.11.2 Closing a Project as Incomplete

1. Go to the Project Details screen.
2. Click the **Edit**  button in the top left corner of the screen.
3. In the **Status** drop-down field, select **Closed - Incomplete** and click the **Save** button.

E06AA0110100001

General	Location Data	Planned Fiscal Year
<p>Title: Improvement and Repair: IA003</p> <p>Status: Closed - Incomplete <input type="checkbox"/></p> <p>Phase: Pre-Planning Project Type: Improvement and Repair Program Funding Type: E06 Education - Demolition DOI Score: 52.00 IA Score: 92.00 Total Cost: \$162,816.00 Total Work Orders: 4</p>	<p>Location: AB100001 Site: IA003 Description: Office Structure Use: Building / Office Portable: No API: 65 CRV: \$670,450.37 FCI: 0.0000 Grades: State: Congressional District: County: Closest City: Gross Sq. Ft.: Cost Center: Ownership of Asset: BIA Top Level Location: AB900003 Top Level Cost Center: AAAA011010 WBS:</p>	<p>Planning Fiscal Year: 2018</p> <p>Design Fiscal Year: 2019</p> <p>Construction Fiscal Year: 2020</p>

Location WBS Types

Location AB100001:

Description:

Need/Benefit:

4. If the project includes open work orders, an error message indicates that there are open work orders in the project that must be set to complete or cancelled.

E06AA0110100001 Improvement and Repair: IA003

Project Closeout

There are open work orders in this project that will be set to complete or cancelled. If there are no actual costs reported, the work order can be cancelled; otherwise, it must be set to completed. Indicate below whether you would like to close or cancel these work orders. You can also choose to duplicate the work order so that the work can be revisited in a future project.

COMP	CAN	Create Duplicate Work Order	Work Order Number	Work Order Description	Estimated Cost	Actual Cost
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	AB154158	REPLACE CENTRIFUGAL EXHAUST FAN, 4910 CFM, 23blank SQUARE OR ROUND, ROOF OR WALL MOUNTED	\$13,874.00	\$0.00
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	AB154161	UPGRADE TO DDC CONTROL SYSTEM FOR HVAC UPGRADE TO DDC CONTROL SYSTEM FOR HVAC FROM	\$119,497.00	\$0.00
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	AB154165	REPLACE CARPET	\$14,664.00	\$0.00

Save
Cancel

5. Identify the work order records you want to complete and click the radio button under the **COMP** column heading in the rows associated with those work order records. The remainder of the work order records will have the **CAN** radio button automatically selected and will be automatically cancelled.
6. Identify the work order records you want to duplicate for new projects to be used in the future and click the empty checkbox under the **Create Duplicate Work Order** column heading in the rows associated with those work order records. The remainder of the work order records will not be duplicated for new projects.

E06AA0110100001 Improvement and Repair: IA003

Project Closeout

There are open work orders in this project that will be set to complete or cancelled. If there are no actual costs reported, the work order can be cancelled; otherwise, it must be set to completed. Indicate below whether you would like to close or cancel these work orders. You can also choose to duplicate the work order so that the work can be revisited in a future project.


COMP	CAN	Create Duplicate Work Order	Work Order Number	Work Order Description	Estimated Cost	Actual Cost
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	AB154158	REPLACE CENTRIFUGAL EXHAUST FAN, 4910 CFM, 23blank SQUARE OR ROUND, ROOF OR WALL MOUNTED	\$13,874.00	\$0.00
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	AB154161	UPGRADE TO DDC CONTROL SYSTEM FOR HVAC UPGRADE TO DDC CONTROL SYSTEM FOR HVAC FROM	\$119,497.00	\$0.00
<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	AB154165	REPLACE CARPET	\$14,664.00	\$0.00

Save
Cancel

7. Click the **Save** button. The Project Details screen is displayed with a confirmation message that the project record is updated. The project status is set to **Closed-Incomplete** in the **Status** field of the Project Details screen.

3.12 Projects Exercises

3.12.1 Projects – Exercise 1: Adding Work Orders to a Project

1. Go to Projects > Browse Projects on the menu bar.
2. Click the **Search** button.
3. Click on a hyperlink in the **Project Number** column.
4. Click the **View** hyperlink next to the **Total Work Orders** field.
5. Click the **Add to Project**  button.
6. Click the **Search** button.
7. Select a work order.
8. Enter the text 'Work Order is suitable for this project' followed by your name and the date in the text field at the bottom of the window.
9. Click the **Save** button.

3.12.2 Projects – Exercise 2: Entering Data for Project Milestones

1. Go to Projects > Browse Projects on the menu bar.
2. Click the **Search** button.
3. Click on a hyperlink in the **Project Number** column.
4. Click on the hyperlink for one of the **Project Milestones**. Ex: Consultation with Bureau of Indian Education, Consultation with Tribe(s) and School, etc.
5. Enter a date for **Scheduled Start Date** (or **Revised Start Date**): _____.
6. Enter a date for **Scheduled End Date** (or **Revised End Date**): _____.
7. Enter a value for **Scheduled Total Cost** (or **Revised Total Cost**): _____.
8. Click the **Save** button.

3.12.3 Projects – Exercise 3: Requesting Funding for a Project

1. Go to Projects > Browse Projects on the menu bar.
2. Click the **Search** button.
3. Click on a hyperlink in the **Project Number** column.
4. Click the **Add Request** button in the Funding Requests section of the screen.
5. Select an **FA Budget Program** from the dropdown.
6. Enter a value (\$5000 or less) in the **Amount** field: _____.
7. Enter some text followed by your name and the date in the **Justification** field.
8. Click the **Save** button.

4 Budget

4.1 Fund Allocation








1. Go to Budget > Fund Allocation on the menu bar.
2. Click the hyperlink for one of the following Programs to view its Functional Area Budget Activity (FABA):
 - Education
 - General Administration
 - OJS/Detention
 - Public Safety and Justice
 - Unfunded

Fund Allocation

Search


2014 2015 **2016** 2017 2018 2019

Education

FABA/FABP	FABA/FABP Description	Carryover (12x, 13x, 14x, 15x)	Appropriation	Recovery	Adjustments	Total Budget Authority	Suballotment	Unsuballotted	
▶ A0E35	Facilities Operations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E45	Facilities Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A1112	Replacement School Construction	\$285,303.93	\$45,504,000.00	\$0.00	\$0.00	\$45,789,303.93	\$190,901.99	\$45,596,401.94	
▶ A1113	Employee Housing Repair	\$1,054,256.09	\$7,565,000.00	\$0.00	\$0.00	\$8,619,256.09	\$2,213,519.95	\$6,405,736.14	
▶ A1114	Facilities Improvement & Repair	\$863,754.88	\$73,241,000.00	\$0.00	\$0.00	\$74,104,754.88	\$20,698,505.84	\$53,406,249.04	
▶ A1116	Replacement Facility Construction	\$789,667.30	\$11,935,000.00	\$0.00	\$0.00	\$12,724,667.30	\$0.00	\$12,724,667.30	
▶ A1118	Fire Protection and Safety Coordination	\$1,396,067.71	\$3,440,000.00	\$0.00	\$0.00	\$4,836,067.71	\$1,799,287.52	\$3,036,780.19	
FABA Totals		\$4,389,049.91	\$141,685,000.00	\$0.00	\$0.00	\$146,074,049.91	\$24,902,215.30	\$121,171,834.61	

General Administration

OJS/Detention

3. Click the **Edit**  button in the row of the FABA to allocate funding to. The following fields become editable:
 - Carryover
 - Appropriation
 - Recovery
 - Adjustments

Fund Allocation

2014 2015 **2016** 2017 2018 2019

Education

FABA/FABP	FABA/FABP Description	Carryover (12x, 13x, 14x, 15x)	Appropriation	Recovery	Adjustments	Total Budget Authority	Suballotment	Unsuballotted	
▶ A0E35	Facilities Operations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E45	Facilities Maintenance	\$ 12000.00	\$ 11000.00	\$ 8000.00	\$ 6250.00	\$37,250.00	\$0.00	\$37,250.00	
▶ A1112	Replacement School Construction	\$285,303.93	\$3,958,094.00	\$0.00	\$0.00	\$4,243,397.93	\$0.00	\$4,243,397.93	
▶ A1113	Employee Housing Repair	\$1,053,827.23	\$750,399.00	\$0.00	\$0.00	\$1,804,226.23	\$58,000.00	\$1,746,226.23	
▶ A1114	Facilities Improvement & Repair	\$891,284.17	\$7,414,962.00	\$0.00	\$0.00	\$8,306,246.17	\$1,679,787.73	\$6,626,458.44	
▶ A1116	Replacement Facility Construction	\$789,667.30	\$0.00	\$0.00	\$0.00	\$789,667.30	\$0.00	\$789,667.30	
▶ A1118	Fire Protection and Safety Coordination	\$1,310,063.87	\$442,638.00	\$0.00	\$0.00	\$1,752,701.87	\$0.00	\$1,752,701.87	
FABA Totals		\$4,342,146.50	\$12,577,093.00	\$8,000.00	\$6,250.00	\$16,933,489.50	\$1,737,787.73	\$15,195,701.77	

4. Enter/update the funding amounts for the FABA in the editable fields and click the **Save**
5. Once funding has been allocated to the FABA, it can then be allocated to its Functional Area Budget Programs (FABPs). To view an FABA's FABPs, click the arrow next to the FABA.

Education

FABA/FABP	FABA/FABP Description	Carryover (12x, 13x, 14x, 15x)	Appropriation	Recovery	Adjustments	Total Budget Authority	Suballotment	Unsuballotted	
▶ A0E35	Facilities Operations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▼ A0E45	Facilities Maintenance	\$12,000.00	\$11,000.00	\$8,000.00	\$6,250.00	\$37,250.00	\$0.00	\$37,250.00	
▶ A0E450000	Facilities Maintenance	\$4,000.00	\$8,000.00	\$4,300.00	\$2,000.00	\$18,300.00	\$0.00	\$18,300.00	
▶ A0E450101	Preventative Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450102	Unscheduled Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450103	Site Maintenance Support	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450104	Protection Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450105	Maintenance of Facilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450106	Pest Control	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450107	Refuse Disposal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
▶ A0E450108	Training	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
A0E45 FA Budget Program Totals		\$4,000.00	\$8,000.00	\$4,300.00	\$2,000.00	\$18,300.00	\$0.00	\$18,300.00	
▶ A1112	Replacement School Construction	\$285,303.93	\$3,958,094.00	\$0.00	\$0.00	\$4,243,397.93	\$0.00	\$4,243,397.93	

6. Click the **Edit** button in the row of the FBP to allocate funding to.
7. Enter/update the funding amounts for the FBP in the editable fields and click the **Save**

4.2 Funding Documents

4.2.1 Browsing Approved Funding Requests

1. Go to Budget > Browse Funding Requests on the menu bar.

Approved Funding Requests

Search
Reset

▼ Search Criteria

Project Number	<input type="text"/>	...
Control Number	<input type="text"/>	...
FA Budget Program	<input type="text"/>	...
Amount	<input type="text"/>	...
Fiscal Year	<input type="text"/>	...
Justification	<input type="text"/>	...
Fund Center	<input type="text"/>	...
WBS	<input type="text"/>	...
Fund	<input type="text"/>	...
In Funding Document	1 selected ▼	
Funding Document	<input type="text"/>	...
Programmatic Funding	None selected ▼	

Search
Reset

▼ Display Options

Number of Rows per Page:	<input type="text" value="25"/>
First Sort Column:	Fiscal Year ▼ DESC ▼
Second Sort Column:	ASC ▼

2. Enter any valid Approved Funding Request search criteria and click the **Search** button. The Approved Funding Requests search results are displayed.

Approved Funding Requests

Previous
Next
1 - 7 of 7 results (page 1 / 1)


▶
↺
🔍
📄

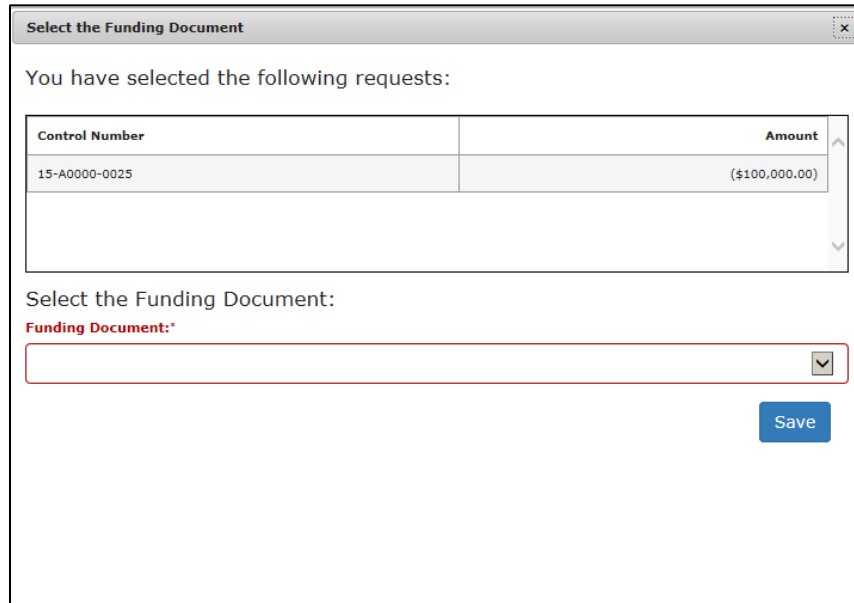
Project Number	Control Number	FA Budget Program	Amount	Fiscal Year ▼ 1	Justification	Fund Center	WBS	Fund	In Funding Document	Funding Document
		A0000NEW							1 selecte	
	17-A0000-0001	A0000NEW	\$15,371.36	2017	approval test	AABB003100	AX.123000XT.00000000000	089A2100RM	Yes	10
	16-A0000-0002	A0000NEW	\$123.00	2016	test	AAHH611010	AX.00000000.00000000000	99XA4415GF	Yes	21
G09S55210100002	15-A0000-0021	A0000NEW	\$100.00	2015	fund center test	AAAA001010	AN.0030898.G0910558100	089A2100DD	Yes	33
G09S55210100002	15-A0000-0023	A0000NEW	\$2.00	2015	Yes WBS test - John	AAAA003100	AN.0030898.G0910558100	00XA477778	Yes	11
G09MM4510100001	15-A0000-0027	A0000NEW	\$100.00	2015		AAAA001060	AN.0030191.G0910745900	090A2100FF	Yes	8
	15-A0000-0051	A0000NEW	\$1.00	2015	1	AAAA001010	AX.MAXIMO16.00000000000	00XA477778	Yes	24
	15-A0000-0060	A0000NEW	\$10.00	2015	3434	AAAA001010	AX.43432423.00000000000	05XA4415GF	Yes	32

Previous
Next

▶
↺
🔍
📄

4.2.2 Adding an Approved Funding Request to a Funding Document

1. On the Approved Funding Requests screen, click the funding request records that you want to add to the new funding document.
2. Click the **Add to Funding Document**  button in the top right corner of the screen. The Select the Funding Document pop-up is displayed.



Select the Funding Document

You have selected the following requests:

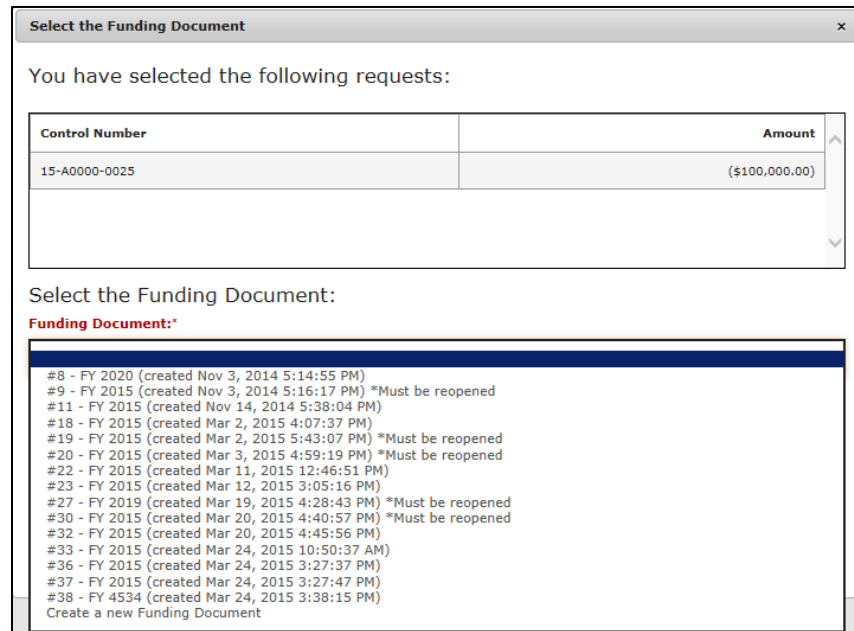
Control Number	Amount
15-A0000-0025	(\$100,000.00)

Select the Funding Document:

Funding Document:*

Save

3. Click in the **Funding Document** field. A drop-down list of available funding documents is displayed.



Select the Funding Document

You have selected the following requests:

Control Number	Amount
15-A0000-0025	(\$100,000.00)


Select the Funding Document:

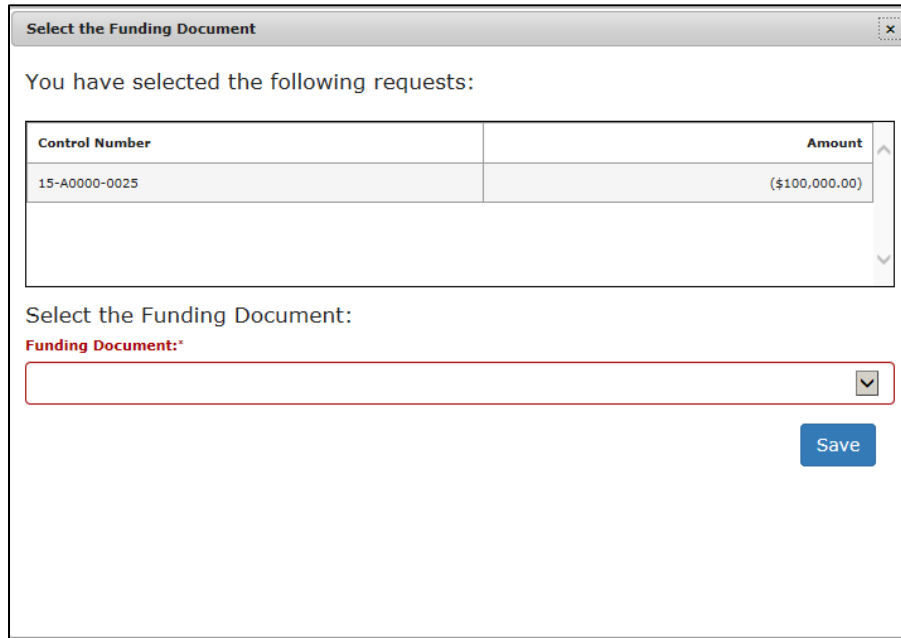
Funding Document:*

- #8 - FY 2020 (created Nov 3, 2014 5:14:55 PM)
- #9 - FY 2015 (created Nov 3, 2014 5:16:17 PM) *Must be reopened
- #11 - FY 2015 (created Nov 14, 2014 5:38:04 PM)
- #18 - FY 2015 (created Mar 2, 2015 4:07:37 PM)
- #19 - FY 2015 (created Mar 2, 2015 5:43:07 PM) *Must be reopened
- #20 - FY 2015 (created Mar 3, 2015 4:59:19 PM) *Must be reopened
- #22 - FY 2015 (created Mar 11, 2015 12:46:51 PM)
- #23 - FY 2015 (created Mar 12, 2015 3:05:16 PM)
- #27 - FY 2019 (created Mar 19, 2015 4:28:43 PM) *Must be reopened
- #30 - FY 2015 (created Mar 20, 2015 4:40:57 PM) *Must be reopened
- #32 - FY 2015 (created Mar 20, 2015 4:45:56 PM)
- #33 - FY 2015 (created Mar 24, 2015 10:50:37 AM)
- #36 - FY 2015 (created Mar 24, 2015 3:27:37 PM)
- #37 - FY 2015 (created Mar 24, 2015 3:27:47 PM)
- #38 - FY 4534 (created Mar 24, 2015 3:38:15 PM)
- Create a new Funding Document

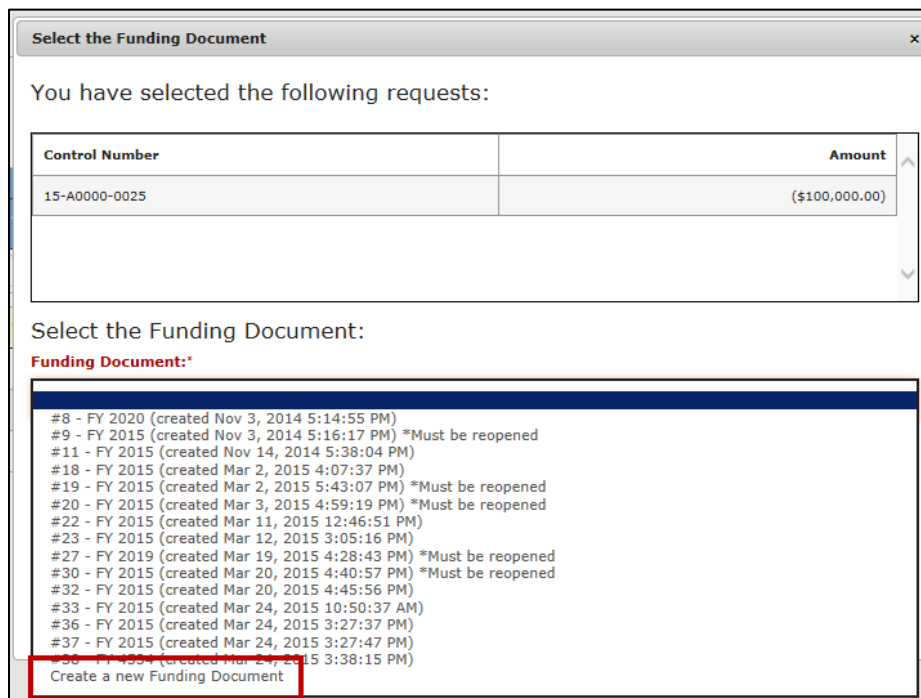
4. To add the approved Funding Request to an existing Funding Document, select the Funding Document and click the **Save** button. A confirmation message is displayed indicating that the request was added to the selected Funding Document.

4.2.3 Creating a New Funding Document

1. On the Approved Funding Requests screen, click the funding request records that you want to add to the new funding document.
2. Click the **Add to Funding Document**  button in the top right corner of the screen. The Select the Funding Document pop-up is displayed.



3. In the **Funding Document** field, select 'Create a New Funding Document'. This will cause the **Fiscal Year** field to be displayed on the Select the Funding Document pop-up.



- If necessary, update the value in the **Fiscal Year** field.

Note: The **Fiscal Year** field is populated with the current Fiscal Year by default.

Select the Funding Document ×

You have selected the following requests:

Control Number	Amount
15-A0000-0025	(\$100,000.00)

Select the Funding Document:

Funding Document:*

Create a new Funding Document ▼

Fiscal Year:*

2015

Save

- Click the **Save** button. A confirmation message is displayed indicating that the funding requests were added to the new funding document.

4.2.4 Viewing Funding Document Details

1. Go to Budget > Browse Funding Documents on the menu bar.

The screenshot shows the 'Funding Documents' search interface. It features a search bar with 'Search' and 'Reset' buttons. Below is a 'Search Criteria' section with various filters: Funding Document, Date Created, Fiscal Year, Justification, Is BO Approved (None selected), BO Approval Date, Is PM Approved (None selected), PM Approval Date, Is DD Approved (None selected), DD Approval Date, Is O&M Funding Document (None selected), and Rejection Comment. At the bottom, the 'Display Options' section shows 'Number of Rows per Page' set to 25 and 'First Sort Column' set to Fiscal Year with a 'DESC' sort order.

2. Enter any valid search criteria and click the **Search** button.

The screenshot shows the search results for 'Funding Documents'. The table has columns for Funding Document, Date Created, Fiscal Year, Justification, Is BO Approved, BO Approval Date, Is PM Approved, PM Approval Date, Is DD Approved, and DD Approval Date. The results are sorted by Fiscal Year in descending order. A red box highlights the 'Funding Document' column, which contains hyperlinks for each document.

Funding Document	Date Created	Fiscal Year	Justification	Is BO Approved	BO Approval Date	Is PM Approved	PM Approval Date	Is DD Approved	DD Approval Date
1	2014-12-05 13:34:54.053	2020		Approved	07/23/2015	Approved	07/23/2015	Pending	
17	2015-04-29 13:28:40.07	2015		Pending		Approved	04/29/2015	Pending	
18	2015-04-30 11:45:47.377	2015		Pending		Approved	04/30/2015	Pending	
19	2015-07-16 09:35:49.17	2015		Approved	07/16/2015	Approved	07/16/2015	Approved	07/16/2015
20	2015-07-22 10:56:18.207	2015		Approved	07/23/2015	Pending		Pending	
21	2015-07-24 10:08:28.56	2015		Pending		Pending		Pending	
7	2014-12-10 12:43:38.29	2015		Pending		Pending		Pending	
8	2014-12-16 11:45:24.383	2015	jkl;	Approved	12/16/2014	Approved	12/16/2014	Approved	12/16/2014
9	2014-12-16 14:53:32.737	2015		Pending		Rejected	12/16/2014	Pending	
10	2014-12-17 11:03:17.527	2015		Rejected	07/24/2015	Pending		Pending	
11	2014-12-18 18:17:36.533	2015		Pending		Rejected	12/18/2014	Pending	
12	2015-02-02 10:25:32.463	2015		Pending		Pending		Pending	

3. Click the hyperlink in the **Funding Document** field to view its Funding Document Details.

Funding Document #21 Details

Edit

Approval Status: **Pending Budget Officer Approval**
 Requesting Organization:
 Authority:
 Application of Burden Rate:
 Application of Burden Rate Document:
 [not uploaded] [Upload](#)
 Conditions:
 Division That Must Approve: **PLANNING & PROGRAMMING**
 Office That Must Approve: **DEPUTY DIRECTOR**
 Justification:
 Justification Document:
 [not uploaded] [Upload](#)

Process:
 Authority Request:
 Doc Type:
 Fiscal Year: **2015**
 Version:
 Doc Date:
 Posting Date:
 Posting Period:
 Person Responsible:

Doc Type	Functional Area Title	Fund Code	Fund Center	Functional Area	Amount
	FACILITIES IMPROVMENT/REP	135A2100RM		A11140000.000000	(\$798.00)
	FACILITIES IMPROVMENT/REP	135A2100RM	AAAA000000	A11140000	\$798.00

Total + Request = \$798.00

Total - Request = (\$798.00)

Total Net = \$0.00

4.2.5 Enter and/or Update Funding Document Details

1. On the Funding Document Details screen, click the **Edit** button in the top right corner. The Edit Funding Document Details screen is displayed.

Edit Funding Document #21 Details

<p>Requesting Organization: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Authority:</p> <ul style="list-style-type: none"> <input type="radio"/> THESE FUNDS ARE MADE AVAILABLE PURSUANT TO H.R. 83, P.L. 113-235, CONSOLIDATED AND FURTHER CONTINUING APPROPRIATIONS ACT, 2015 FOR THE FISCAL YEAR ENDING SEPTEMBER 30, 2015. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2016. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED. <input type="radio"/> THESE FUNDS ARE MADE AVAILABLE PURSUANT TO H.R. 3547, P.L. 113-76, CONSOLIDATED APPROPRIATIONS ACT, 2014 FOR THE FISCAL YEAR ENDING SEPTEMBER 30, 2014. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2015. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED. <input type="radio"/> THESE FUNDS ARE MADE AVAILABLE PURSUANT TO P.L. 113-6 (H.R. 933), CONSOLIDATED AND FURTHER CONTINUING APPROPRIATIONS ACT, 2013. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2014. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED. <input type="radio"/> THESE FUNDS ARE MADE AVAILABLE PURSUANT TO H.R. 2055, P.L. 112-74, CONSOLIDATED APPROPRIATIONS ACT, 2012 FOR THE FISCAL YEAR ENDING SEPTEMBER 30, 2012. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2013. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED. <input type="radio"/> THESE FUNDS ARE MADE AVAILABLE PURSUANT TO P.L. 112-141, MOVING AHEAD FOR PROGRESS IN THE 21ST CENTURY ACT. FUNDS ARE AVAILABLE UNTIL EXPENDED. <input type="radio"/> REIMBURSABLE AUTHORITY IS AUTHORIZED BY (SPECIFY) <input type="radio"/> OTHER (SPECIFY) <p>Application of Burden Rate: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Application of Burden Rate Document: <small>[not uploaded]</small> Upload</p> <p>Conditions: <input style="width: 90%; height: 20px;" type="text"/></p>	<p>Division That Must Approve: <input style="width: 90%; height: 20px; border: 1px solid gray;" type="text" value="PLANNING & PROGRAMMING"/></p> <p>Office That Must Approve: <input style="width: 90%; height: 20px; border: 1px solid gray;" type="text" value="DEPUTY DIRECTOR"/></p> <p>Justification: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Justification Document: <small>[not uploaded]</small> Upload</p> <p>Process: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Authority Request: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Doc Type: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Fiscal Year: <input style="width: 90%; height: 20px;" type="text" value="2015"/></p> <p>Version: <input style="width: 90%; height: 20px;" type="text"/></p> <p>Doc Date: <input style="width: 90%; height: 20px;" type="text" value="MM/DD/YYYY"/></p> <p>Posting Date: <input style="width: 90%; height: 20px;" type="text" value="MM/DD/YYYY"/></p> <p>Person Responsible: <input style="width: 90%; height: 20px;" type="text"/></p>
--	--

2. Enter and/or select information about the funding document for all required fields and any additional fields.
3. Click the **Save** button. A confirmation message is displayed indicating that the Funding Document was saved.

4.2.6 Uploading Files in Support of a Funding Document

1. Go to the Funding Document Details screen.

Funding Document #21 Details Edit

Approval Status: **Pending Budget Officer Approval**

Requesting Organization: **AAK3-Deputy Director, Office of Indian Services**

Authority: **THESE FUNDS ARE MADE AVAILABLE PURSUANT TO H.R. 3547, P.L. 113-76, CONSOLIDATED APPROPRIATIONS ACT, 2014 FOR THE FISCAL YEAR ENDING SEPTEMBER 30, 2014. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2015. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED.**

Application of Burden Rate:
Application of Burden Rate Document: [not uploaded] [Upload](#)

Conditions:
Division That Must Approve: **PLANNING & PROGRAMMING**
Office That Must Approve: **DEPUTY DIRECTOR**

Justification:
Justification Document: [not uploaded] [Upload](#)

Process: **Return**

Authority Request:

Doc Type:

Fiscal Year: **2015**

Version: **01**

Doc Date:

Posting Date:

Posting Period:

Person Responsible:

Version 0 Version 1

Doc Type	Functional Area Title	Fund Code	Fund Center	Functional Area	Amount
	FACILITIES IMPROVMENT/REP	135A2100RM	AAK3000000	A11140000.000000	(\$798.00)
	FACILITIES IMPROVMENT/REP	135A2100RM	AAAA000000	A11140000.000000	\$798.00

Total + Request = \$798.00 Total - Request = (\$798.00) Total Net = \$0.00

2. Click the **Upload** hyperlink in the **Application Rate of Burden Document** or **Justification Document** field. The Upload File window is displayed.

Upload File

File*: Choose File | No file chosen

Document Name*:

Classification*: App. of Burden Rate

Funding Document ID: 21

File Access Rights

Read*: All

Write*: Owner

Either the Project Number or User Access Region(s) must be specified.

Project Number:

User Access Region(s)

- ALASKA
- CENTRAL OFFICE
- EASTERN
- EASTERN OKLAHOMA
- GREAT PLAINS
- MIDWEST
- NAVAJO
- NORTHWEST
- PACIFIC
- ROCKY MOUNTAIN
- SOUTHERN PLAINS
- SOUTHWEST
- Test Region
- WESTERN

Author Name*:

Document Description*:

300 characters left

Save Reset

3. Click the **Browse/Choose File** button next to the File field.

4. Select the file to upload.
5. Enter values in all of the required fields.
6. Click the **Save** button. A confirmation message is displayed indicating that the ELibrary document was saved.

4.2.7 Approving a Funding Document

Note: A pending approval funding document must be approved by a Budget Officer (BO) first, a Program Manager (PM) second, and a Deputy Director (DD) third. If one’s level of authority is second or third, one cannot approve or reject the funding document before it is approved by the level of approval that comes before it in the sequence.

1. Go to Budget > Browse Funding Documents on the menu bar.

The screenshot shows the 'Funding Documents' search and display options interface. It includes a search bar with 'Search' and 'Reset' buttons, a search criteria section with fields for Funding Document, Date Created, Fiscal Year, Justification, Is BO Approved, BO Approval Date, Is PM Approved, PM Approval Date, Is DD Approved, DD Approval Date, Is O&M Funding Document, and Rejection Comment. Below the search criteria is a display options section with fields for Number of Rows per Page (set to 25) and First Sort Column (set to Fiscal Year, DESC).

2. Enter any valid search criteria and click the **Search** button.
3. Select the row of the funding document to be approved. The selected row will be highlighted.

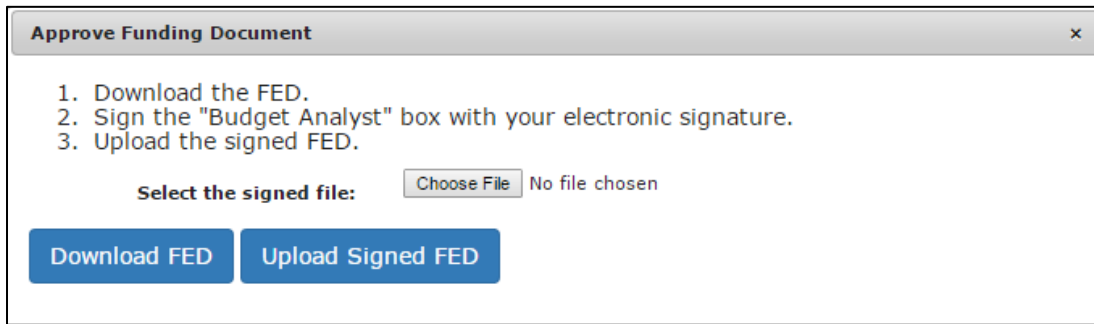
Note: One can identify how far along the funding document is in the approval process by looking at its status in the Is BO Approved, Is PM Approved, and Is DD Approved fields. The fields correspond to Budget Officer Approval, Program Manager Approval, and Deputy Director Approval.

The screenshot shows the 'Funding Documents' table with search results. The table has columns for Funding Document, Date Created, Fiscal Year, Justification, Is BO Approved, BO Approval Date, Is PM Approved, PM Approval Date, Is DD Approved, and DD Approval Date. The table shows 16 results, with the first row selected. A red arrow points to the 'Approve' button in the top right corner of the table.

Funding Document	Date Created	Fiscal Year	Justification	Is BO Approved	BO Approval Date	Is PM Approved	PM Approval Date	Is DD Approved	DD Approval Date
				1 selected		None selec		None selec	
Z	2014-12-10 12:43:38.29	2015		Pending		Pending		Pending	
9	2014-12-16 14:53:32.737	2015		Pending		Rejected	12/16/2014	Pending	
11	2014-12-18 18:17:36.533	2015		Pending		Rejected	12/18/2014	Pending	
17	2015-04-29 13:28:40.07	2015		Pending		Approved	04/29/2015	Pending	
18	2015-04-30 11:45:47.377	2015		Pending		Approved	04/30/2015	Pending	

4. Click the **Approve**  button. The Approve Funding Document pop-up is displayed.

5. Click the **Download FED** button in the **Approve Funding Document** popup window.



Approve Funding Document x

1. Download the FED.
2. Sign the "Budget Analyst" box with your electronic signature.
3. Upload the signed FED.

Select the signed file: No file chosen

6. Open the PDF file, enter your electronic signature in the Electronic Signature text field and save the file.
7. Return to the Approve Funding Document popup window.
8. Click the **Browse/Choose File** button and select the signed FED file.

Note: The exact name of the button depends on the browser being used.

9. Click the **Upload Signed FED** button to upload the file. Once the signed FED is uploaded, the funding document will be approved.

Note: The funding document is passed to the next level of approval in the following sequential order: Budget Officer > Program Manager > Deputy Director. The same approval process is followed at every level of approval.

10. Once the funding document is approved at the Deputy Director level, the document is ready to be exported so it can be uploaded into FBMS.

4.2.8 Rejecting a Funding Document

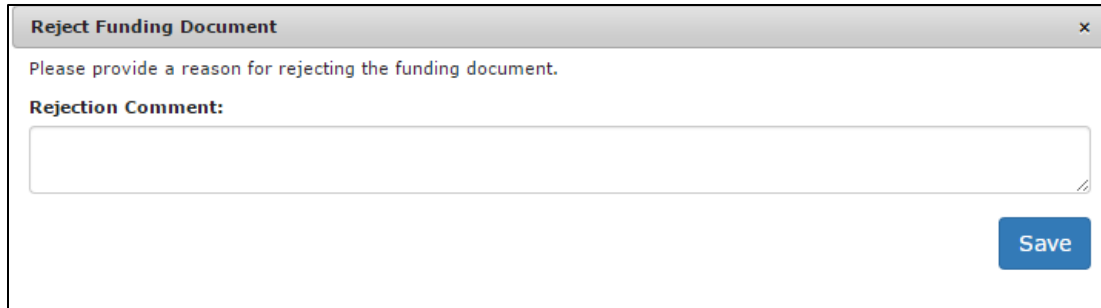
1. Go to Budget > Browse Funding Documents on the menu bar.

2. Enter any valid search criteria and click the **Search** button.
3. Select the row of the funding document to be approved or rejected. The selected row will be highlighted.

Note: You can identify how far along the funding document is in the approval process by looking at its status in the Is BO Approved, Is PM Approved, and Is DD Approved fields. The fields correspond to Budget Officer Approval, Program Manager Approval, and Deputy Director Approval.

Funding Document	Date Created	Fiscal Year	Justification	Is BO Approved	BO Approval Date	Is PM Approved	PM Approval Date	Is DD Approved	DD Approval Date
				1 selected		None selec		None selec	
2	2014-12-10 12:43:38.29	2015		Pending		Pending		Pending	
9	2014-12-16 14:53:32.737	2015		Pending		Rejected	12/16/2014	Pending	
11	2014-12-18 18:17:36.533	2015		Pending		Rejected	12/18/2014	Pending	
17	2015-04-29 13:28:40.07	2015		Pending		Approved	04/29/2015	Pending	
18	2015-04-30 11:45:47.377	2015		Pending		Approved	04/30/2015	Pending	

4. Click the **Reject**  button. The Reject Funding Document pop-up is displayed.



The screenshot shows a dialog box titled "Reject Funding Document" with a close button (x) in the top right corner. Below the title bar, the text "Please provide a reason for rejecting the funding document." is displayed. Underneath, the label "Rejection Comment:" is followed by a large, empty text input field. In the bottom right corner of the dialog, there is a blue button labeled "Save".

5. Enter a reason for rejecting the funding document in the **Rejection Comment** field.
6. Click the **Save** button. A confirmation message is displayed indicating that the funding document was rejected.

4.2.9 Exporting the FBMS Entry Document (FED)

1. Go to Budget > Browse Funding Documents on the menu bar.

The screenshot shows the 'Funding Documents' search interface. It includes a search bar with 'Search' and 'Reset' buttons. Below is a 'Search Criteria' section with various filters: Funding Document, Date Created, Fiscal Year, Justification, Is BO Approved (None selected), BO Approval Date, Is PM Approved (None selected), PM Approval Date, Is DD Approved (None selected), DD Approval Date, Is O&M Funding Document (None selected), and Rejection Comment. At the bottom, the 'Display Options' section shows 'Number of Rows per Page' set to 25 and 'First Sort Column' set to Fiscal Year with a 'DESC' sort order.

2. Enter any valid search criteria and click the **Search** button.

The screenshot shows the search results for 'Funding Documents'. The table has 11 columns: Funding Document, Date Created, Fiscal Year, Justification, Is BO Approved, BO Approval Date, Is PM Approved, PM Approval Date, Is DD Approved, and DD Approval Date. The results show 21 items, with the first few rows highlighted in a red box. The table is sorted by Fiscal Year in descending order.

Funding Document	Date Created	Fiscal Year	Justification	Is BO Approved	BO Approval Date	Is PM Approved	PM Approval Date	Is DD Approved	DD Approval Date
1	2014-12-05 13:34:54.053	2020		Approved	07/23/2015	Approved	07/23/2015	Pending	
17	2015-04-29 13:28:40.07	2015		Pending		Approved	04/29/2015	Pending	
18	2015-04-30 11:45:47.377	2015		Pending		Approved	04/30/2015	Pending	
19	2015-07-16 09:35:49.17	2015		Approved	07/16/2015	Approved	07/16/2015	Approved	07/16/2015
20	2015-07-22 10:56:18.207	2015		Approved	07/23/2015	Pending		Pending	
21	2015-07-24 10:08:28.56	2015		Pending		Pending		Pending	
7	2014-12-10 12:43:38.29	2015		Pending		Pending		Pending	
8	2014-12-16 11:45:24.383	2015	jkl;	Approved	12/16/2014	Approved	12/16/2014	Approved	12/16/2014
9	2014-12-16 14:53:32.737	2015		Pending		Rejected	12/16/2014	Pending	
10	2014-12-17 11:03:17.527	2015		Rejected	07/24/2015	Pending		Pending	
11	2014-12-18 18:17:36.533	2015		Pending		Rejected	12/18/2014	Pending	
12	2015-02-02 10:25:32.463	2015		Pending		Pending		Pending	

3. Click the hyperlink in the **Funding Document** field to view its Funding Document Details.

Funding Document #21 Details

[Edit](#)
[Download PDF](#)
[Export to Excel](#)

Approval Status: **Fully Approved**
 Requesting Organization: **AAK3-Deputy Director, Office of Indian Services**
 Authority: **THESE FUNDS ARE MADE AVAILABLE PURSUANT TO H.R. 3547, P.L. 113-76, CONSOLIDATED APPROPRIATIONS ACT, 2014 FOR THE FISCAL YEAR ENDING SEPTEMBER 30, 2014. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2015. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED.**
 Application of Burden Rate:
 Application of Burden Rate Document: [App of Burden](#)
 Conditions:
 Division That Must Approve: **PLANNING & PROGRAMMING**
 Office That Must Approve: **DEPUTY DIRECTOR**
 Justification:
 Justification Document:
 [not uploaded] [Upload](#)

Process: **Return**
 Authority Request:
 Doc Type:
 Fiscal Year: **2015**
 Version: **01**
 Doc Date:
 Posting Date:
 Posting Period:
 Person Responsible:

Version 0 Version 1

Doc Type	Functional Area Title	Fund Code	Fund Center	Functional Area	Amount
	FACILITIES IMPROVMENT/REP	135A2100RM	AAK3000000	A11140000.000000	(\$798.00)
	FACILITIES IMPROVMENT/REP	135A2100RM	AAAA000000	A11140000.000000	\$798.00

Total + Request = \$798.00 Total - Request = (\$798.00) Total Net = \$0.00

4. Click the **Download PDF** button. The FBMS Entry Document (FED) PDF document will be downloaded.

Funding Document #21 Details

[Edit](#)
[Download PDF](#)
[Export to Excel](#)

Approval Status: **Fully Approved**
 Requesting Organization: **AAK3-Deputy Director, Office of Indian Services**
 Authority: **THESE FUNDS ARE MADE AVAILABLE PURSUANT TO H.R. 3547, P.L. 113-76, CONSOLIDATED APPROPRIATIONS ACT, 2014 FOR THE FISCAL YEAR ENDING SEPTEMBER 30, 2014. FUNDS ARE AVAILABLE THROUGH SEPTEMBER 30, 2015. NO YEAR FUNDS ARE AVAILABLE UNTIL EXPENDED.**
 Application of Burden Rate:
 Application of Burden Rate Document: [App of Burden](#)
 Conditions:
 Division That Must Approve: **PLANNING & PROGRAMMING**
 Office That Must Approve: **DEPUTY DIRECTOR**
 Justification:
 Justification Document:
 [not uploaded] [Upload](#)

Process: **Return**
 Authority Request:
 Doc Type:
 Fiscal Year: **2015**
 Version: **01**
 Doc Date:
 Posting Date:
 Posting Period:
 Person Responsible:

Version 0 Version 1

Doc Type	Functional Area Title	Fund Code	Fund Center	Functional Area	Amount
	FACILITIES IMPROVMENT/REP	135A2100RM	AAK3000000	A11140000.000000	(\$798.00)
	FACILITIES IMPROVMENT/REP	135A2100RM	AAAA000000	A11140000.000000	\$798.00

Total + Request = \$798.00 Total - Request = (\$798.00) Total Net = \$0.00


5. Click the **Export to Excel** button. The FBMS Entry Document (FED) Excel document will be downloaded.

4.3 Budget Exercises

4.3.1 Budget – Exercise 1: Browsing Pending Funding Requests

1. Go to Budget > Funding Requests Pending Approval > Project Funding Requests on the menu bar.
2. Enter your funding request value in the **Amount** Search Criteria field.
3. Click the **Search** button.

4.3.2 Budget – Exercise 2: Browsing Approved Funding Requests

1. Go to Budget > Browse Funding Requests on the menu bar.
2. Click the **Search** button.
3. Review the Funding Requests that are available.
4. Use one of the search fields below a column heading to filter the results. Ex: Type an existing Project Number into the **Project Number** field and click the **Search**  button.

4.3.3 Budget – Exercise 3: Viewing Funding Document Details

1. Go to Budget > Browse Funding Documents on the menu bar.
2. Click the **Search** button.
3. Click on the hyperlink in the **Funding Document** column for one of the rows.
4. Review the Funding Document Details.

5 Reports

5.1 Project Progress Report

1. Go to Projects > Project Progress Report on the menu bar.

Project Progress Report

Project:

Status:

2. To filter by Project number, click in the **Project** drop-down field. The project numbers of all available projects are displayed.
3. Select the Projects to include with the checkboxes next to the Project Numbers.
Note: Click Select All to check all projects. To search for a project, type into the search field and the list will be filtered.
4. To filter by Project Status, select the statuses to include in the **Status** field.
5. Click the **Search** button. The Project Progress Report results screen is displayed.

Project Progress Report

▶ New	2
▶ In Progress	1
▶ Closed - Incomplete	2

6. On the Project Progress Report results screen, click the status of projects you want to view. The list of projects is displayed.

Project Progress Report

▼ New	2
▶ E01CC5110100001	
▶ E01CC5110100004	
▶ In Progress	1
▶ Closed - Incomplete	2

7. Click the Project Number hyperlink of the project to view its details.

[E05DD32N1700001](#)

Title: **Improvement and Repair: AB107565** Planning FY: **2016**
 Status: **New** Design FY: **2017**
 Phase: **Pre-Planning** Construction FY: **2018**
 Program Funding Type: **E05 Education - MI&R** Total Estimated Cost: **\$0.00**
 Pending Changes: **Yes** Funds Used to Date: **\$0.00**
 Emergency Project: **No** Remaining Funds: **\$0.00**
 Portable: **Yes**
 Ownership of Asset: **BIA**
 Description:
 Need/Benefit:
 Pre-Planning

Milestone/Task	Scheduled Start Date	Scheduled End Date	Scheduled Total Cost	Revised Start Date	Revised End Date	Revised Total Cost	Actual Start Date	Actual End Date	Actual Total Cost	Physical Percent Complete	Status
Consultation with Bureau of Indian Education	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Enrollment Projections on file	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Consultation with Tribe(s) and School	07/27/2015	07/31/2015	\$1,500.00	07/27/2015	07/31/2015	\$1,500.00			\$0.00	75%	In Progress
Tribal Consultation Letter issued			\$0.00			\$0.00			\$0.00	0%	New
Tribal Resolution and Letter received			\$0.00			\$0.00			\$0.00	0%	New
Obtain confirmation of FTEs for occupancy of school			\$0.00			\$0.00			\$0.00	0%	New
If tribe requests 297 procurement method AND project cost estimate >= \$100K, need Organizational Capacity Review			\$0.00			\$0.00			\$0.00	0%	New
If tribe requests 638, verify that they are not on any list of the			\$0.00			\$0.00			\$0.00	0%	New

8. Click the **Export to Excel** button to download an Excel file of the Project Progress Report.

5.2 Functional Area Budget Activity (FABA) Distribution Report

1. Go to Budget > FA Budget Activity Distribution Report on the menu bar. The Functional Area Budget Activity Distribution Report screen is displayed.

The screenshot shows a web interface for the Functional Area Budget Activity Distribution Report. At the top left, there is a blue button labeled "Export to Excel". At the top right, there is a dropdown menu showing the year "2015". Below this is a light blue header bar with the word "Education". Underneath, a green header bar displays "A1112 - Replacement School Construction". The main content is a table with the following columns: "FA Budget Program", "Funding", "Appropriation", "Recovery", "Adjustments", "Total Budget Authority", "Suballotment", and "Unsuballotted". The table lists 17 budget programs, all with values of \$0.00 except for the first one, which has a Total Budget Authority of \$1.00.

FA Budget Program	Funding	Appropriation	Recovery	Adjustments	Total Budget Authority	Suballotment	Unsuballotted
A11120000 - Replacement School Construction	\$0.00	\$1.00	\$0.00	\$0.00	\$1.00	\$1.00	\$0.00
A11121010 - Building, Sites & Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11121111 - Construction Academic	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11121212 - Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11121313 - Dormitories	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11121414 - Quarters Education	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11121515 - Bus Garage/Maintenance Shop	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11121616 - Site/Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11122020 - Contingency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11122929 - Tribal Administration	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11123030 - Management & Inspection	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11122121 - Project Management	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11122525 - Program Management	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11124040 - Advance Planning and Design	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A11124111 - Planning	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

2. Click the **Export to Excel** button to download an Excel file of the FABA Distribution Report.