

BLM AZ BUDGET TOOL

<http://web.az.blm.gov/azbudget/planning/index.cfm>



BLM Arizona Budget Tool -- You are working in **FY 2015 Data** [Change FY](#)

Arizona State Office Budget Shop



		
Mark Harner Budget Analyst	Angie Meece Budget Analyst	Bianca Spilde Mgmt & Prog Specialist

WHY IS THIS TRAINING IMPORTANT?

- AZ Budget Tool updated to facilitate the Copying and/or Deletion of Tasks.
- This training video will provide users with in-depth knowledge and the ability to utilize this new upgrade to it's fullest extent.




LESSON OBJECTIVES 

- By the completion of this lesson and with the use of a computer, employees will be able to demonstrate the ability to:
 - Discuss the background issues which necessitated this upgrade to the database.
 - Discuss User Access types as related to this upgrade
 - Determine the best available method(s) to copy and/or delete multiple Tasks over multiple Fiscal Years
 - Copy individual Tasks within and to Future FYs

COURSE MAP 

- **Powerpoint Presentation**
 - Provide Background Information regarding the issues and updates with the Fiscal Copy process
 - Provide Refresher of the Tool's User Roles and how these Roles relate to the recent upgrade.
- **Live Demo!**
 - Demonstrate process for Fiscal Copy of ALL Tasks
 - Demonstrate how to Delete ALL Fiscal Year Tasks for specified Criteria
 - Demonstrate Copying individual Tasks within a FY or from one FY to another.

**FISCAL COPY OF TASKS
BACKGROUND INFORMATION**



**SPRING 2014
FY15 PTA PROCESS**

- SBT and State Leadership determined AZ to operate with 3 year Budget Planning Process
- Using FY14 (current FY) as the model, FYs 15, 16 & 17 tasks were created based on those FY14 Tasks.
- This procedure put AZ on the path to 3 FY planning in the Tool, but the process must not stop there.

3-YEAR BUDGET PLAN



- Simply having three fiscal years in the Tool does **NOT** qualify as a 3 year Budget Planning Process
- There needs to be an ongoing review, update and management of all three years.
- In a perfect world, rolling into the FY16 PTA would just be a matter of minor review and tweaks based on anticipated funding levels and policy changes.
- Each budget decision made in the current FY should be made with an eye towards future FYs

FY16 PTA – PROBLEMS/ISSUES



- Most FY16 Tasks in the Tool still reflected FY14 data
- Deletion of inaccurate/obsolete FY16 tasks did not allow for corrected tasks to be copied into FY16
- Similarly, individual tasks could not be copied into FY16 for the same reason.

UNIQUE TASK – KEY ELEMENTS

Current Task: LLAZA01000 | L1020 | BS | Weed inventory over the ASFO (FY2015)

- To ensure database integrity, each Task must be UNIQUE within each FY – The Task ID is based on these elements:
 - Funds Center (i.e. LLAZA01000)
 - Subactivity (i.e. L1020)
 - PE (i.e. BS)
 - Task Name (i.e. Weed inventory over the ASFO)
- Users are not able to create or copy Tasks if that function would create a duplicate Task.
- The tool requires that one or more of these elements must be different to ensure that each Task ID is unique.

USER ROLES / ACCESS REFRESHER

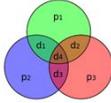


- **Budget Admin – AZ914 employees** – Includes administrative functions in the Tool for ALL AZ offices plus data entry access to the same offices.
- **Budget Group Admin – District Budget Analysts** – Includes administrative functions in the Tool for ALL offices within their District plus data entry access to the same offices.
- **Budget User (with Data Entry access)** – No administrative functions, but access to enter data for their Office/Office Group.
- **Budget User (with NO Data Entry access)** – No administrative functions and no access to enter data. Users only have the capability to run reports (read only access).

COPY / DELETE ALL TASKS

- Functionality only Available to Budget Admins
Extreme Care must be taken for either of these functions 
 - Copy ALL Tasks from FY to Future FY
 - Tasks to be Copied can now be Selected by Office Group and/or Office
 - ALL Selected Tasks **MUST NOT** Exist in the Future FY
 - Delete ALL Tasks from Specified FY
 - Tasks to be Deleted can also be Selected by Office Group and/or Office
 - This function can **NOT** be **UNDONE!**
- ** These options will be discussed in more detail during the Live Demo**

AVOIDING UNIQUE TASK VIOLATIONS



- Copy Individual Task within Current FY
 - Tool copies all data but adds "Copy of" to beginning of Task Name
 - User can then update/modify NEW Task as appropriate
 - Copy Individual Task to NEW (Future) FY
 - If Unique Task ID does NOT exist in future FY
 - All data will be copied and user can modify NEW Task as appropriate
 - If Unique Task ID does exist in future FY there are three options
 - Modify current Task to ID that doesn't exist in future FY (**Not Recommended**)
 - Modify future FY Task so current Task can be copied into that Future FY
 - Use "Overwrite" feature and Future FY Task will be replaced by current Task
- ** These options will be discussed in more detail during the Live Demo**

WHERE WE STAND – FY16 PTA BY DISTRICT/DIVISION OR OFFICE

- IF FY16 Tasks HAVE Been Updated
 - No need (or desire) to Copy or Delete all Tasks
 - Minor tweaking can be accomplished either by editing Tasks in FY16 or if necessary, Copy Individual Task(s) from FY15
- IF FY16 Tasks Have Been PARTIALLY Updated
 - Determination must be made whether to:
 - Start Over by following the procedure on the next slide
Or
 - Leave the FY16 Tasks that had been updated (making minor tweaks as necessary) and COPY additional Individual tasks from FY15 to FY16 with Overwrite feature and Create New FY16 Tasks as reqd.

FY16 PTA (CONT.)

- IF FY16 Tasks Have NOT Been Updated
 - Option 1 (Best) - If most tasks will be similar in FY16
 - Delete ALL FY16 Tasks then copy ALL FY15 Tasks into FY16
 - Modifications can then be accomplished by editing those Tasks plus potential addition of NEW tasks for FY16 or individual deletion of tasks no longer required in FY16.
 - Option 2
 - Delete ALL FY16 Tasks
 - COPY appropriate Individual tasks from FY15 to FY16 (edit for FY16) and Create New FY16 Tasks as required.
 - Option 3
 - Retain FY16 Tasks (created from FY14 tasks last year)
 - COPY appropriate Individual tasks from FY15 to FY16 (edit ALL tasks for FY16) and create New FY16 Tasks as required.

All these options will be revisited after the Live Demo

IMPORTANT NOTE

- Always COPY and DELETE at the lowest possible level necessary to accomplish the desired outcome
- For AZ Strip District for example - If AZA00, AZA01 and AZA03 have already updated all of their Task Sheets for FY16, but AZA02 has not updated any of theirs:
 - You definitely would NOT want to delete ALL AZA FY16 tasks
 - Deleting ONLY AZA02 tasks (if desired) would suffice. From there, any of the options we just discussed could be used for their update
- Another example - If AZ910 Division has not updated any of their FY16 tasks:
 - You could delete ALL Division FY16 tasks if appropriate
 - Or maybe, the AZ914 tasks currently in FY16 are accurate enough that only minor updates are required ... but AZ910/912 tasks would be better off through complete deletion - In this case, it would be best to delete ONLY AZ910 and AZ912 tasks.

LIVE DEMONSTRATION



CONCLUSION



- Employees should now, with the use of a computer, be able to demonstrate the ability to:
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