

AZ Budget Database Training

Copy/Delete Tasks Upgrade – Module 6

Slide: Welcome Screen (1)



Slide: Instructor slide (2) - All



Hello, my name is Mark Harner, Budget Analyst at the Arizona State Office.

Hi, my name is Angie Meece, Budget Analyst at the Arizona State Office.

Howdee, my name is Bianca Spilde, Management & Program Specialist at the Arizona State Office.

(Mark) We are here today to provide some training regarding a recent upgrade to the Arizona Budget Tool. Bianca, can you tell us why this training session important and then take a look at the lesson objectives?

Slide: Training Importance (3) – Bianca

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 its fullest extent.



So, why is this training so important? Well, the answer is very simple – Some serious issues had recently been identified regarding how the Budget Tool has been used for Budget Planning. Updates have just been loaded and a bit of new functionality added to the Budget Tool. This training session will provide all users with some background information and the ability to fully utilize all aspects of this recent upgrade.

Slide: Lesson Objectives (4) - Bianca

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

The objectives of this lessons are to ensure that all employees will be able to demonstrate the ability to discuss the various background issues which necessitated this database upgrade, discuss User Access Types, Determine the best method or methods to copy and or delete Tasks individual and multiple tasks either within the current Fiscal Years or to Future Fiscal Years. Angie, could you outline a course map on how we will achieve these objectives?

Slide: Course Map (5) - Angie

COURSE M&P 

- **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.

First, we will begin by providing that general background information regarding the Fiscal Copy process within the Tool. This background will also touch on the PTA process and the 3-year budget planning process. Next we will refresh your memory of the User Roles and functions utilized by the tool to regulate database access as it relates to these recent upgrades. Finally, we will go to a Live Demo of the Budget Tool in order to demonstrate the process involved in the Fiscal Copy of all tasks; possible deletion of all tasks for specified criteria (such as District, Division and/or Office; and the copying of individual tasks within a given Fiscal Year or from one Fiscal Year to another.

Slide: **Main Point #1** - General Background Information (6) - **Angie**

FISCAL COPY OF TASKS BACKGROUND INFORMATION



Now that we have the training session planned out, Mark, let's jump into the background information required to fully understand this upgrade.

Slide: (7) **FY15 PTA Process (Spring 2014)** - **Mark**

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.

During the FY15 PTA Process back in the Spring of 2014, it was determined by State Leadership that Arizona would begin to operate using a 3-year Budget Planning Process. Generally speaking, this means that three fiscal years would be initially planned and periodically updated (for all three years) when those plans changed. Only the current year would require tracking for actual obligation and expenditure purposes, but the planning would continue to apply to all three fiscal years.

At that time, fiscal years 15, 16 & 17 were created in the tool using the current FY14 task sheets as a starting point. During the FY15 PTA process, users updated the FY15 tasks by modification, addition and probably some deletions. However, the FY16 & 17 tasks unfortunately laid dormant for the most part. Of course, that should not be the case as the next discussion on a 3-year budget plan will show.

Slide: (8) 3-year Budget Plan - Bianca



3-YEAR BUDGET PLAN FY 15 - 17 Budget

- 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.

As Mark alluded to, simply having FYs 15, 16 & 17 loaded in the tool does not mean that we are working with a 3-year budget plan. Those out-year plans must also be updated as part of the process. As projects, positions or other planned costs are added, deleted or modified in the current fiscal year, attention must be paid to whether those changes should also be rolled into the future fiscal years.

For example, the decision for a District to reduce (or not fill) a Biologist position in FY15 due to cost restraints must be related to those future FYs. It may be determined that the position will also not be filled in FY16, but definitely will be required for FY17. Such decisions will have consequences such as what those additional funds should be used for in FY16 or if the funds are still not available in FY17, what will we do without to properly fund in FY17. Each decision made in the current Fiscal Year should be made with an eye towards the future Fiscal Years. This is the strength of multi-year planning.

Slide: (9) FY16 PTA Problems & Issues - Angie

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.

Unfortunately, most FY 16 and 17 tasks were not updated during the FY15 PTA process or during FY15 in general. As a result, most out-year tasks still reflected the original FY14 data.

Under the previous versions of the Budget Tool, there was no capability for deleted inaccurate or obsolete tasks to be re-copied from a more accurate fiscal year. Also, individual tasks could not be copied in to replace those deleted tasks for the same reason.

Before we go into the solution or fix, we will need to do a little more housekeeping.

Slide: (10) Unique Task – Key Elements - Mark

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.

In order to fully grasp what copying or deleting Tasks consists of within the database, we first need to look at what constitutes a Unique Task.

As with any database, database integrity relies on having unique records which can be stored, related and compared as required by the user. Simply put, each unique Task record must be represented by a Key Task ID.

Please take note of the four fields or key elements listed on this slide. Three of those elements can be identical, as long as at least one of the four is different. If all four elements are identical, the task would not be unique and would not be allowed.

Without getting too technical into the inner-workings of the database, this is where problem originated. Despite tasks being deleted, the related and unique TaskIDs were not deleted so the same Task could not be re-copied into that Fiscal Year.

Finally, the fifth field or Key Element that comes into play is the Fiscal Year. Tasks CAN have the same Funds Center, Subactivity, PE and Task Name IF they are in separate Fiscal Years.

Therefore the “Current Task” listed at the top of this slide could be valid for FY2016 and FY2017 in addition to the FY2015 version shown here.

Bianca, could you briefly review the User Roles and Access discussed in previous sessions?

Slide: (11) User Roles / Access Refresher - Bianca

**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).

Sure, Mark – As you can see, there are four basic levels of access to the budget tool. The new information on this slide deals with Administrative functions available to AZ914 and to a lesser extent, the Budget Analysts in the District Offices.

As we get into copying and deleting tasks on the next few slides, the differences in these roles will become more evident. Basically standard Budget Users (with data entry access) now have the ability to copy individual task sheets within a fiscal year or from one fiscal year to another.

In addition to that capability, Budget Admins also have the ability to copy multiple tasks from one Fiscal year to another or Delete multiple tasks from a given Fiscal Year.

This capability is where we will start - Mark

Slide: (12) Copy / Delete All Tasks – Mark

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

As mentioned earlier, access to this functionality is extremely limited and will only be used sparingly if at all during the year. Budget folks can now copy ALL tasks from one fiscal year to a future fiscal year. The most main use of this function will be for copying current and updated Tasks into a NEW fiscal year. For example, at some point it will be determined to be time to load FY18 Tasks ... in which case, it will be very easy to simply copy ALL updated tasks into that fiscal year.

A nice improvement with this upgrade is that fact that tasks selected to be copied can now be drilled down to District or Division and further down to Office. So if only AZA01 tasks are ready to be copied into FY18, it is now possible to copy only those tasks and the others at a later date when they are ready.

There may also be some limited opportunities to utilize this function, but it must be emphasized that there cannot be ANY tasks currently existing in the Future fiscal year for the criteria selected. In the above example, AZA would still be able to copy AZA00, AZA02 or AZA03 since FY18 tasks do not currently exist in those offices ... but AZA01 could not be copied again.

The exception to this rule would be if it was decided that the wrong fiscal year tasks were copied for AZA01 into FY18. In this case, ALL of those tasks (AZA01 only) could be deleted from FY18 and then the correct FY copied in. So, while the Delete function cannot be undone you could copy Tasks in after the delete. The problem arises if those FY18 tasks were modified, all those modification would be deleted and unrecoverable.

Slide: (13) Avoiding Unique Task Violations – Angie

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

As discussed, copying individual tasks capability is available all users with data entry access. We will discuss the procedures in full during the live demo portion of this training, but this slide takes a quick look at how the database ensures that each Task remains unique when copying.

Copying a task within a single fiscal year is quite simple. The user will just copy and the tool will automatically change the Task Name to ensure there is no duplication. From there the user can simply modify the necessary fields in the NEW task and update the Task Name prior to saving. That was easy!

The options available for copying an individual task from one fiscal year to another are a little more complex, but pretty well spelled out on this slide. If the unique task id does not exist in the future fiscal year, simply copy it and all data will be transferred. Also easy!

The user can modify the current task id to one that does not exist in the future fiscal year, but the problem with that would be that you would then have an extra task in the current fy that would either need to be modified or deleted.

Now that we've had a look at the basics, Mark will take a quick look at where we stand in the FY16 PTA process.

Slide: (14) FY16 PTA Procedures - Mark

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.

In order to get FY16 updated, we will look at a couple of possibilities and discuss what would be the best way to proceed.

First possibility would be if your District or Office has already updated all of the FY16 tasks. If this is the case, you will not need to worry about the whole Copy/Delete task thing until we look forward to FY17 and 18. There may still be some minor editing or even copying additional individual tasks from FY15, but much of the work is already done.

Next, we will take look at the possibility that Tasks have been partially updated. In this case, a determination will need to be made as to how to proceed. If only a few updates have been made to FY16, you might consider starting over by deleting all FY16 tasks for that Office and then copying new ones in (discussed on next slide). Or, you maybe if quite a few tasks have already been updated, it would be best just to continue updating or copying in additional individual tasks as required. This could include either deleting individual tasks or using the overwrite feature or creating new Tasks in FY16.

Slide: (15) FY16 PTA Procedures (cont) - Mark

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

The final possibility is that none of the FY16 Tasks have been updated yet. Option 1 is listed on this slide as “best option” ... but that only plays if most FY16 tasks will be similar. This option goes with deleting all those tasks which were copied in from FY14 and then replacing them with more current FY15 tasks. Once the new tasks are loaded, the standard update and possible addition of new individual tasks and deletion of unneeded tasks can be accomplished.

Option 2 could be more efficient if you would prefer to pick and choose which individual tasks you might want to copy into FY16. Then you could create new tasks and/or edit other tasks as appropriate.

Option 3 would basically be a hybrid of several of the options discussed so far. Keep the current tasks in FY16, copy applicable individual tasks from FY15 (Overwrite) if necessary, create new tasks where appropriate and edit all to fit the current plan.

We will look at each of these option in more detail during the upcoming Live Demo section.

Slide: (16) Copy/Delete by Office - Bianca

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.

Always COPY and DELETE at the lowest possible level necessary to accomplish the desired outcome. In other words, in some cases it may not be necessary to delete an entire District or Division where only an Office or two require complete deletion.

In the first example three of the office already updated their FY16 tasks and it would be a bad thing to delete all District tasks and copy over FY15 tasks. Only one office in this case would benefit from the procedure, so only delete and copy the AZA02 tasks.

The second example is similar, but deleting all of the Division tasks would not be as bad as deleting updated tasks in the previous example. However, it still could be more efficient to only delete & copy for the Offices that really need it. This could also be an example of AZ914 already updating the tasks as well. It is just important to complete a full analysis of the potential benefits and outcomes prior to deleting an entire District or Division's tasks.

Live Demo: Main Point #2 – (17) – Mark

As discussed in previous videos, we will be using the Test database for this Live Demo. The reasons have all been provided in great detail, but we will remind you again that this is not actual data and should not be construed that way. All functionality will remain the same, but please do not read anything else into the data. Thank you.

2a Login Procedures – Angie

BLM Budget ToolUpgraded on June 1, 2015

This site is for development and testing purposes only.
To make sure your browser has the latest files please clear your browsing cache (if you haven't already):

- a. Go to Tools | Internet Options...
- b. In the "General" tab "Browsing History" section click the "Delete" button
- c. In the "Delete Browsing History" window "Temporary Internet files" section, click the "Delete Files..." button, then click "Yes"
- d. Close the "Delete Browsing History" window
- e. Close the "Internet Options" window
- f. Restart your browser.

The [LIVE](#) BLM Budget Tool

Please Login

user:

password:

[Oops, I forgot my password.](#)

Reminder: New users must review the training videos by following the link below to DOI Learn. Login and then enroll in the "Arizona Budget Tool" Course. When finished, launch & complete the self-certification test in DOI Learn.

["Arizona Budget Tool Course" at DOI Learn](https://gm2.geolearning.com/geonext/doi/NewCourseCatalog.geo?id=155207)
<https://gm2.geolearning.com/geonext/doi/NewCourseCatalog.geo?id=155207>

This site is best viewed at 1024x768 screen resolution or higher.
Developed by [Recfusion](#) v 4.2.350 7/6/2015 Please send any bug reports to [Recfusion](#).

We have previously covered where to find the database – either enter the website into you Internet Explorer, or you can take the route through the BLM AZ homepage, to the link on the Budget homepage for the AZ Budget Planning Database.

We have also discussed the specific login procedures as well. Mark, could you go ahead and login as “Test Dude”?

If anyone would like to review any of this information, it can be found in Training Videos 2 & 3.

So, now we have logged in and selected FY 2015, let’s take a look at this new functionality.

2b Copy Multiple Tasks by Fiscal Year - Bianca

In the Test database, FY2018 has been created by the budget shop and Test Dude is now the Budget Analyst at the Arizona Strip District Office. The first few examples of new functionality are only available to the State Office Budget Shop (AZ914) and the Budget Analysts in each District. However, it is good information for everyone to know.

These users with the BudgetAdmin or BudgetGroupAdmin Roles discussed previously, have an extra tab on the top of their main menu within the Budget Tool. <Click on Support Tables> This is the Support Tables tab, which Test Dude has clicked. In addition to the capability to add or modify Vehicle data (which will not be discussed in this session), these users have a Fiscal Copy tab as well <Click on Fiscal Copy>. This screen has received a substantial facelift with this upgrade and we will take a look at all of these changes.

First of all, <Click Office Group pull-down and hold> there is now a pull-down option for the Office Group (or District/Division). In Test Dude's case, he only has access to AZ Strip but this option is very helpful at the State Office where it might be necessary to select an District or Division. Once selected, <Click on Offices and hold> Test Dude has the opportunity to select a single office or all offices within his group. <Click 2015 & None> Oops! It doesn't look like we can copy using this selection criteria.

While Test Dude pulls a report, let's review why we might not be able to copy all tasks to FY18. <Run Reports, FY2018, Mod-Bud Plan-ProjData- Relationship Rpt, AZA00-AZA03> As discussed previously, not possible to copy tasks to a Fiscal Year where some already exist. <Scroll down> Gadzooks - it looks like the AZA01 Tasks have already been copied into FY18. <Close> We will assume (for now) that those tasks are good and now look to only copy the other Offices at this time.

So, we will start with AZA00 District Office <Click AZA00> Now the copy to 2018 option is available and would be able to go ahead and copy those tasks 2015 to 2018. First let's take a look at some of the notes on the screen. Most important is that fact that you should only copy tasks when no other users are editing/adding tasks to be copied.

There are a variety of ways to ensure that is the case such as early morning or late afternoon copying. Or, you could send an email to the particular audience stating that "We will be performing database maintenance between 8-10am tomorrow so please do not use the tool between those hours" – or something to that effect.

Another important note is #3, which shows how many tasks are in 2015 (for the criteria selected) and how many are marked for copying. Since it shows 61 tasks but only 60 available for copy – it is evident that 1 task is not marked for copying. For now we will assume that is correct, but will go back and look at all the tasks when completed with this section. <Click on Copy Tasks> Test Dude has clicked the Copy Tasks button and hit OK.

Now we get confirmation that 60 task records were copied from 2015 for use in 2018. Also you can click the link [<Click Link>](#) to see specifics as to what was copied. [<Open Excel>](#) As you can see, the top Task is the one that was not marked to copy, but all of the others were copied. [<Close Excel and Go to Tasks>](#) Let's go back and look at that Task – [<AZA00, L1010-JC>](#).

When we scroll down to the bottom of the task, we see that sure enough the “No” button was selected for copy to new fiscal year. If it turns out that this task was a 1 year only project and is not needed in FY18, we are good to go. If we do need this task in FY18, we could do the Copy Task procedure which will be covered later. For now, we are set. [<Scroll up>](#)

Next, we will go to FY2018 [<Click FY2018>](#) and take a look at one of the tasks that we just copied. [<AZA00 L1010-EG>](#) We see that the task was copied exactly as it existed in FY15 at the time of copy. Another nice touch is that we can click on the Show Modifications link [<Click Link>](#) and we now can see who copied it and when – as well as which FY it was copied from. Yay! It also shows that it was completed through the “Copy FY Data Routine”. We will contrast that to an individual task copy later.

[<Logout & Login>](#) Now, in order to quickly show the full functionality of this Fiscal Copy operation, Mark is going to logout as Test Dude and go back in as himself. [<Click Support Tables and Fiscal Copy>](#). The Budget Shop has a couple of additional options, such as copying the Support Tables and BPS Themes, but we will go right down to the Copy Tasks again.

[<Click Office Groups>](#) Now you can see that Mark has access to all of the Districts and Divisions. [<Select AZ910>](#) When he selects AZ910 Division, 910, 912 & 914 Offices are available for selection, but he will select the entire Division. [<All, 2016, 2018>](#) Since there are currently no tasks in FY18 for this division he is able to copy all tasks from 2016 to 2018 (55 tasks in all). [<Copy Tasks, OK>](#) He gets confirmation that all 55 were copied from FY16 to 18 and can even click a link to see those 55 tasks.

So, hopefully you will see that as long as there are no tasks in the fiscal year where you want to copy tasks, the process is pretty simple. But, what happens if there are unwanted tasks in that fiscal year? We will take a look at getting rid of those pesky tasks in the next demo. [<Logout & Log back in as Test Dude>](#)

2c Delete Multiple Tasks by Fiscal Year - Angie

Ok, let's say that Test Dude has confirmed that the entire AZ Strip has not updated any of its FY16 Tasks yet as part of the PTA Process. It is determined that all four of the offices would like to use the FY15 tasks rather than the old FY14 tasks currently loaded in FY16. As we discussed earlier, the best option would be for Testdude to delete all those tasks currently in FY16 and re-copy them, this time from FY15. <Click Support Tables and Fiscal Copy>

The procedure for this is extremely simple, but also can be dangerous since deleted tasks cannot be recovered. However, if used properly – it can save lots of time as well. In this example, we know that Test Dude has confirmed that ALL FY16 tasks for the AZ Strip should be deleted, he can simply select All Office Group Offices and FY16. He confirms that yes, 292 tasks is correct and clicks the Delete Tasks button. <Click Delete Tasks> One more chance to back out, but Test Dude is confident and clicks OK. <Click OK>

Next, we could click the link to get an Excel listing of those tasks deleted (which is recommended) and move on to the next step of copying FY15 tasks into FY16. As the note says, it is best to refresh the screen by clicking the Fiscal Copy tab <Click Fiscal Copy Tab>. Now we have the ability to copy 291 task records from FY15 to FY16 by clicking the Copy Tasks tab.

Through the magic of video editing, those 291 tasks are now available in FY16. As discussed, the Delete Tasks function can also be used for individual Offices rather than the entire District. As you can see, selecting All Office Group Offices for FY16 shows that 291 Tasks will be deleted. Changing the Office selection to AZA00 only, <Click AZA00> and there are 60 tasks to be deleted. AZA01 <Click AZA01> - 109 tasks; AZA02 <Click AZA02> - 45 tasks; AZA03 <Click AZA03> - 77 tasks. Based on the single office selection, the process would work exactly the same with the ability to print a report and moving on.

Again, it is important that no users are adding or editing tasks in those Offices when these group deletions are made. Also, the system will not allow current or past fiscal year tasks to be deleted in this manner – which is a nice safety net.

2d Copy Individual Tasks to Future FY - Mark

Next, we will look at the updated function which ALL users (with data entry access) will be able to use now – Copying individual tasks to a future fiscal year. As discussed earlier in this session, there are two circumstances to consider prior to carrying out this function – whether the task being copied already exists in the future fiscal year or not.

Logically, it follows that upon determining that a task is required in a future fiscal year, the user will of course know whether the task does not already exist OR that it does exist but should be replaced. Therefore, we will not go into that side of it any further but would recommend that you go back to some of the earlier slides for review, if desired.

So, without further delay, we will go ahead and demonstrate some examples:

1 – Copy Task to Future FY (Task does not exist in Future FY) - Angie

Mark has logged in as himself to facilitate showing a variety of examples across the State. We will start with a FY15 task that we already know is not currently loaded in FY18. <AZ955-L1660-IA> The task “Key Elements” are AZ955 <Show>, L1660 <Show>-IA <Show>, Engineering Operations and Maintenance <Show>. As you can see, there are Ops <Click Ops>, GSA Vehicles <Click GSA >, and more assigned to this FY15 Task <Click Main Task>. As we go back to the Main Task tab, we now know that this is the task that we need to copy to FY18 (this could be any future year desired – FY18 is just for training purposes).

<Scroll down to the bottom of the screen> As we scroll down we see the “Copy Task” button. <Click Copy Task> Clicking that button generates a pop-up asking whether the user wants to copy to a new fiscal year or the current one. We previously discussed the copy tasks within the current fiscal year, and this training is geared towards copying to a new fiscal year. <Click OK>

We get another popup <Click Pulldown> to select the fiscal year to copy to: <Select 2018> From there we get another popup which is basically a skeletonized version of the new FY18 task. The user can make changes at this time to any of the listed fields, but must select a Project. <Move Window> You can see what the FY15 project was and if it is still valid for FY18 (and still deemed appropriate) select that one for FY18. Once all the fields are correct, click “Copy Task” <Copy Task>. You should get confirmation that the task was copied and the option of going to FY18 to look at the new task or continue working in FY15. <Click 15> For this example we will just go on to the next example.

Staying in AZ955, let's look at another FY15 task that we know does not exist yet in FY18. **<AZ955-L1653-IB >** Mark selected L1653-IB Cashe ACM Abatement. As we look at the Main Task tab we see a couple items that we might want to update prior to copying the task to FY18. For example, there is no Task Owner or Task Status designated in this task. So for the sake of training, we will go ahead and update those two fields **<Owner-Reed / Status-Active>**. Also, something new – in the past, 955 would enter the WBS as part of the Task Name (since the WBS field was just recently added to the Task Sheet. Now, we can go ahead and enter that information into the appropriate field, and delete it from the Task Name (if desired) **<Enter WBS and Delete from Task Name>**. Please note that when the Task Name is changed, it also changes one the Key Elements for that Task – So, even if the original task had been in FY18, we could now copy without overwriting an FY18 task since the Unique Task ID would be different.

<Save Task> First, we will need to save the changes made to the FY15 task and next copy task **<Copy Task>**. Again, we will click OK **<OK>** for future fiscal year, select the Engineering Project **<Select Eng>** and click Copy Task **<Click Copy Task>** and we get confirmation that it was copied. This time, we will go ahead out to FY18 to view the new task **<Click View New Task / OK>**

Now as this new task is opened, we see that all of our changes were also copied into the FY18 Task. Task Owner **<Show>**, WBS **<Show>**, and Task Status **<Show>** have each been updated.

2 – Copy Task to Future FY (Task does exist in Future FY) - Bianca

<Change FY to 2017> Mark has changed the Fiscal Year to 2017 and we will pull up an AZ914 task – L1040-XW-Budget Support **<914-L1040-XW>**. So, it is confirmed that there is a Task in FY17 for this Unique ID, but we can also see that the only modification to the record was when it was initially copied into the FY (probably back in 2014).

Since we know that our current FY15 task is more up to date than this one, we will go ahead and copy it in. Of course another option (since we are already in FY17), would be to first delete this task **<Click Delete tab – But CANCEL>** ... but for training, we are just gonna leave it here.

<Change FY to 2015 & 914-L1040-XW> So, rolling back to FY15 and pulling up the same task – We can simply click the Copy Task button **<Copy Task>** and follow the on screen prompts as before. **<Click OK – 2017 - >** The difference comes up because as we know, the task already exists in FY17. As discussed earlier, we could go back and edit the task and make it unique, but in this case we know that it is preferred to the old task currently in FY17 so we will select Overwrite Existing Task **<Click Overwrite Existing Task>**, cringe at the scary warning and click OK **<Click OK>**. We get confirmation that the FY17 task was overwritten and click close **<Close>**

This time we will go out to FY17 and take a quick look at the new Task. [<Change FY2017>](#) Everything has now been replaced on this task with data from the FY15 task. As we take a look at the Modification Records, [<Click Link>](#) we can see the difference between the initial “Copy FY Data routine” record from the 7th and today’s Individual Task Copy with Overwrite. Pretty awesome, eh? [<Close>](#).

Well, that about wraps the live demo portion of this session. There are many different examples that we could demonstrate, but we are limited by time constraints.

Slide: (18) Conclusion – Mark

In conclusion, employees who have completed this training should now have a number of new tools available to them for updating Tasks in the Tool. They should be able to demonstrate an understanding of the background issues which caused the need to upgrade the tool.

They will be able to demonstrate how User Access types play into database access and how they relate to this update. Finally, they will be able to demonstrate the ability to determine the best method for copying full years of tasks across fiscal years as well as copying individual tasks.

Hopefully you have all enjoyed this training session and feel secure in your ability to use this new knowledge and abilities. As a reminder, this session was based on an interim update to the system. The next full upgrade and concurrent training session is still being planned for late in the Summer.

Thank you for your time.