FY25 Budget Formulation
Teams and PBCS User Guide
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Overview

Oracle’s Planning & Budgeting Cloud Solution (PBCS) and Profitability and Cost Management (PCM)

Responsibility Center Resource Proposals (RCRPs) are the first step in the annual budget formulation process to better understand RC resource plans. The RCRP process is an opportunity for RCs to consider how to leverage and realign resources to further strategic priorities that advance the Plan for Pitt. Details on the FY25 Budget Formulation process and submission requirements have been distributed in a separate document to Support and Primary RC’s. At a very high level, RCRPs include three components: (1) Operating Budget Narrative; (2) Strategic Operating Budget Requests; and (3) Capital Budget Requests. PBCS will continue to be used to enter operating and capital requests for the upcoming fiscal year. PCM was used to generate income statements for RCs which will be provided to RCs in private Teams channels.

Instructions for accessing materials on Teams and navigating PBCS for the Operating and Capital Budget Requests are described in this document.

Accessing Materials on Teams

Click your private channel in Team’s Budget ReSTART for primary RCs or Team’s Budget ReSTART Support RCs:

Under the Files tab, find the folders for FY23 Actual and FY24 ReSTART Statements and the FY25 Budget Formulation Process:
Overview

The FY23 Actual & FY24 Budget ReSTART Statements folder will contain income statements generated from PCM plus supplemental reports such as Activity Metrics, Flux Report, Tuition Report, Financial Aid Budget, and Widget report for Primary RCs. Primary RCs will also have a notification in the Posts tab that has links to the details of your activity metrics which are on the ReSTART Dashboard.

The FY25 Budget Formulation folder will contain materials that are explained further in the separate Support RC and Primary RC Budget Formulation guidance. The guidance is also saved in the FY25 Budget Formulation folder.
**PBCS Navigation**

**Initial Access**

To gain access to PBCS, please complete the PRISM User Access Information Form found on the PRISM website at [https://www.technology.pitt.edu/prism-access](https://www.technology.pitt.edu/prism-access). Note that all RC Business Managers already have access to PBCS and can login as described below.

Oracle automatically sends an email from Oracle Cloud oraclecloudadmin_ww@oracle.com when your user account has been established in PBCS. However, security roles need to be assigned by Budget & Financial Reporting (BFR) before access is complete. Please wait until BFR sends a confirmation that your access is available before attempting login. When confirmation is received, use the *Log into PBCS* button found on the PBCS Information website at [https://www.technology.pitt.edu/prism-planning-and-budgeting-cloud-solution-pbcs](https://www.technology.pitt.edu/prism-planning-and-budgeting-cloud-solution-pbcs).

**Logging into PBCS**

To begin, go to my.pitt.edu. Search “PBCS” in the search feature in the upper right corner.

The page below will appear. For RCRP, you will be using the tile highlighted below. It would be advantageous to choose the heart and make it a favorite so it can be quickly accessed the next time. Once you choose it as a favorite, you will not need to search for PBCS again, you can just go to the tile.
**PBCS Navigation**

Click on the task tile for **RCRP Operating & Capital Requests** or CTRL Click the link below or copy and paste the URL into your browser. *Do not use Internet Explorer. We recommend Firefox or Chrome.*  
https://planning-a536919.epm.us-ashburn-1.ocs.oraclecloud.com/epmcloud/. This URL is new for FY25 and will need to be added before you can begin.

To sign in, click Pitt Passport (Red Arrow).

Sign in with your University of Pittsburgh username and password (*the same credentials you use to sign into PRISM*). *We recommend you bookmark the page for future logins.*
**PBCS Navigation**

Once signed in to RCRP Operating & Capital Requests, the user will be taken to the home screen:

![PBCS Home Screen](image)

### Set User Preferences (User Variable and Display)

Once logged in, each user needs to set their User Variable. **You only need to do this once in PBCS.**

To do so, click on the **Tools** icon, then on **User Preferences**, and click on **User Variables**.

![User Variables](image)

The user should then either type their user Member (blue box below) or find their user Member using the tree box (red box below). The Member is based on the access that has been assigned to each user. Users can select any level Member from Senior Officer (if available to them) down to Department. It is recommended that users set the User Variable to the highest level to which they have write access.
**PBCS Navigation**

So, if a user is a business manager with access at the RC level, the user can either type their RC number directly into the Member input field with the prefix “RC” (e.g., Arts and Sciences would type RC06) or click on the tree box to select their Member from the University hierarchy. Refer to the RC Table posted on General Accounting’s website for each RC’s number and description and the Senior Officer (SO) number and description under which each RC reports.

If you click on the tree box (red box above), you will see a screen with panels that reflects the hierarchy of the University’s reporting structure. In the resulting selection screen, Total Department represents total University. If you click on Total Department, it then reflects the list of Senior Officers (SO). If you click on a Senior Officer, it shows the RCs that report to the SO. If you click on an individual RC, it shows department rollup groups (if you previously requested them of B&P) or the list of individual departments that fall under the RC.

Once you type or select your Member (SO, RC, department rollup, or specific department), click OK and Save. Your User Variable changes are now saved.
**PBCS Navigation**

Once back at the User Preferences display, click on **Display** on the left side of the screen. Under **Number Formatting**, select “Comma” for the Thousands Separator and “Black” for the Negative Color. These settings will produce the best display of results as you work through your budget input forms.

![Display Settings](image)

Once you have adjusted these two Display settings, click Save, then click the **Home button** at the upper right section of the PBCS screen (to the left of your name) to get back to the Home screen of the application.

**Adding a Favorite or Bookmark**

Once you have logged in to the *Planning and Budgeting Cloud: PittPlan* home page, you can create a favorite or bookmark within your browser to save the link. By adding the favorite at this point, you will be logged into the home page directly rather than going through the my.pitt.edu page. The favorite will appear with “EPM Cloud,” however, you can edit the name.

Alternatively, you can continue to choose to access via my.pitt.edu by selecting the tile that you have marked as a favorite in the “Logging into PBCS” section above.

The following link can also be used to create a bookmark that will redirect to the PBCS home page.

https://planning-a536919.epm.us-ashburn-1.ocs.oraclecloud.com/epmcloud/. This **URL is new for FY25** and will need to be added before you can begin.
**PBCS Navigation**

**PBCS Home Page**

Top Left-Side of Screen:  
Top Right-Side of Screen:  
Center Screen:  

1. **Navigator** - Use the Navigator menu to access functions, applications settings, and preferences. Under the Preferences link, you can manage several personal preferences such as email options, display options and printing options. For example, in display options you can change the number formatting such as negative number display and thousand separator.

2. **Home** - Use the Home button to quickly return to the home screen from any window.

3. **Accessibility Settings** - Use the Accessibility Settings button to apply the screen reader mode or high contrast.

4. **Settings/Actions** - Use the Settings and Actions drop-down link to sign out, view the Oracle-provided help documentation and access the Oracle Cloud Customer community.

5. **Function Icons / Tiles** - Use the various function icons to access functions assigned to your role in PBCS. Note, depending on your role you might see fewer tiles than what is pictured.

6. **Announcements** - Announcement regarding the overall system will be posted in the Activity/Recent/Favorites section.

7. **Tour** – View an Oracle provided 8-minute YouTube video on the “Overview: Tour of Planning in EPM Enterprise Cloud”.
**PBCS Navigation**

**Logging out of PBCS**

Log out of PBCS by selecting the drop-down arrow next to your name in the upper right corner of the window, then select the “Sign Out” hyperlink. A second Sign Out window will appear, click Cancel to remain logged in to PBCS. Click OK to continue logging out. You must complete this to completely log out of PBCS.
Strategic Operating and Capital Requests

As noted in the FY 2025 Budget Formulation Guidance for Support RCs or FY 2025 Budget Formulation Guidance for Primary RCs, given the outlook for the FY 2025 budget, we will be focused on existing commitments and priorities. As such, this year’s process will mainly focus on updating prior year operating and capital requests, new self-funded operating requests, or revenue-supported operating requests. PBCS is prepopulated with adjusted prior year requests. Prior year requests that were approved in the prior year were removed, or if the requests were only partially funded, the funding was adjusted downward. For unfunded prior year requests, RCs may remove or adjust the requests as desired.

The one-time and permanent request process is intended to capture all needs simultaneously to reduce the need for ad-hoc funding requests (for both operating and capital). All capital requests above $50,000 should be submitted regardless of the project’s funding source. Consequently, RCs will need to internally fund any requests or needs that arise during the fiscal year following the guidance provided in FY 2025 Budget Formulation Guidance for Support RCs or FY 2025 Budget Formulation Guidance for Primary RCs.
Strategic Operating Budget Request

Creating a Strategic Operating Budget Request

1. Click the Navigator icon in the upper left of the window.

2. Under My Connections, open the Project/Capital Intake module by selecting the Open in New Window icon to the right of the link. This will open the requests module in a new window, allowing you to easily return to the RCPR forms for review and entry. If you click on the hyperlink, the module will open over the existing RCRP module and you will need to log out to return to RCRP.

3. The header at the top of the left side of the page will now reference – PittFund.
**Strategic Operating Budget Request**

4. In the new browser window, ensure that under “Navigation Flows” (4 circles forming a square) in the upper right-hand corner, “Project Intake” is selected. It will appear gray when selected.

5. Next, select the *Operating* function icon.
6. The New Budget Request – Operating form will open. The department field will default to your assigned RC security. If you have more than one, click the link to update and then click the process arrow to refresh the form with the new RC. Note, the form selections are now located at the bottom of the screen.

7. All existing operating budget requests for the selected RC will be displayed, if any.

8. To add a new request, right-click in any white cell on the form and select Add Request Operating. You can also add an attachment (optional) through this drop-down.
**Strategic Operating Budget Request**

9. In the pop-up window, enter the *Permanent Cost amount* (if it a one-time request, enter $0). Here you can also review and modify the RC if needed. When ready, click the Launch button.

10. A message will be displayed noting that the new request creation was successful.

11. Complete each field on the *New Budget Request* tab. Click in each cell and enter the values. Notice, that some cells are already populated.
12. Save your work by clicking the Save button in the top right corner. **When adding a new Operating Request, you MUST CLICK SAVE before moving to the next screen.**

13. A pop-up message will appear confirming the save. Click **OK**.

14. Click on the **Funding Assumptions – Permanent** tab at the bottom of the screen (for permanent funding requests only).

15. Fill out the **Funding Assumptions** options related to the project. Notice that each project has its column.
**Strategic Operating Budget Request**

16. Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.

17. Click on the *Funding Assumptions - One-Time* tab at the bottom of the screen (for one-time funding requests only).

18. Enter all One-time Costs related to the project:

![Funding Assumptions - Operating - One-Time](image)

<table>
<thead>
<tr>
<th>Request Name</th>
<th>FY23</th>
<th>FY24</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19. Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.

20. Click on the *Forced Ranking* tab at the bottom of the screen.

![Forced Ranking](image)

21. For each request, select the primary objective in the Plan for Pitt from the drop-down menu that most closely aligns with your request. If the request has a secondary objective, which is optional, select the objective from the drop-down menu.
**Strategic Operating Budget Request**

22. For 1-3 of your highest priority not RC self-funded operating requests you plan to advance for your RC, rank your request in numeric order (number 1 is highest), and include a *Justification Narrative*.

### Forced Ranking - Operating

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Primary Objective (required)</th>
<th>Secondary Objective (optional)</th>
<th>Forced Ranking of Not RC Self-Funded Requests (limit of 3)</th>
<th>Operating Requests Justification Narrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test RCRF Request</td>
<td>1.3 Enrich student experience</td>
<td>1.1 Inclusive / equitable campus</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>O178</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>O180</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

23. For RC self-funded requests you plan to advance for your RC, rank all of your requests in numeric order (number 1 is the highest), and include a *Justification Narrative*.

### Forced Ranking - Operating

<table>
<thead>
<tr>
<th>Request Name</th>
<th>Primary Objective (required)</th>
<th>Secondary Objective (optional)</th>
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</tr>
</thead>
<tbody>
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<td>1.1 Inclusive / equitable campus</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>O178</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>O180</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Capital Request

Creating a Capital Request

1. Click the Navigator icon in the upper left of the window.

2. Under My Connections, open the Project/Capital Intake module by selecting the Open in New Window icon to the right of the link. This will open the requests module in a new window, allowing you to easily return to the RCRP forms for review and entry. If you click on the hyperlink, the module will open over the existing RCRP module and you will need to log out to return to RCRP.

3. The header at the top of the left side of the page will now reference – PittFund.
Capital Request

4. In the new browser window, ensure that under “Navigation Flows” (4 circles forming a square) in the upper right-hand corner, “Project Intake” is selected. It will appear gray when selected.

5. Next, select the Capital function icon.
**Capital Request**

1. The *New Budget Request – Capital* form will open. The department field will default to your assigned RC security. If you have more than one, click the link to update and then click the process arrow to refresh the form with the new RC. Note, the form selections are now located at the bottom of the screen.

   ![New Budget Request - Capital](Image)

   **New Budget Request - Capital**

2. All existing Capital Requests for the selected RC will be displayed, if any.

3. To add a new request, right-click inside one of the white cells inside the form and select *Add Request Capital*. Each capital request must meet the University capitalization threshold of being at least $50,000. You can also add an attachment (optional) through this drop-down.

   ![New Budget Request - Capital](Image)
4. In the pop-up window, enter the **One-Time Cost amount**. Here you can also review and modify the RC if needed. When ready, click the Launch button.

5. A message will be displayed indicating that the new request creation was successful.

6. Enter the details of your project.

   New Budget Request - Capital

<table>
<thead>
<tr>
<th>Years</th>
<th>Department</th>
<th>Version</th>
<th>Request Name</th>
<th>Building</th>
<th>Project Description</th>
<th>How was Project Value Determined</th>
<th>Has this project been reviewed by the Office of Planning and Design?</th>
<th>How does your proposal contribute to the journey to carbon neutrality by 2037?</th>
</tr>
</thead>
<tbody>
<tr>
<td>C159</td>
<td>Test Capital RCP Request</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C177</td>
<td>Building Name</td>
<td>Test Capital RCP Request</td>
<td>Justification</td>
<td>Yes</td>
<td>Reducing energy demand or consumption</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal</td>
<td></td>
<td></td>
<td></td>
<td>N/A</td>
<td>Encouraging low carbon connections via active, shared, and low carbon mobility</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description of Project Scope (locate floors, rooms, description of work)</th>
<th>Include Description</th>
<th>Requestor</th>
<th>Total One-time Costs</th>
<th>Estimated Future Annual Cost</th>
<th>Associated New Revenue Cost Savings</th>
<th>Associated Operating Impact</th>
<th>Associated Support RC Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your RC</td>
<td>Explanation</td>
<td>RC Head</td>
<td>10,000,000</td>
<td>10,000,000,000</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>10,000,000</td>
<td>10,000,000,000</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Joint Requests?</th>
<th>Joint Request RC #1</th>
<th>Joint Request RC #2</th>
<th>Joint Request RC #3</th>
<th>Final Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>01 - Chancellor</td>
<td>05 - Student Affairs</td>
<td>10 - SVC and Provost</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td>--</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
7. Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.

8. Click on the Funding Assumptions tab on the bottom of the screen.

9. Complete the Funding Assumptions related to the project.

10. Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.

11. Click on the Forced Ranking tab at the bottom of the screen.

12. For each request, select the primary objective in the Plan for Pitt from the drop-down menu that most closely aligns with your request. If there is a secondary objective, which is optional, select the objective from the drop-down menu.
**Capital Request**

13. For 1-3 of your highest priority not RC self-funded capital request you plan to advance for your RC, rank your request in numeric order (number 1 is highest), and include a **Justification Narrative**.

<table>
<thead>
<tr>
<th>Forced Ranking of Not RC Self-Funded Capital Requests (limit of 3)</th>
<th>Forced Ranking of RC Self-Funded Capital Requests</th>
<th>Capital Requests Justification Narrative</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Justification</td>
</tr>
</tbody>
</table>

14. For RC self-funded requests you plan to advance for your RC, rank all of your requests in numeric order (number 1 is the highest), and include a **Justification Narrative**.

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</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Justification</td>
</tr>
</tbody>
</table>

15. Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.

**Operating Reports**

Operating reports are obtained by selecting the **Operating** icon, selecting the hanging tab icon in the left outside margin for reports, and typing in the **Member** segment values which will be your RCXX.
Reports

Operating Reports

The first tab, Operating Reports, provides the full set of reports. The reports open on the screen in PDF format which can be downloaded or sent to a printer.
Reports

Capital Reports

Capital reports are obtained by selecting the Capital icon, selecting the hanging tab icon in the left outside margin for reports, and typing in the Member segment values which will be your RCXX.

The first tab, Capital Reports, provides the full set of reports. The other tabs may alternatively be selected if only a specific report is needed. The reports open on the screen in PDF format which can be downloaded or sent to a printer.