



***FY25 Budget Formulation
Teams and PBCS User Guide***

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Overview

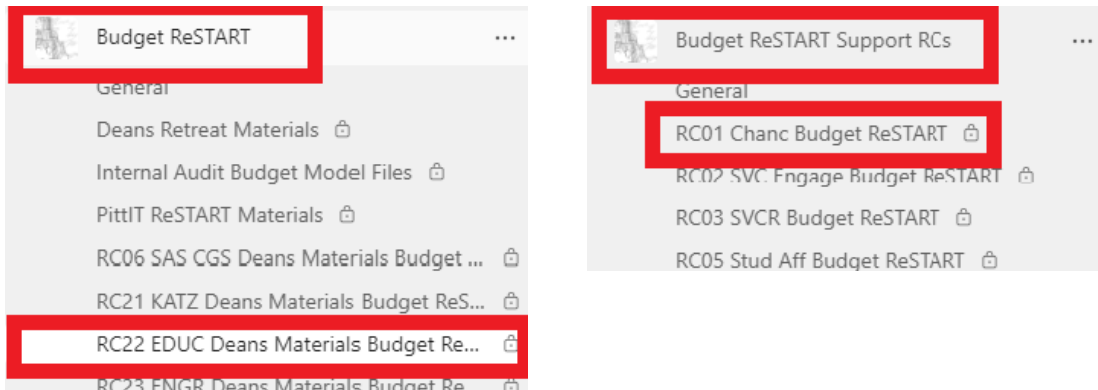
Oracle’s Planning & Budgeting Cloud Solution (PBCS) and Profitability and Cost Management (PCM)

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.

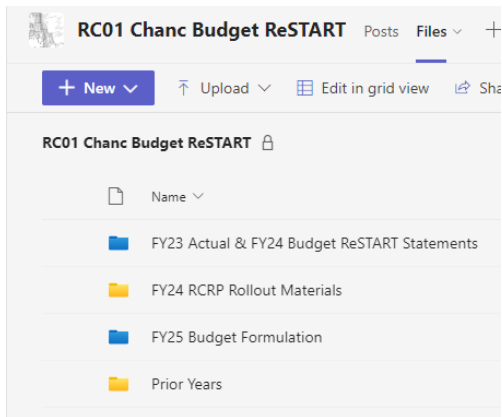
Accessing Materials on Teams

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

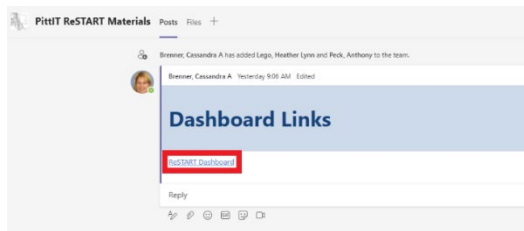


Under the *Files* tab, find the folders for FY23 Actual and FY24 ReSTART Statements and the FY25 Budget Formulation Process:

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>. Note that all RC Business Managers already have access to PBCS and can login as described below.

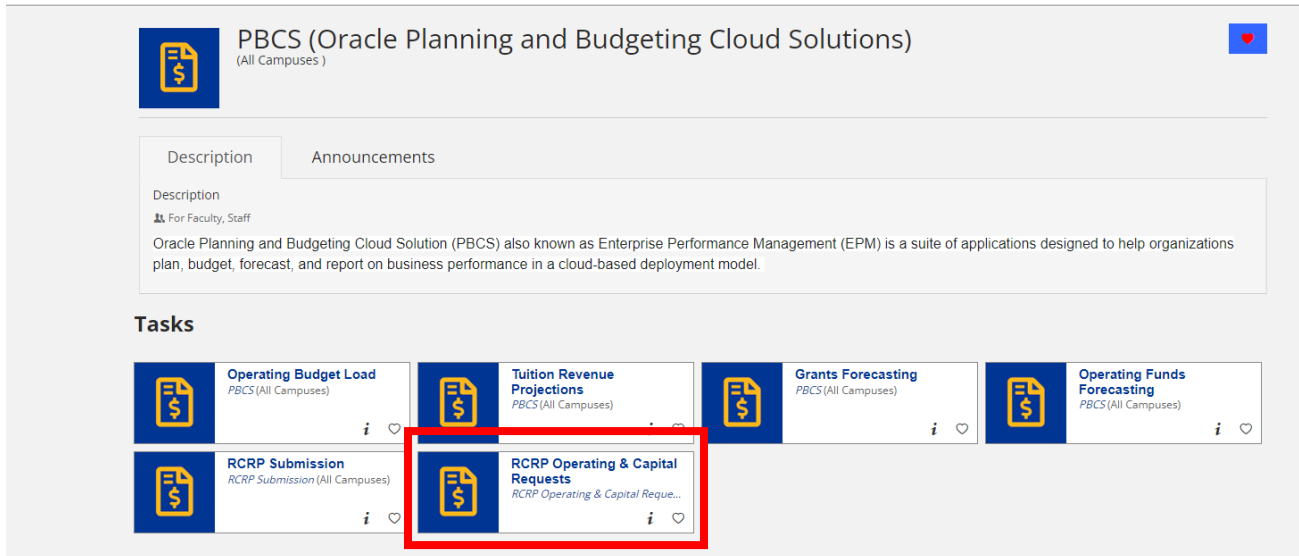
Oracle automatically sends an email from Oracle Cloud oraclecloudadmin_ww@oracle.com when your user account has been established in PBCS. However, security roles need to be assigned by Budget & Financial Reporting (BFR) before access is complete. Please wait until BFR sends a confirmation that your access 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>.

Logging into PBCS

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



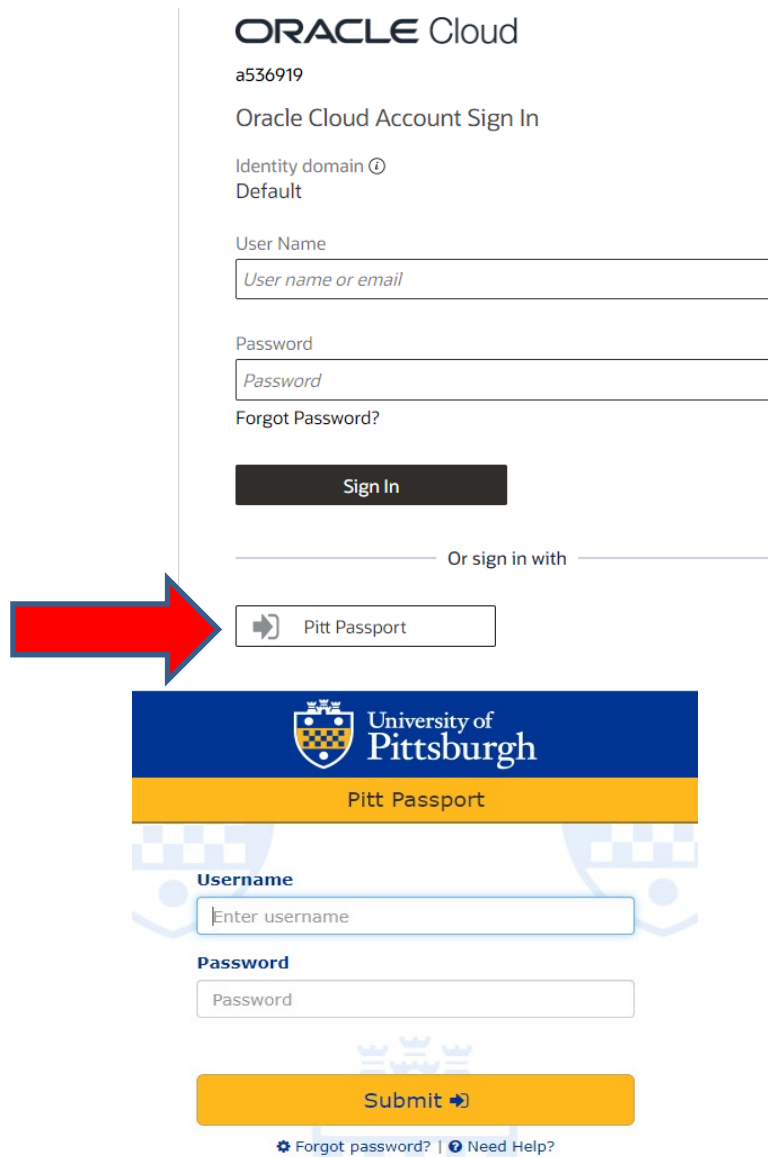
The page below will appear. For RCRP, you will be using the tile highlighted below. It would be advantageous to choose the heart and make it a favorite so it can be quickly accessed the next time. Once you choose it as a favorite, you will not need to search for PBCS again, you can just go to the tile.



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).

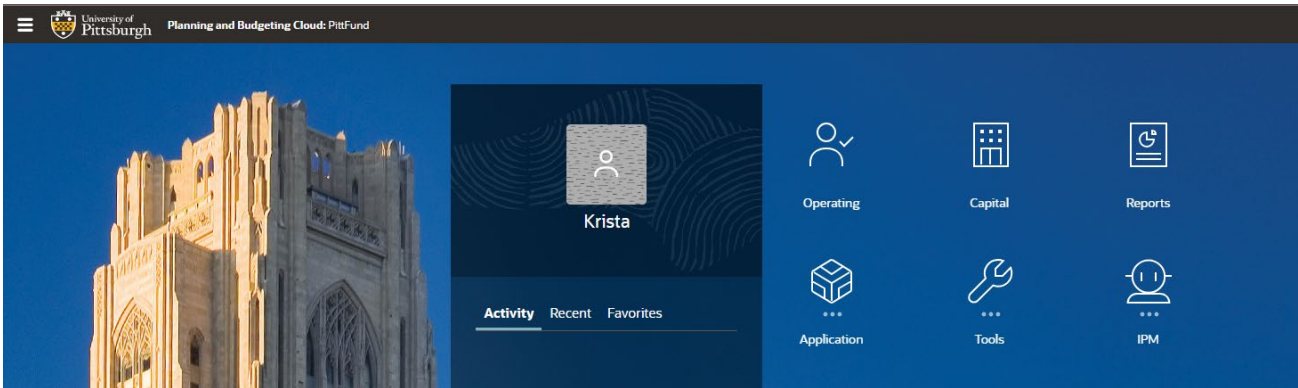


The screenshot shows the Oracle Cloud Account Sign In page. At the top, it says "ORACLE Cloud" and "a536919". Below that is "Oracle Cloud Account Sign In". There are fields for "Identity domain" (Default), "User Name" (with placeholder "User name or email"), and "Password" (with placeholder "Password"). A "Forgot Password?" link is present. A "Sign In" button is below the password field. Below the "Sign In" button is a separator line and the text "Or sign in with". Underneath is a "Pitt Passport" button with a right-pointing arrow icon. A large red arrow points to this button. Below the "Pitt Passport" button is a blue and yellow banner with the University of Pittsburgh logo and the text "University of Pittsburgh" and "Pitt Passport". Below the banner are fields for "Username" (with placeholder "Enter username") and "Password" (with placeholder "Password"). A yellow "Submit" button with a right-pointing arrow icon is below the password field. At the bottom, there are links for "Forgot password?" and "Need Help?".

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

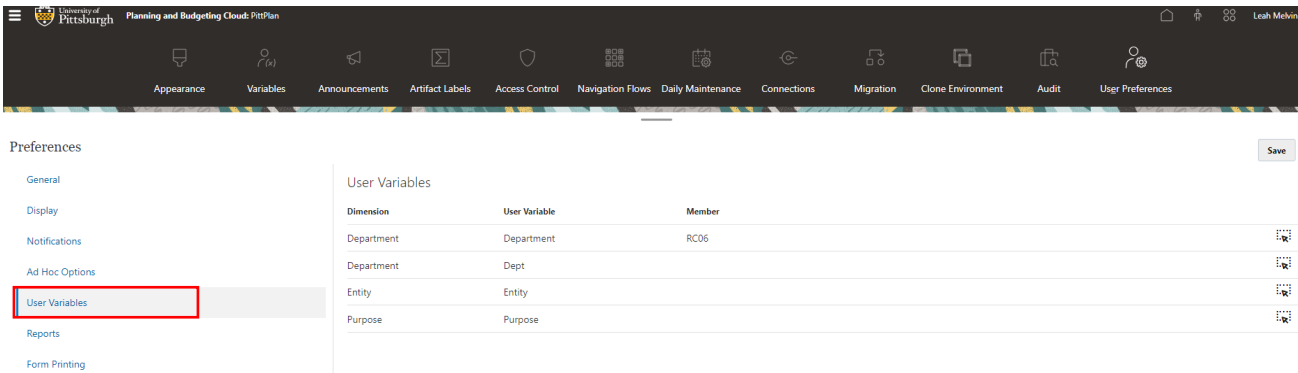
Once signed in to RCRP Operating & Capital Requests, the user will be taken to the home screen:



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.



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.

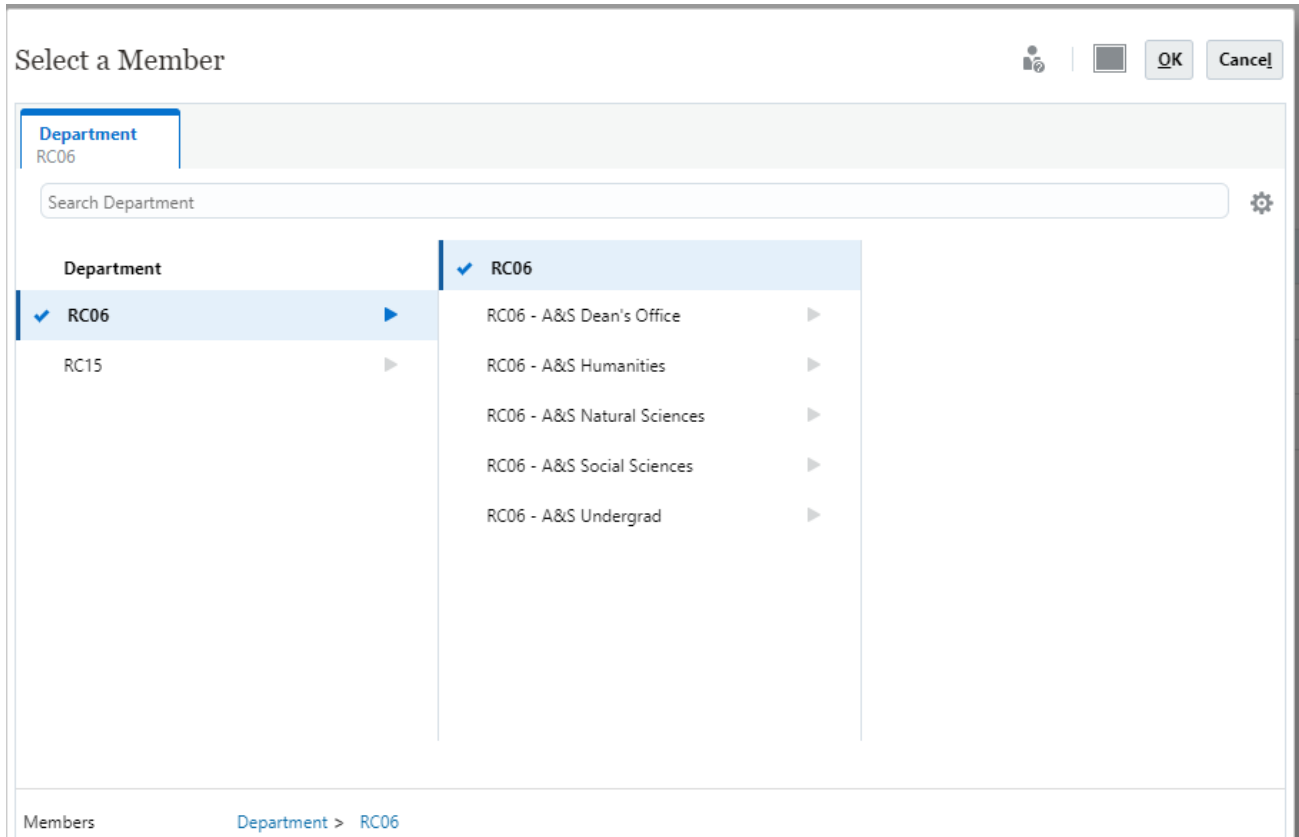
PBCS Navigation

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.*

User Variables

Dimension	User Variable	Member
Department	Department	RC06

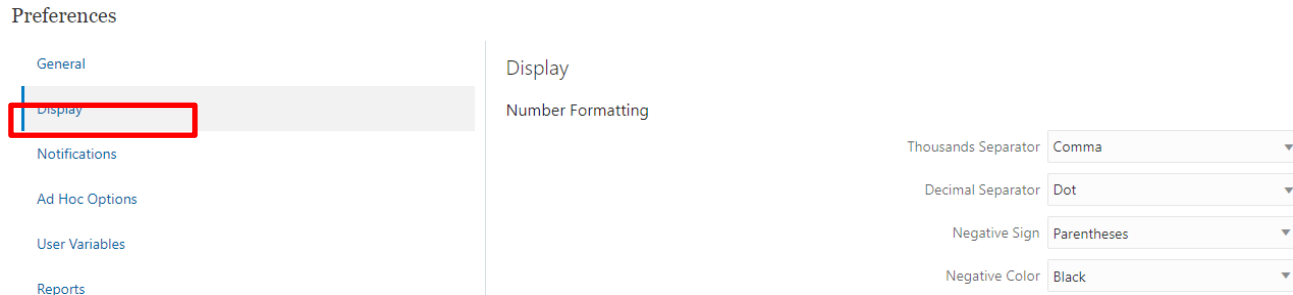
If you click on the tree box (red box above), you will see a screen with panels that reflects the hierarchy of the University’s reporting structure. In the resulting selection screen, Total Department represents total University. If you click on Total Department, it then reflects the list of Senior Officers (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.



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.

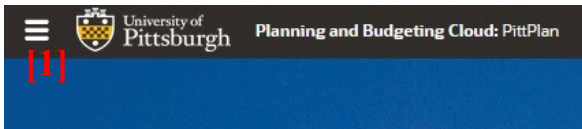
The following link can also be used to create a bookmark that will redirect to the PBCS home page.

<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

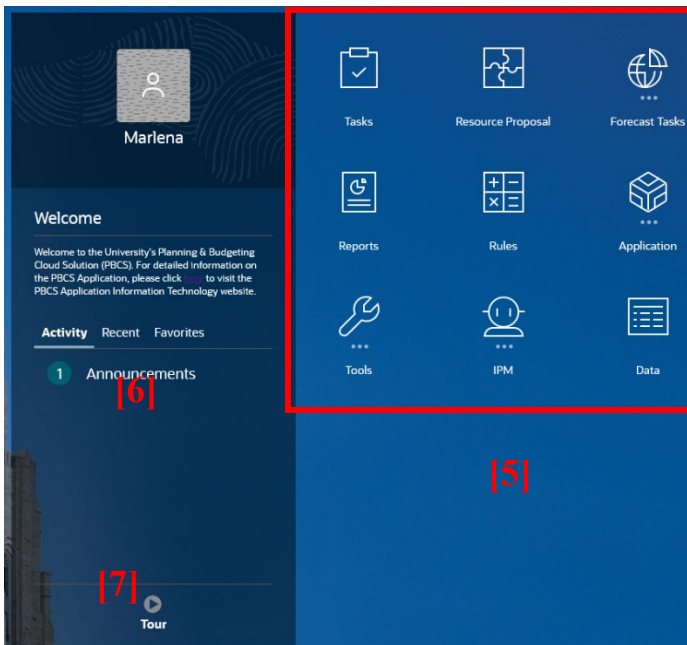
Top Left-Side of Screen:



Top Right-Side of Screen:



Center Screen:

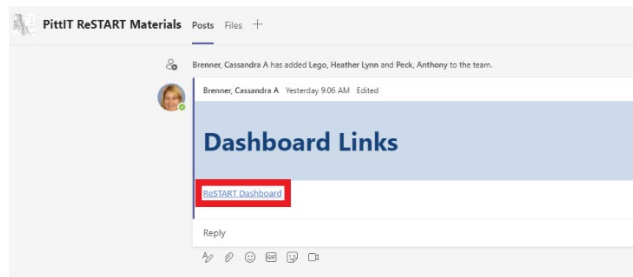
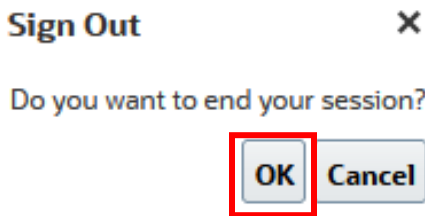
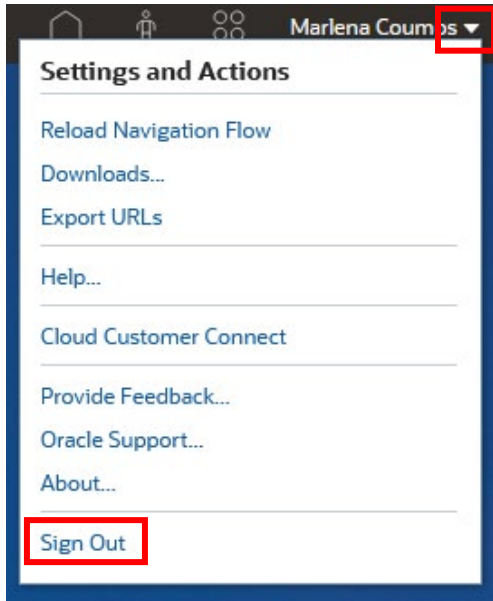


1. **Navigator** - Use the Navigator menu to access functions, applications settings, and preferences. Under the Preferences link, you can manage several personal preferences such as email options, display options and printing options. For example, in display options you can change the number formatting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

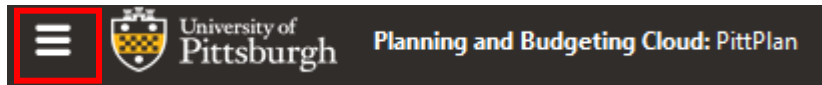
As noted in the FY 2025 Budget Formulation Guidance for Support RCs or FY 2025 Budget Formulation Guidance for Primary RCs, given the outlook for the FY 2025 budget, we will be focused on existing commitments and priorities. As such, this year's process will mainly focus on updating prior year operating 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.

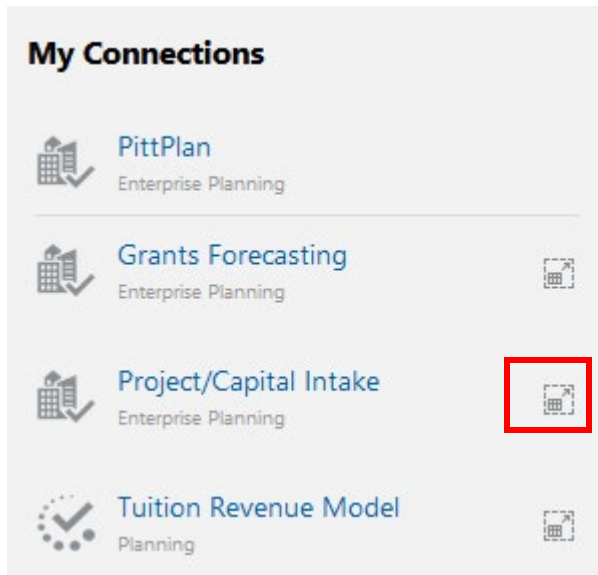
Strategic Operating Budget Request

Creating a Strategic Operating Budget Request

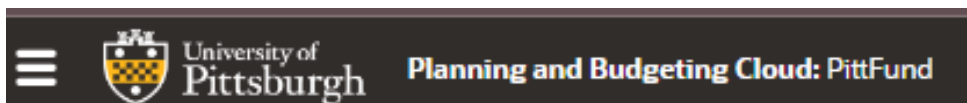
1. Click the *Navigator* icon in the upper left of the window.



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.*

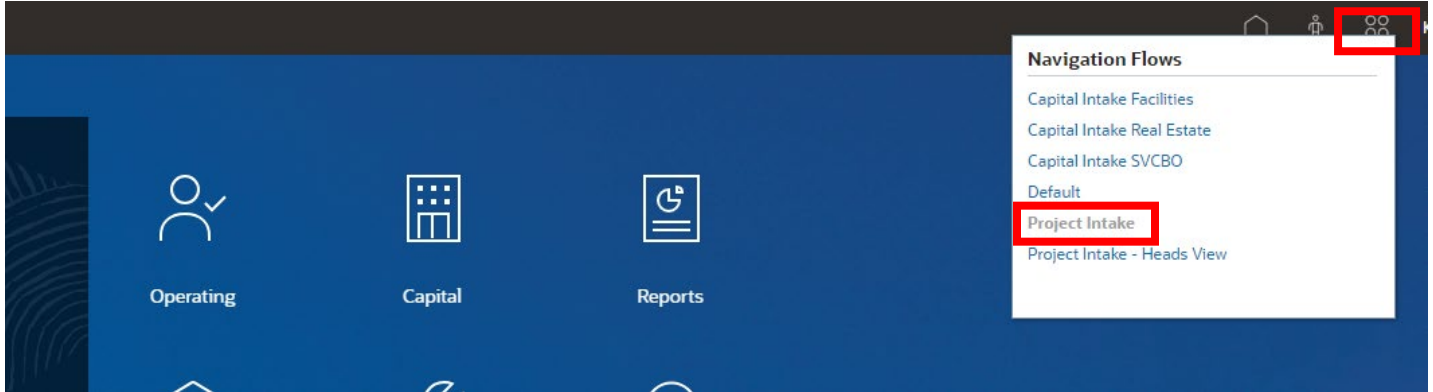


3. The header at the top of the left side of the page will now reference – PittFund.

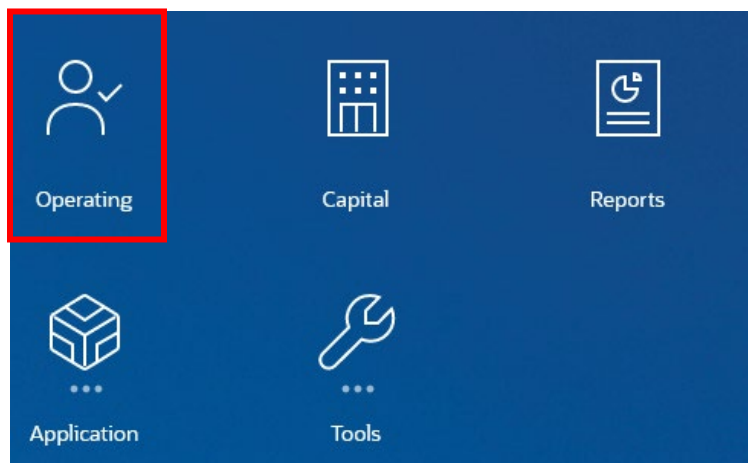


Strategic Operating Budget Request

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.

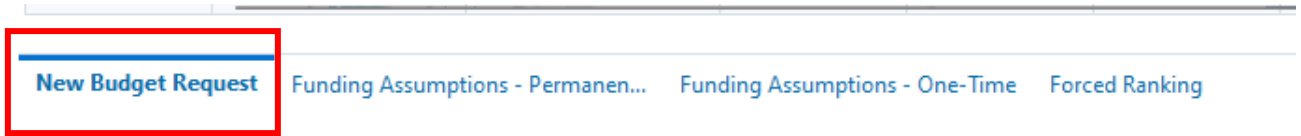


5. Next, select the *Operating* function icon.



Strategic Operating Budget Request

- 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.



New Budget Request - Operating ⓘ

Years FY24	Department 60 - Libraries	Version Submitted	
	Request Name	Project Description	Requestor
O178	Test RCRP Request	Test RCRP Request	Your Name
Project			

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

New Budget Request - Operating ⓘ

Years FY24	Department 60 - Libraries	Version Submitted	
	Request Name	Project Description	
O178	Test RCRP		
Project			

- Add Request Operating
- Delete Request
- Submit Request
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History
- Attachments
- Lock/Unlock Cells

Strategic Operating Budget Request

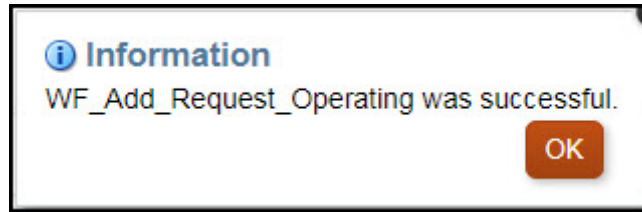
- In the pop-up window, enter the *Permanent Cost amount* (if it a one-time request, enter \$0). Here you can also review and modify the RC if needed. When ready, click the Launch button.

WF_Add_Request_Operating Launch Cancel

* Please enter a Permanent Cost amount. * Please select a Version.

* Please enter an RC.

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



- Complete each field on the *New Budget Request* tab. Click in each cell and enter the values. Notice, that some cells are already populated.

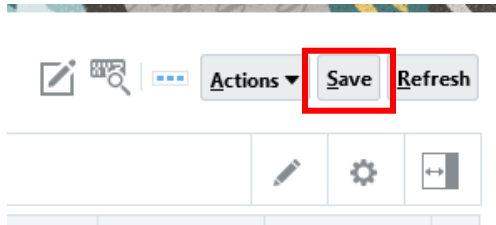
New Budget Request - Operating

Years FY24	Department	Version	Request Name	Project Description	Requestor	Total Permanent Costs	Total One-time Costs	Total Cost	Associated New Revenue/ Cost Savings	Associated Capital Impact	Associated Support RC Impact	Joint Requests?	Joint Request RC #1	Joint Request RC #2	Joint Request RC #3	Final Status
			Test RCRP Request	Test RCRP Request	Your Name	999,999	1	1,000,000	Yes	Yes	Yes	Yes	31 - Dental Medicine	24 - Law	01 - Chancellor	--
						575,000		575,000								--
			Project			999,999	1	1,000,000								--

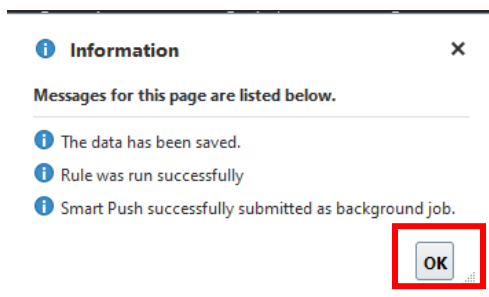
Request Name	Project Description	Requestor	Associated New Revenue/ Cost Savings	Associated Capital Impact	Associated Support RC Impact	Joint Requests?	Joint Request RC #1
Test RCRP Request	Test RCRP Request	Your Name	Yes	Yes	Yes	Yes	31 - Dental Medicine

Strategic Operating Budget Request

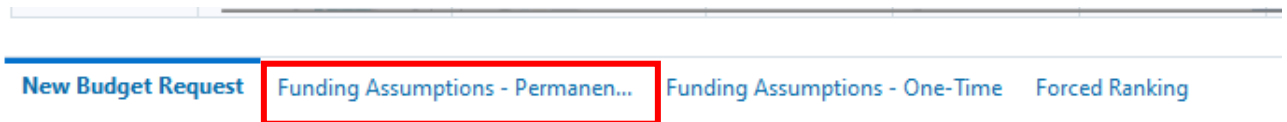
12. Save your work by clicking the Save button in the top right corner. **When adding a new Operating Request, you MUST CLICK SAVE before moving to the next screen.**



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.

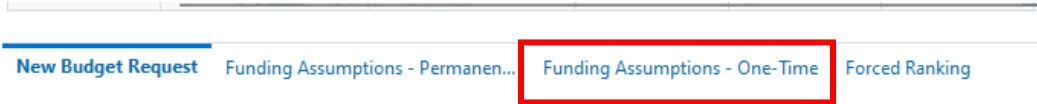
Funding Assumptions - Operating - Permanent i

Department	Version	FY24		FY24
60 - Libraries	Submitted	O178	O180	Operating Total
Request Name		Test RCRP Request		
Total Permanent Costs		999,999	575,000	1,574,999
RC Self-Funded		99,999		99,999
Not RC Self-Funded		900,000		900,000
Total		999,999		999,999

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).



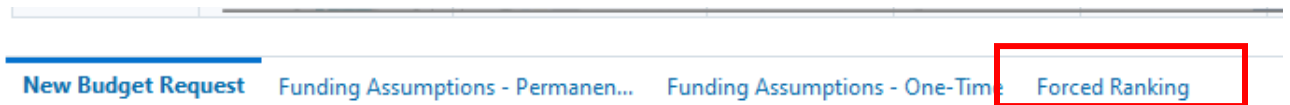
18. Enter all One-time Costs related to the project:

Funding Assumptions - Operating - One-Time ⓘ

	FY24		FY24
	O178	O180	Operating Total
Request Name	Test RCRP Request		
Total One-time Costs	1		1
RC Self-Funded	0		0
Not RC Self-Funded	1		1
Total	1		1

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.



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.

Forced Ranking - Operating ⓘ

Department	Version	Request Name	Primary Objective (required)	Secondary Objective (optional)	Forced Ranking of Not RC Self-Funded Requests (limit of 3)	Forced Ranking of RC Self-Funded Requests	Operating Requests Justification Narrative
60 - Libraries	Submitted						
O178		Test RCRP Request	1.3 Enrich student experience	1.1 Inclusive / equitable campus	1	1	Justification
O180							Justification

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 i

Department 60 - Libraries		Version Submitted				
	Request Name	Primary Objective (required)	Secondary Objective (optional)	Forced Ranking of Not RC Self-Funded Requests (limit of 3)	Forced Ranking of RC Self-Funded Requests	Operating Requests Justification Narrative
O178	Test RCRP Request	1.3 Enrich student experience	1.1 Inclusive / equitable campus	1	1	Justification
O180						Justification

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**.

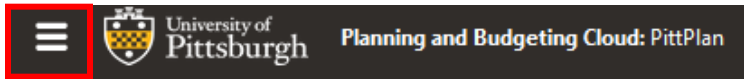
Forced Ranking - Operating i

Department 60 - Libraries		Version Submitted				
	Request Name	Primary Objective (required)	Secondary Objective (optional)	Forced Ranking of Not RC Self-Funded Requests (limit of 3)	Forced Ranking of RC Self-Funded Requests	Operating Requests Justification Narrative
O178	Test RCRP Request	1.3 Enrich student experience	1.1 Inclusive / equitable campus	1	1	Justification
O180						Justification

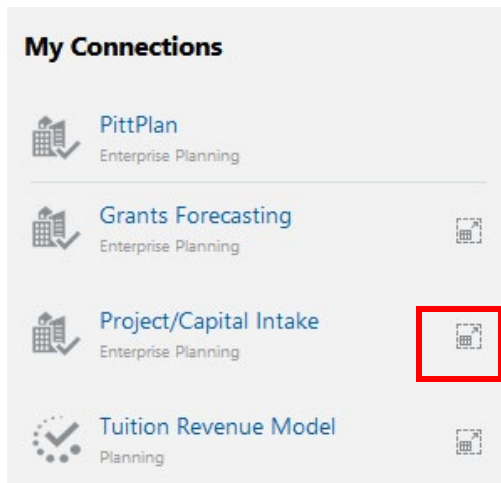
Capital Request

Creating a Capital Request

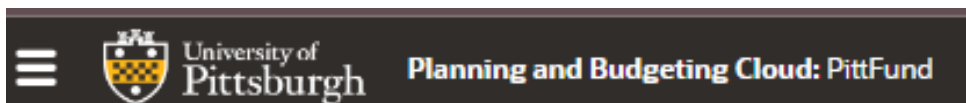
1. Click the *Navigator* icon in the upper left of the window.



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.*

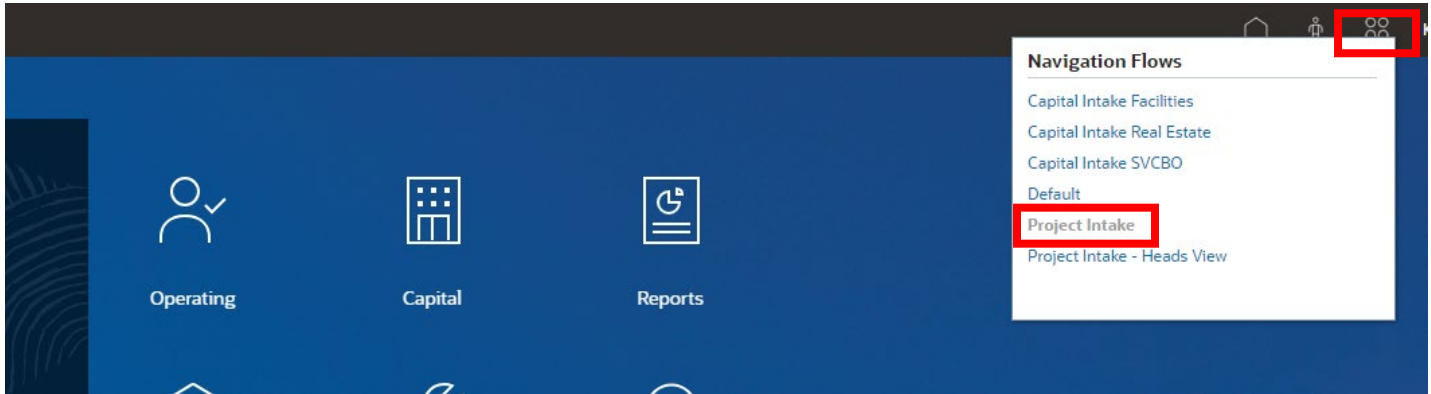


3. The header at the top of the left side of the page will now reference – PittFund.

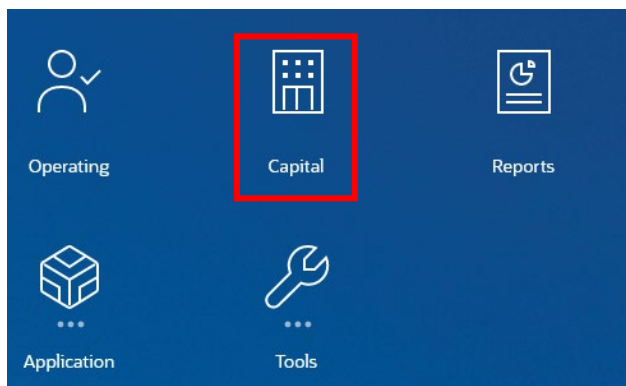


Capital Request

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.

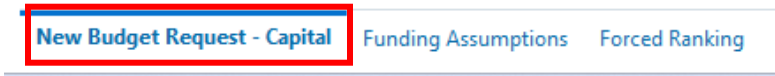


5. Next, select the *Capital* function icon.



Capital Request

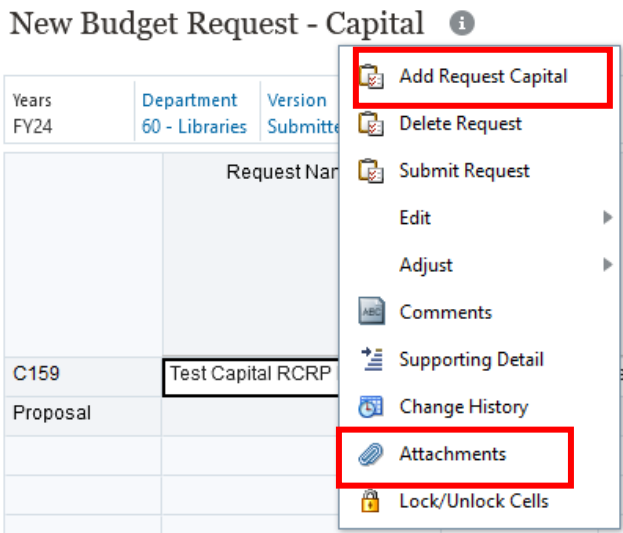
1. The *New Budget Request – Capital* form will open. The department field will default to your assigned RC security. If you have more than one, click the link to update and then click the process arrow to refresh the form with the new RC. Note, the form selections are now located at the bottom of the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



New Budget Request - Capital i

Years	Department	Version	
FY24	60 - Libraries	Submitted	
	Request Name	Building	Project Description
C159	Test Capital RCRP Request	Building Name	Test Capital RCRP Request
Proposal			

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.



Capital Request

- 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.

WF_Add_Request_Capital

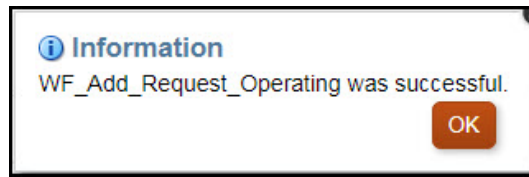
* Please enter a One-Time Cost amount.

* Please select a Version.

* Please enter an RC.

Launch **Cancel**

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



- Enter the details of your project.

New Budget Request - Capital

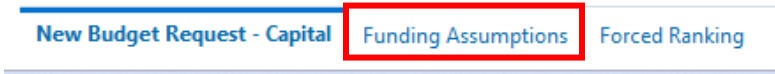
Request Name	Building	Project Description	How Was Project Value Determined	Has this project been reviewed by the Office of Planning and Design?	How does your proposal contribute to the journey to carbon neutrality by 2037?	
C159	Test Capital RCRP Request	Building Name	Test Capital RCRP Request	Justification	Yes	Reducing energy demand or consumption
C177						
Proposal					N/A	Encouraging low carbon connections via active, shared, and low carbon mobility

Description of Project Scope (include floors, rooms, description of work)	What Department/Group is the Project for?	Why is the Project Required?	Requestor	Total One-time Costs	Estimated Future Annual Cost	Associated New Revenue/Cost Savings	Associated Operating Impact	Associated Support RC Impact
Include Description	Your RC	Explanation	RC Head	10,000,000	10,000,000,000	Yes	Yes	Yes
				10,000,000				
				10,000,000	10,000,000,000	Yes	Yes	Yes

Joint Requests?	Joint Request RC #1	Joint Request RC #2	Joint Request RC #3	Final Status
Yes	01 - Chancellor	05 - Student Affairs	10 - SVC and Provost	--
				--
Yes	01 - Chancellor	05 - Student Affairs	10 - SVC and Provost	--

Capital Request

- Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.
- Click on the *Funding Assumptions* tab on the bottom of the screen.

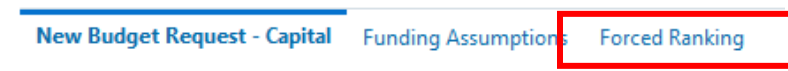


- Complete the *Funding Assumptions* related to the project.

Funding Assumptions - Capital i

Department 60 - Libraries	Years FY24	Version Submitted	Request Name	Total One-time Costs	Crossfoot of Cash Flow on Screen	RC Self-Funded	Not RC Self-Funded
			C159 Test Capital RCRP Request	10,000,000	10,000,000	0	10,000,000
			C177 <input type="text"/>	10,000,000			
			Grand Total Test Capital RCRP Request	20,000,000	10,000,000	0	10,000,000

- Save your work by clicking the Save button in the top right corner, then click OK in the confirmation window.
- Click on the *Forced Ranking* tab at the bottom of the screen.



- 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.

Forced Ranking - Capital i

Department 60 - Libraries	Version Submitted	Request Name	Primary Objective (required)	Secondary Objective (optional)
		C159 Test Capital RCRP Request	1.4 Enhance employee experience	1.5 Update physical / operational environment
		C177 <input type="text"/>		

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**.

Forced Ranking of Not RC Self-Funded Capital Requests (limit of 3)	Forced Ranking of RC Self-Funded Capital Requests	Capital Requests Justification Narrative
1	1	Justification

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**.

Forced Ranking of Not RC Self-Funded Capital Requests (limit of 3)	Forced Ranking of RC Self-Funded Capital Requests	Capital Requests Justification Narrative
1	1	Justification

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.

The following prompts have been defined in the report. You may use the default values shown, or select other members.

Respond to Prompts at Book Level

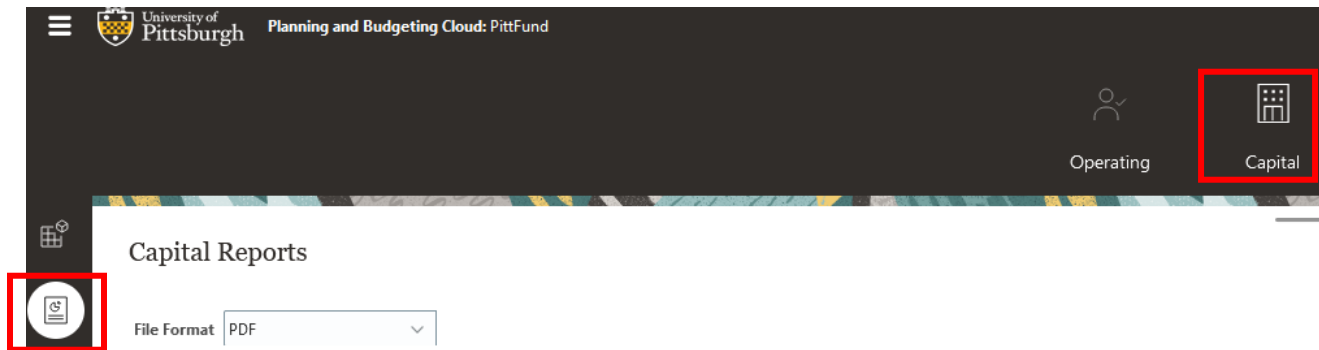
Prompt	Selection	Type	Source
Please type your "RCxx" number:	<input type="text" value="Selection"/>	Report in Book	Book: Operating Reports Report: Project Summary - Operating Grid: All
Enter Version:	<input type="text" value="Submitted"/>	Report in Book	Book: Operating Reports Report: Project Summary - Operating Grid: All

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.



The following prompts have been defined in the report. You may use the default values shown, or select other members.

Respond to Prompts at Book Level

Prompt	Selection	Type	Source
Please type your "RCxx" number:	<input type="text" value="Selection"/>	Report in Book	Book: Operating Reports Report: Project Summary - Operating Grid: All
Enter Version:	<input type="text" value="Submitted"/>	Report in Book	Book: Operating Reports Report: Project Summary - Operating Grid: All