

Field Budget Submission System (FBSs)

Training and Reference Guide

Revised January 2008

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FY10 Key Dates & Contacts



Key Processes and Dates:

- **FBSs Hands-on Training** Jan 18
- **FBSs Proposal Entries Due** Feb 15
- **Final Data Review** Feb 19-22
- **Variance Analysis Follow-up** Feb 22-27
- **Supplementary Submissions & Crosscuts** Mar 14
- ***FY10 Submission Due*** Mar 14
- **Budget Validation (CH, EH, LS, MS & PH)** TBD (April/May)

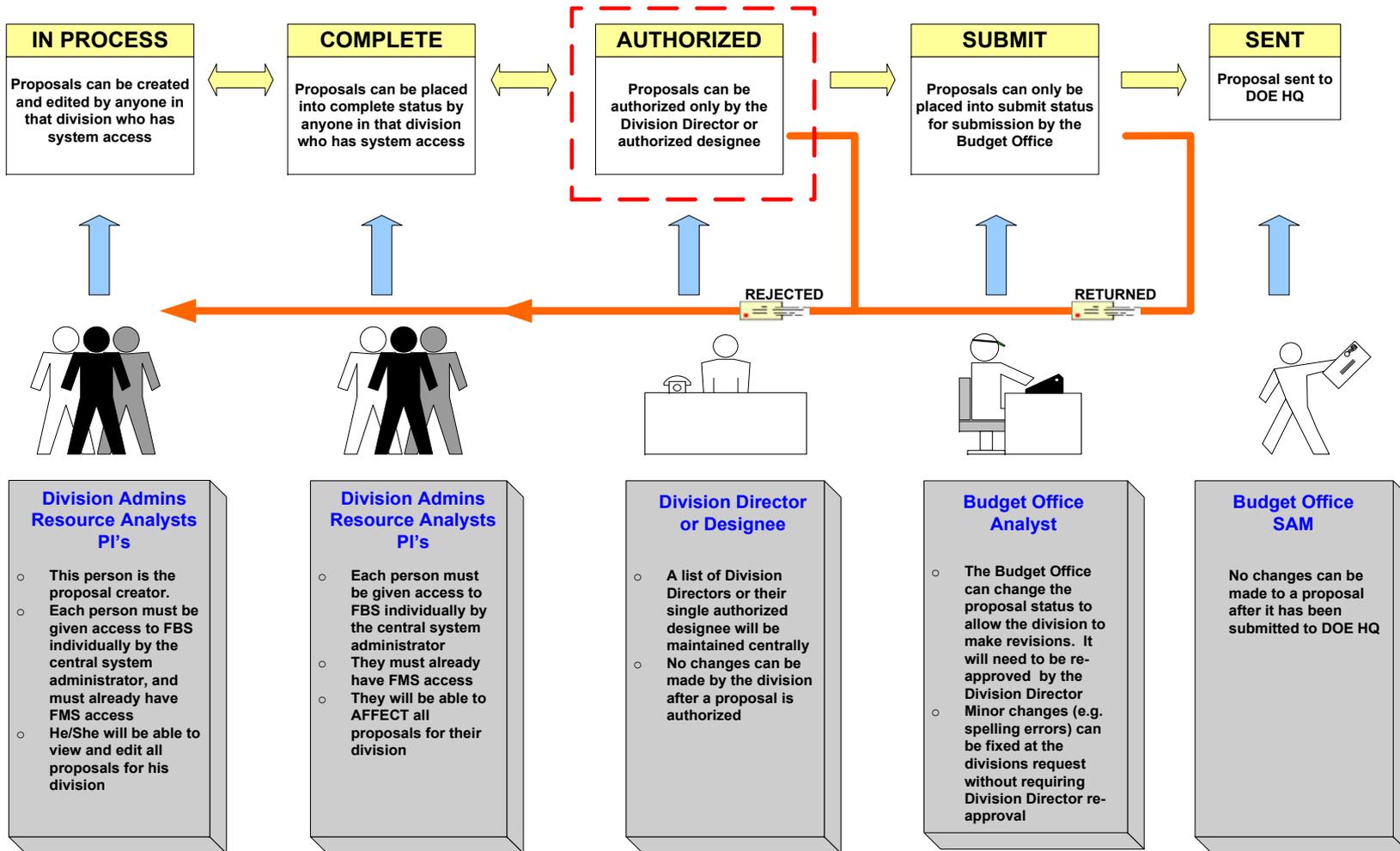
WFO Key Processes and Dates:

- **RAPID Proposal/Award Data extract** Feb 7
- **Template sent to Field** Feb 11
- **Template due to Budget Office** Feb 22

Contact Information:

- **DOE Direct and FBSs questions:** Email FBSsnotify@lbl.gov or call Sonya Neely (x6214) or Anastasia Schiller (x4273)
- **Work for Others:** David Hathaway (x7713)

FBSs Internal Work Flow



FBSs Requirements



Enter into FBSs as a...

DOE:	Proposal (Submitted thru interim process)	Place Holder (Not submitted thru interim process)	Attach FWP to proposal in FBSs
NNSA	No	Yes	No
Office of Science R&D	Yes	No	Yes
Office of Science Construction	No	Yes	Yes*
Office of Science S&S	No	Yes	Yes
EERE	Yes	No	Yes
Electric Transmission and Distribution	No	Yes	Yes
Fossil Energy	No	Yes	Yes
Civilian Radioactive Waste Mgmt	No	Yes	Yes
Environmental Management	No	Yes	Yes
Environment Safety and Health	No	Yes	Yes
Intelligence	No	Yes	Yes
Crosscuts:	No	No	Email-Budget Office
WFO:	Place Holder info entered into an excel template.		

* Attach the Project Data Sheet (PDS) for Construction Projects

iii.

I. SECURITY

The Field Budget Submission System (FBSs) is a component of LBNL's Financial Management System (FMS). In order to access FBSs you must have a valid FMS User ID and password and security access to FBSs. First time users should use their LDAP User ID and password to access FMS. For FMS access issues, contact Aurora Pecoraro at (510) 486-6439. For FBSs access, contact Sonya Tom Neely at (510) 486-6214, or Anastasia Schiller at (510) 486-4273.

FBSs production can be accessed through the FMS web site (via Internet Explorer) at: <https://fms/fmsprd>

For training purposes, login to: <https://fms/fmstrn>

1) Login to FBSs

PeopleSoft 8 Sign-in - Microsoft Internet Explorer

Address: <https://fmssrv2.lbl.gov:8001/psp/fmsprd/?cmd=login>

PeopleSoft.

User ID: JDMARSH

Password:

Sign In

1. Enter your User ID,
2. Enter your password, &
3. Click the "Sign In" button.

(Note: Use Internet Explorer.)

Nederlands Svenska
简体中文 繁體中文

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Done Trusted sites

A window similar to the one shown below will appear on your screen:

Employee-facing registry content - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address <https://fmsrv1.lbl.gov:8401/psp/FB55QA/EMPLOYEE/ERP/h/?tab=DEFAULT> Go Links

Personalize [Content](#) | [Layout](#)

Home Worklist MultiChannel Console Add to Favorites Sign out

Menu

Search:

- My Favorites
- Project Costing
- General Ledger
- Field Budget Submission
- Grants
- Customer Contracts
- Customers
- Allocations
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

4. Click on "Field Budget Submission" which is located in the navigation window.

powered by PeopleSoft

Internet

You are now in FBSs.

The screenshot shows a Microsoft Internet Explorer browser window. The address bar contains the URL: https://fmsrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/s/WEBLIB_EOPP_SC.HOMEPAGE.FieldFormula.IScript_AppHP?pt_fname. The page title is "Base Navigation Page - Microsoft Internet Explorer".

The main content area is titled "Field Budget Submission" and includes the following sections:

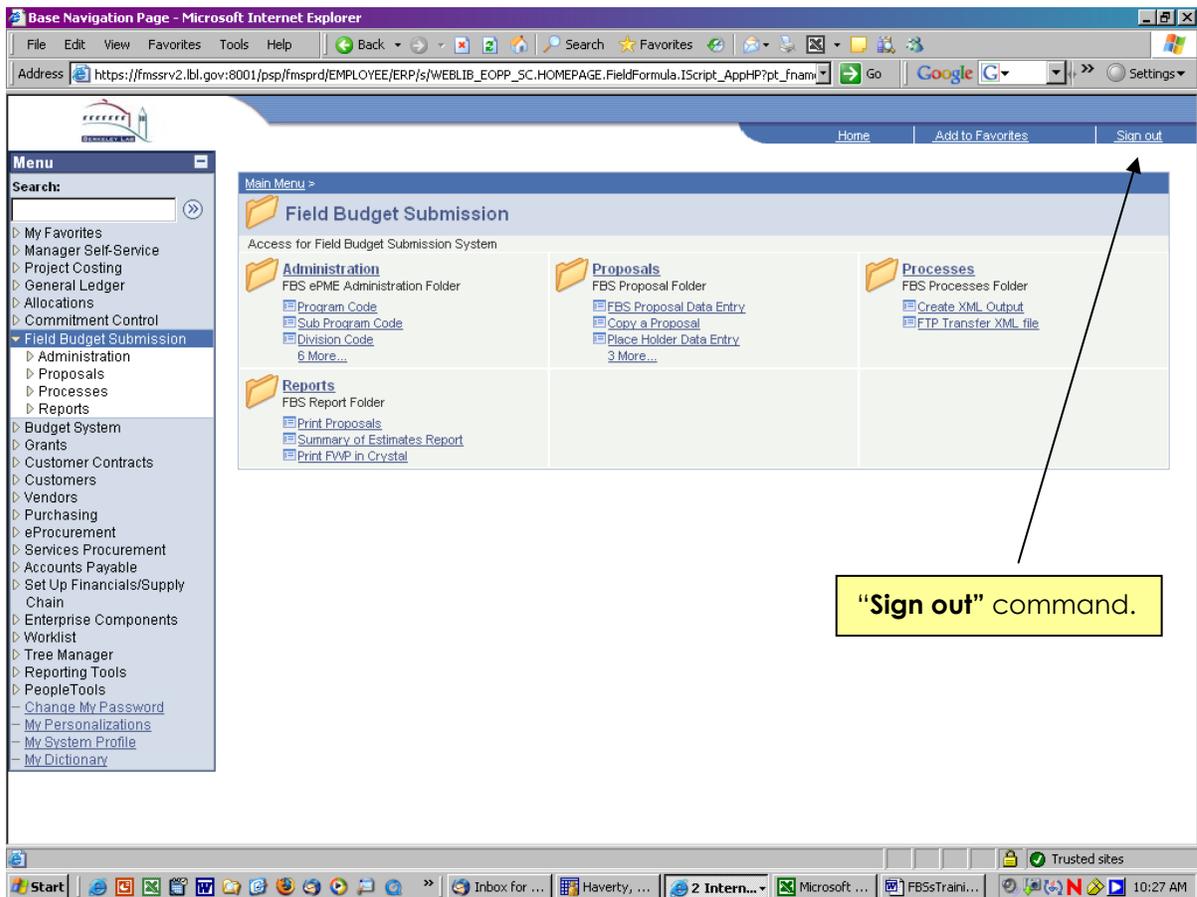
- Administration**: FBS ePME Administration Folder
 - [Program Code](#)
 - [Sub Program Code](#)
 - [Division Code](#)
 - [6 More...](#)
- Proposals**: FBS Proposal Folder
 - [FBS Proposal Data Entry](#)
 - [Copy a Proposal](#)
 - [Place Holder Data Entry](#)
 - [3 More...](#)
- Processes**: FBS Processes Folder
 - [Create XML Output](#)
 - [FTP Transfer XML file](#)
- Reports**: FBS Report Folder
 - [Print Proposals](#)
 - [Summary of Estimates Report](#)
 - [Print FWP in Crystal](#)

The left-hand navigation menu includes the following items:

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission** (selected)
 - Administration
 - Proposals
 - Processes
 - Reports
- Budget System
- Grants
- Customer Contracts
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Payable
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

2) Log out of FBSs

While in FBSs, you may click on the “**sign out**” command which is located at the top right-hand corner of any screen.



II. PROPOSAL CREATION & MAINTENANCE

1) Add a Proposal

FBSs has two proposal entry options:

- **“FBS Proposal Data Entry”** which will be used to enter an *R&D proposal* that will be submitted to DOE HQ via the interim proposal submission process. (i.e., For FY10, Office of Science and EERE)
- **“Place Holder Data Entry”** which has two functions: 1) to submit proposals to DOE HQ via email for those HQ Programs not participating in the interim proposal submission, and 2) to record *all other proposal types* for institutional summary reporting purposes. (This includes all Construction activity.)

Navigation:

- **Proposals**
- **FBS Proposal Data Entry**

The screenshot shows a web browser window titled "Base Navigation Page - Microsoft Internet Explorer". The address bar shows a URL starting with "https://fmsrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/s/WEBLIB_EOPP_SC.HOMEPAGE.FieldFormula.IScript_AppHP?pt_fnam...". The page content includes a "Menu" on the left and a "Proposals" section on the right. The "Proposals" section contains a grid of links: "FBS Proposal Data Entry", "Copy a Proposal", "Place Holder Data Entry", "Copy a Place Holder", "Copy Proposal to Placeholder", and "Copy Placeholder to Proposal". A yellow box with the text "1. Select 'FBS Proposal Data Entry'." has an arrow pointing to the "FBS Proposal Data Entry" link in the grid. The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock displaying "10:38 AM".

The screenshot shows the 'FBS Proposal Data Entry' web application. The 'Proposals' section is active, showing fields for 'LBNL Proposal ID' (Train08), 'Funding Year' (2010), and 'Proposal Sequence Number' (1). There are buttons for 'Find an Existing Proposal', 'Add a New Proposal', and 'Add'. A menu on the left lists various system functions. Numbered callouts provide instructions: 2. Select 'Add a New Proposal'. 3. Enter an 'LBNL Proposal ID'. (Maximum 8 characters). 4. The Funding Year field defaults to the year for a Budget (On-cycle) proposal. However, if you're adding a Funding (Off-cycle) proposal, you'll need to overwrite the default with the appropriate funding year. (See 'Proposal Funding Year' below for a detailed definition.) Note: This field will not be editable after you click 'Add' in Step 5. 5. Click 'Add'.

a. Proposal Funding Year

The “**Funding Year**” field refers to the fiscal year which will be funded; not the current fiscal year. This field depends on whether the “**Proposal Purpose**” is “**Budget**” (an **On-cycle Proposal**) or “**Funding**” (an **Off-cycle Proposal**)

“**On-cycle Proposals**” are submitted during the Annual Budget Call, and are a request for funding two years after the year during which the proposal was submitted.

For example:

Given the following criteria: Current Fiscal Year = 2008
Proposal Purpose = Budget (On-cycle Proposal)

Then, on the “Add a New Proposal” screen, enter the “Funding Year”, **2010**.

“**Off-cycle Proposals**” are submitted outside the Annual Budget Call, and are typically requests for funding in the current or next fiscal year.

For example:

Given the following criteria: Current Fiscal Year = 2008
Proposal Purpose = Funding (Off-cycle Proposal)
On the “Add a New Proposal” screen, enter the “Funding Year”, **2008 or 2009**.

General Information:

(1) The proposal is comprised of 5 main tabs:

1. Admin
2. Technical
3. Budget
4. Attachment
5. Status History

(2) Required fields are highlighted **yellow**. (NOTE: All required fields must be populated before you can save the proposal.)

(3) Magnifying glasses are lookup tools which provide a data table specifically for its adjacent field. A data table may be sorted when you click on the column headings.

b. Administrative Information

The following screen appears with the “Admin” tab open:

6. Populate all required fields that are shaded **yellow** and other fields as needed.

“Sub Division” is a division assigned code to help with identification and reporting within the Division. This is a free form, non-validated field.

7. The “End Date” is required and is the end date of the project. If there is none, then leave it blank and click on the “Open Ended” check box.

Scroll down further on the “Admin” tab:

8. After the required “Primary B&R” is entered, the “HQ Program” is automatically populated. This field can be overwritten. (Note: An “HQ Program Manager” field will be placed next to the “HQ Program.” It will be optional due to systemic limitations, but is required for the interim submission.)

If a **Foreign/Non-U.S. collaborator** is involved in the project, populate all collaborator fields. An additional field (Foreign Location) appears if you check “**Foreign Collaborator**”.

Scroll down even further on the “Admin” tab:

The screenshot shows the PeopleSoft FBS Proposal Data Entry form in Microsoft Internet Explorer. The form includes fields for Subcontractor Name and Description Of Work, and checkboxes for various research types. Three callout boxes provide instructions:

- Human Research:** If you check “Human Research”, you will need to enter the Compliance Number and the Approval Date.
- Animal Research:** Similarly, if “Animal Research” applies, then the NIH Compliance Number and Approval Date are required.
- CRADA:** If a CRADA applies, then enter the CRADA

A green callout box at the bottom right states: **9. Proceed to the “Technical” tab.**

The form also includes fields for No of Postdoc Fellows, No of Graduate Students, and No of Undergraduate Students. Below these are sections for Human Research (with HHS Compliance No and IRM Approval Date), Animal Research (with NIH Compliance No and IACUC Approval Date), and CRADA (with CRADA Number). Buttons for Save, Notify, Add, Update/Display, and Include History are at the bottom. Navigation links for Admin, Budget, Technical, Attachment, Status History, and Glossary are also present.

c. Technical Information

10. "Work Proposal Title" is a required field. (Maximum 300 characters)

11. "Category of Research" and "Category of Work" are also required.

12. "Project Objective Description" and "Abstract" are required. (Note: Each has a maximum of 1,333 characters. The system will allow you to continue typing beyond the limit, but will truncate after moving to another field.)

Scroll Down further on the “Technical” tab.

13. There must be at least one Milestone. The system defaults the first milestone of “Submit Proposal” this can be overwritten. Add additional milestones by using the “+” button.

14. You may now click on the “Save” button.

15. Proceed to the “Budget” tab.

d. Budget Information

Note:

- The budget years are dependent on the "Funding Year" entered on the "Add New Proposal" screen of Page 7.
- The dollars entered below are in Thousands.
- See the budget category definitions below.

	Prior Years	CarryOver	2008 Current FY	2009 BY - 1	2010 Current BY	2011 BY + 1	2012 BY + 2	2013 BY + 3	2014 BY + 4	2015 BY + 5	2016 BY + 6	2017 BY +
Scientific Staffing	0.0	10.0	10.0	8.0	8.0	8.0	8.0					
Other Direct Staffing	0.0		2.5	2.5	2.5	2.5	2.5					
Total Direct Staffing (Staff Years)	0.0	10.0	12.5	10.5	10.5	10.5	10.5					
Operating Total Obligations	0	100	200	250	250	300	300					
Operating Total Costs	0	100	200	250	250	300	300					
Equipment Obligations	0	200	10	200	250	250	300	300				
Equipment Costs	0	190	200	250	250	300	300					

16. Enter FTE information for "Staffing" to the tenths decimal place, and also budget dollars (\$K) for "Operating" & "Equipment" to the whole number.

The first two columns are designated for budget amounts from "**Prior Years**": the first column automatically sums all prior years' amounts that have been entered into FBSs and the second provides the proposal creator with the option to update them. (This is not required information.) The "**Carryover**" column is a calculation of the "**Prior Years**" budget data.

Note: You must be using IE as your browser for the columns to align correctly

- Scientific Staffing = Estimate for Scientific Full Time Equivalents (use FTE's, not staffing dollars)
- Other Direct Staffing = Estimate for other FTE's (use FTE's, not staffing dollars)
- Operating Total Obligations = Operating Budget Authority (BA)
- Operating Total Costs = Operating Budget Obligations (BO)
- Equipment Obligations = Equipment Budget Authority
- Equipment Costs = Equipment Budget Obligations

Scroll to the right on the “Budget” tab.

17. “Total to Complete Display” will calculate when you save your entries. If you wish to change this number, you may overwrite the calculations by entering the new total in the “Total to Complete” column. (Note: This is not a required field.)

Years	CarryOver	2008 Current FY	2009 BY - 1	2010 Current BY	2011 BY + 1	2012 BY + 2	2013 BY + 3	2014 BY + 4	2015 BY + 5	2016 BY + 6	2017 BY + 7	Total to Complete Display	Total to Complete
10.0		10.0	8.0	8.0	8.0	8.0						52.0	
		2.5	2.5	2.5	2.5	2.5						12.5	
10.0		12.5	10.5	10.5	10.5	10.5						64.5	
100		200	250	250	300	300						\$1,400	
100		200	250	250	300	300						\$1,400	
200	10	200	250	250	300	300						\$1,500	
190		200	250	250	300	300						\$1,490	

18. Click on the “SAVE” button which is always located at the lower left-hand corner of the screen.

e. Attachments

For attachments to work correctly you need to have the POP-UP Blocker turned-off. On the Microsoft Internet Explorer Toolbar, click on:

- Tools
- Pop-up Blocker
- Turn off Pop-up Blocker.

The “Attachment” screen appears as follows:

19. Choose a category which best describes the attachment. (FBSs allows for one attachment per category. The “Other” category is an exception and may be selected multiple times to add multiple files.) It is acceptable to attach a single PDF of the entire proposal package under the category “Proposal”

20. Click on the paper clip to attach the file. Use the “-” button to delete an attachment.

21. Click “Save”

f. Status

When a proposal is created, the status is defaulted to “In Process”.

22. When the proposal is ready for approval, first click on the “+” sign to add a new status row. Then, change the status to “CO” (Completed).

23. You may add comments for the designated division approver here.

24. Click “SAVE” to implement the status change.

The completed proposal will appear as follows:

25. You have the option of clicking the “Notify” button to send an email to inform the Divisional Designee to review & approve the proposal.

Your proposal is now complete and is a candidate for approval by the Divisional Designee.

g. Glossary

The Glossary tab includes FBSs field definitions in the order that they appear during the proposal setup stage.

A list of proposals generated from your search will appear:

The screenshot shows the 'Proposals' section of the FBS Proposal Data Entry application. The search form includes the following fields:

- LBNL Proposal ID: begins with []
- Funding Year: = []
- Proposal Sequence Number: = []
- Primary PI: begins with []
- FBS Key: begins with []
- Proposal Division ID: begins with [LD]
- Proposal Sub Division ID: begins with []
- Proposal Status: = []
- Short Name: begins with []

Buttons: Search, Clear, Basic Search, Save Search Criteria

Search Results

LBNL Proposal ID	Funding Year	Proposal Sequence Number	FBS Key	Proposal Division ID	Proposal Sub Division ID	Proposal Status	Short Name
CSEKCL	2007	1	000000146	LD	(blank)	In Process	LD_CSEKCL
CSEKCL	2008	1	000000478	LD	(blank)	Sent	CSEKCL -LD-RO-08
LDIAC06	2006	1	000000362	LD	(blank)	Completed	IAC WORKSHOP

Select a proposal from the list and it will be displayed for you to update. Remember to save your changes and set the status to “Complete” when the proposal is ready to be approved.

3) Delete a DOE Proposal

1. Find and select the proposal to delete.
2. Click on the “Status History” tab.
3. Change the status of the proposal to “DE” (Deleted).
4. Click on the “Save” button.

*****NOTE: Once the “Deleted” status has been saved, there’s no means to retrieve the proposal.**

4) Copy a DOE Proposal

Navigation

- Field Budget Submission
- Proposals
- Copy a proposal

The following screen will appear:

Copy Proposal
Enter any information you have and click Search. Leave fields blank for a list of all values.

Proposal to copy

FBS Key:

LBNL Proposal ID:

Funding Year:

Proposal Sequence Number:

Proposal Division ID:

Proposal Status:

[Basic Search](#) [Save Search Criteria](#)

1. Use a combination of these search fields to find the proposal you would like to copy or leave them all blank to bring up a list of all proposals.

The "Clear" button will clear all the search fields.

A list of proposals generated from your search will appear:

Copy a Proposal

Enter any information you have and click Search. Leave fields blank for a list of all values.

Proposal to copy

FBS Key:

LBNL Proposal ID:

Funding Year:

Proposal Sequence Number:

Proposal Division ID:

Proposal Status:

[Basic Search](#)

Search Results

View All First 1-3 of 3 Last

FBS Key	LBNL Proposal ID	Funding Year	Proposal Sequence Number	Proposal Division ID	Proposal Status
000000146	CSEEKL	2007	1	LD	In Process
000000362	LDIAC06	2006	1	LD	Completed
000000478	CSEEKL	2008	1	LD	Sent

2. Click on the proposal you would like to copy.

Populate the required fields and click the copy button.

3. Enter the new "Proposal ID".

4. Enter the new "Funding Year".
ATTENTION: This field must be entered correctly. You will not be able to change it after you've clicked on the "Copy" button. (Refer to the definition in the section titled Proposal Funding Year on page 7.)

5. Click on the "Copy" button to save and create the copy.

6. A successful copy notification will appear. Click "OK".

7. Return to the FBS Proposal Data Entry screen to find and update the copied proposal.

NOTE:

(1) Attachments can't be copied from proposal to proposal. They will need to be individually reattached to the newly copied proposal.

(2) The status of the copied proposal is automatically set to "In Process".

III. DIVISION REVIEW & APPROVAL

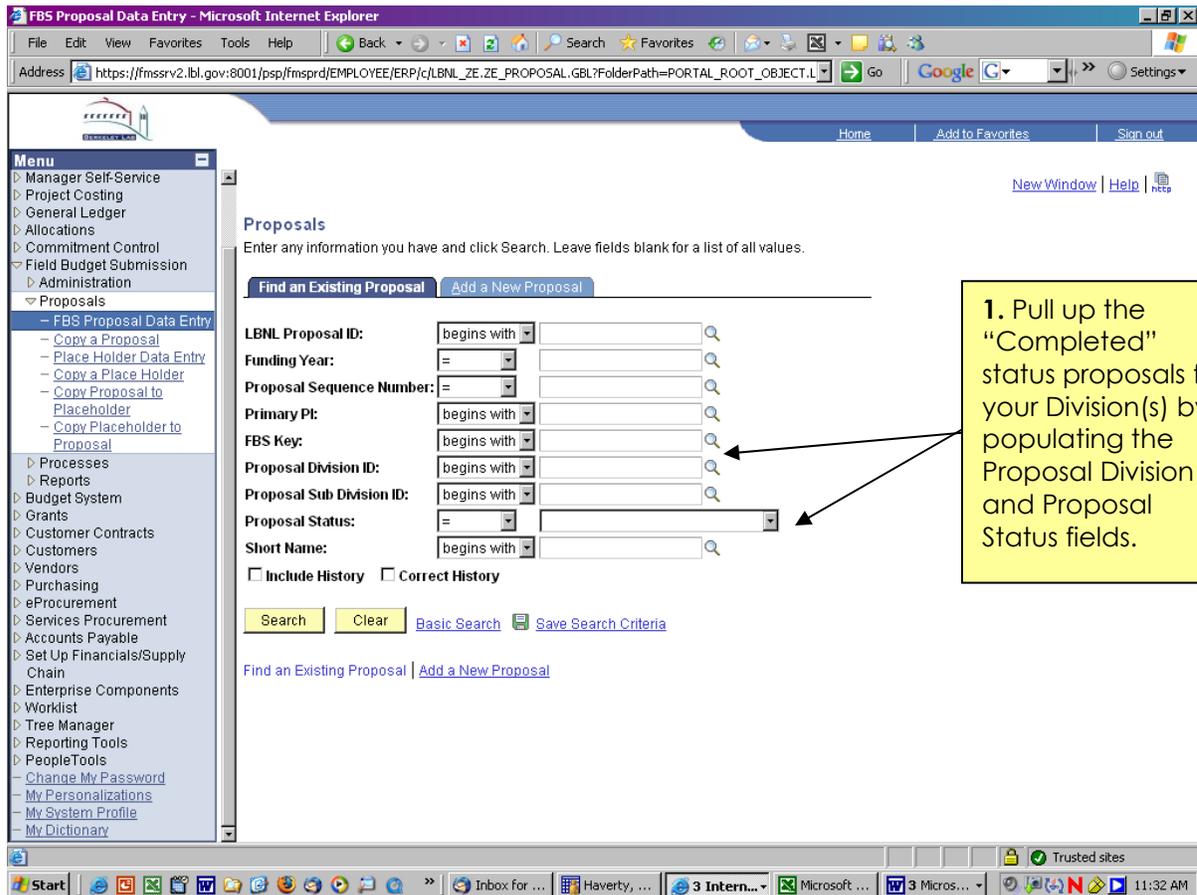
After a proposal has been placed into “Completed” status by the **Proposal Author**, the proposal becomes available for approval or rejection by the **Division Director/Authorizer**.

Division Directors/Authorizers are listed in the Administration section of FBSs under Division Code. This list is maintained by the Budget Office.

Navigation

- Field Budget Submission
- Proposals
- FBS Proposal Data Entry
- Find an Existing Proposal

The following screen will appear:



start 50°F Desk... Re: FBS T... 4 Intern... G:\Finand... 2 Micros... Search Desktop 7:33 AM

FBS Proposal Data Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print Mail News Local intranet

Address https://fmsrv2.bl.gov:8101/psp/fmstrm/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROPOSAL.GBL?FolderPath=PORTAL_ROOT_OBJECT.LBNL_FBS.FBS_PROPOSAL_ZE_PROPOSAL_GBL&IsFt

Home Worklist Add to Favorites Sign out

New Window Help

Menu

Search: []

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
- Administration
- Proposals
 - FBS Proposal Data Entry
 - Copy a Proposal
 - Place Holder Data Entry
 - Copy a Place Holder
 - Copy Proposal to Placeholder
 - Copy Placeholder to Proposal
- Processes
- Reports
- Budget System
- Planning
- Grants
- Customer Contracts
- Billing
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Banking
- Cash Management
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Proposals

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Proposal Add a New Proposal

LBNL Proposal ID: begins with []

Fiscal Year: = []

Proposal Sequence Number: = []

Primary PI: begins with []

FBS Key: begins with []

Proposal Division ID: begins with [] NS

Proposal Sub Division ID: begins with []

Proposal Status: = [] Completed

Short Name: begins with []

Include History

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-2 of 2 Last

LBNL Proposal ID	Fiscal Year	Proposal Sequence Number	FBS Key	Proposal Division ID	Proposal Sub Division ID	Proposal Status	Short Name
NPDSF	2010	1	000002118	NS	(blank)	Completed	PDSE
TRAIN08	2010	1	000002118	NS	(blank)	Completed	FBS Trainin...

Find an Existing Proposal Add a New Proposal

Discussions Discussions not available on https://fmsrv2.bl.gov:8101/ Local intranet

4. Select the proposal you want to review to either approve or reject.

The selected proposal is now displayed and ready for review. You may also print this proposal to facilitate the review. (Refer to Proposal Reporting on page 28 to review how to print a proposal.)

To reject or approve the proposal, go to the Status History Tab.

The screenshot shows the 'FBS Proposal Data Entry' web application in Microsoft Internet Explorer. The 'Status History' tab is active, displaying details for proposal 'FBS TRAINING' (ID: TRAIN08, Sequence: 1, Status: Authorized, Funding Year: 2010). A 'Proposal Status' window is open, showing the status changed by Neely, Sonya T. on 01/17/2008. The status is currently 'AU' (Authorized). A comment box contains the text: 'This proposal is authorized for submission to HQ.' The 'Save' button is highlighted at the bottom of the window.

5. Select "+" to add a new status row.

6. Click on the magnifying glass to pull up a status list and change the status to "AU" to authorize the proposal to be sent to HQ by the Budget Office or "RJ" to return it for editing.

7. You may add comments as needed. This is optional.

8. Remember to click the "Save" button.

Note: Authorizing a proposal will send a system generated e-mail to the Budget Office for institutional review. The Budget Office will either approve the proposal and send it to DOE, or return the proposal and notify the proposal author.

IV. PROPOSAL REPORTING

1) Print Proposal in FWP Format

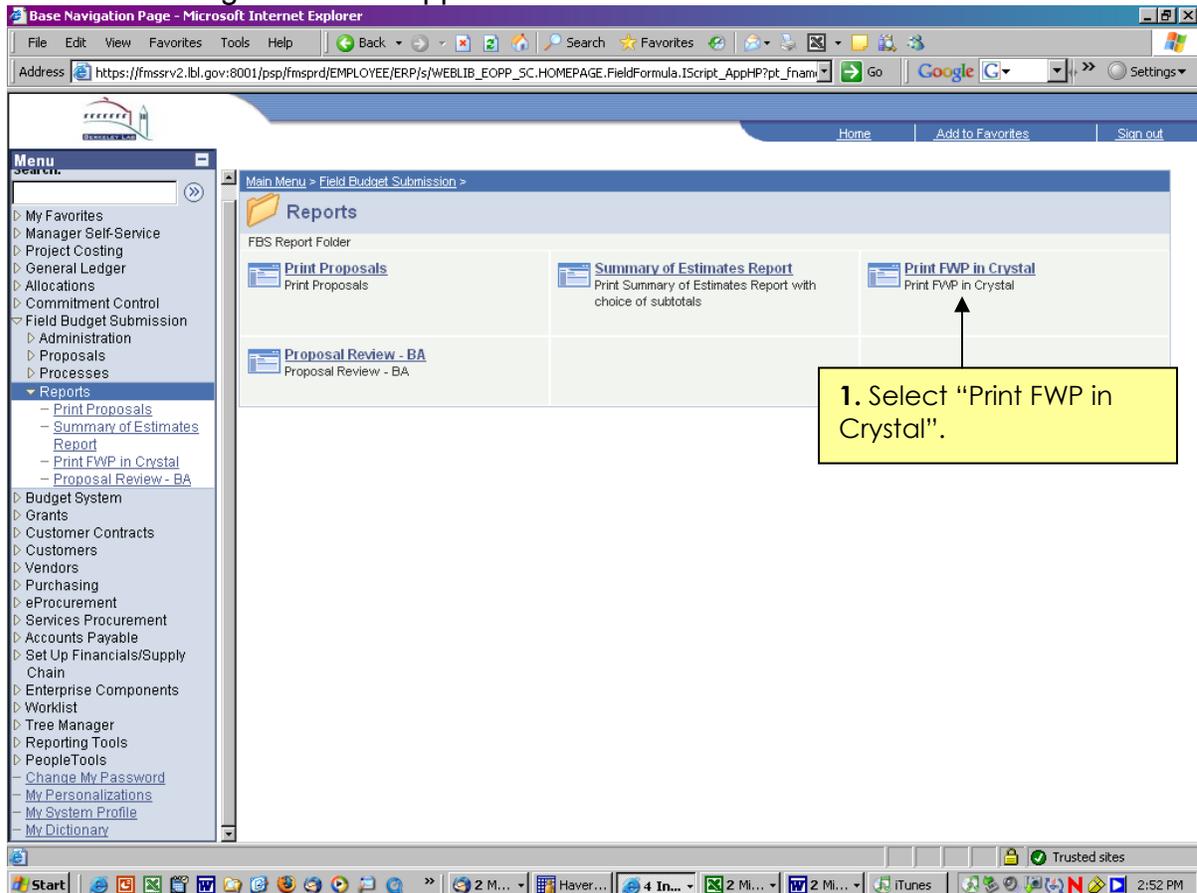
This functionality prints the information entered for the proposal in the standard DOE Field Work Proposal Form.

(Note: Not all information entered into FBSs has a corresponding location on the standard form.)

Navigation

- Field Budget Submission
- Reports

The following screen will appear:



Print FWP in Crystal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address Links

Home Worklist Add to Favorites Sign out

PeopleSoft

Menu

Search:

My Favorites
Project Costing
General Ledger
Field Budget Submission
Administration
Proposals
Processes
Reports
Print Proposals
Print FWP in Crystal
Grants
Customer Contracts
Customers
Allocations
Set Up Financials/Supply Chain
Enterprise Components
Worklist
Application Diagnostics
Tree Manager
Reporting Tools
PeopleTools
Change My Password
My Personalizations
My System Profile
My Dictionary

New Window Help

FWP Crystal Run Control

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search by: Run Control ID begins with

Case Sensitive

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Here you can directly input an existing Run Control ID, use the search functionality to find an existing Run Control ID, or add a new Run Control ID.

Done

Start 2 Mozilla Haverty... Print F... 2 Micr... \\Issno... Internet 11:48 AM

After selecting a Run Control ID:

The screenshot shows a web browser window titled "Print FWP in Crystal - Microsoft Internet Explorer". The address bar shows the URL: https://fmssrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_ZE.ZE_PROP_RUNCNTR.GBL?FolderPath=PORTAL_ROOT_OBJECT.LBNL_FBS.FBS_REPORT.ZE_PROP_RUNCNTR_1. The page title is "FWP Crystal Report".

On the left, there is a "Menu" sidebar with a search box and a list of navigation options. The "Reports" section is expanded, and "Print FWP in Crystal" is selected.

The main content area displays the "FWP Crystal Report" configuration. At the top, it shows "Run Control ID: sneely_training" and buttons for "Report Manager", "Process Monitor", and "Run". Below this is a search form with the following fields:

- Proposal ID:
- Short Name:
- From Seq Nbr: To Seq Nbr:
- From Fiscal Year: To Fiscal Year:
- From FBS Key: To FBS Key:
- Division ID:
- Sub Division:
- Proposal Status:
- Primary PI:

A "Clear" button is located next to the Proposal ID field. Below the search form are buttons for "Save", "Add", and "Update/Display".

A yellow callout box on the right contains the text: "3. Use the search criteria to define the proposal(s) you wish to print, and then select the 'Run' button."

The following Process Scheduler is generated:

Process Scheduler Request

User ID: STNEELY Run Control ID: stneely

Server Name: **PSNT** Run Date: 02/06/2006
Recurrence: Run Time: 12:46:00PM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	ZEFWRPT	ZEFWRPT	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

4. Select the "Server Name".

5. Click "OK".

The following screen appears:

The screenshot shows a web browser window displaying the 'Print FWP in Crystal' application. The browser's address bar shows the URL: https://fmssrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNTR.GBL?FolderPath=PORTAL_ROOT_OBJECT.LBNL_FBS.FBS_REPORT_ZE_PROP_RUNCNTR_. The application interface includes a left-hand menu with categories like 'My Favorites', 'Manager Self-Service', 'Project Costing', 'General Ledger', 'Allocations', 'Commitment Control', 'Field Budget Submission', 'Administration', 'Proposals', 'Processes', 'Reports', 'Budget System', 'Planning', 'Grants', 'Customer Contracts', 'Billing', 'Customers', 'Vendors', 'Purchasing', 'eProcurement', 'Services Procurement', 'Accounts Receivable', 'Accounts Payable', 'Banking', 'Cash Management', 'Set Up Financials/Supply Chain', 'Enterprise Components', 'Worklist', 'Tree Manager', 'Reporting Tools', and 'PeopleTools'. The main content area is titled 'FWP Crystal Report' and shows a 'Run Control ID' of 'steeley_training'. It features a 'Run' button and a 'Process Instance:1160313' label. A yellow callout box with a black border contains the text: '6. Your instance (job) number is located on the upper right-hand corner. Select the "Process Monitor" to check the job status.' The callout box also points to the 'Process Monitor' link and the 'Process Instance' label. At the bottom of the browser window, the taskbar shows the 'Process Instance:1160313' window and a 'Local intranet' icon.

The process log will appear with the status of your job request:

The screenshot shows a Microsoft Internet Explorer browser window displaying the PeopleSoft application. The address bar shows the URL: https://fmsrv2.lbl.gov:8201/psp/fbssprd/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNTL.GBL. The page title is "Print Proposals - Microsoft Internet Explorer".

The main content area is titled "Process List" and "Server List". Below this is a "View Process Request For" section with search filters for User ID (PJSHEPHERD), Server (PSUNX), and Run Status. A "Refresh" button is visible in this section.

The "Process List" table contains the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4217		SQR Report	ZEPROPRN	PJSHEPHERD	07/26/2005 2:38:59PM PDT	Queued	N/A	Details
<input type="checkbox"/>	4215		SQR Report	ZEPROPRN	PJSHEPHERD	07/26/2005 2:31:00PM PDT	Success	Posted	Details
<input type="checkbox"/>	4214		SQR Report	ZEPROPRN	PJSHEPHERD	07/26/2005 10:03:15AM PDT	Success	Posted	Details
<input type="checkbox"/>	4213		SQR Report	ZEPROPRN	PJSHEPHERD	07/26/2005 10:02:42AM PDT	Success	Posted	Details
<input type="checkbox"/>	4210		SQR Report	ZEPROPRN	PJSHEPHERD	07/25/2005 3:20:56PM PDT	Cancelled	N/A	Details

A yellow callout box on the right side of the page contains the following text: "7. If the job is not complete, click the 'Refresh' button to refresh the status. You can view/print the report when the 'Run Status' changes to 'Success' and the 'Distribution Status'". Arrows point from this callout to the "Refresh" button and the "Run Status" column of the table.

At the bottom of the page, there is a link: [Go back to Proposal Run Control](#).

Continue to refresh until you see Run Status is "Success" and Distribution Status is "Posted".

The screenshot shows the PeopleSoft interface for 'Print FWP in Crystal'. On the left is a navigation menu. The main area contains a 'View Process Request For' form with fields for User ID (BPHAVERT), Type, Last (1 Days), Server, Name, Instance, Run Status, and Distribution Status. Below this is a 'Process List' table with 8 rows. The table columns are: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The rows show various instances of the ZEFWRPT process, with run statuses ranging from Success to Error and distribution statuses of Posted. A yellow callout box with the text '8. Your print is now ready to view. Select "Details"' has an arrow pointing to the 'Details' link in the row for instance 4264.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	4267		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 4:19:19PM PDT	Success	Posted	Details
<input type="checkbox"/>	4266		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 4:13:12PM PDT	Success	Posted	Details
<input type="checkbox"/>	4264		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 3:53:42PM PDT	Error	Posted	Details
<input type="checkbox"/>	4262		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 2:55:00PM PDT	Error	Posted	Details
<input type="checkbox"/>	4261		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 2:49:52PM PDT	Error	Posted	Details
<input type="checkbox"/>	4260		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 2:49:39PM PDT	Error	Posted	Details
<input type="checkbox"/>	4259		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 2:41:58PM PDT	Error	Posted	Details
<input type="checkbox"/>	4258		Crystal	ZEFWRPT	BPHAVERT	08/17/2005 2:40:58PM PDT	Error	Posted	Details

The following screen appears:

Process Detail

Process	
Instance: 4267	Type: Crystal
Name: ZEFWRPT	Description: ZEFWRPT
Run Status: Success	Distribution Status: Posted

Run	Update Process
Run Control ID: bphptest	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSNT	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 08/17/2005 4:19:22PM PDT	Parameters Transfer
Run Anytime After: 08/17/2005 4:19:19PM PDT	Message Log
Began Process At: 08/17/2005 4:19:42PM PDT	Batch Timings
Ended Process At: 08/17/2005 4:23:12PM PDT	View Log/Trace

OK Cancel

9. Select "View Log/Trace" to view your FWP.

Print FWP in Crystal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address Links

PeopleSoft®

Home Worklist Add to Favorites Sign out

New Window Help Customize Page

Menu

Search:

- My Favorites
- Project Costing
- General Ledger
- Field Budget Submission
 - Administration
 - Proposals
 - Processes
- Reports
 - Print Proposals
 - Print FWP in Crystal
- Grants
- Customer Contracts
- Customers
- Allocations
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

View Log/Trace

Report

Report ID: 3268 Process Instance: 4267 [Message Log](#)

Name: ZEFWPRPT Process Type: Crystal

Run Status: Success

ZEFWPRPT

Distribution Details

Distribution Node: fmssrv2-SSL Expiration Date: 08/24/2005

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	08/17/2005 4:23:12.000000PM PDT
ZEFWPRPT_4267.PDF	1,550,328	08/17/2005 4:23:12.000000PM PDT
PeopleSoft Trace File	483	08/17/2005 4:23:12.000000PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	BPHAVERT

Return

10. Your FWP has been generated in the PDF format. Select it to view.

Process Instance: 4264

Start | Internet | 5:40 PM

Sample generated Field Work Proposal:

start | 50°F Desk... | Re: FBS T... | 5 Intern... | G:\Financi... | 2 Micros... | Search Desktop | 7:59 AM

https://fmssrv2.lbl.gov:8101/psreports/fmstrn/1054606/ZEFWRPT_1160313.PDF - Microsoft Internet Explorer

Address: https://fmssrv2.lbl.gov:8101/psreports/fmstrn/1054606/ZEFWRPT_1160313.PDF

1 / 6 | 130% | Sign | Find

DOE Form 5120.2		U.S. Department of Energy		Page 1 of 6
FIELD WORK PROPOSAL				
PROGRAM: KB NUCLEAR PHYSICS				
1. WORK PROPOSAL NO. TRAIN08	2. REVISION NO 1	3. DATE PREPARED 1/17/2008		
4. WORK PROPOSAL TITLE FBS Training for first time users and those who require a refresher		5. BUDGET AND REPORTING CODE KB0402024		
6. WORK PROPOSAL TERM BEGIN: 10/01/2009 END: OPEN		7. Is this Work Proposal Included in the Institutional Plan NO		
8. HEADQUARTERS/OPERATIONS OFFICE PROGRAM MANAGER		11. HEADQUARTERS ORGANIZATIONS SC26 - Office of Nuclear Physics	14.DOE ORGANIZATION CODE SC Office of Science	
9. OPERATIONS OFFICE WORK PROPOSAL REVIEWER		12. FIELD OFFICE SC INTEGRATED SERVICE CENTER	15.DOE ORGANIZATION CODE SC - BSO	
10. CONTRACTOR WORK PROPOSAL PRINCIPAL INVESTIGATOR(S)/MANAGER: SYMONS,TIMOTHY J PHONE # 510/486-5670		13. CONTRACTOR NAME University of California Lawrence Berkeley National Lab 1 Cyclotron Road Berkeley, CA 94720	15.DOE CONTRACTOR CODE 53	
17. WORK PROPOSAL DESCRIPTION (Approach, anticipated benefits in 200 words or less) <u>PRINCIPAL INVESTIGATOR:</u> WEHNER,MICHAEL				

Done | Unknown Zone

2) Print All Proposal Information

This functionality prints a list of all information entered for the proposal (including FBSs fields that do not print on the FWP), and can be used for reviewing purposes.

Navigation

- Field Budget Submission
- Reports
- Print Proposals

The following screen will appear:

The screenshot shows a web browser window titled "Base Navigation Page - Microsoft Internet Explorer". The address bar contains the URL: https://fmsrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/s/WEBLIB_EOPP_SC.HOMEPAGE.FieldFormula.IScript_AppHP?pt_fname. The page features a navigation menu on the left and a main content area titled "Reports". The "Reports" section is under the "Field Budget Submission" main menu. It contains an "FBS Report Folder" with three links: "Print Proposals", "Summary of Estimates Report", and "Print FWP in Crystal". A yellow callout box with a black border points to the "Print Proposals" link, containing the text: "1. Select Print Proposals to generate a summary of all proposal info entered into FBSs." The taskbar at the bottom shows the Start button, several application icons, and the system clock displaying 2:58 PM.

Print Proposals - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address https://fmsrv2.lbl.gov:8201/psp/fbssprd/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNTL.GBL Go Links

PeopleSoft®

Home Worklist Add to Favorites Sign out

New Window Help

Proposal Run Control

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search by: Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

[Find an Existing Value](#) [Add a New Value](#)

2. Find an existing Run Control ID or add a new Run Control ID.

Internet

After selecting a Run Control ID:

The screenshot shows a web browser window displaying a "Print Proposals" application. The browser's address bar shows the URL: https://fmssrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNTL.GBL?FolderPath=PORTAL_ROOT_OBJECT.LBNL_FBS.FBS_REPORT.ZE_PROP_RUNCNTL_C. The application interface includes a "Menu" on the left with a search bar and a list of navigation options. The main content area is titled "Print Proposal" and features a "Run Control ID" field set to "steeley". There are links for "Report Manager", "Process Monitor", and a "Run" button. A "Process Request Dialog" is visible near the "Run" button. Below the "Run" button is a form with the following search criteria:

- Proposal ID: TRAIN08
- Short Name: [empty]
- From Seq Nbr: [empty]
- To Seq Nbr: [empty]
- From Fiscal Year: 2010
- To Fiscal Year: 2010
- From FBS Key: [empty]
- To FBS Key: [empty]
- Division ID: [empty]
- Sub Division: [empty]
- Proposal Status: [dropdown menu]
- Primary PI: [empty]

At the bottom of the form are buttons for "Save", "Return to Search", "Refresh", "Add", and "Update/Display". A yellow callout box on the right contains the following text:

3. Use the search criteria to define the proposal(s) you wish to print.

Then, select the "Run" button.

Selecting **RUN** generates the following screen:

Process Scheduler Request

User ID: STNEELY Run Control ID: stneely

Server Name: PSNT Run Date: 01/17/2008
Recurrence: Run Time: 8:10:14AM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	ZEPROPRN	ZEPROPRN	SQR Report	Web	PDF	Distribution

OK Cancel Refresh

4. Select the "Server Name", PSNT.

5. Select "OK".

The following screen appears:

Print Proposals - Microsoft Internet Explorer

Address: https://fmssrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNI_ZE_ZE_PROP_RUNCNTL.GBL?PORTALPARAM_PTCNAV=ZE_PROP_RUNCNTL_GBL&EOPP.SCNode=ERP&EOPP.SCP

Menu

Search:

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
 - Administration
 - Proposals
 - Processes
- Reports
 - Print Proposals
 - Summary of Estimates Report
 - Print FWP in Crystal
 - Proposal Review - BA
 - Variance Reports
 - WFO Summary Report
- Budget System
- Planning
- Grants
- Customer Contracts
- Billing
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Banking
- Cash Management
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Print Proposal

Run Control ID: steely

Report Manager Process Monitor Run

Process Instance:1160316

Proposal ID: TRAIN08

Short Name

From Seq Nbr To Seq Nbr

From Fiscal Year: 2010 To Fiscal Year: 2010

From FBS Key To FBS Key

Division ID

Sub Division

Proposal Status

Primary PI

Save Return to Search Refresh

6. Your instance (job) number will appear in the upper right-hand corner.

Select "**Process Monitor**" to check the job status and view the results.

Process Instance:1160316

Local Intranet

The process log will appear as follows:

The screenshot shows a web browser window displaying a process log. The browser is Microsoft Internet Explorer, and the address bar shows the URL: https://fmssrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNICNTL.GBL?PORTALPARAM_PTCNAV=ZE_PROP_RUNICNTL_GBL&EOPP.SCNode=ERP&EOPP.SCP

The interface includes a menu on the left, a search bar, and a main content area with tabs for "Process List" and "Server List". The "Process List" tab is active, showing a "View Process Request For" form and a table of process instances.

The "View Process Request For" form includes fields for User ID (STNEELY), Type, Last (3 Days), Refresh, Server, Name, Instance, Run Status, and Distribution Status. A "Refresh" button is highlighted with a yellow callout box.

The "Process List" table displays the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1160316		SQR Report	ZEPROPRN	STNEELY	01/17/2008 8:16:59AM PST	Queued	N/A	Details
<input type="checkbox"/>	1160315		SQR Report	ZEPROPRN	STNEELY	01/17/2008 8:10:14AM PST	Success	Posted	Details
<input type="checkbox"/>	1160314		SQR Report	ZEPROPRN	STNEELY	01/17/2008 8:04:20AM PST	Success	Posted	Details
<input type="checkbox"/>	1160313		Crystal	ZEWPRPT	STNEELY	01/17/2008 7:55:03AM PST	Success	Posted	Details

A yellow callout box with the text: "7. If the job is not complete, click the 'Refresh' button to refresh the status again. You can view/print the report when the Run Status changes to 'Success' and the Distribution Status is 'Posted'." points to the "Refresh" button and the "Distribution Status" column of the table.

Continue to refresh until you see that the Run Status is “Success” and the Distribution Status is “Posted”.

The screenshot shows a web browser window displaying a 'Process List' page. The page includes a navigation menu on the left, a search bar, and a 'View Process Request For' form. Below the form is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1160316		SQR Report	ZEPROPRN	STNEELY	01/17/2008 8:16:59AM PST	Success	Posted	Details
<input type="checkbox"/>	1160315		SQR Report	ZEPROPRN	STNEELY	01/17/2008 8:10:14AM PST	Success	Posted	Details
<input type="checkbox"/>	1160314		SQR Report	ZEPROPRN	STNEELY	01/17/2008 8:04:20AM PST	Success	Posted	Details
<input type="checkbox"/>	1160313		Crystal	ZEFWRPT	STNEELY	01/17/2008 7:55:03AM PST	Success	Posted	Details

A yellow callout box with the text "8. Your report is now ready to view. Select 'Details'" has an arrow pointing to the 'Details' link in the first row of the table. The callout box is labeled "Main Content".

The following screen appears:

The screenshot shows a Microsoft Internet Explorer browser window displaying a web application. The browser's address bar shows the URL: https://fmssrv2.bl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNICNTL.GBL?PORTALPARAM_FTCNAV=ZE_PROP_RUNICNTL_GBL&EOPF.SCNode=ERP&EOPF.SCP. The page title is "Print Proposals - Microsoft Internet Explorer".

The application interface includes a "Menu" on the left side with a search bar and various navigation options. The main content area is titled "Process Detail" and displays the following information:

Process	
Instance:	1160316
Type:	SQR Report
Name:	ZEPROPRN
Description:	ZEPROPRN
Run Status:	Success
Distribution Status:	Posted

Below the process details, there are two main sections: "Run" and "Update Process".

Run	Update Process
Run Control ID: steeley	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

At the bottom of the "Run" section, there is a "Date/Time" table:

Date/Time	Actions
Request Created On: 01/17/2008 8:17:04AM PST	Parameters Transfer
Run Anytime After: 01/17/2008 8:16:59AM PST	Message Log
Began Process At: 01/17/2008 8:17:34AM PST	Batch Timings
Ended Process At: 01/17/2008 8:17:48AM PST	View Log/Trace

At the bottom of the page, there are "OK" and "Cancel" buttons. A yellow callout box with a black border and an arrow pointing to the "View Log/Trace" link contains the text: "9. Select 'View Log/Trace' to view your report."

start 50°F Desk... Re: FBS Tr... 5 Intern... G:\Finand... 2 Micros... Search Desktop 8:20 AM

Print Proposals - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address: https://fmsrv2.bl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNICNTL_GBL?PORTALPARAM_PTCNAV=ZE_PROP_RUNICNTL_GBL&EOPP.SCNode=ERP&EOPP.SCP=

Home Worklist Add to Favorites Sign out

New Window Help Customize Page

Menu

Search:

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
 - Administration
 - Proposals
 - Processes
- Reports
 - Print Proposals
 - Summary of Estimates Report
 - Print FWP in Crystal
 - Proposal Review - BA
 - Variance Reports
 - WFO Summary Report
- Budget System
- Planning
- Grants
- Customer Contracts
- Billing
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Banking
- Cash Management
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

View Log/Trace

Report

Report ID: 1054609 Process Instance: 1160316 [Message Log](#)

Name: ZEPROPRN Process Type: SQR Report

Run Status: Success

ZEPROPRN

Distribution Details

Distribution Node: fmsrv2-SSL Expiration Date: 09/17/2008

File List

Name	File Size (bytes)	Datetime Created
SQR_ZEPROPRN_1160316.out	1,506	01/17/2008 8:17:48.000000AM PST
zepprpn_1160316.PDF	4,851	01/17/2008 8:17:48.000000AM PST
zepprpn_1160316.out	719	01/17/2008 8:17:48.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	STNEELY

[Return](#)

10. Your report has been generated in PDF format. Select it to view.

Discussions Discussions not available on https://fmsrv2.bl.gov:8101/

Process Instance:1160316 Local intranet

3) Proposal Review Report - BA

This Report prints a summary of key information entered for proposals, and may be used to review proposals.

Navigation

- Field Budget Submission
- Reports
- Proposal Review - BA

The following screen will appear:

The screenshot shows a web browser window titled "Base Navigation Page - Microsoft Internet Explorer". The address bar contains the URL: https://fmsrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/s/WEBLIB_EOPP_SC.HOMEPAGE.FieldFormula.IScript_AppHP?pt_fname. The page features a navigation menu on the left and a main content area. The main content area is titled "Main Menu > Field Budget Submission > Reports" and contains an "FBS Report Folder" with three report links: "Print Proposals", "Summary of Estimates Report", and "Print FWP in Crystal". A fourth link, "Proposal Review - BA", is highlighted with a yellow callout box. The callout box contains the text: "1. Select 'Proposal Review - BA' to generate your division's summary report." The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 3:06 PM.

Proposal Review - BA - Microsoft Internet Explorer

Address https://fmsrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNT3.GBL

Home | Add to Favorites | Sign out

New Window | Help

Menu

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
 - Administration
 - Proposals
 - Processes
- Reports
 - Print Proposals
 - Summary of Estimates Report
 - Print FWP in Crystal
 - Proposal Review - BA**
- Budget System
- Grants
- Customer Contracts
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Payable
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

Proposal Review - BA

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

Search by: Run Control ID begins with

Case Sensitive

[Search](#) | [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Find an existing Run Control ID or add a new Run Control ID.

Done

Start | 2 M... | Haver... | 4 In... | 2 Mi... | 2 Mi... | iTunes | 3:10 PM

Proposal Review - BA - Microsoft Internet Explorer

Address: https://fmsrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/c/LBNL_ZE.ZE_PROP_RUNCNT3.GBL?FolderPath=PORTAL_ROOT_OBJ1

Home | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

Menu

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
 - Administration
 - Proposals
 - Processes
- Reports
 - Print Proposals
 - Summary of Estimates Report
 - Print FWP in Crystal
 - Proposal Review - BA**
- Budget System
- Grants
- Customer Contracts
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Payable
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Division Report

Run Control ID: bphavertyproposalreview [Report Manager](#) [Process Monitor](#) **Run**

Proposal Division ID

B+R Classification

Primary PI

Proposal Status

Funding Year

3. Use the search criteria to define the proposal(s) you wish to print. (Note: The funding year must be entered.)

Then, select the **"Run"** button.

Start | 2 M... | Haver... | 4 In... | 2 Mi... | 2 Mi... | iTunes | 3:14 PM

Selecting "Run" generates the following screen:

The screenshot shows the 'Process Scheduler Request' page in a web browser. The page includes a menu on the left, a header with navigation links, and a main content area with form fields and a table. Instructional callouts are present:

- 4. Select Server PSNT**: Points to the 'Server Name' dropdown menu.
- 5. If you want to generate a PDF report, check mark "FBS Proposal Summary", enter "Web" for the "*Type", and enter "PDF" for the "*Format".**
If you want to generate a Excel report, check mark "Proposal Review for Excel," enter "Web" for the "*Type", and enter "XLS" for the "*Format".: Points to the 'Process List' table.
- 6. Select "OK".**: Points to the 'OK' button.

Process Scheduler Request

User ID: BPHAVERT Run Control ID: bptest

Server Name: [Dropdown] Run Date: 12/12/2006 Run Time: 10:42:36AM [Reset to Current Date/Time]

Recurrence: PSNT
Time Zone: PSNT2
Process List: PSOS390, PSUNX, PSUNX2

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	FBS Proposal Summary	ZERPT003	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	Proposal Review for Excel	ZERPT004	Crystal	Web	XLS	Distribution

OK Cancel

Select the **Process Monitor** to check the job status.

The screenshot shows a web browser window titled "Proposal Review - BA - Microsoft Internet Explorer". The address bar shows a URL starting with "https://fmsrv2.lbl.gov:8001/psp/fmsprd_1/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNT3.GBL?FolderPath=PORTAL". The page has a blue header with "Home", "Add to Favorites", and "Sign out" links. A "Menu" sidebar on the left contains various navigation options like "My Favorites", "Manager Self-Service", "Project Costing", "General Ledger", "Allocations", "Commitment Control", "Field Budget Submission", "Administration", "Proposals", "Processes", "Reports", "Budget System", "Grants", "Customer Contracts", "Customers", "Vendors", "Purchasing", "eProcurement", "Services Procurement", "Accounts Payable", "Set Up Financials/Supply Chain", "Enterprise Components", "Worklist", "Tree Manager", "Reporting Tools", "PeopleTools", "Change My Password", "My Personalizations", "My System Profile", and "My Dictionary".

The main content area is titled "Process List" and "Server List". It features a "View Process Request For" section with search filters for "User ID" (BPHAVERT), "Type", "Last" (1 Hours), "Server", "Name", "Instance", "Run Status", and "Distribution Status". There is a "Refresh" button and a "Save On Refresh" checkbox.

Below this is a "Process List" table with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains two rows of data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1004588		Crystal	ZERPT003	BPHAVERT	12/12/2006 10:48:00AM PST	Success	Posted	Details
<input type="checkbox"/>	1004587		Crystal	ZERPT003	BPHAVERT	12/12/2006 10:42:36AM PST	Success	Posted	Details

A yellow callout box with a black border and an arrow pointing to the "Details" link in the second row of the table contains the text: "7. Your Report is ready to view. Select 'Details'".

At the bottom of the page, there are "Save" and "Notify" buttons, a "Go back to Proposal Review - BA" link, and "Process List | Server List" navigation links.

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time "10:49 AM".

Proposal Review - BA - Microsoft Internet Explorer

Address: https://fmsrv2.lbl.gov:8001/psp/fmsprd_1/EMPLOYEE/ERP/c/LBNL_ZE.ZE_PROP_RUNCNT3.GBL?FolderPath=PORTAL

Home | Add to Favorites | Sign out

New Window | Help | Customize Page |

Menu

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
 - Administration
 - Proposals
 - Processes
 - Reports
 - Print Proposals
 - Summary of Estimates Report
 - Print FWP in Crystal
 - Proposal Review - BA
- Budget System
- Grants
- Customer Contracts
- Customers
- Vendors
- Purchasing
- eProcurement
- Services Procurement
- Accounts Payable
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Process Detail

Process

Instance:	1004588	Type:	Crystal
Name:	ZERPT003	Description:	FBS Proposal Summary
Run Status:	Success	Distribution Status:	Posted

Run

Run Control ID:	bphtest
Location:	Server
Server:	PSNT
Recurrence:	

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

Date/Time

Request Created On:	12/12/2006 10:48:10AM PST
Run Anytime After:	12/12/2006 10:48:00AM PST
Began Process At:	12/12/2006 10:48:27AM PST
Ended Process At:	12/12/2006 10:48:39AM PST

Actions

- [Parameters](#) Transfer
- [Message Log](#)
- Batch Timings
- [View Log/Trace](#)

OK Cancel

8. Select "View Log/Trace" to view your Report

Done

Start | 3 Mozilla Thu... | Haverty, Bridg... | 4 Internet E... | FBSsTrainingMa... | 10:52 AM

Proposal Review - BA - Microsoft Internet Explorer

Address: https://fmssrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/c/LBNL_ZE_ZE_PROP_RUNCNT3.GBL

Home Add to Favorites Sign out

New Window Help Customize Page

Menu

- My Favorites
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- Set Up Financials/Supply Chain
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- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

View Log/Trace

Report

Report ID: 929603 Process Instance: 1004900 [Message Log](#)

Name: ZERPT003 Process Type: Crystal

Run Status: Success

FBS Proposal Summary

Distribution Details

Distribution Node: fmssrv2-SSL Expiration Date: 01/11/2007

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	12/12/2006 2:49:01.000000PM PST
ZERPT003_1004900.PDF	21,887	12/12/2006 2:49:01.000000PM PST
PeopleSoft Trace File	481	12/12/2006 2:49:01.000000PM PST

Distribute To

Distribution ID Type	Distribution ID
User	BPHAVERT

[Return](#)

9. Select either the XLS or PDF file that you ran.

Start 2 Mozill... Haverty, 4 Inter... FBSSTrai... iTunes 2:49 PM

Sample Report of the PDF version.

start 50°F Desk... Re: FBS Tr... 7 Interne... G:\Financi... 2 Micros... Search Desktop 8:31 AM

https://fmssrv2.lbl.gov:8101/psreports/fmstrn/1054610/ZERPT003_1160317.PDF - Microsoft Internet Explorer

File Edit Go To Favorites Help

Back Forward Stop Home Search Favorites Print Mail

Address https://fmssrv2.lbl.gov:8101/psreports/fmstrn/1054610/ZERPT003_1160317.PDF Go Links

1 / 1 78.6% Sign Find

Selection Criteria: Division Id: NS
 Primary B&R: Funding Year: 2010
 Primary PI: Proposal Status: Authorized

1/17/2008 FBSs Proposal Review - BA Page 1 of 1

LBL/ Proposal ID	Short Name	Proposal Status	Funding Year	PI	Primary B&R	HQ Program	FY 2008			FY 2009			FY 2010			FY 2011			FY 2012		
							ETE	Operating BA	Equipment BA												
NPDSF	POSF	Authorized	2010	Olson,Douglas L	KB0201022	SC28 - Office of Nuclear Physics	0.0	0	0	0.0	0	1,000	0.0	0	0	0.0	0	0	0.0	0	0
TRAIN08	FBS TRAINING	Authorized	2010	Wehner,Michael	KB0402024	SC28 - Office of Nuclear Physics	12.5	200	200	10.5	250	250	10.5	250	250	10.5	300	300	10.5	300	300
Grand Total							12.5	200	200	10.5	250	1,250	10.5	250	250	10.5	300	300	10.5	300	300

Done Unknown Zone

V. PLACE HOLDER CREATION

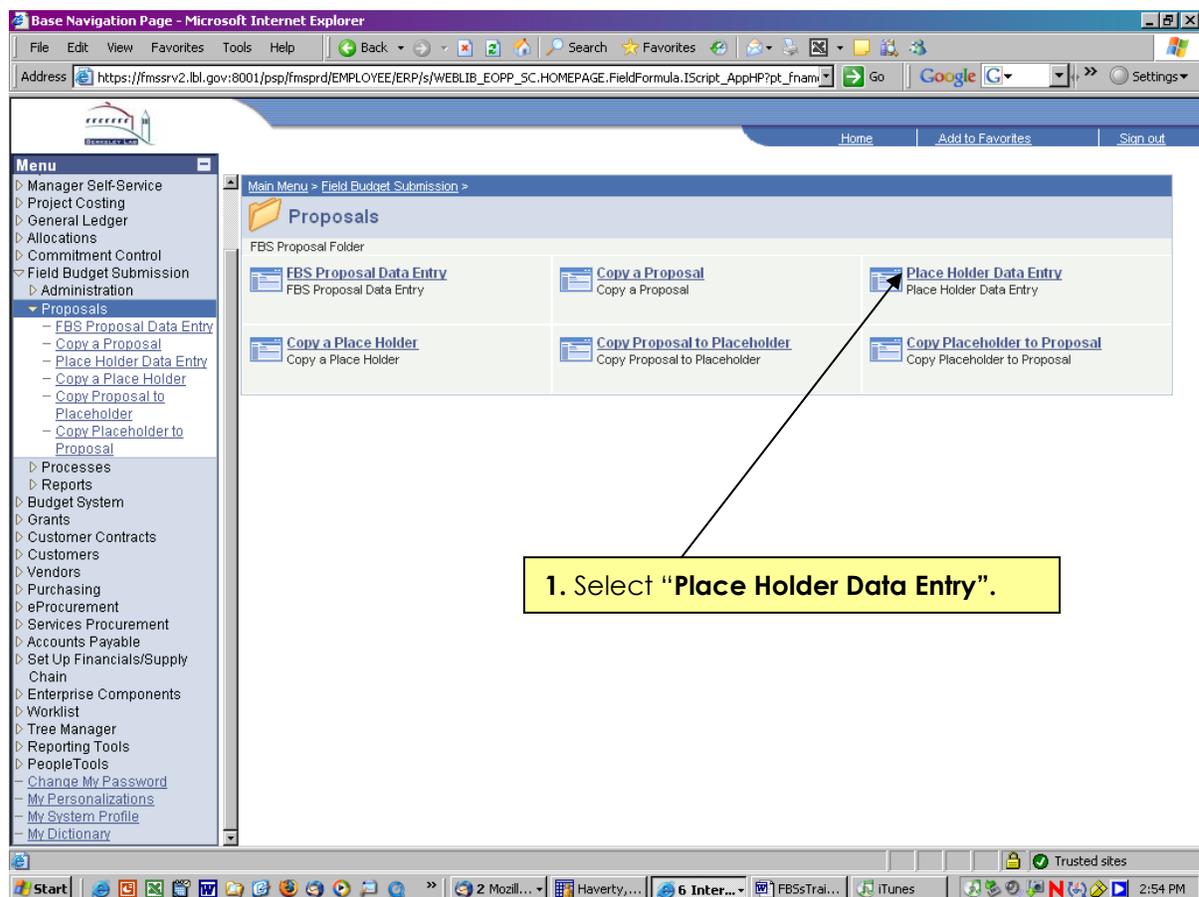
1) Add a Place Holder

FBSs has two proposal entry options:

- **“FBS Proposal Data Entry”** which will be used to enter an *R&D proposal* that will be submitted to DOE HQ via the interim proposal submission process. (i.e., For FY10, Office of Science and EERE)
- **“Place Holder Data Entry”** which has two functions: 1) to submit proposals to DOE HQ via email for those HQ Programs not participating in the interim proposal submission, and 2) to record *all other proposal types* for institutional summary reporting purposes. (This includes all Construction activity.)

Navigation:

- **Proposals**
- **Place Holder Data Entry**



The screenshot shows a web browser window titled "Place Holder Data Entry - Microsoft Internet Explorer". The address bar shows a URL from "https://fmssrv2.lbl.gov:8101/". The page content includes a "Menu" on the left, a "Place Holder Proposal" form in the center, and a "Taskbar" at the bottom. Five yellow callout boxes with black borders and arrows point to specific elements on the page:

- 2. Select "Add a New Place Holder".** Points to the "Add a New Place Holder" button in the "Place Holder Proposal" section.
- 3. Enter an "LBNL Proposal ID". (Maximum 8 characters)** Points to the "LBNL Proposal ID" input field.
- 4. This field is defaulted to reflect the "Funding Year" for a Budget (On cycle) proposal.** Points to the "Funding Year" input field, which contains the value "2010".
- 5. Click "Add".** Points to the "Add" button at the bottom of the form.

The "Place Holder Proposal" form includes the following fields and buttons:

- Buttons: "Find an Existing Place Holder" and "Add a New Place Holder"
- Fields: "LBNL Proposal ID:" (empty), "Funding Year:" (2010), "Proposal Sequence Number:" (1)
- Buttons: "Add" (highlighted in yellow)
- Footer: "Find an Existing Place Holder | Add a New Place Holder"

a. Administrative Information

The following screen appears with the “Admin” tab open:

6. Populate all required fields that are shaded **yellow** and other fields as needed.

7. Select a “**Proposal Type**” (Construction, or Operating)

8. Proceed to the “**Technical**” tab.

Menu

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
 - Administration
 - Proposals
 - FBS Proposal Data Entry
 - Copy a Proposal
 - Place Holder Data Entry
 - Copy a Place Holder
 - Copy Proposal to Placeholder
 - Copy Placeholder to Proposal
 - Proposes
 - Reports
 - Budget System
 - Planning
 - Grants
 - Customer Contracts
 - Billing
 - Customers
 - Vendors
 - Purchasing
 - eProcurement
 - Services Procurement
 - Accounts Receivable
 - Accounts Payable
 - Banking
 - Cash Management
 - Set Up Financials/Supply Chain
 - Enterprise Components
 - Worklist
 - Tree Manager
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Save Return to Search Notify Add Update/Display

Admin | Technical | Budget | Attachment | Status

b. Technical Information

Place Holder Data Entry - Microsoft Internet Explorer

Address: https://fmsrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/g/LBNL_ZE.ZE_PLHOLD_PROPOSAL.GBL?FolderPath=PORTAL_ROOT_OBJECT.LBNL_FBS.FBS_PROPOSAL.ZE_PLHOLD_PRI

Menu

Search:

- My Favorites
- Manager Self-Service
- Project Costing
- General Ledger
- Allocations
- Commitment Control
- Field Budget Submission
- Administration
 - Proposals
 - FBS Proposal Data Entry
 - Copy a Proposal
 - Place Holder Data Entry
 - Copy a Place Holder
 - Copy Proposal to Placeholder
 - Copy Placeholder to Proposal
- Processes
- Reports
- Budget System
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- Grants
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- Purchasing
- eProcurement
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Banking
- Cash Management
- Set Up Financials/Supply Chain
- Enterprise Components
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- Tree Manager
- Reporting Tools
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Admin | Technical | Budget | Attachment | Status

*Proposal Short Name (20 Characters or Less)

Proposal ID **K42931** Sequence # **1** Status **In Process** Funding Year **2010**

*Division **CS** Sub Division **IT** Proposal Type **Operating** FBS Key **000002120**

*Work Proposal Title

Project Objective Description

9. "Project Objective Description" is not required for place holders, but if you do not populate it, please enter a descriptive Work Proposal Title.

10. Proceed to the "Budget" tab.

Save Return to Search Notify Add Update/Display

Admin | Technical | Budget | Attachment | Status

Done Local intranet

c. Budget Information

Note:

- a) The budget years are dependent on the "Funding Year" entered on the "Add New Placeholder" screen of page 57.
- b) The dollars entered below should be in Thousands.
- c) Refer to the budget category definitions below.

(\$ in Thousands)	Prior Years	CarryOver	2008 Current FY	2009 BY - 1	2010 Current BY
Scientific Staffing	2.0		2.0	2.0	2.0
Other Direct Staffing	0.0				
Total Direct Staffing (Staff Years)	2.0		2.0	2.0	2.0
Operating Total Obligations	518		537	562	562
Operating Total Costs	518		537	537	537
Equipment Obligations	0				
Equipment Costs	0				

11. Enter FTE information for staffing to the tenths decimal place, and also budget dollars for "Operating" & "Equipment" to the whole number in Thousands (\$K).

Budget dollars for Construction Proposal Types should be entered into the Equipment section.

Scientific Staffing = Estimate for Scientific Full Time Equivalents (use FTE's, not staffing dollars)

Other Direct Staffing = Estimate for other FTE's (use FTE's, not staffing dollars)

Operating Total Obligations = Operating Budget Authority (BA)

Operating Total Costs = Operating Budget Obligations (BO)

Equipment Obligations = Equipment Budget Authority

Equipment Costs = Equipment Budget Obligations

d. Attachments

Attach a complete FWP to the place holder if you want the Budget Office to submit the FWP to the HQ Program.

However, if the place holder entry is for institutional reporting purposes only, then do not attach an FWP.

The screenshot shows the 'Place Holder Data Entry' web application. The main content area is divided into tabs: Admin, Technical, Budget, Attachment, and Status. The 'Attachment' tab is selected, showing a table with one row for an attachment. The table has columns for Doc No, File Category, Attached File, Attached by, and Date Added. A yellow callout box with the number 12 points to the 'File Category' dropdown menu in the table row. The callout text reads: '12. To attach your FWP, select the "Other" category and then click on the paper clip to attach your FWP.'

12. To attach your FWP, select the "Other" category and then click on the paper clip to attach your FWP.

e. Status

When a place holder is created, the status is defaulted to “In Process”.

13. When the place holder is done, click on the “+” sign to add a new status row. Then, change the status to “CO” (Completed).
Note: Place holders do not require a Division Director or Designate to “Authorize”. The “CO” status is the final status of a place holder.

14. Click “Save”

2) Copy a Place Holder

Navigation

- Field Budget Submission
- Proposals
- Copy a proposal

The following screen will appear:

Copy a Place Holder

Enter any information you have and click Search. Leave fields blank for a list of all values.

Place Holder to copy

FBS Key:

LBNL Proposal ID:

Funding Year:

Proposal Sequence Number:

Proposal Division ID:

Proposal Status:

[Basic Search](#) [Save Search Criteria](#)

1. Use a combination of these search fields to find the place holder you would like to copy, or leave them all blank to bring up a list of all place holders.

Note: The "Clear" button will clear all the search fields.

A list of placeholders generated from your search will appear:

Copy Place Holder
Enter any information you have and click Search. Leave fields blank for a list of all values.

Place Holder to copy

FBS Key:

LBNL Proposal ID:

Funding Year:

Proposal Sequence Number:

Proposal Division ID:

Proposal Status:

[Basic Search](#)

Search Results
View All First 1-100 of 200 Last

FBS Key	LBNL Proposal ID	Funding Year	Proposal Sequence Number	Proposal Division ID	Proposal Status
000000300	39KCO2	2007	1	MS	In Process
000000301	A410X	2007	1	AL	In Process
000000302	A510X	2007	1	AL	In Process
000000303	A610X	2007	1	AL	In Process
000000304	A710X	2007	1	AL	In Process
000000305	A810X	2007	1	AL	In Process
000000306	A910X	2007	1	AL	In Process
000000307	A911X	2007	1	AL	In Process
000000308	B77PH2CO	2007	1	FA	In Process
000000309	B77PH2PE	2007	1	FA	In Process

2. Click on the place holder you would like to copy.

Populate the required fields and click the copy button.

3. Enter the new "Placeholder ID".

4. Enter the new "Funding Year".
(ATTENTION: This field must be entered correctly. You will not be able to change it after you've clicked on the "Copy" button.)

5. Click on the "Copy" button to save and create the copy.

6. A successful copy notification will appear. Then, click "OK".

7. Return to the "Place Holder Data Entry" screen to search for and update the place holder copy.

NOTE:

(1) Attachments can't be copied from place holder to place holder. If necessary, they will need to be reattached to the place holder copy.

(2)The status of the place holder copy is automatically set to "In Process".