



**This job aid includes information for Agency Division and Facility users.**

Submit projects for review within your agency ..... 1  
 Recall projects for review within your agency ..... 2

**Submit projects for review within your agency**

Use this function to pass projects from one person to another within your agency. Projects can only be released to a person in your agency with a higher security level than yours.

**1. Select:** Projects tab.  
 → Tab is located at top of screen.



**2. Select:** Biennium and Working Versions.  
**3. Select:** Load.



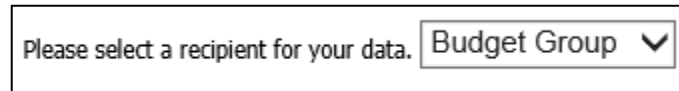
**4. Select:** Checkbox next to the project to submit.  
 → You can select one or more projects with a status of Draft.

Add	Delete	Lock/Unlock	Prerelease	Submit	Recall	Details	Copy	View History	Report
Select All	Number	Title	Class	Priority	Subprojects				
<input checked="" type="checkbox"/>	40000565	Test	Grant						

**5. Select:** Submit.  
 → A dialog is displayed to select who to submit the data to and how to handle duplicates.



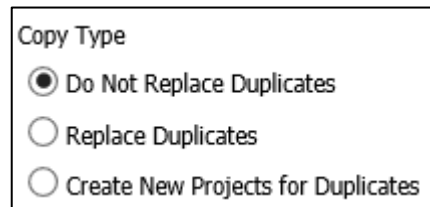
**6. Select:** Recipient.  
 → You can submit the project(s) to the Budget Group Only or users designated by your agency budget division to review projects.



**7. Select:** Type of Data.  
 → Default is Project(s). FTEs and Both are not available for selection.



**8. Select:** Copy Type.  
 → If there are duplicates, you can select to not replace duplicates, replace duplicates, or create new projects for duplicates.



**9. Select:** Ok.  
 → A message is displayed in a new browser window that data was submitted/released successfully.





The data was submitted/released successfully.

Close

10. Select: Close.

Close

11. View: Submitted To.

→ On the project list, the Submitted To field for the selected project(s) is changed to reflect the recipient you selected.

Submitted To

Budget Group

12. View: Status.

→ On the project list, the Status field for the selected project(s) is changed to Pending.

Status

Pending

### Recall projects for review within your agency

Use this function to recall a project that is in pending status.

1. Select: Projects tab.

→ Tab is located at top of screen.

Capital Budgeting System

Projects Ten-Year View Reappropriations Cost Estimates Capital FTEs Versions Facility Users Reports Settings

2. Select: Biennium and Working Versions.

Biennium 2019-21

3. Select: Load.

Working Versions  Prioritize Projects

Load

4. Select: Checkbox next to the project to recall.

→ You can select one or more projects with a status of Pending.

Add Delete Lock/Unlock Prerelease Submit Recall Details Copy View History Report

Select All	Number	Title	Class	Priority	Subprojects
<input type="checkbox"/>	40000568	Test	Grant		
<input checked="" type="checkbox"/>	40000567	Library	Preservation		

5. Select: Recall.

→ Email notification is sent to the individual selected as the recipient for the project(s) that have been recalled.

→ The project status is changed to Recalled for the project(s) you selected to recall.

Recall

Status

Recalled

### Additional Information – Help Desk

For additional information about Capitol Budget System (CBS) contact the OFM Help Desk.



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