This job aid includes information for Agency Budget Operations users.

**Round Version**
You will need to round a version prior to submitting it to OFM.

1. **Select:** Versions tab.
2. **Select:** Biennium, Budget Types, and Load Data.
3. **Select:** Checkbox next to the Version to round.
   ➞ You can select one or more.
4. **Select:** Round button.
   ➞ A message box will appear verifying your intention to round the entire version.
5. **Select:** OK.
   ➞ **Caution!** This action cannot be undone.

**Release to OFM**
Use this feature to release project(s) to OFM for review.

1. **Select:** Projects tab.
   ➞ Tab is located at top of screen.
2. **Select:** Biennium, Budget Type, Version, and Working Versions.
3. **Select:** Load.
4. **Select:** Checkbox next to the project to copy.
   ➞ You can select one or more or select Select All to release.
5. **Select:** Release.
A dialog is displayed to select the type of data to submit.

6. Select: Data Types.
   ➔ You can select to copy FTEs, Project(s), or Both.

<table>
<thead>
<tr>
<th>Data Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ FTEs</td>
</tr>
<tr>
<td>○ Project(s)</td>
</tr>
<tr>
<td>○ Both</td>
</tr>
</tbody>
</table>

7. Select: Copy Type.
   ➔ Choose to not replace duplicates, replace duplicate, or create new projects for duplicates.

<table>
<thead>
<tr>
<th>Copy Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Do Not Replace Duplicates</td>
</tr>
<tr>
<td>○ Replace Duplicates</td>
</tr>
<tr>
<td>○ Create New Projects for Duplicates</td>
</tr>
</tbody>
</table>

8. Select: Ok.
   ➔ Selection will run a prerelease edit check for selected project(s) prior to submittal.

   If there are errors:
   ➔ A CBS Edit Report will display.
   ➔ Projects with critical errors need to be corrected prior to OFM submittal.
   ➔ Projects with warning messages can be released.

   If there are no errors:
   ➔ A message is displayed in a new browser window that data was submitted/released successfully.
   ➔ Email notification is sent to the OFM analyst that there are projects pending their review.


10. View: Submitted To.
    ➔ On the project list, the Submitted To field for the selected project(s) is changed to Budget Group.

The data was submitted/released successfully.

Close
If there is a need to re-release the project to OFM, the project status must be changed to draft by viewing the project details or modifying the details.

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