

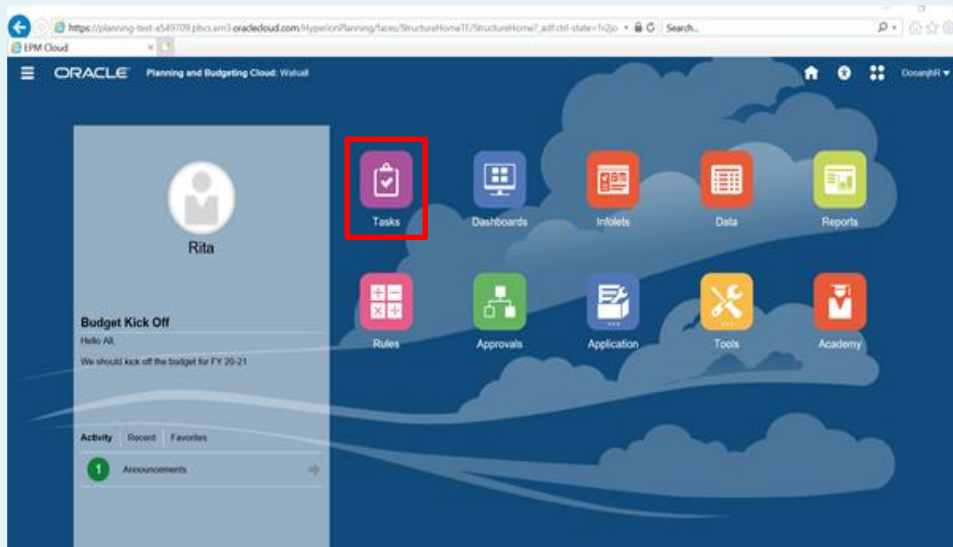
Capital Forecasting on Smart View

1

Another method of entering Capital forecasting is through Smart View

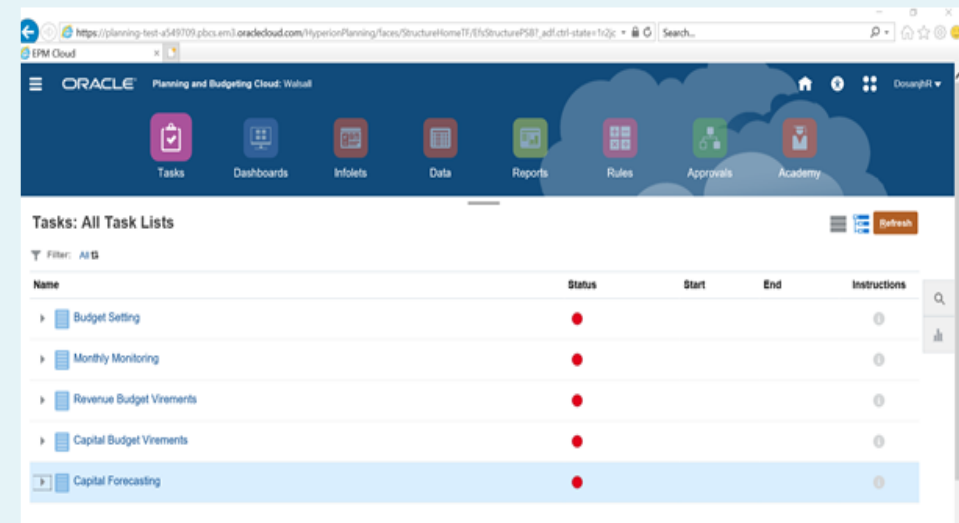
1. To access Planning and Budgeting Cloud Service (PBCS) please click here: https://planning-a549709.pbcs.em3.oraclecloud.com/HyperionPlanning/faces/LogOn?_afdf.ctrl-state=rt47s06t3_5

2. Select **Tasks**



2

1. Click on  to the left of **Capital Forecasting**

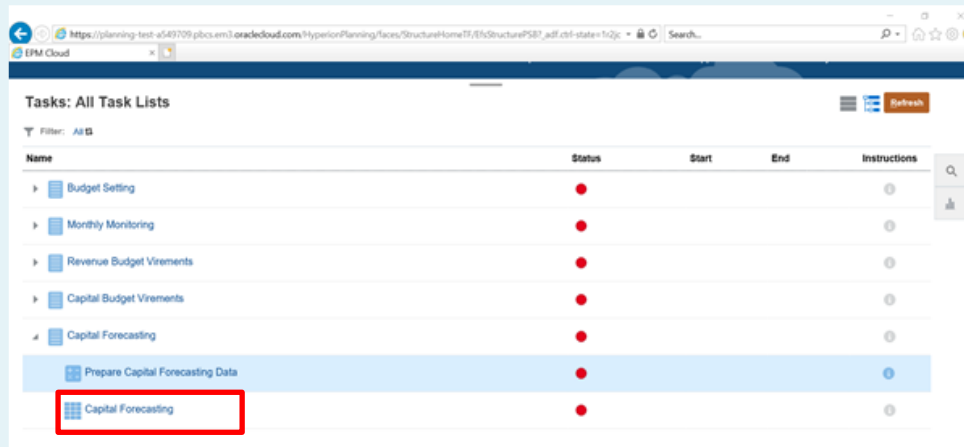


Capital Forecasting on Smart View

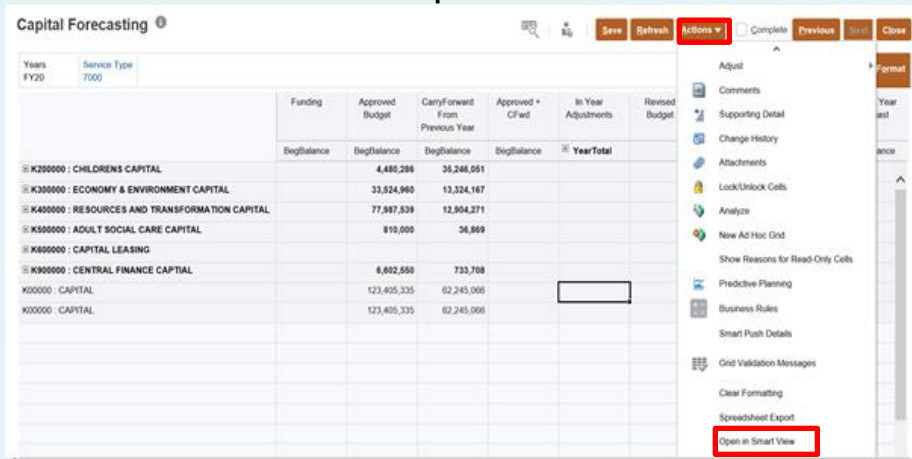
3

4

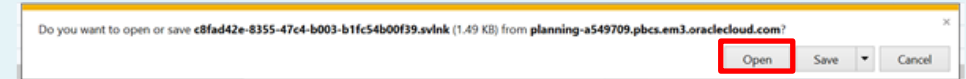
1. Click on



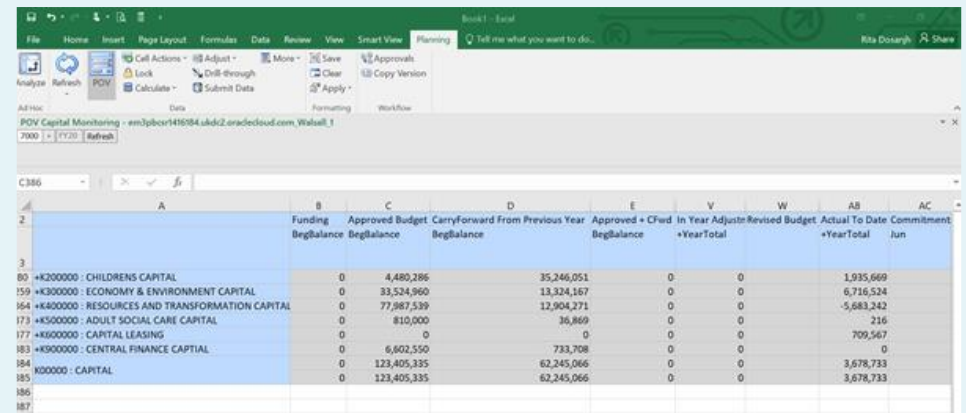
2. Click on **Actions** and select **Open in Smart View**



6. Click **Open** on the pop-up box below



7. This will open smart view in Microsoft Excel



8. You can search a service type (below list of capital service types) by clicking on the drop-down arrow in the POV capital monitoring section

Service Type	Description
7100	Childrens Services Capital
7150	Education Capital
7155	Schools DFC
7200	Economy & Environment Capital
	Resources & Transformation
7300	Capital
7400	Adults Capital
7500	Leasing
7600	Capital - Centrally Held

Capital Forecasting on Smart View

5

POV Capital Monitoring - em3pbcnr416184.ukds2.oracloud.com,Walsall_1

7000 - FY20 Refresh

A390

	A	B	C	D	E	V
		Funding	Approved Budget	CarryForward From Previous Year	Approved + CFwd	In Year Adjust
		BegBalance	BegBalance	BegBalance	BegBalance	+YearTotal
80	+K200000 : CHILDRENS CAPITAL	0	4,480,286	35,246,051	0	0
259	+K300000 : ECONOMY & ENVIRONMENT CAPITAL	0	33,524,960	13,324,167	0	0
364	+K400000 : RESOURCES AND TRANSFORMATION CAPITAL	0	77,987,539	12,904,271	0	0
373	+K500000 : ADULT SOCIAL CARE CAPITAL	0	810,000	36,869	0	0
377	+K600000 : CAPITAL LEASING	0	0	0	0	0
383	+K900000 : CENTRAL FINANCE CAPITAL	0	6,602,550	733,708	0	0
384	X000000 : CAPITAL	0	123,405,335	62,245,066	0	0
385		0	123,405,335	62,245,066	0	0
386						

9. Click **Refresh** and the information requested for the particular Service type will be displayed

File Home Insert Page Layout Formulas Data Review View Smart View Planning Tell me what you want to do...

Analyze Refresh POV Cell Actions Adjust More Save Approvals Lock Drill-through Clear Copy Version Calculate Submit Data Apply

Ad Hoc Data Formatting Workflow

POV Capital Monitoring - em3pbcnr416184.ukds2.oracloud.com,Walsall_1

7300 - FY2 Refresh

A259

	A	B	C	D	E	V
		Funding	Approved Budget	CarryForward From Previous Year	Approved + CFwd	In Year Adjust
		BegBalance	BegBalance	BegBalance	BegBalance	+YearTotal
109	+K400000 : RESOURCES AND TRANSFORMATION CAPITAL	0	77,987,539	12,904,271	0	0
110	X000000 : CAPITAL	0	77,987,539	12,904,271	0	0
111		0	77,987,539	12,904,271	0	0

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3. Capital forecasting information can't be entered at this point because it's at the highest hierarchy grouping.

The hierarchy is:

- **Parent 1** - Capital
- **Parent 2** - Directorate
- **Parent 3** - Division of Service
- **Parent 4** - Capital Scheme
- **Child** - Cost Centre

Forecasting information must be entered at cost centre (child) level. In order to get to this level click on the **+** symbol at the front of each parent.

Analyze Refresh POV Cell Actions Adjust More Save Approvals Lock Drill-through Clear Copy Version Calculate Submit Data Apply

Ad Hoc Data Formatting Workflow

POV Capital Monitoring - em3pbcnr416184.ukds2.oracloud.com,Walsall_1

7300 - FY20 Refresh

A6

+K420100 : COUNCIL CHAMBER REFURBISHMENT

	A	B	C	D	E	V	W	X
		Funding	Approved Budget	CarryForward From Previous Year	Approved + CFwd	In Year Adjustments	Revised Budget	Actual
		BegBalance	BegBalance	BegBalance	BegBalance	+YearTot	+YearTot	+YearTot
6	+K420100 : COUNCIL CHAMBER REFURBISHMENT	Council Funded	0	187,002	187,002	0	187,002.00	
7	+K420000 : DEMOCRATIC SERVICES CAPITAL	Council Funded	0	187,002	187,002	0	187,002.00	
10	+K440000 : FINANCE CAPITAL	0	0	3,105,539	0	0		
20	+K450000 : HOUSING STANDARDS & IMPROVEMENTS CAPITAL	0	2,747,558	313,052	0	0		
48	+K470000 : INFORMATION, COMMUNICATION AND TECHNOLOGIES CAPITAL	0	11,300,000	5,988,295	0	0		
81	+K480000 : INTEGRATED FACILITIES MANAGEMENT CAPITAL	0	1,434,900	3,101,505	0	0		
108	+K490000 : LEP	0	62,505,081	208,878	0	0		-8
109	+K400000 : RESOURCES AND TRANSFORMATION CAPITAL	0	77,987,539	12,904,271	0	0		-5
110	X000000 : CAPITAL	0	77,987,539	12,904,271	0	0		-5
111		0	77,987,539	12,904,271	0	0		-5

This will get you to the cost centre (child) level where forecasting information can be input by entering the relevant information in the yellow cells. The editable cells are current year forecast, carry forward and comments. Once you have completed the forecasting information, click on the **Submit Data**. Once submitted these changes will be updated and saved into PBCS.

[illegible]