

Budget Portal User Manual Fiscal Years 2018-2019



State of Ohio
Office of Budget & Management
Budget Portal User Manual
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Introduction

The OBM Budget Portal is where information and documents required for your agency's Fiscal Years 2018-2019 budget request are completed, uploaded and accessed. Since the last operating budget request a few changes have been made to the Budget Portal including:

- Agencies no longer upload Word template documents for Program Activity A & B and Non-GRF Fund Activity questions. These documents have been converted into web-forms.
- Agencies are required to complete a set of GRF ALI Activity questions for each GRF line item.
- A new Form Share Wizard function gives agency staff the ability to collaborate on web-form documents.
- Agencies now have the ability to export completed web-forms as a Word document.
- Document submission pages are now color coded so that users can see at a glance if documents have been edited or submitted.

This guide provides instructions on how to navigate and enter information in the Budget Portal. Contact your OBM Budget Analyst if you need additional information.

Deadlines

All requests for possible inclusion in the respective "As Introduced" versions of budget bills must be submitted in the OBM Budget Portal **no later than 5 p.m. depending on your agency:**

- Professional regulatory boards and commissions and smaller agencies: **September 16, 2016**
- Cabinet agencies and all remaining executive agencies: **October 14, 2016**
- Constitutional statewide officeholders, and legislative and judicial agencies: **November 1, 2016.**

Accessing the Portal <http://budgetcenter.obm.ohio.gov/>

Agency users will receive an email containing a link to the OBM Budget Portal. To establish access for a new user, contact your OBM budget analyst. New users will login with an email address and a temporary password supplied in the email. You will then be prompted to enter a new password.





Password Reset

Account Information

Email Address:

Security Question:

Security Answer: Security Answer is Case Sensitive.

Ohio Office of Budget and Management 30 E. Broad Street, 34th Floor, Columbus, OH 43215, 614-466-6674 [Home Page](#) | [Forms](#) | [Contact OBM](#)
Equal Employment Opportunity Policy

Click the **Click here if you forgot your password link** and enter an email address to have a new temporary password sent.

If you have difficulty logging in to the OBM Budget Center, please contact your OBM Budget Analyst.

Navigation

After logging in, the agency Budget Center page allows the user to choose to open the Budget Portal or Language Portal. This guide is for only the Budget Portal. Information about the Language Portal can be found on OBM's website along with the Operating Budget Guidance.



The Budget Portal Home page provides a navigation bar on the left side of the page.

1. Verify (or **Select**) your agency code at the top of the page.



Information

Guidance

Blue Book Questions

Role and Overview

Priorities

Objectives

Program Series

Program Activity

BI/COGNOS Reports

Fund Activity

Additional Documents

Budget Submission Overview

Welcome to the OBM Budget Portal. Every two years Ohio is required by law to prepare and adopt an operating budget.

Below is a snapshot view of the budget development that has been completed for your agency.

For access to guidance documents and templates, click on the Guidance tab.

To continue with your submission, click on the left navigation links to complete requested executive budget (Blue Book) questions will find by clicking on the left navigation links. All forms can be completed within the portal. Documents may also be saved or

Please note you must enter Program Series information before you can upload Program Documents.

Agency Submission Statistics

| Documentation | Budget Portal Section | Incomplete | Complete | Progress |
|--|--------------------------------------|------------|----------|---|
| Role and Overview | Role and Overview | ✓ | | |
| Web URL | Role and Overview | ✓ | | |
| Priorities | Priorities | | 0 | |
| Objectives | Objectives | | 0 | |
| Program Series | Program Series | | 0 | |
| Program Activity A Online Form | Program Activity | 8 | 0 | <div style="width: 0%; height: 10px; background-color: #ffc107;"></div> |
| Program Activity B Extended Request Online Form | Program Activity | 0 | 0 | <div style="width: 0%; height: 10px; background-color: #ffc107;"></div> |
| Non GRF Fund Activity Online Form | Fund Activity | 7 | 0 | <div style="width: 0%; height: 10px; background-color: #ffc107;"></div> |
| BPM-0003 (upload one report for each non-GRF Fund) | Fund Activity | 7 | 0 | <div style="width: 0%; height: 10px; background-color: #ffc107;"></div> |
| GRF ALI Activity Online Form | Fund Activity | 5 | 0 | <div style="width: 0%; height: 10px; background-color: #ffc107;"></div> |
| BPM-0004-Summary Type A | BI/COGNOS Reports | | 0 | |
| BPM-0004-Summary Type B | BI/COGNOS Reports | | 0 | |
| BPM-0004-Summary Type A and Type B | BI/COGNOS Reports | | 0 | |
| BPM-0004-Detail Type A | BI/COGNOS Reports | | 0 | |
| BPM-0004-Detail Type B | BI/COGNOS Reports | | 0 | |
| BPM-0004-Detail Type A and Type B | BI/COGNOS Reports | | 0 | |
| BPM-0002 Type A (upload one report for each Program Activity A request) | BI/COGNOS Reports | | 0 | |
| BPM-0002 Type A and Type B (upload one report for each Program Activity B request) | BI/COGNOS Reports | | 0 | |
| Director's Summary Letter | Additional Documents | ✓ | | |
| Index to Budget Request | Additional Documents | ✓ | | |
| Agency Table of Organization | Additional Documents | ✓ | | |
| Agency Staffing Requirements | Additional Documents | ✓ | | |
| Fee Worksheet | Additional Documents | ✓ | | |
| CSI Questionnaire | Additional Documents | ✓ | | |

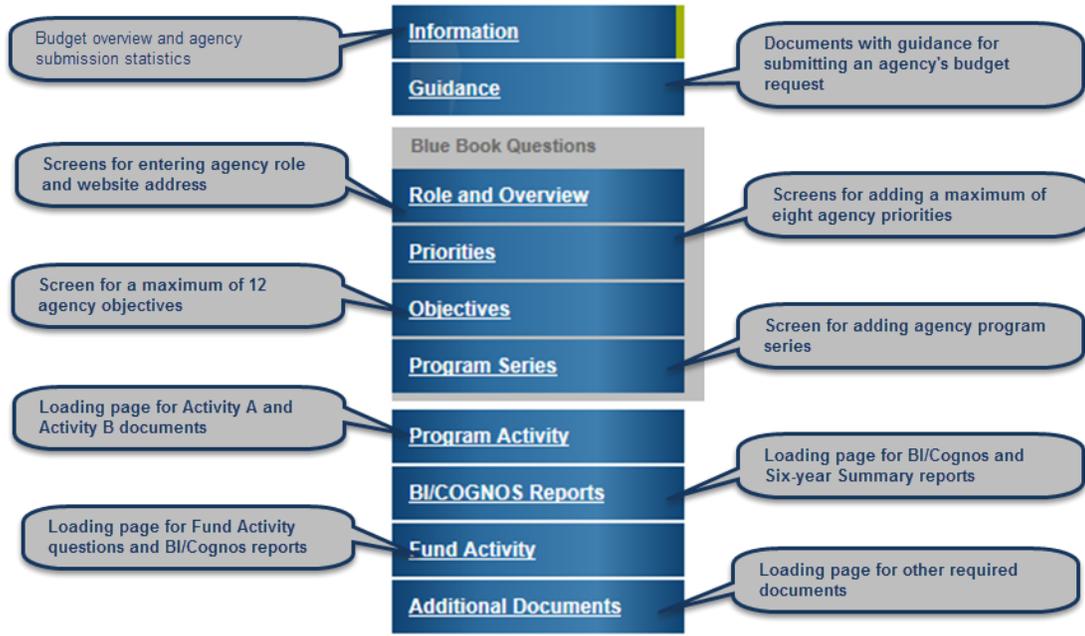
Additional Information

If you have any questions or concerns, please contact your OBM budget analyst.

Note: The **Incomplete**, **Complete**, and **Progress** columns will change as forms are submitted and documents are uploaded.

The navigation bar has links to pages to add information and documents for an agency's budget submission.

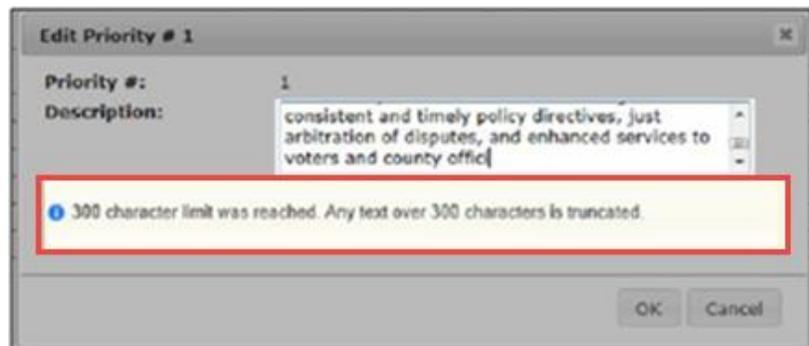




Using Portal Pages

The top of each page includes instructions and any character limits for text-entry fields.

Note: Character limits include spaces. Consider these limits when copying and pasting information from other sources. A message (shown below) will be displayed if an entry in a field has reached a character limit; when this happens, the text will be shortened to fit in the field.



- Most pages allow users to enter information in any order. However, **Program Series** information must be entered before you can upload program documents.



Descriptions of Links and Corresponding Pages

Information

- Click the **Information** link to display the Home page.
 - This page contains the **Agency Submission Statistics** table displaying a current look at the budget request that has been completed for your agency.

- Information
- Guidance
- Blue Book Questions
- Role and Overview
- Priorities
- Objectives
- Program Series
- Program Activity
- BI/COGNOS Reports
- Fund Activity
- Additional Documents

Budget Submission Overview

Welcome to the new OBM Budget Portal. Every two years Ohio is required by law to prepare and adopt an operating budget.

Below is a snapshot view of the budget development that has been completed for your agency.

For access to guidance documents and templates, click on the Guidance tab.

To continue with your submission, click on the left navigation links to complete requested executive budget (Blue Book) questions will find by clicking on the left navigation links. All forms can be completed within the portal. Documents may also be saved and returned to the portal.

Please note you must enter Program Series information before you can upload Program Documents.

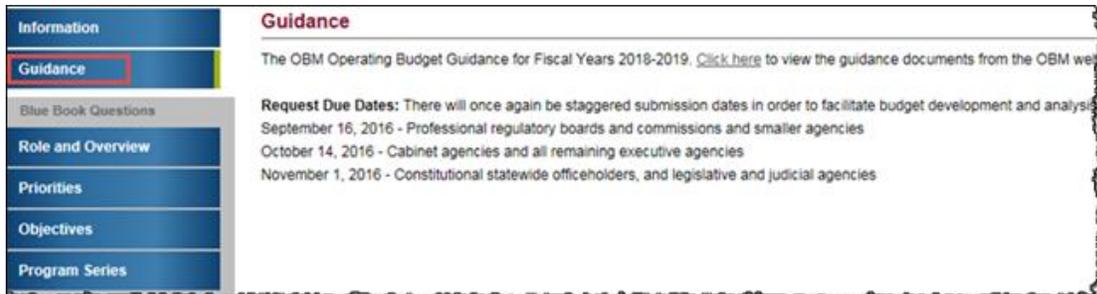
Agency Submission Statistics

| Documentation | Budget Portal Section | Incomplete | Complete | Progress |
|--|-----------------------------------|------------|----------|--|
| Role and Overview | Role and Overview | ✓ | | |
| Web URL | Role and Overview | ✓ | | |
| Priorities | Priorities | | 0 | |
| Objectives | Objectives | | 0 | |
| Program Series | Program Series | | 0 | |
| Program Activity A Online Form | Program Activity | 8 | 0 | <div style="width: 100%; height: 10px; background-color: #ccc;"></div> |
| Program Activity B Extended Request Online Form | Program Activity | 0 | 0 | <div style="width: 100%; height: 10px; background-color: #ccc;"></div> |
| Non GRF Fund Activity Online Form | Fund Activity | 7 | 0 | <div style="width: 100%; height: 10px; background-color: #ccc;"></div> |
| BPM-0003 (upload one report for each non-GRF Fund) | Fund Activity | 7 | 0 | <div style="width: 100%; height: 10px; background-color: #ccc;"></div> |
| GRF ALI Activity Online Form | Fund Activity | 5 | 0 | <div style="width: 100%; height: 10px; background-color: #ccc;"></div> |
| BPM-0004-Summary Type A | BI/COGNOS Reports | | 0 | |
| BPM-0004-Summary Type B | BI/COGNOS Reports | | 0 | |
| BPM-0004-Summary Type A and Type B | BI/COGNOS Reports | | 0 | |
| BPM-0004-Detail Type A | BI/COGNOS Reports | | 0 | |
| BPM-0004-Detail Type B | BI/COGNOS Reports | | 0 | |
| BPM-0004-Detail Type A and Type B | BI/COGNOS Reports | | 0 | |
| BPM-0002 Type A (upload one report for each Program Activity A request) | BI/COGNOS Reports | | 0 | |
| BPM-0002 Type A and Type B (upload one report for each Program Activity B request) | BI/COGNOS Reports | | 0 | |

Guidance

- Click the **Guidance** link.
 - This provides agency information about request due dates and a link to the Operating Budget Guidance.

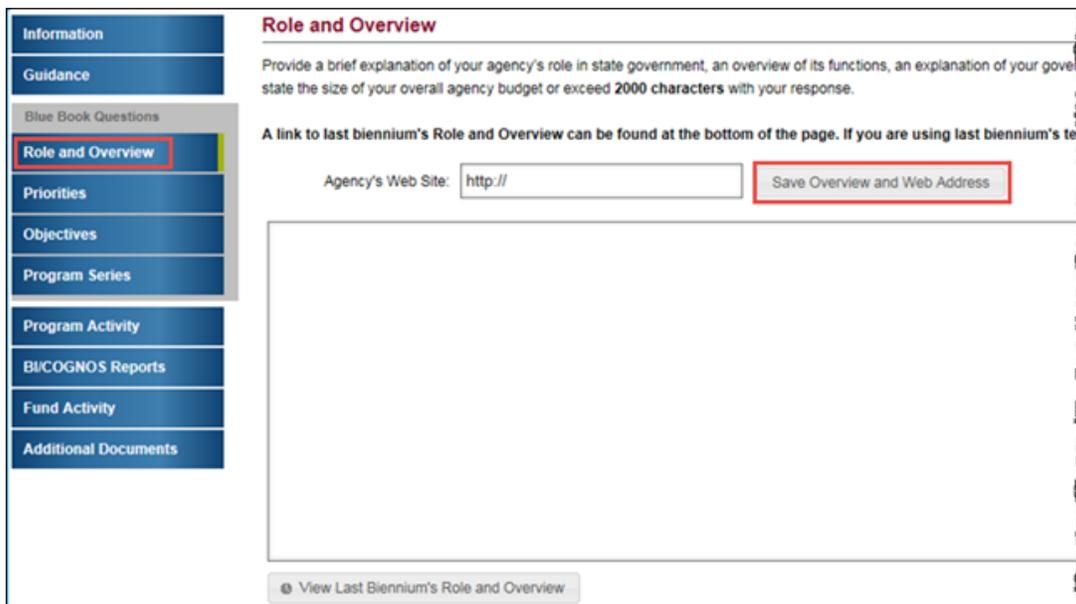




Role and Overview

1. Click the **Role and Overview** link.
2. Add a link to the agency's website.
3. Add an explanation of the agency's role in state government as well as the agency's functions, structure, recent accomplishments and number of full-time employees.
 - This information will be displayed in the Executive Budget Blue Book.
4. Click the **Save Overview and Web Address** button to save information.

Note: Information provided on this page will be lost if a user leaves this page without clicking this button.



Priorities and Objectives

1. Click the **Priorities** or the **Objectives** link.
2. Click the **Add Priority** button.
3. Enter information about the agency's important tasks and goals in the **Description** field.
4. Click **Save**.



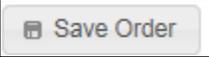
- This information will be displayed in the Executive Budget Blue Book.

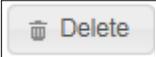
1. Click an **Edit** link to change current information.
 - The **Edit Priority** window will open.

2. Make adjustments in the **Description** box.
3. Click **Save**.
4. Click **Add Priority**  to add an additional Priority.
5. Simply drag and drop the rows to reorder priorities.



| | | |
|---|----------------------|---|
| 1 | Edit | Maintain the highest level of readiness of the Ohio Army and Air National Guard. The key to high read capability to meet national defense and state mission requirements. |
| 3 | Edit | Attract and sustain a military force structure within Ohio that is ready, relevant, and responsive to the nat |
| 2 | Edit | Maintain the Ohio Air and Army National Guard's infrastructure in order to meet the training requirem |

6. Click **Save Order**  when you are finished prioritizing.

7. When necessary, click **Delete**  to remove a priority.

- The entry and edit of Objectives works in the same manner as Priorities.

Program Series

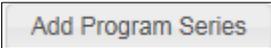
1. Click the **Program Series** link in the navigation bar to open the **Program Series** page.

Note: Add Program Series information before adding any program budget request information.

| Program Series | | | | | | | |
|--|---|-------------------|------------------|---|----------------------|------------------|--------------------------|
| Provide a brief overview of each of your agency's A-level program series (ex. "123A1"). Please do not exceed 1300 characters for each of your responses. | | | | | | | |
| | # | Program Series ID | Series Title | Description | Last Modified | Last Modified By | Delete |
| Edit | 1 | 2600A | Criminal Justice | This program series contains the Law Enforcement (2600G) and Victims Services (2601B) programs. The Law Enforcement Program encompasses all functions of the office charged with providing training, investigatory, and technical assistance services to the law enforcement community across the state, as well as those sections providing enforcement-related activities. The Victims Services Program encompasses all functions charged with assisting victims of crime and with protecting children. | 5/25/2016 8:56:45 AM | SMoody | <input type="checkbox"/> |
| Edit | 2 | 2610A | Legal Services | This program series contains the Citizen Protection (2610B) and State Agencies (2611B) programs. Citizen Protection focuses on protecting the rights of citizens and businesses across the state in the areas of consumer protection, environmental enforcement, charitable law, and antitrust law. The State Agencies Program provides legal representation to state officials and state agencies. This includes, but is not limited to, legal advice, contract review, litigation support, and debt collection. | 5/25/2016 9:03:48 AM | SMoody | <input type="checkbox"/> |

[Add Program Series](#)

To add a Program Series

2. Click **Add Program Series**  to open the **Add Program Series** pop-up window.

3. Select a **Program Series ID** from the dropdown menu.

4. The **Series Title** will automatically display.

5. Enter a **Description** of each A-level Program Series.

- The Description field will automatically populate with information from the last budget request. If any of this information has changed, make edits as necessary,
- If text is copied and pasted, special characters may be automatically removed. Review your entry before proceeding.

6. Click **OK**.

- This information will be displayed in the Executive Budget Blue Book.



To Delete a Program Series:

1. Check the box in the series **Delete** column,
2. Click the **Delete Selected Program Series** button.

| | # | Program Series ID | Series Title | Description | Last Modified | Last Modified By | Delete |
|----------------------|---|-------------------|--------------------|---|----------------------|------------------|-------------------------------------|
| Edit | 1 | 2600A | Criminal Justice | This program series contains the Law Enforcement (2600B) and Victims Services (2601B) programs. The Law Enforcement Program encompasses all functions of the office charged with providing training, investigatory, and technical assistance services to the law enforcement community across the state, as well as those sections providing enforcement-related activities. The Victims Services Program encompasses all functions charged with assisting victims of crime and with protecting children. | 5/25/2016 8:58:45 AM | S Moody | <input type="checkbox"/> |
| Edit | 2 | 2610A | Legal Services | This program series contains the Citizen Protection (2610B) and State Agencies (2611B) programs. Citizen Protection focuses on protecting the rights of citizens and businesses across the state in the areas of consumer protection, environmental enforcement, charitable law, and antitrust law. The State Agencies Program provides legal representation to state officials and state agencies. This includes, but is not limited to, legal advice, contract review, litigation support, and debt collection. | 5/25/2016 9:03:48 AM | S Moody | <input checked="" type="checkbox"/> |
| Edit | 3 | 2620A | Program Management | This program series contains the Program Management Program (2620B). This program provides operational support including information technology, finance, human resources, office services, facilities management, fleet management, library services, records retention, training, internal audit, and communications. This program primarily serves to benefit the employees and programs of the Attorney General's Office. | 6/14/2016 3:12:03 PM | MGreulich | <input type="checkbox"/> |

Note: Follow this same procedure to delete documents in any section in the portal.

Program Activity

The Program Activity page will be populated with a list of active programs generated from FY 2016 spending data. If a program is not listed, click **Add New Program** to add it. If a listed program will no longer be used in the FY 2018-2019 biennium, you can change the status of that program to Inactive by clicking **Edit** to the left of the program's ID number.

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Program Activity

Complete a Program Activity A request for each of your agency's B-level programs below. Click **Edit** to the left of each program ID number to open to Program Activity A web-form for that program.

The list of active programs below has been generated based on FY 2016 actual spending data. If a program is not listed, click **Add New Program** below to add it. If a listed program will no longer be used in the FY 2018-2019 biennium, you can change the status of that program to Inactive by clicking **Edit** to the left of the program's ID number.

To add a Program Activity B request for a program, click **Edit** under the **Activity B** column. You can add multiple Program Activity B requests for any given program.

Program

[Print All Activity A Requests](#)
[Color Key](#)
[Form Share Wizard](#)

| | Prog ID | Program B Description | Modified | Modified By | Is in OAKS? | Active FY 18-19? | Activity B | Activity B Count |
|----------------------|---------|-----------------------------|----------|-------------|-------------|------------------|------------|------------------|
| Edit | 2200B | ARMY NATIONAL GUARD SUPPORT | | | Yes | Yes | | 0 |
| Edit | 2225B | AIR NATIONAL GUARD SUPPORT | | | Yes | Yes | | 0 |
| Edit | 2230B | Firefighters | | | Yes | Yes | | 0 |
| Edit | 2250B | BUCKEYE INN | | | Yes | Yes | | 0 |
| Edit | 2260B | CAMP PERRY CLUBHOUSE | | | Yes | Yes | | 0 |
| Edit | 2270B | CAMP PERRY OPERATIONS | | | Yes | Yes | | 0 |
| Edit | 2280B | MILITIA | | | Yes | Yes | | 0 |
| Edit | 2290B | PROGRAM MANAGEMENT | | | Yes | Yes | | 0 |

[+ Add New Program](#)

Activity B Priorities

To reorder the Program B priorities, simply drag and drop the rows, or enter the priorities yourself. When you are finished prioritizing, click "Save Priorities".

[Print All Activity B Requests](#)
[Print Activity B Priorities](#)
[Form Share Wizard](#)



Each row in the far left column will be color coded to represent what action has been taken.

Color Key ✕

| | |
|--|---|
| | Action has not been taken. Complete the form to clear this color. |
| | The form was opened and is in progress, but is not complete. Select the Save and Submit button when the form is complete to clear this color. |
| | The Save and Submit button was selected in the form. Clear indicates to the OBM Budget Analyst that the agency is done with the entry. |

Close

Activity A

Complete a **Program Budget Request – Activity A** web-form for each of your agency’s programs that will be active in the FY 2018-2019 biennium.

1. Click Edit to the left of a Program’s ID. Edit
 - A web-form for that Program will display.

Program Form ✕

Export to Word

Program Number 2225B
Program Name AIR NATIONAL GUARD SUPPORT

Will this program be active for the FY18-19 biennium? Yes No

FY 2018 Funding Request \$

FY 2019 Funding Request \$

FY 2018 FTEs

FY 2019 FTEs

Program Summary

1. Explain the purpose of this program. What public service or existing need does this program address?

2. Explain the population served and/or community regulated by this program.

3. Describe the services or activities provided by this program.

Activity A Funding Level

Save Save and Submit

Form Attachments

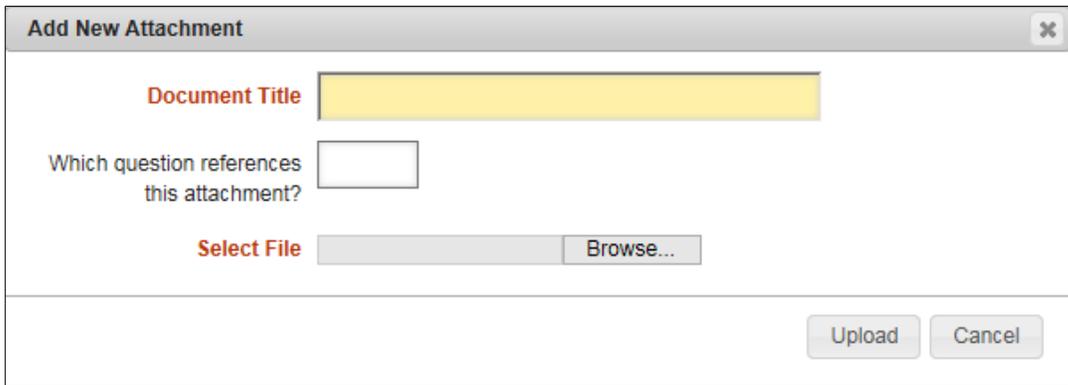
No attachments were found for this form.

+ Add Attachment

2. Confirm whether or not the Program will be active in the FY18-19 biennium.
3. Enter the **Funding Request** and **FTEs** for each year of the coming biennium.



4. Answer each required question. You may be prompted to answer additional questions depending on how you answer certain “Yes or No” questions.
5. Upload attachments  (not required) if you wish to add information that will not display properly in a text-only field, such as a chart or table.



The dialog box titled "Add New Attachment" contains the following fields and buttons:

- Document Title:** A text input field with a yellow background.
- Which question references this attachment?:** A small text input field.
- Select File:** A button labeled "Browse..."
- Bottom right:** "Upload" and "Cancel" buttons.

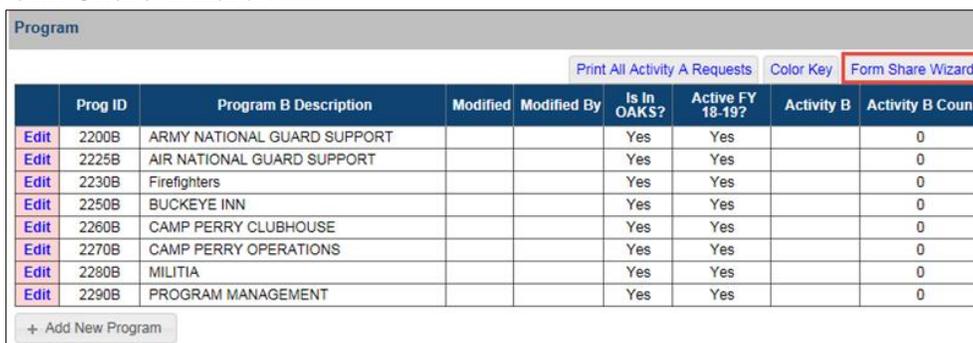
6. Click the **Export to Word** button  to create a copy of the document to save to your desktop.
7. Click **Save**  to keep a draft of the incomplete form.
 - The color will change to yellow on the Program table
 Or
 Click **Save and Submit**  if the entry is complete.
 - The color will change to white on the Program table.
 - You will still be able to make further changes to the entry.

Note: If a submitted form needs adjustment, click the **Edit** link, make changes and **Save and Submit** again.

Activity Form Sharing

A link is located at the top right of the Program home page that allows agency staff members to collaborate on forms by emailing certain questions.

1. Click the **Form Share Wizard** link.



| Program | | | | | | | | |
|----------------------|---------|-----------------------------|----------|-------------|-------------|------------------|------------|------------------|
| | Prog ID | Program B Description | Modified | Modified By | Is In OAKS? | Active FY 18-19? | Activity B | Activity B Count |
| Edit | 2200B | ARMY NATIONAL GUARD SUPPORT | | | Yes | Yes | | 0 |
| Edit | 2225B | AIR NATIONAL GUARD SUPPORT | | | Yes | Yes | | 0 |
| Edit | 2230B | Firefighters | | | Yes | Yes | | 0 |
| Edit | 2250B | BUCKEYE INN | | | Yes | Yes | | 0 |
| Edit | 2260B | CAMP PERRY CLUBHOUSE | | | Yes | Yes | | 0 |
| Edit | 2270B | CAMP PERRY OPERATIONS | | | Yes | Yes | | 0 |
| Edit | 2280B | MILITIA | | | Yes | Yes | | 0 |
| Edit | 2290B | PROGRAM MANAGEMENT | | | Yes | Yes | | 0 |

[+ Add New Program](#)



2. Select which program activities to share.

Select only the funds or program activities from the left box that you wish to send to the recipient, and click the right arrow to move them to the Selected Items box. Only items with incomplete forms will be listed.

Available Items

- 2200B - ARMY NATIONAL GUARD SUPPORT
- 2225B - AIR NATIONAL GUARD SUPPORT
- 2230B - Firefighters
- 2250B - BUCKEYE INN
- 2260B - CAMP PERRY CLUBHOUSE
- 2270B - CAMP PERRY OPERATIONS

Selected Items

- 2290B - PROGRAM MANAGEMENT

3. Select which questions to share.

Question Selection

Select the question(s) for the recipient to answer.

Select All

- FY 2018 Funding Request \$
- FY 2019 Funding Request \$
- FY 2018 FTEs
- FY 2019 FTEs
- 1. Explain the purpose of this program. What public service or existing need does this program address?
- 2. Explain the population served and/or community regulated by this program.
- 3. Describe the services or activities provided by this program.
- 4. Provide estimates of the annual volume of services or activities provided at this funding level, including people served, assistance provided, and number of awards and amounts.
- 5. Describe existing services or activities that cannot be maintained or will be eliminated at this funding level, including service level impacts compared to the current biennium.
- 6. Describe the various funding sources for this program. Are these funding sources dedicated solely to this program or do these funding sources support other programs?
- 7. Do any federal grants support this program?
- 8. Does this program pass funds to other state or local entities?
- 9. Describe any internal or external factors influencing the costs of this program, including trends in demographics, caseloads, or technology, and any changes in federal/state funding or regulations.
- 10. Do any other state programs interact with this program?
- 11. Describe how the effectiveness of this program is measured. Include any federal and/or state key indicators used to measure success, the frequency of evaluations, how data is tracked and published, and any changes made as a result of evaluations.
- 12. Provide any additional information concerning this program not included above that will service to assist OBM in the analysis of this request.



-
- Indicate who you want to send these questions to.

Recipient Information

Enter the full email address of the person who will answer these questions.

Recipient Name Dana Hunter

Email Address dana.a.hunter.nfg@mail.mil

Comment (will appear in email message) send me information about the effectiveness of this program

Due Date 08/01/2016

Do you want to be copied on the emails sent to this recipient?

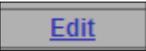
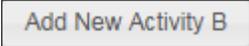
[Back to Question Selection](#) [Continue](#)

The recipient will receive *separate* emails providing access to answer the selected. The recipient will *only* receive the questions you select with the latest answers, and will not see any other questions or answers. When the recipient answers the question(s), the sender will receive emails with the answers, and those answers will be saved in the form. Each time an answer is saved, it will *overwrite* the previous answer.

Activity B

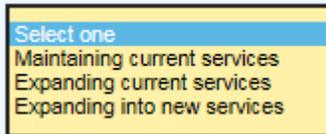
Complete one or more **Extended Program Budget Request – Activity B** forms for the programs for which your agency is requesting funding above the Activity A request limits (see Operating Budget Guidance).

A link to Activity B will display after Activity A has been entered for that Program ID.

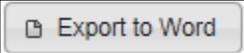
- Click the **Edit** link  in the **Activity B** column next to the associated Program.
- Enter a description. 
- Click **Add New Activity B**. 
 - A **Program B Form** displays.



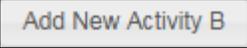
- Click the drop-down arrow to select the option that best represents the nature of the extended request.



- Depending on this selection, the form will ask different questions.

- Enter the **Funding Request** and **FTEs** for each year of the coming biennium.
- Answer each required question. You may be prompted to answer additional questions depending on how you answer certain “Yes or No” questions.
- Upload additional attachments  (not required) if you wish to add information that will not display properly in a text-only field, such as a chart or table.
- Click the **Export to Word** button  to retain a copy.
- Click **Save and Submit**  if the entry is complete.
Or
Click **Save**  to keep a draft of the form.

Additional Activity B

- Enter a description. 
- Click **Add New Activity B.** 
- Reorder Program B priorities, drag and drop the rows, or enter the priorities yourself.
- Click **Save Priorities** when finished prioritizing,



Activity Form Sharing

1. Click the **Form Share Wizard** link.

Activity B Priorities

To reorder the Program B priorities, simply drag and drop the rows, or enter the priorities yourself. When you are finished prioritizing, click "Save Priorities".

[Print All Activity B Requests](#) [Print Activity B Priorities](#) [Form Share Wizard](#)

| | Priority | Activity B Title | Prog ID | Program B Description | Modified | Modified By |
|----------------------|----------|---------------------|---------|--------------------------------|------------|-------------|
| Edit | 1 | Office Equipment | 5450B | JUVENILE CORRECTIONAL FACILITI | 08/02/2016 | DStanger |
| Edit | 2 | Replacement Vehicle | 5450B | JUVENILE CORRECTIONAL FACILITI | 08/02/2016 | DStanger |

2. Select which program activities to share.
3. Select which questions to share.
4. Indicate who you want send these questions to.

When the recipient answers the question(s), the sender will receive emails with the answers, and those answers will be saved in the web-form.

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Executive Agency Budget Request (BI COGNOS)

BPM-0004-Summary: Executive Agency Budget Request - Summary
After your agency's data entry into OAKS BPM is complete, attach three versions of

BPM-0004-Detail: Executive Agency Budget Request - Detail
After your agency's data entry into OAKS BPM is complete, attach three versions of

[Add Executive Agency Budget Requests](#)

Six Year Summary Reports by Program (BI COGNOS)

Submit one **BPM-0002: Six Year Summary Report – Type A** for each of your age
Submit one **BPM-0002: Six-Year Summary Report – Type A + B** for each of your

[Add Six Year Summary Documents](#)

1. Upload and attach the BI Cognos report **Executive Agency Budget Request – DETAIL**.
 - You will need to upload three versions of the report: **Type A**, **Type B**, and **Type A + Type B**.



Upload Executive Agency Budget Request

Summary or Detail Summary **Detail**

Type

Select File

1. Upload and attach the BI Cognos report **Executive Agency Budget Request-SUMMARY**.
 - You will need to upload three versions of the report: **Type A, Type B, and Type A + Type B.**

Upload Executive Agency Budget Request

Summary or Detail **Summary** Detail

Type

Select File

2. Upload and attach the **Six Year Summary Report – Type A** for each Program Activity A request

Upload Six Year Summary Reports by Program (BI COGNOS)

Type A - Program Budget Request - Six Year Summary Report

Type A + Type B - Extended Program Budget Request - Six Year Summary Report

Program

Select File

3. Upload and attach the **Six-Year Summary Report – Type A + B** for each Program Activity B request

Upload Six Year Summary Reports by Program (BI COGNOS)

Type A - Program Budget Request - Six Year Summary Report

Type A + Type B - Extended Program Budget Request - Six Year Summary Report

Program

Select File



Fund Activity

The Fund Activity page will be populated with a list of active programs generated from FY 2016 spending data.

The Fund Activity Summary – Required Questions should be completed for each agency non-GRF fund.

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Fund Activity Questions

The lists of active funds and GRF line items below have been generated based on FY 2016 actual spending data. If a fund or GRF line item is not listed, click either **Add New Fund** or **Add GRF** to be used in the FY 2018-2019 biennium, you can change the status of that fund or line item to Inactive by clicking **Edit** to the left of the fund or line item number.

In the top section, complete a Fund Activity Summary for each of your agency's non-GRF funds by clicking **Edit** to the left of each fund ID number. For each non-GRF fund, a Fund Activity Summary will be displayed under the **BI Cognos Report** column.

In the bottom section, complete a GRF ALI Activity Summary for each of your agency's GRF appropriation line items by clicking **Edit** to the left of each ALI number.

Non-GRF

[Print All](#) [Color Key](#) [Form Share Wizard](#)

| | Fund ID | Fund Description | Is In OAKS? | Active FY 18-19? | Modified | Modified By | BI Cognos Report | Uploaded | Uploaded By |
|----------------------|---------|--------------------------------------|-------------|------------------|----------|-------------|------------------------|----------|-------------|
| Edit | 3420 | Army National Guard Service Contract | Yes | Yes | | | Upload | | |
| Edit | 3E80 | Air National Guard Agreement | Yes | Yes | | | Upload | | |
| Edit | 3R80 | Counter Drug Operations | Yes | Yes | | | Upload | | |
| Edit | 5340 | Armory Improvements | Yes | Yes | | | Upload | | |
| Edit | 5360 | Camp Perry Clubhouse and Rent | Yes | Yes | | | Upload | | |
| Edit | 5370 | Maintenance Ohio National Guard | Yes | Yes | | | Upload | | |
| Edit | 5U80 | Community Match Armories | Yes | Yes | | | Upload | | |
| Edit | 3410 | Air National Guard Base Security | Yes | No | | | Upload | | |
| Edit | 5LY0 | OH Military Medal/Distinction | Yes | No | | | Upload | | |

[+ Add New Fund](#)

GRF

[Print All](#) [Color Key](#) [Form Share Wizard](#)

| | ALI | ALI Description | Is In OAKS? | Active FY 18-19? | Modified | Modified By |
|----------------------|--------|-------------------------|-------------|------------------|----------|-------------|
| Edit | 745401 | Ohio Military Reserve | Yes | Yes | | |
| Edit | 745404 | Air National Guard | Yes | Yes | | |
| Edit | 745407 | National Guard Benefits | Yes | Yes | | |
| Edit | 745409 | Central Administration | Yes | Yes | | |
| Edit | 745499 | Army National Guard | Yes | Yes | | |

[+ Add GRF ALI](#)

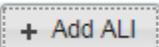
Non-GRF Funds

Complete the Required Questions for each of your agency's Non-GRF Funds that will be active in the FY 2018-2019 biennium.

1. Click Edit to the left of the Fund ID. Edit
 - A web-form for the Fund beside the link will display.

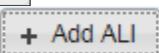


2. Answer each required question. You may be prompted to answer additional questions depending on how you answer certain “Yes or No” questions.

3. Click **Add ALI** 

4. Enter ALI information requested.

5. Click Add. 

6. Click **Add ALI**  if there are additional Appropriation Line Items for this Fund.

7. Upload attachments  (not required) if you wish to add information that will not display properly in a text-only field, such as a chart or table.

8. Click the **Export to Word** button  to create a copy of the document to save to your desktop.



9. Click **Save**  to keep a draft of the incomplete form.

- The color will change to yellow on the Fund table

Or

Click **Save and Submit**  if the entry is complete.

- The color will change to white on the Fund table.

Note: If a submitted form needs adjustment, click the **Edit** link, make changes and **Save and Submit** again.

10. To upload a BI report for each fund, click the **Upload** link in the BI Cognos Report column.



11. Upload a **Fund Activity Summary Report (BPM-0003)** for each non-GRF fund.



Add a New Fund

1. Click the **Add a New Fund** button  at the bottom left corner of the Non-GRF table

2. Enter the Fund code. 

3. Enter a description. 

4. Click Submit. 

- A web-form will display for Funds marked Active for FY 18/19.

5. Follow the same steps listed previously in this section to complete the Fund entry.

Inactivating a Fund

1. Click the **Edit** link  beside the Fund ID that will not be used.

- A web-form will display.

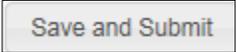


2. Click **No** Yes No when asked if the fund will be active in the next biennium
 - The questions will not be visible.
3. Click **Save** or **Save and Submit**.

GRF ALIs

1. Click the Edit link to the left of the GRF ALI.
 - A web-form for the ALI beside the link will display.



-
2. Answer each required question. You may be prompted to answer additional questions depending on how you answer certain “Yes or No” questions.
 3. Click **Save**  to keep a draft of the incomplete form.
 - The color will change to yellow on the Fund table
 Or
 Click **Save and Submit**  if the entry is complete.
 - The color will change to white on the Fund table.

Note: If a submitted form needs adjustment, click the **Edit** link, make changes and **Save and Submit** again.

Add GRF ALI

1. Click the **Add GRF ALI** button  at the bottom left corner of the GRF table
2. Enter the **ALI** code. 
3. Enter an **ALI Title**. 
4. Enter the **Purpose** of the ALI. 
5. Click **Submit**. 
6. Mark **Yes**  beside the question that asks if the ALI will be active.
 - A web-form will display for the new ALI. (This is the same form shown previously for the existing ALI.)
7. Enter answers to the questions on the web-form.
8. Upload attachments  (not required).
9. Click the **Export to Word** button  to create a copy of the document to save to your desktop.
10. Click **Save**  to keep a draft of the incomplete form.
 - The color will change to yellow on the Fund table
 Or
 Click **Save and Submit**  if the entry is complete.
 - The color will change to white on the Fund table.

Note: If a submitted form needs adjustment, click the **Edit** link, make changes and **Save and Submit** again.



Additional Documents

| | |
|----------------------|---|
| Information | As mentioned in the FY18-19 Operating Budget Guidance, the following documents must be uploaded to the Budget Portal: |
| Guidance | Director's Summary Letter |
| Blue Book Questions | Index to Budget Request |
| Role and Overview | Agency Table of Organization |
| Priorities | Agency Staffing Table (Appendix L) |
| Objectives | Fee Worksheet (Appendix M) |
| Program Series | Agency Compliance with Customer Service Standards Questionnaire (Appendix N) |
| Program Activity | |
| BI/COGNOS Reports | |
| Fund Activity | |
| Additional Documents | Additional Required and Supplemental Documents |
| | <input type="button" value="Add Document"/> |

1. Click the **Add Document** button.
2. Upload the following documents:
 - Director's Summary Letter
 - Index to Budget Request
 - Agency Table of Organization
 - Agency Staffing Table (Appendix L)
 - Fee Worksheet (Appendix M)
 - Agency Compliance with Customer Service Standards Questionnaire (Appendix N)

