USING THE VALUE REPORTING PORTAL

Performance measures are established for each project and reported by agency representatives on a quarterly basis. Data entered in this site are rolled up into standard Cognos Business Intelligence reports for use by agency executives and program managers. This information helps the state better track its achievement of expected project outcomes.

This job aid is a guide for agency representatives who use the Value Reporting Portal to enter and track performance measurements for certain enterprise and multi-agency programs.

To view related reports launch the OAKS Business Intelligence application from MyOhio.gov and navigate to Public Folders > BI Reporting Folders > BI Standard Reports > Value

For each monitored project the designated agency representative will receive an introduction e-mail with project-specific information.

Metric types–cost, time, number, percent, or value–are used to categorize the measurements that have been selected as key to determining if the project or programs is achieving its expected outcomes.

As each project has a target range, the agency should identify the value it expects to achieve through the enterprise program over the project lifespan.

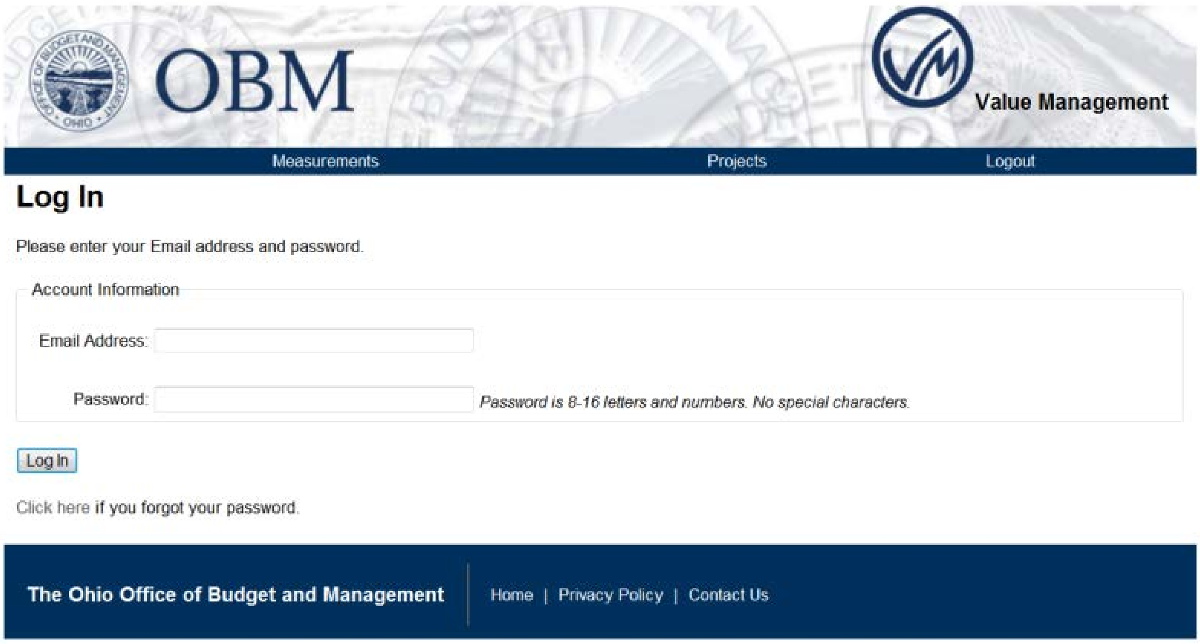
Logging into the Value Reporting Portal for the First Time

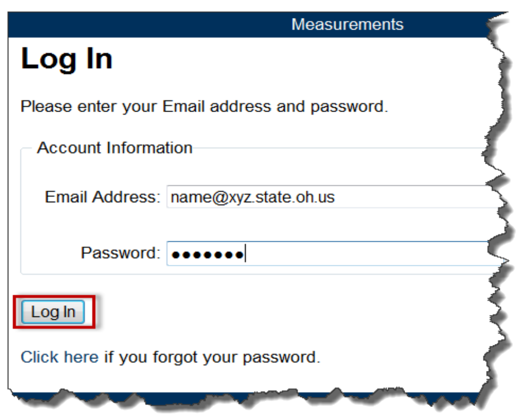
Designated agency reporting representatives will receive a log-in notice for the Value Reporting Portal along with a temporary password and a link to the **First Time Login** screen. To request an account contact the Value Management Office.

Step-by-Step	Screen
1. Click the link in the e-mail received. The First Time Login page will display. 2. Enter **Email Address.** 3. Enter **Temporary Password.** 4. Enter a new password in the **Create Password** field**.** 5. Enter new password again in the **Retype Password** field. 6. Choose a **Security Question.** 7. Enter the **Security Answer.** 8. Click **Create User.** Note: Password is 8-16 letters and numbers. No special characters.	

The **Log In** page will display.

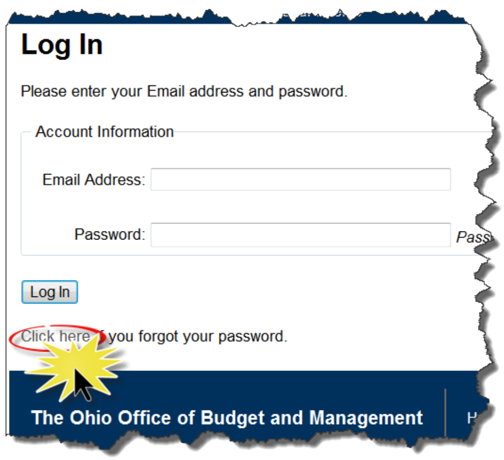
The agency reporting representative will be prompted to log in again.



Step-by-Step	Screen
1. Enter **Email Address**. 2. Enter **Password**. 3. Click **Log In**. Note: This is the only log-in screen that appears in the future (unless the password has been reset). Note: Once initial log in is complete, continue to access the Value Reporting Portal on a regular basis using this URL. http://vmo.obm.ohio.gov/	

Resetting the Password

If the password is forgotten or isn't working, it can be reset from within the Value Reporting Portal.

Step-by-Step	Screen
1. Click the link at the bottom of the Log In page.	
2. Enter **Email Address**. 3. Enter the **Security Answer**. 4. Click **Reset Password**.	

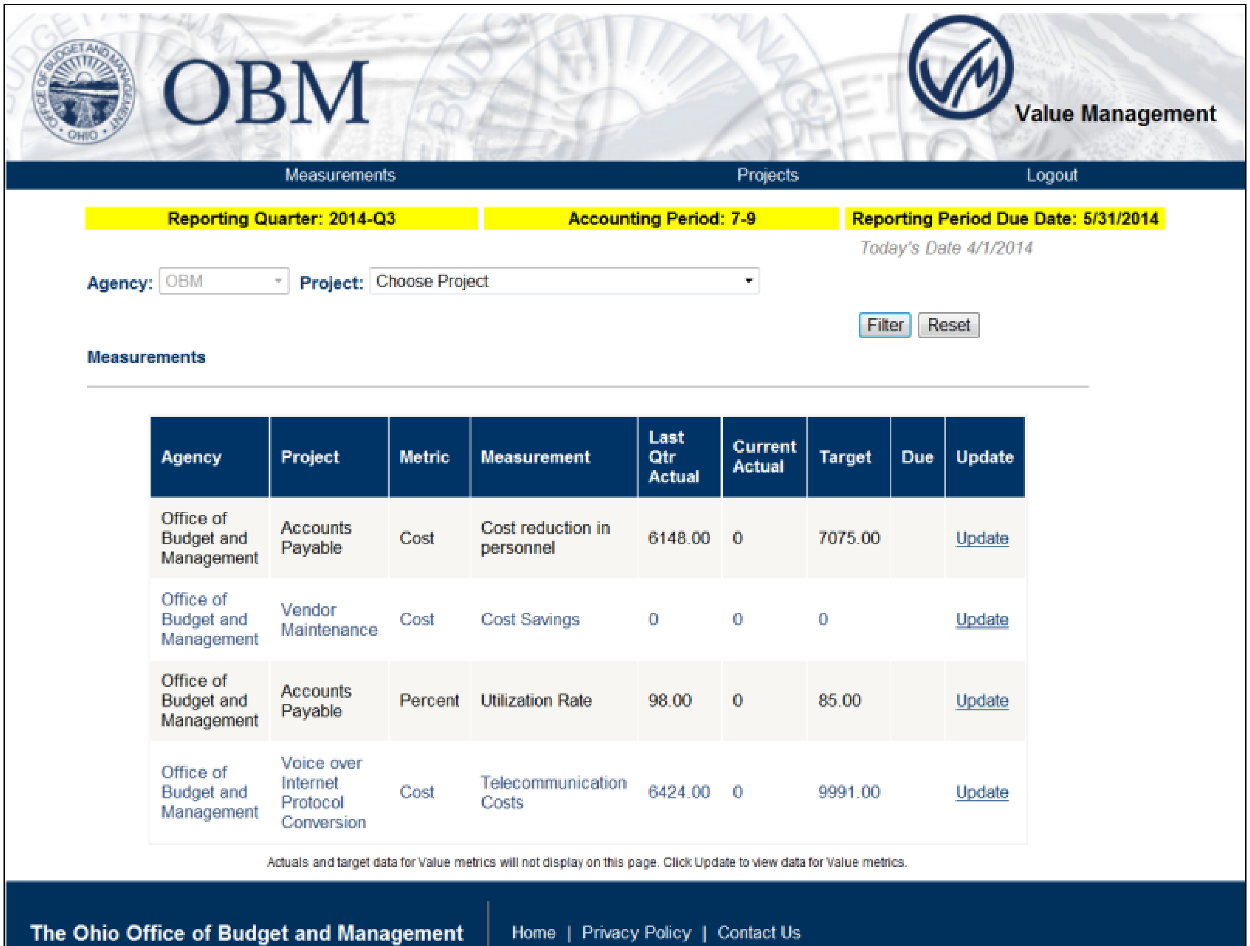
Navigating the Measurements Page

After successful log-in, the **Measurements** page appears.

Users will generally access the Measurements page most frequently, but key set up information, such as baselines and investments, is contained in the Projects page, described later in this document.

In each project, focus on measuring key operational and strategic information and minimize difficult or costly to compile, or immaterial information.

The Value Management Office (VMO) suggests an 80/20 approach—try to capture at least 80% of the "benefits" that can be measured, omitting those that add little to the "bottom line" but may require significant effort. Depending on baselines and the project targets, what to include and exclude from the measurements may be a subject to discuss further with the manager of the project or the VMO.


OBM
Value Management
Measurements | Projects | Logout

Reporting Quarter: 2014-Q3 | Accounting Period: 7-9 | Reporting Period Due Date: 5/31/2014

Today's Date 4/1/2014

Agency: OBM Project: Choose Project

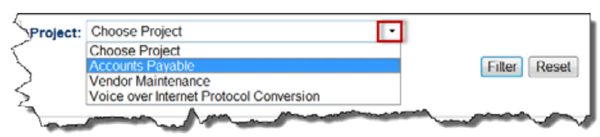
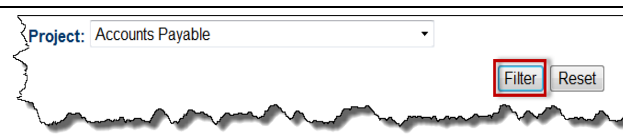
Filter Reset

Measurements

Agency	Project	Metric	Measurement	Last Qtr Actual	Current Actual	Target	Due	Update
Office of Budget and Management	Accounts Payable	Cost	Cost reduction in personnel	6148.00	0	7075.00		Update
Office of Budget and Management	Vendor Maintenance	Cost	Cost Savings	0	0	0		Update
Office of Budget and Management	Accounts Payable	Percent	Utilization Rate	98.00	0	85.00		Update
Office of Budget and Management	Voice over Internet Protocol Conversion	Cost	Telecommunication Costs	6424.00	0	9991.00		Update

Actuals and target data for Value metrics will not display on this page. Click Update to view data for Value metrics.

The Ohio Office of Budget and Management | Home | Privacy Policy | Contact Us

Step-by-Step	Screen
1. Click the **Project** drop-down button to select a particular project. **Note** All project measurements assigned to that agency will display when initially accessing this screen.	
2. Click the **Filter** button to view that project's metrics.	
3. Click the **Reset** button to display all projects.	

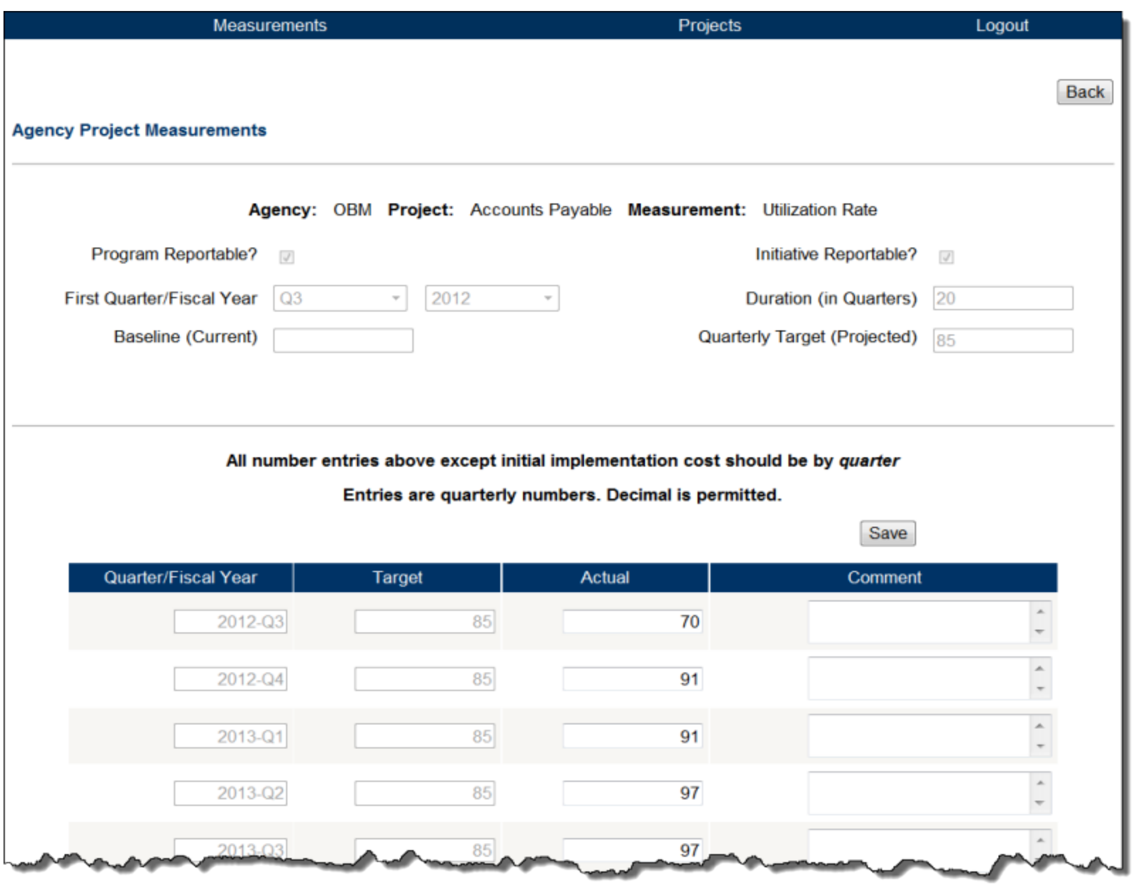
4. Click the **Update** link to access a specific measure to view and edit data.

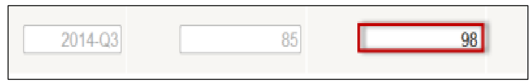
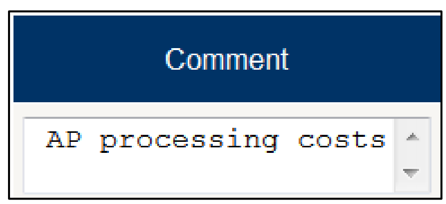
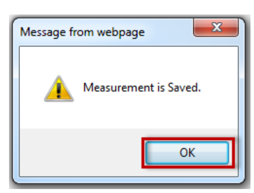
Updating Agency Project Measurements

The **Agency Project Measurements** update page appears.

This page includes general project data like the agency name, the project name, and the name of the measurement. Also shown are whether the program is being tracked, when the agency entered the project, how long the value monitoring period will last (the time horizon needed to achieve full value), the original baseline and the target set within the agency. If the measurement is using the time metric, a time type will also display. If an initial investment was required for the agency to participate (e.g., had to buy equipment as part of the project), the initial investment and an amortization period are included. This information is provided by the agency and any changes or additions should be directed to the Value Management Office

Note For additional detail on the project metrics and measurements, see the Projects page discussed later in this document.



Step-by-Step	Screen
1. Enter **Actual** number entry by quarter. For cost-based measures include **actual** results, **unanticipated savings** and **other costs**, Include recurring savings or costs in each quarter reported. Include one time savings or costs in the quarter in which they are experienced. If this is a time or value metric a single actual field or a dropdown list of options will appear in the screen.	
Reporting periods are based on state fiscal year Q1 = July, Aug., Sept. Q2 = Oct, Nov., Dec Q3 = Jan., Feb., Mar. Q4 = Apr., May, June Agencies should report measurements within 60 days after the end of the quarter so that all analyses of project performance can be completed each quarter.	
Optional Include additional explanations and notes in the **comment** field.	
2. Click **Save**.	
A message that the **Measurement is Saved** appears. 3. Click **OK**.	

The **Measurements** page appears again.

Measurements

Agency	Project	Metric	Measurement	Last Qtr Actual	Current Actual	Target	Due	Update
Office of Budget and Management	Accounts Payable	Cost	Cost reduction in personnel	6148.00	0	7075.00		Update
Office of Budget and Management	Accounts Payable	Percent	Utilization Rate	98.00	98.00	85.00		Update

Repeat all steps listed from the Measurements page through the Agency Projects Measurements page if there are additional lines and /or projects to update.

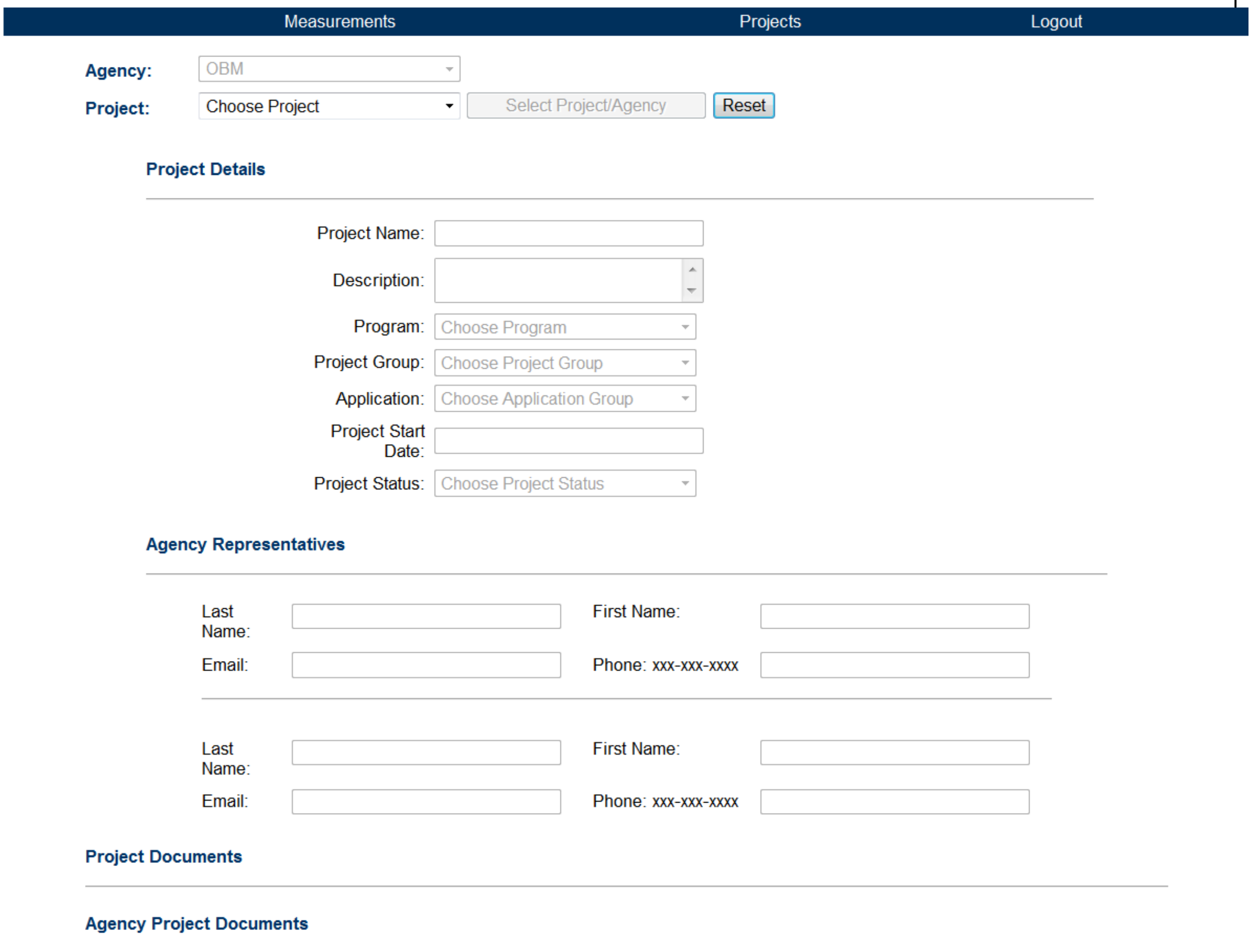
Note

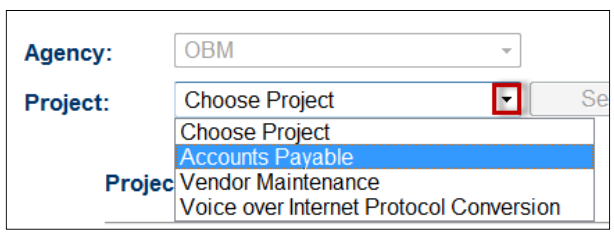
Measurement details with a "value" metric type will not display measurements on this page –The actual selections for "value" metrics will display after clicking the **Update** link.

Selecting a Project

Step-by-Step	Screen
1. Click **Projects** at the top of the page.	

The **Projects** page appears.

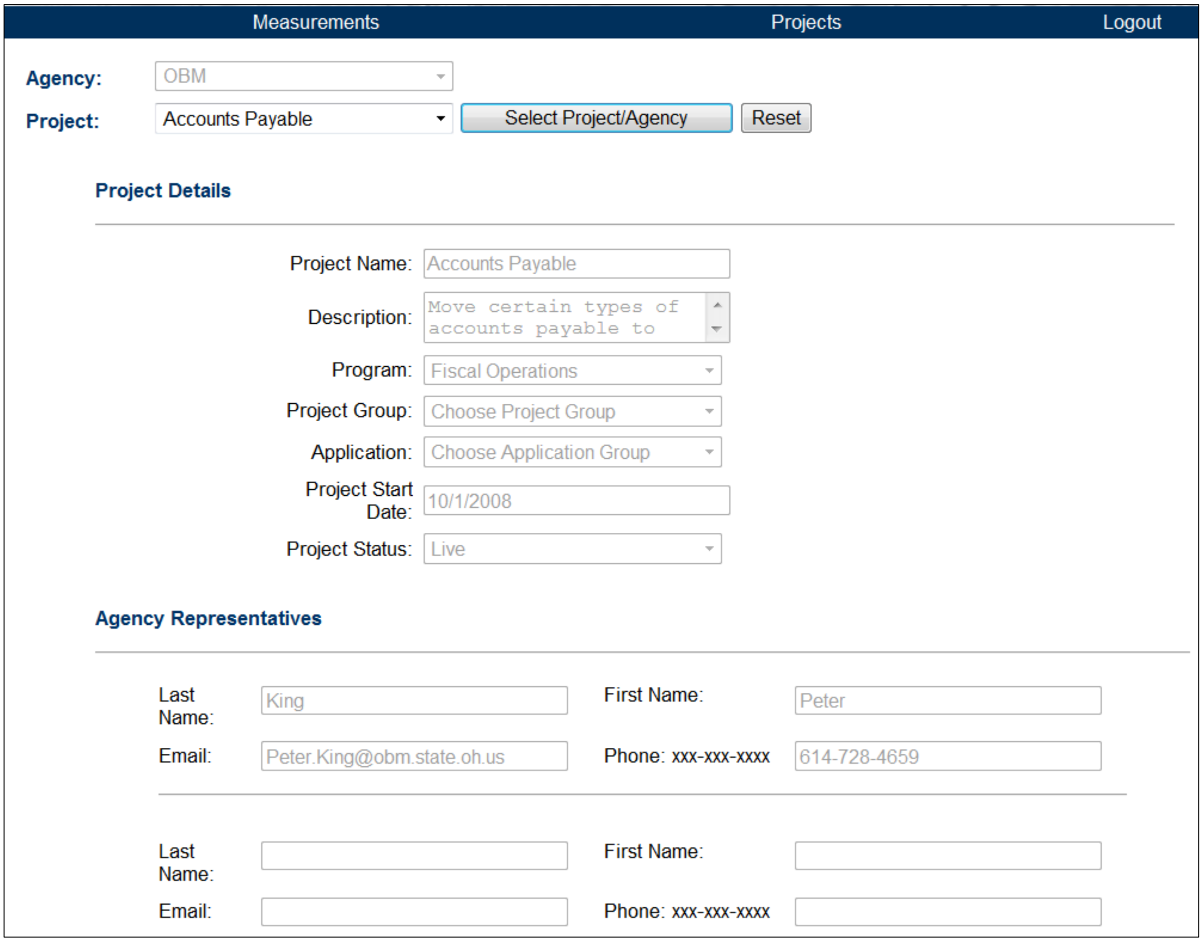


2. **Choose** a **Project** from the drop-down list. **Note:** If the user has access to only one project, the project list will not be selectable.	
3. Click **Select Project/Agency**.	

Fields are populated with Project Details and informormation about Agency Representatives. Agency Project Documents are also accessable from the bottom of this page.

The Project Details are used in Cognos Business Intelligence reporting.

If any information is incorrect, or needs to change, contact the VMO administrator.



Agencies are encouraged to identify a primary and secondary contact for each project. This person should be acquainted with the project measures and able to accurately track and report progress.

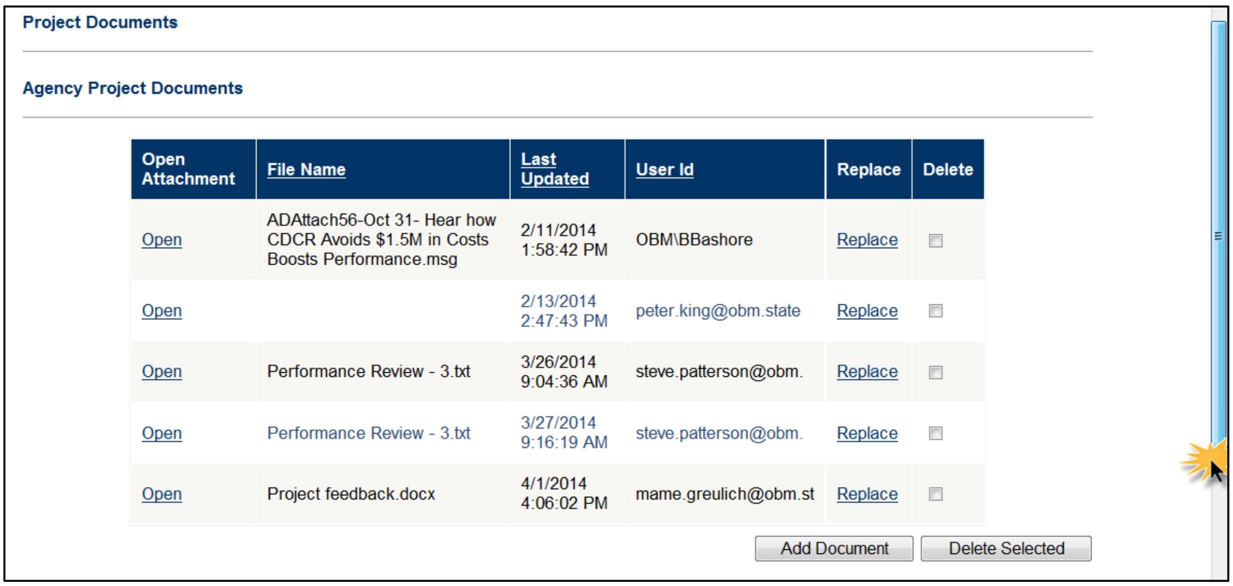
Maintaining Agency Project Documents

Project documents contain information that all agencies implementing the project can access. This information may include the original business case for the project, implementation schedules or value achievement horizons, or directions on collecting the value measurement baselines and actuals.

When beginning a new project under value monitoring, check for a document in this section of the site that will contain instructions to set baselines and identify operational level measures that will help determine the agency's progress in realizing the anticipated value of the project.

The Agency Project Documents page contains unique documents that can be shared between the agency and the VMO administrator. These might contain original performance estimates and detailed measurement information or other workbooks or implementation tools.
Once a project has been selected from the project drop-down menu, documents related to that agency project can be added, replaced, deleted, or viewed.

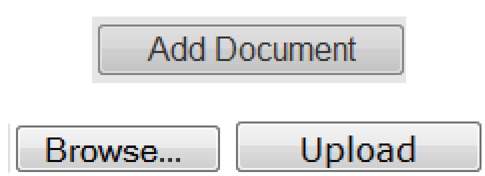
Use the Agency Project Documents to save workbooks on baselines and target measures and then use these to maintain measures between quarterly reporting periods.

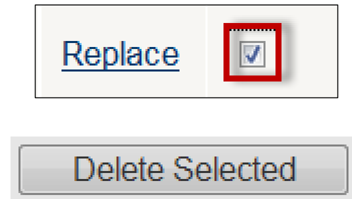
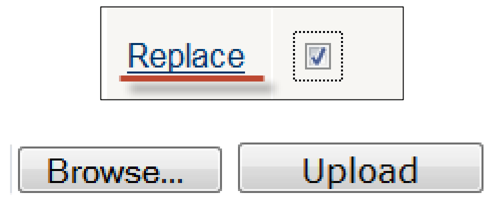

Project Documents

Agency Project Documents

Open Attachment	File Name	Last Updated	User Id	Replace	Delete
Open	ADAttach56-Oct 31- Hear how CDCR Avoids $1.5M in Costs Boosts Performance.msg	2/11/2014 1:58:42 PM	OBM\BBashore	Replace	
Open		2/13/2014 2:47:43 PM	peter.king@obm.state	Replace	
Open	Performance Review - 3.txt	3/26/2014 9:04:36 AM	steve.patterson@obm.	Replace	
Open	Performance Review - 3.txt	3/27/2014 9:16:19 AM	steve.patterson@obm.	Replace	
Open	Project feedback.docx	4/1/2014 4:06:02 PM	mame.greulich@obm.st	Replace	

Add Document Delete Selected

Step-by-Step	Screen
1. Scroll down the **Projects** page to find **Agency Project Documents**.	
2. Choose to open, add, delete, or replace a document.	
Optional — Click the **Open** link to review an existing project related document.	
Optional — Click the **Add Document** button to attach additional agency project documents. Click **Browse** to find a saved file.Click **Upload** to store the file in the portal.	

<table>
<tr><td>Optional
Mark the Delete box beside the file to select it for removal.
Click the Delete Selected button to remove an attached file.</td><td>
</td></tr>
<tr><td>Optional
Click the Replace link to switch a previously-uploaded document with a newer version.
Click Browse to find a saved file.
Click Upload to store the file in the portal.</td><td>
</td></tr>
</table>

Noting Lessons Learned

Comments about Lessons Learned can be added at the bottom of the Projects page.

Use Lessons Learned to share specific information about the implementation experience. Also include general observations about implementation progress and target achievement

<table>
<tr><th>Step-by-Step</th><th>Screen</th></tr>
<tr><td>1. Enter comments into the text box.</td><td>
</td></tr>
<tr><td>2. Click the Add button.</td><td>
</td></tr>
</table>