



**GOVERNOR'S OFFICE OF
PLANNING AND BUDGET**

BUDGET TOOL

USER MANUAL

Section II. A – Agency User's Guide

Amended FY 2014 and FY 2015

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Preface

The purpose of the BudgetTool User Manual is to provide detailed instructions for using the BudgetTool application. All agencies will use BudgetTool to submit their Amended FY 2014 and FY 2015 budget requests to the Governor's Office of Planning and Budget (OPB). The manual is divided into sections:

Section I: Getting Started – This section contains general orientation and instructions on:

Technical Requirements

Application Setup

Access

Navigation Overview

It is anticipated that *Section I* will be read first as these instructions are not repeated in the following sections and apply to all users of the application.

Section II.A: Agency User's Guide – This section contains detailed instructions on the business processes and how to use the application to develop an agency's budget request, submission by the agency, and workflow through the Governor's Recommendation to the General Assembly.

Section II.B: OPB Budget Development Guide – This section contains detailed instructions for the OPB Analysts to be used in developing the OPB Recommendation.

Section III: Performance Measures – this section contains instructions for agencies to enter and update performance measures in BudgetTool. These will appear in the Governor's Budget Report.

Section II: Agency User's Guide

Purpose

The purpose of this section of the BudgetTool User Manual is to provide instructions for the specific business processes for the current budget cycle as well as instructions of how to use BudgetTool to develop the Amended FY 2014 and FY 2015 agency budgets from Agency Request through the Governor's Recommendation to the General Assembly.

This part of the manual incorporates both business and technical instructions. While it is anticipated that the application will not change dramatically from year to year, only use those business instructions that apply to the budget year being worked on as the business processes more than likely will change from year to year.

II. A: Agency Budget Request

The Agency Request is prepared using the BudgetTool application. Agencies will use descriptors to enter fund source and object class changes by program/subprogram. The AOB or an approved cutoff amendment is selected as the starting point for budget requests and changes are made using descriptors. Any Statutory, Fiscal Affairs, or Executive Order amendment types in BudgetNet should be included in the cutoff amendment. Data will be advanced from the FY 2014 cutoff amendment in summary except for the following record detail: Federal Funds, Federal Recovery Funds, Other Funds, Personal Services, and Unique Objects. The same base will be used for both the Amended FY 2014

and FY 2015 budgets. The base is advanced from BudgetNet to BudgetTool but State Funds – Prior Year are **not** advanced. OPB analysts will ensure BudgetTool reflects the appropriate base budget for these requests.

NOTE: General Policy Guidelines and Preparation Procedures for Amended FY 2014 and FY2015 budget preparation are posted on the OPB website at <http://www.opb.georgia.gov> .

II.A.1 General Instructions – Amended FY 2014 and FY 2015

The Amended FY 2014 and FY 2015 Budgets require each agency to submit the same level of funding that is appropriated for FY 2014 (HB 106). Budget requests for additional funds will be allowed only for growth, workload and enrollment driven programs.

The budget submission process in BudgetTool consists of the following components:

1. Base Budget (pre-approved by OPB)
2. One-Time Deletes
3. Revised Base Budget
4. Workload (only agencies designated by OPB)
5. Redistributions (optional)
6. Other Adjustments (as required)

Base Budget

The Base Budget should be either the AOB or an approved cut-off amendment which will include Statutory, Fiscal Affairs, or Executive Order amendments to date in BudgetNet. The same base is used for AFY 2014 and FY 2015 budget requests.

One-Time Deletes

One-Time Deletes are non-recurring items of expenditure that are considered one time purchases in FY 2014 and are deleted from the base. These will be provided by OPB and will reduce the budget request.

Revised Base Budget

The Revised Base is the Base Budget less any One-Time Deletes.

Workload

Additional funds will be allowed only for growth, workload and enrollment driven programs. Budget requests requiring new state funding out of revenue growth include:

- Department of Behavioral Health
- Department of Community Health
- Department of Human Resources
- Department of Education

- Board of Regents, University System of Georgia
- Technical College System of Georgia

Funding to be included as Workload increases will be communicated to agencies by OPB prior to budget submission.

Redistribution

To address additional expenditure needs, agencies must identify resources from within the current budget and redistribute funds as necessary. Provide a complete description for all budget redistributions and explain the impact on service delivery and performance of the program using the BudgetTool application.

Redistribution among *object classes and among sub-programs* within a program should be requested as an amendment to the current budget and should **NOT** be included as part of the agency's Amended FY 2014 or FY 2015 budget request. However, requests for redistribution of funds *between programs* must be submitted in BudgetTool as part of the budget request. Agencies are expected to manage their expenditure needs through the flexibility provided in program budgeting. The total of all redistributions and increased funding needs must net to zero. Positions and motor vehicles redistributed from one program to another should be reflected in the position and motor vehicle counts for the programs affected.

Other Adjustments

Other Adjustments include those not covered by the other change types.

Business Process

The business process sequence for budget development is as follows:

Base: The agency fiscal officer selects the AOB or an approved cutoff amendment as their base, and then notifies the OPB Analyst. The base should include all Statutory, Fiscal Affairs, and Executive Order amendments to date in BudgetTool. The base is advanced from BudgetNet to BudgetTool. State Funds – Prior Year are not advanced. This base is fixed and cannot change through the budget development cycle. Before entering any changes, reports for the cutoff amendment should be run in both BudgetNet and BudgetTool for comparison to confirm by program and fund source that the proper amounts were loaded.

One-Time Delete: These are items included in the FY 2014 budget that are one-time occurrences, and therefore, must be removed from this year's request. These are always negative and will reduce the agency request upon submission to OPB.

Workload: Requests for additional funds or workload increase pertain only to those agencies with growth, workload and enrollment driven programs.

Redistributions: Agencies will use the redistribution change type to fund any enhancements needed by moving the necessary funds from other programs. The sum of all the redirect redistribution for an agency must equal zero by fund source.

Other Adjustments: Adjustments not covered by any of the other change types.

NOTE: BudgetTool validation for the budget plan which is to equal the amount of funding appropriated in FY 2014 (HB106) is not applicable for the **Legislative** and **Judicial** Branch agencies or for any other programs that may be exempt.

II.A.2 Creating an Agencywide or Standard Descriptor List

There are three types of descriptors in BudgetTool:

Statewide – descriptors that are setup by OPB but can be used by agencies. Primarily these are for changes that will be universal throughout the state regardless of agency or program. However, in some instances OPB may setup statewide descriptors that are agency specific and/or program specific but requires a different percentage or different wording than the descriptor used by all other agencies.

Agencywide – descriptors that are set up by the agency; special security role is needed; can be used by the entire agency. These are for changes within an agency that may apply to numerous programs.

Standard – descriptors that can be setup by the agency administrator or agency analyst. These are intended to be used for specific program changes.

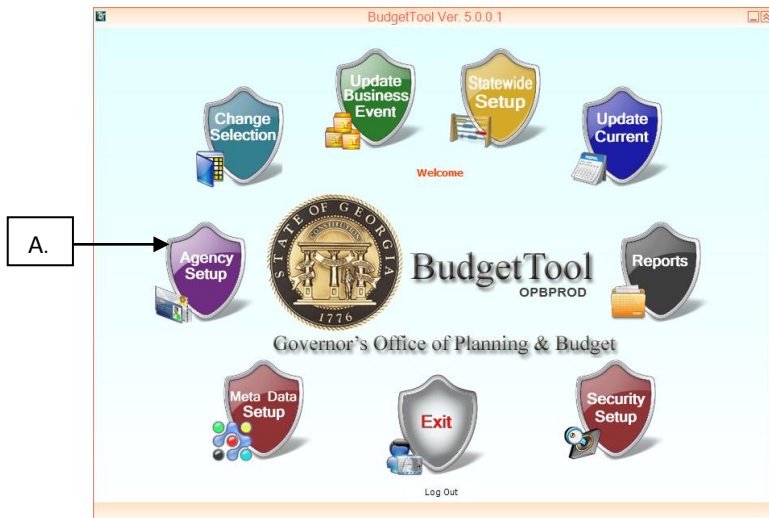
Agencywide and Standard descriptors can be set up at one time by the agency administrator before the change entries are done or agency analysts can set up standard descriptors as they make change entries.

All descriptors – Statewide, Agencywide, and Standard - can be accessed from a dropdown list when change entries are made.

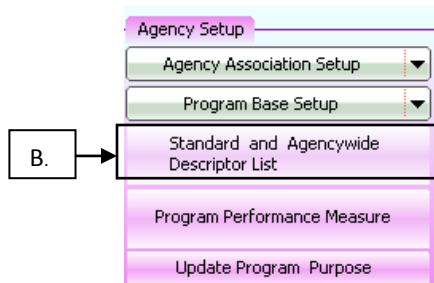
A descriptor is the collection of information about the change that is being requested. It is the key to communicating throughout the entire budget process what is being requested, why, and what effect it will have on customers and deliverables. Descriptors are also what appear in the Governor's Budget Report. Therefore, care should be taken to provide as much detail as necessary to enable other users of the information to have a clear understanding of what is being requested. If needed, agencies may attach documents to support a program, object class or fund source change. A descriptor can only be deleted in the stage it was created. In other words, an agency request descriptor cannot be deleted in the OPB Recommendation stage or beyond. When a descriptor is deleted all entries **for all programs**, funds sources, object classes, and counts are also deleted. If you want to delete a change entry for a single program and that is the only place the descriptor is used

then it is correct to delete the descriptor. However, if the descriptor is used on multiple programs and you delete it trying to delete a specific entry, all entries will be deleted. Delete with caution.

- A. To set up Agencywide or Standard descriptors in advance, click the **Agency Setup** Shield

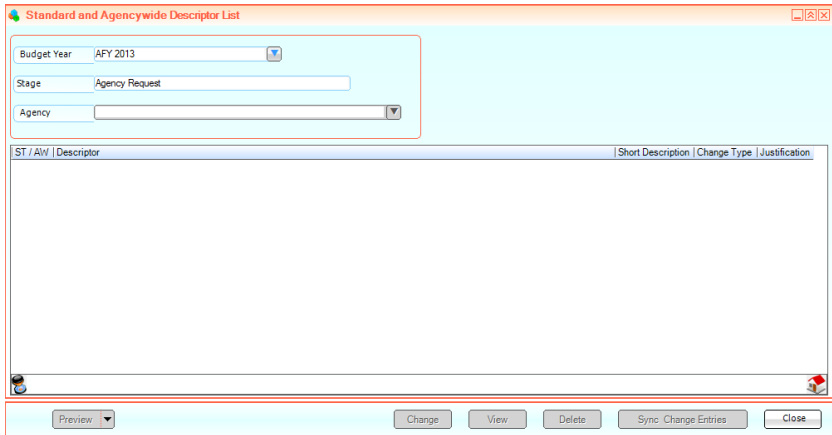


- B. Click Standard and Agencywide Descriptor List



- C. Select Budget Year, Stage, and Agency and click Get List of Descriptor
Refer to Section II.A.3.C.4.2 **Adding a New Descriptor** (p.13)

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This shows the list of all descriptors that have been entered by the agency – standard and agencywide.

II.A.3 Creating a Change Entry

A. Click the **Change Selection Shield**



B. Change Selection Screen

- a. Select the **Budget Year** from the drop down box
- b. Select the appropriate **Stage** and **Agency** from the drop down box
Click Include attached agencies checkbox if you would like to include attached agencies in the program list.
- c. Click Show Programs
- d. The program list populates (d.). Double-click the Program or highlight the Program and click the **(d.1) Program/Sub Program Change View** button to view the various entries within their individual categories – Funds, Object Class and Counts. Or highlight the Program and click the **(d.2) Program/Sub Program Change Entry** button at the bottom of the page to open the change entry Summary Screen.

The screenshot shows the 'Change Selection' window with the following elements:

- a.** Points to the 'Budget Year' dropdown menu, which is set to 'AFY 2014'.
- b.** Points to the 'Stage' dropdown menu (set to 'Agency Request') and the 'Agency' dropdown menu (set to 'Department of Banking and Finance [406]').
- c.** Points to the 'Include attached agencies' checkbox (checked) and the 'Show Programs' button.
- d.** Points to a table of programs.

Code	Name
0910300	Consumer Protection and Assistance
0910302	▶ Consumer Protection & Assistance for Customers of Mortgage Licensees...
0910301	▶ Consumer Protection and Assistance for Financial Institution Customers
0910101	Departmental Administration
0910400	Financial Institution Supervision
0910401	▶ Examination and Supervision of Depository Financial Institutions
0910402	▶ Examination and Supervision of Non-depository Financial Institutions
0910600	Non-Depository Financial Institution Supervision
0910602	▶ Licensing and Supervision of Money Service Businesses
0910601	▶ Licensing and Supervision of Mortgage Brokers and Lenders

At the bottom of the window, there are two buttons:

- d.1** points to the 'Program/Sub Program Change View' button, which is preceded by a 'Preview' dropdown menu.
- d.2** points to the 'Program/Sub Program Change Entry' button.

C. Agency Program/Sub Program Change Entry Screen

The Change Entry screen gives the user a current view of all program changes entered in total to the Fund Sources and Object Classes side by side as well as changes to Position and Motor Vehicle counts. This screen can be opened for stand-alone programs, sub-programs, and parent programs. When opened for a parent program you will not be able to make change entries. In addition, the user can click on any of the detail buttons at the bottom of the screen to see the details for: State Funds, Federal Funds, Federal Recovery Funds, Other Funds, Personal Services (Object Class 300), Common Objects, Unique Objects, and a list of all attached documents. This is a great place to see all changes made to a program and to see the summary at the parent program level changes made to all subprograms.

To see changes by change entry type, click on **Program/Sub Program Change View**.

The **Program/Sub Program Change View** screen opens with three tabs (Note: for OPB there is a fourth tab, "Recommendation"). The tabs are as follows:

1. **Base Adjustments** – This tab shows all Base amounts by fund source, object class and counts. One-Time Deletes are shown. Adjustments are totaled and the Revised Base Budget calculated and displayed. (Note: Scroll down to view "Counts" for positions and vehicles.)

The screenshot shows the 'Program/Sub Program Change View' window. At the top, it displays 'Change Selection' and a dropdown menu. Below this, there is a header section with the following information:

- Department of Banking and Finance [406]
- Base : FY13 AOB [5/31/2012]
- Program : [0910300] Consumer Protection and Assistance
- Sub Program : [0910301] Consumer Protection and Assistance For Financial Institution Cust
- Budget Year : Amended Fiscal Year 2014
- Policy : Responsible and Efficient Government
- Rank : 6
- Stage: Agency Request

Below the header, there are buttons for 'Add New Change Entry', 'Get Existing Change Entry', and 'Program/Sub Program Change Entry'. The main area is divided into two tabs: 'Base Adjustments' (selected) and 'Other Adjustments'. The 'Base Adjustments' tab contains a table with the following data:

Description	Base	One Time Delete	Total Base Adj	Revised Base Budget
A. Funds				
1. State Funds				
State General Funds	218,206			218,206
Sub Total :	218,206			218,206
Total :	218,206			218,206
B. Object Class				
1. Common Object Classes				
[300] Personal Services	199,296			199,296
[301] Regular Operating Expenses	4,891			4,891
[305] Computer Charges	3,718			3,718
[306] Real Estate Rentals	7,336			7,336
[307] Telecommunications	2,887			2,887
[312] Contractual Services	78			78
Sub Total :	218,206			218,206
Total :	218,206			218,206
D. Counts				
1. Position Count				
Position Count	1			1
Sub Total :	1			1
Motor Vehicle Count				

At the bottom of the screen, there are buttons for 'Preview', 'State Funds', 'Federal Funds', 'Recovery Funds', 'Other Funds', 'PS 300', 'Common Obj', 'Unique Obj', 'Documents', and 'Close'.

Note that in the header of both the Change Entry and Change View the following information is displayed:

Base: this show number and its approval date of the amendment that was used as the cutoff amendment (Base).

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Program: shows the name and number of the program that is being displayed.

Budget Year: shows if you are working in AFY2014 or FY2015.

Stage: shows the stage in which you are working. For agencies this will always be Agency Request.

Advanced: shows the date and time the stage was advanced by OPB.

Submitted: shows the date and time the stage was submitted by the agency.

Policy: shows the policy area under which the agency falls.

Rank: show the ranking of the program by the agency.

The program purpose statement for single and parent programs is shown under the budget year.

3. **Other Adjustments** - This tab shows the Base and Revised Base amounts by funds source, object classes and counts. Separate columns exist for Redistribution, Workload, and Other Adjustment change types in the Agency Request stage. (Note: in the OPB recommendation stage and beyond, there are additional columns for the Statewide Descriptors.) The Adjusted Total column is calculated as the Revised Base Budget plus or minus all of the Other Adjustments.

Description	Base	Revised Base Budget	WorkLoad Adjustment	Redistribution	Other Adjustment	Adjusted Total
A. Funds						
1. State Funds						
State General Funds	218,206	218,206				218,206
Sub Total :	218,206	218,206				218,206
Total :	218,206	218,206				218,206
B. Object Class						
1. Common Object Classes						
[300] Personal Services	199,296	199,296				199,296
[301] Regular Operating Expenses	4,891	4,891				4,891
[305] Computer Charges	3,718	3,718				3,718
[306] Real Estate Rentals	7,336	7,336				7,336
[307] Telecommunications	2,887	2,887				2,887
[312] Contractual Services	78	78				78
Sub Total :	218,206	218,206				218,206
Total :	218,206	218,206				218,206
D. Counts						
1. Position Count						
Position Count	1	1				1
Sub Total :	1	1				1
Motor Vehicle Count						

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Changes are entered in BudgetTool very much like they were last year. The screens have been somewhat modified and in some cases more data is requested.

1) Adding a New Change Entry for the selected program

- a. Click **Add New Change Entry** to create a new entry and enter amounts

Program/Sub Program Change View

Change Selection

Department of Banking and Finance [406]

Base : FY13 AOB [5/31/2012] Policy : Responsible and Efficient Government

Program : [0910300] Consumer Protection and Assistance

Sub Program : [0910301] Consumer Protection and Assistance for Financial Institution Cust Rank : 6

Budget Year : Amended Fiscal Year 2014 Stage: Agency Request

Base Adjustments / Other Adjustments

Description	Base	Revised Base Budget	WorkLoad Adjustment	Redistribution	Other Adjustment	Adjusted Total
A. Funds						
1. State Funds						
State General Funds	218,206	218,206				218,206
Sub Total :	218,206	218,206				218,206
Total :	218,206	218,206				218,206
B. Object Class						
1. Common Object Classes						
[300] Personal Services	199,296	199,296				199,296
[301] Regular Operating Expenses	4,891	4,891				4,891
[305] Computer Charges	3,718	3,718				3,718
[306] Real Estate Rentals	7,336	7,336				7,336
[307] Telecommunications	2,887	2,887				2,887
[312] Contractual Services	78	78				78
Sub Total :	218,206	218,206				218,206
Total :	218,206	218,206				218,206
D. Counts						
1. Position Count						
Position Count	1	1				1
Sub Total :	1	1				1
Motor Vehicle Count						

b. Change Entry Summary [Add] Screen

A descriptor is required when a change entry is needed. If you have previously created a descriptor for this agency it will appear in the descriptor drop down box. A new descriptor can be created by clicking the **Add New Descriptor** button.

2) Adding a New Descriptor

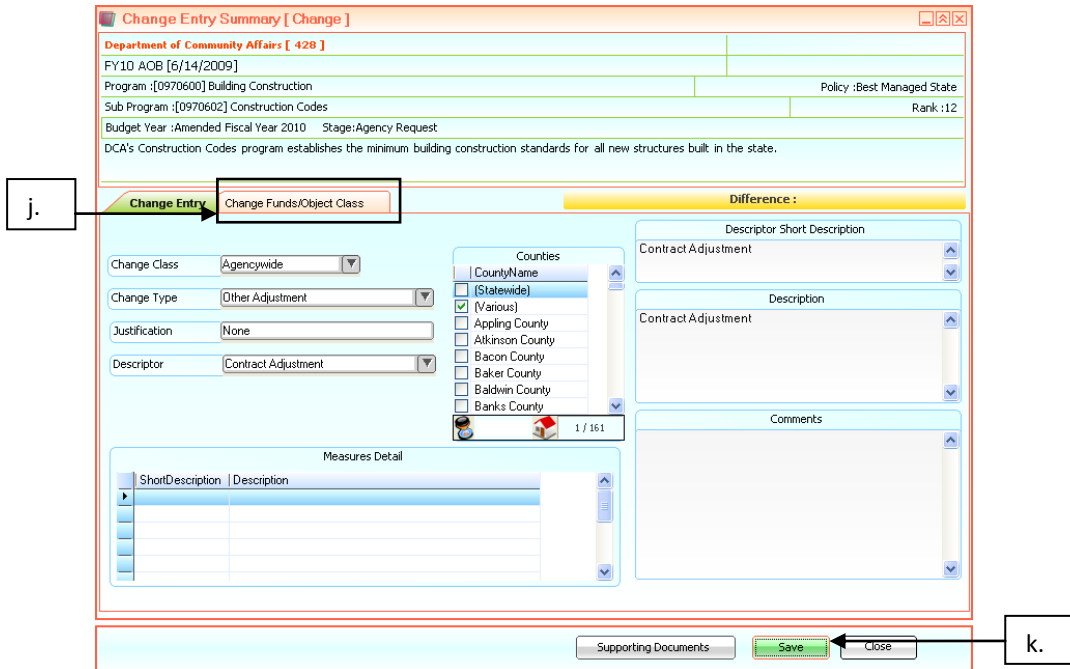
- a. (Required) Choose the Change Class - Agencywide or Standard
 Note: Statewide descriptors are created by OPB. Do not create agencywide or standard descriptors for change types assigned to the Statewide change class.
Agencywide: This descriptor is created by the agency and will be effective for the entire agency. These are used to make change entries for multiple programs.
Standard: is created by a specific analyst for use on one or several programs or sub programs.
- b. (Required) Choose the Change Type from the drop down menu
 - 1. One Time Delete
 - 2. Other Adjustment
 - 3. Redistribution
 - 4. Workload Adjustment
- c. Justification – is not used in the agency request stage (defaults to 'none'). It is reserved for use in the OPB Recommendation stage and beyond for further grouping descriptors.
- d. (Required) Type in the Descriptor name (50 characters max) – it must be unique

- e. (Required) Type in a Short Description explaining the request (250 characters max)
- f. In the larger Description box give a more detailed explanation of the request and the reason for the request if needed (500 characters max)
- g. (Required) Choose the Counties which will be affected by the request
 1. Statewide: The request will affect every county in the state
 2. Various: Only some counties will be affected by the request but they are not specified
 3. Choose the affected counties individually
- h. Comments. Use this section to add any additional comments about the Descriptor or the setup (4,000 characters max)
- i. Click Save to return to the **Change Entry Summary [Change]** Screen

The screenshot shows the 'Descriptor Setup [Add]' window. On the left, a vertical list of callouts (a-f) points to the following fields: 'Change Class' (set to 'Agencywide'), 'Change Type', 'Justification' (set to 'None'), 'Descriptor', 'Short Desc', and a large 'Description' text area. On the right, a 'Counties' list box contains checkboxes for '(Statewide)', '(Various)', 'Appling County', 'Atkinson County', and 'Bacon County'. Callout 'g' points to this list. Below the list are two text areas: 'Description' and 'Comments'. Callout 'h' points to these areas. At the bottom right, there are 'Save' and 'Cancel' buttons. Callout 'i' points to the 'Save' button.

You have now entered the descriptor but it is not yet linked to the program. The next steps accomplish this.

- j. You are returned to the window that only shows the Change Entry Tab
- k. Click Save – you have now linked the descriptor to the program and the Change Funds/Object Class tab is visible.

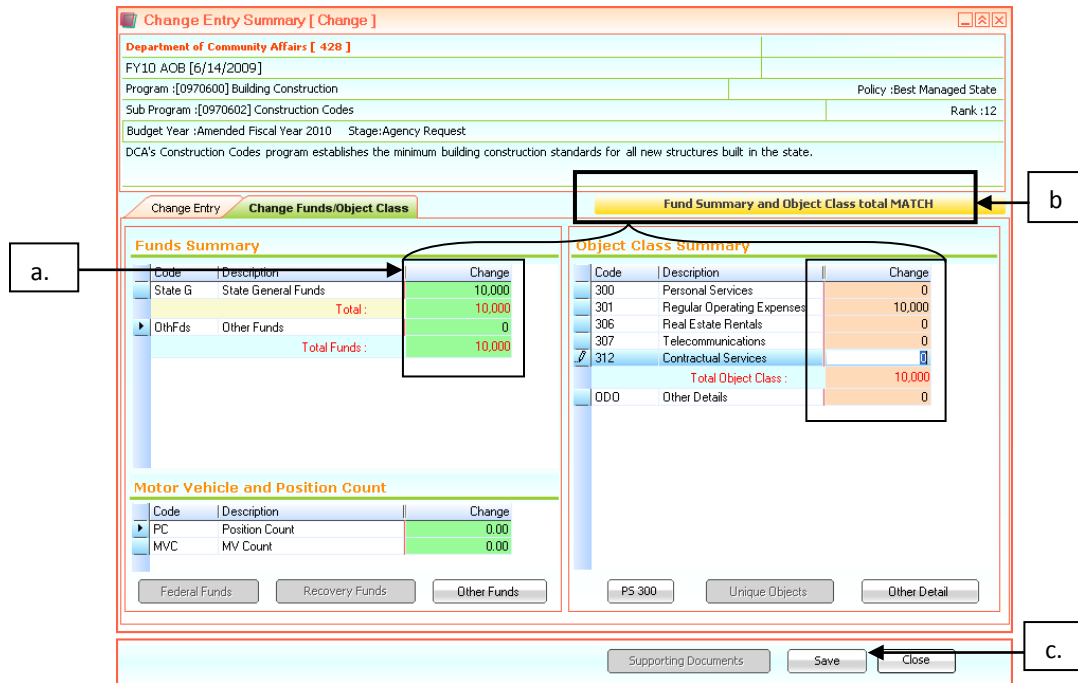


- 3) Change Entries – click on the Change Funds/Object Class Tab
 - a. Input the change amount into Fund Summary and Object Class Summary change sections. Also input any changes to Position and Motor vehicle counts this change requires.
 The Funds Summary must equal the Object Class Summary
In the example shown below \$10,000 was input as the change amount for State General Funds and \$10,000 was input as Regular Operating Expenses
 - b. This box alerts the user if they are still out of balance

NOTE: Tab out of field for the screen to refresh and check the data

- c. Click in the Fund Summary section to update the page then click **Save**

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Note: Depending on the agency, program, fund sources, and object classes the following buttons *may* be active at the bottom of the window – Federal Funds, Recovery Funds, Other Funds, PS 300, and Unique Objects. These buttons are used to enter the details supporting the summary level entries on the Change Entry Summary (Change) screen. The Documents button will always be active and allows the user to attach documents or view the documents that have been attached.

The PS 300 detail requirement. The base detail is loaded from the cutoff amendment. Any changes entered to Object Class 300 – Personal Services also need to have supporting detail entered. The detail items that are loaded are specific to an agency and program. The following is an example of the detail items that could appear:

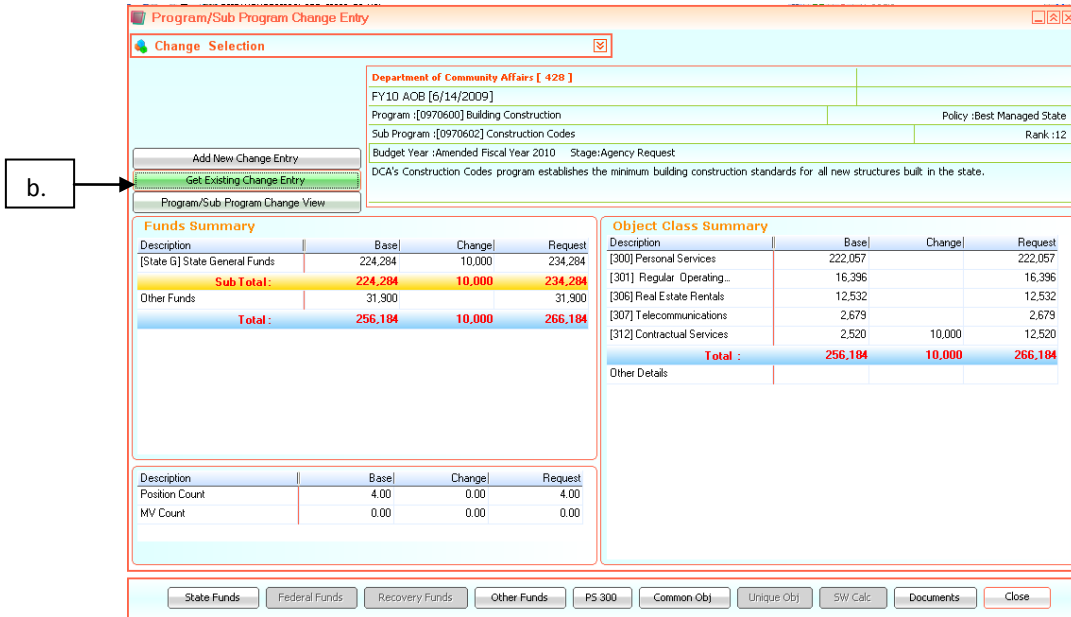
Regular Salaries, FICA, ERS or TRS, Health Insurance, Unemployment, Merit System Assessments, Lapse Factor, Personal Liability, Pay for Performance, Workers Compensation, Overtime, Temporary/Casual Labor

The detail must add to the summary entry for Object Class 300 – Personal Services.

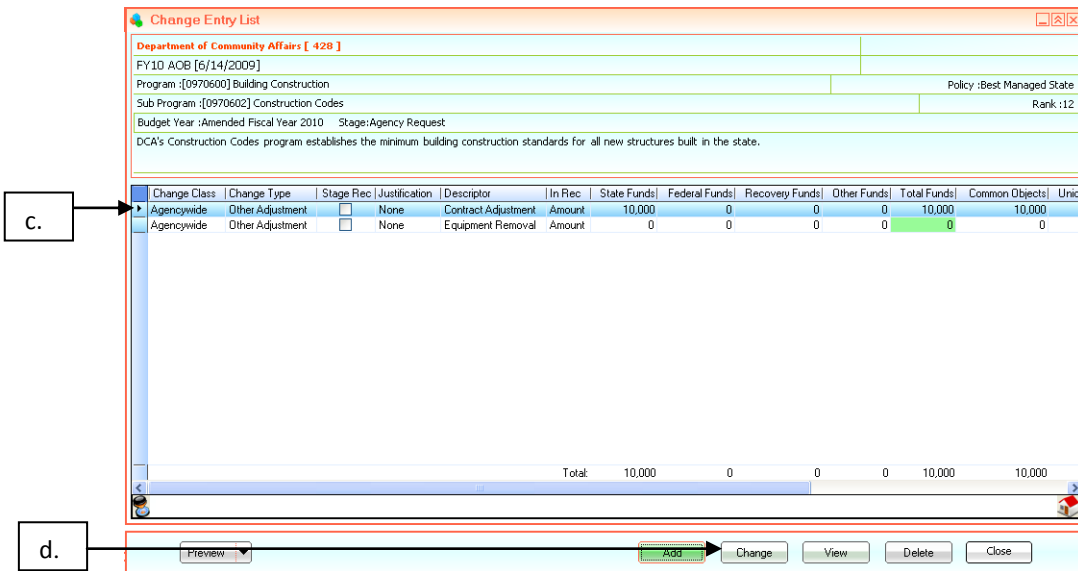
4) Editing Existing Changes

- a. The Agency Program/Sub Program Change Entry screen now shows the updated change amounts

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- b. Click the **Get Existing Change Entry** to view, edit, or delete the existing entries. New change entries can also be added using this screen.
- c. The Change Entry List window opens. Click the entry you would like to edit
- d. Click **Change** (or double click the entry in the list)



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- e. The Change Entry Summary will now indicate [Change] to show a change is being made
- f. Click **Change Funds/Object Class** and make the change entries necessary and Click **Save**

e.

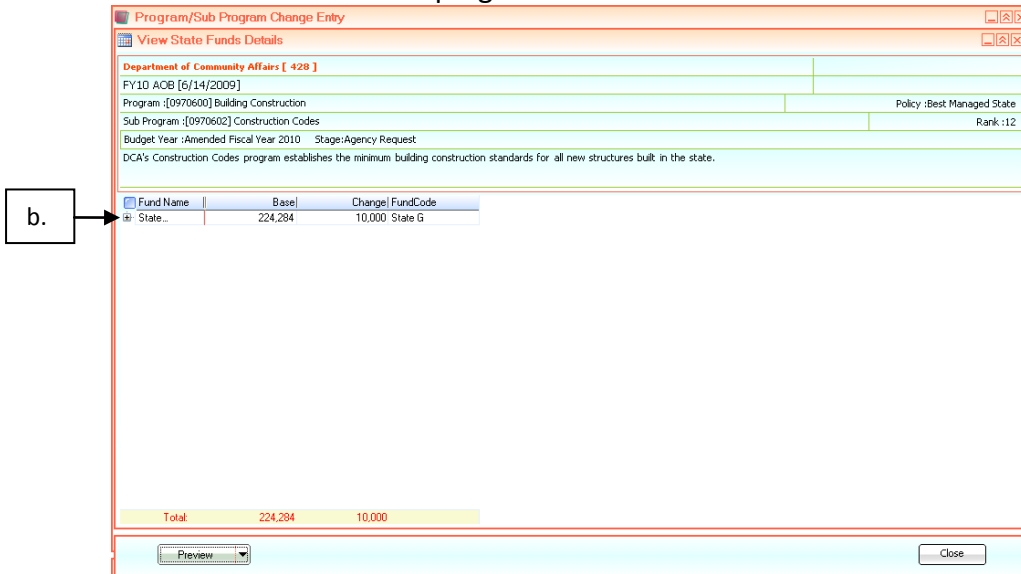
f.

5) Detail Views

- a. Click State Funds

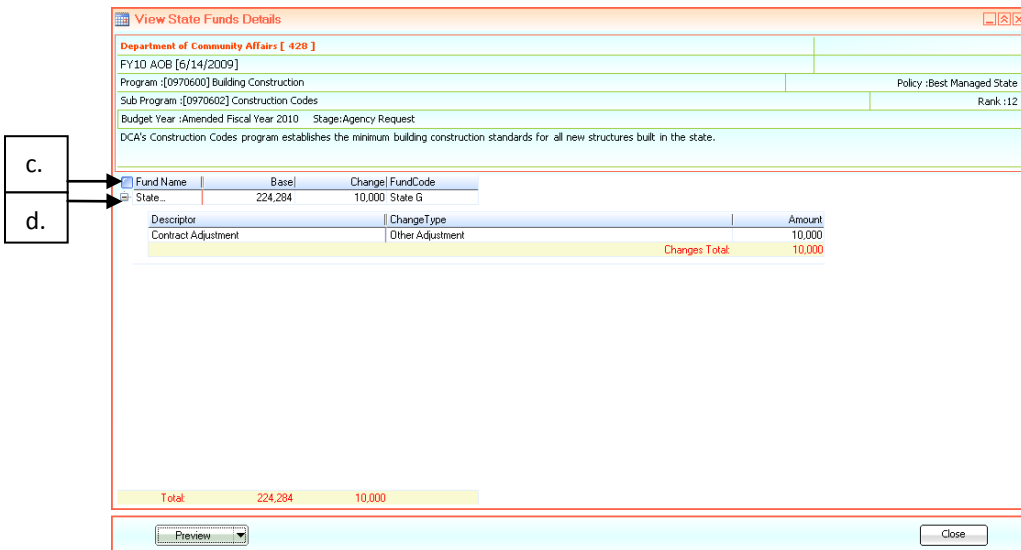
a.

b. The **View State Funds Details** screen is a detailed view by descriptor of changes to all state funds for that program.



c. Clicking the **Fund Name** box expands all the detail lists at once

d. Click the blue triangle on the left of the line to get a more detailed view of an individual fund line for instance State General Funds



More detail views can also be seen by clicking on the other buttons at the bottom of the Agency Program/Sub program Change Entry screen – Federal Funds, Recovery funds, Other Funds, PS 300, Common Object Class, Unique Object Class.

In addition, by clicking the **Documents** button you can see and access a list of documents that have been attached for this program.

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6) Editing Unique Objects

- a. Click the amount space in the change column to edit the amount
- b. Click the **Unique Objects** button

Change Selection

Department of Community Affairs [428] Advanced:9/9/2008 9:29:13 PM
 FY09 Amendment 1 [8/15/2008] Submit:9/2/2008 5:00:53 PM
 Program :[0971500] Rental Housing Programs Policy :Growing Georgia
 Sub Program :[0971501] GHFA Affordable Housing Rank :6
 Budget Year :Fiscal Year 2010 Stage:Agency Request
 The program's purpose is to allocate federal and state housing credits on a competitive and non-competitive basis and HOME funds on a competitive basis.

Get Existing Change Entry
 Program/Sub Program Change View

Funds Summary			
Description	Base	Change	Request
[State G] State General Funds	3,287,829	-751,588	2,536,241
Sub Total:	3,287,829	-751,588	2,536,241
Federal Funds	1,895,182		1,895,182
Federal Recovery Funds			
Other Funds	3,067,096		3,067,096
Total :	8,250,107	-751,588	7,498,519

Object Class Summary			
Description	Base	Change	Request
[300] Personal Services	3,118,159		3,118,159
[301] Regular Operating..	518,170		518,170
[305] Computer Charges	106,690		106,690
[306] Real Estate Rentals	150,766		150,766
[307] Telecommunications	37,443		37,443
[312] Contractual Services	1,031,050		1,031,050
Sub Total:	4,962,278		4,962,278
Unique Class Objects	3,287,829	-751,588	2,536,241
Total :	8,250,107	-751,588	7,498,519

Description	Base	Change	Request
Position Count	44.00	0.00	44.00
MV Count	0.00	0.00	0.00

State Funds Federal Funds Recovery Funds Other Funds PS 300 Common Obj **Unique Obj.** SW Calc Documents Close

c. Change Entry Unique Object Class Details Screen

1. Click the Amount and type in the Change amount used on the previous page
2. This amount can be further summarized by tabbing in each line and adding an additional row

View Common Object Class Details

Department of Human Services [427] Policy:Healthy Georgia
 Base : FY13 Amendment 5 [3/11/2013]
 Program :[2010300] Adoptions Services
 Sub Program :[2010301] Adoption Services and Supplements Rank :1
 Budget Year :Amended Fiscal Year 2014 Stage:Agency Request
 To support and facilitate the permanent placement of children in safe and stable homes by providing financial assistance and supportive services.

Object Code	Object Name	Base	Change
315	Grants and Benefits	81,117,638	-1

Descriptor	ChangeType	Amount
Test01_OneTime_Agy2014_Descriptor	One Time Delete	-1
Changes Total:		-1

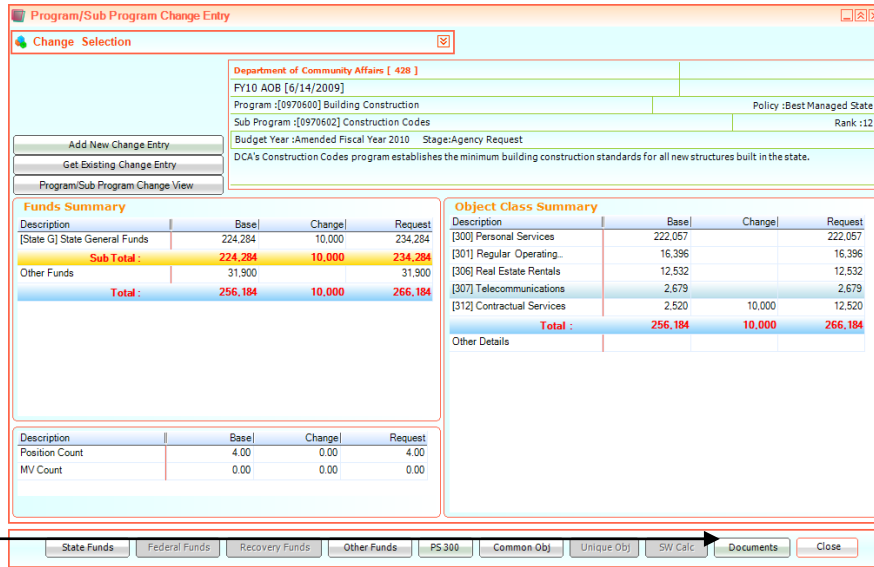
Total : 81,117,638 -1

Preview Close

Supporting Documents

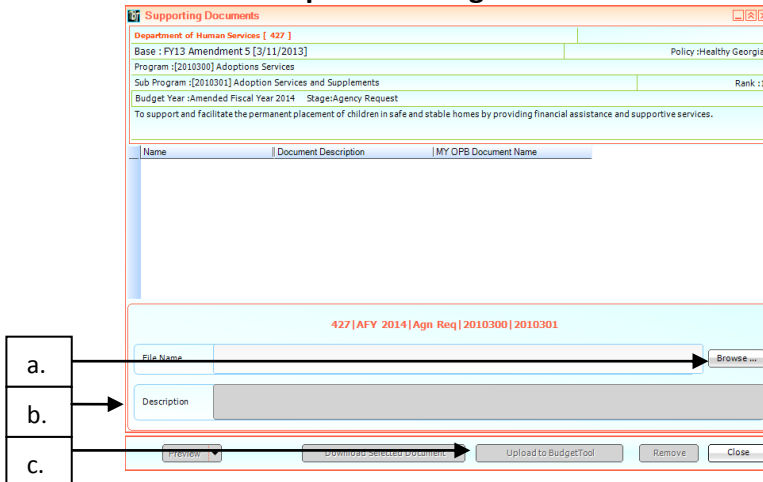
A. Attaching Supporting Documents

- 1) Click the **Change Selection** Shield and make your selections. Once the program list loads, either highlight a program and click on the 'Change View' or 'Change Entry' button or double click the program.
- 2) Click **Documents** at the bottom of the Agency Program/Sub Program Screen

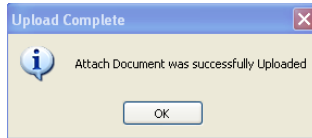


3) Supporting Documents Screen

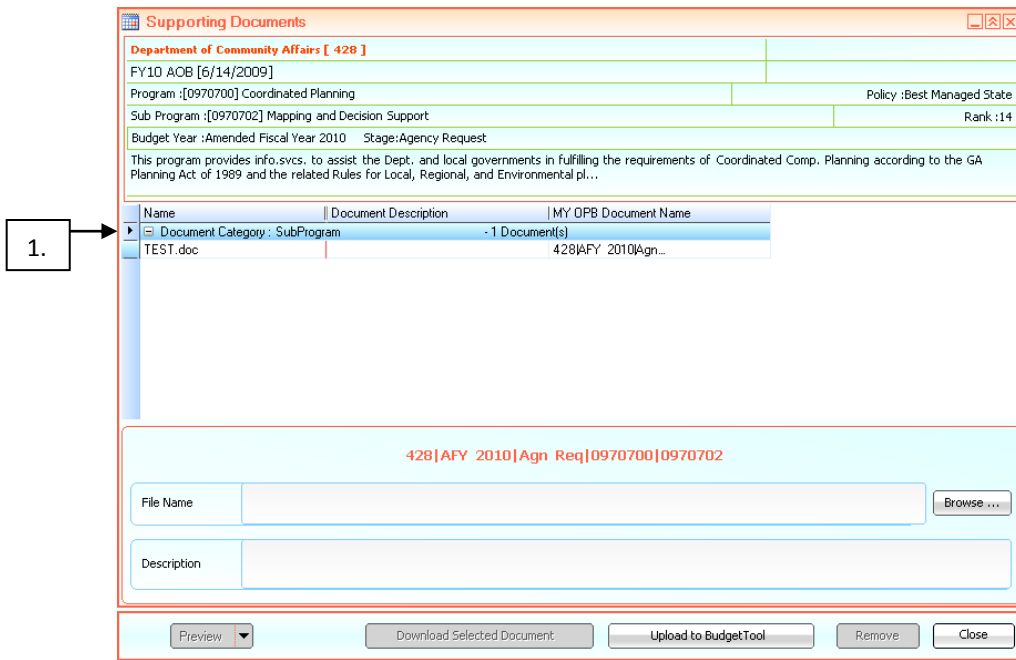
- a. Click the **Browse** button to locate the file you would like to upload
- b. Tab to **description** and type in a description of the file being uploaded
 Note you will not be able to upload the document until you have typed a description.
- c. Click the **Upload to BudgetTool** button



d. A dialog box confirms the upload; click **OK**



e. The document will now appear in the supporting document window.
1. Click the blue triangle here to see the list of documents.



B. Downloading Supporting Documents

- a. Highlight the document to be download to your computer
- b. Click **Download Selected Documents** at the bottom of the Supporting Documents Screen

The screenshot shows the 'Supporting Documents' window for the Department of Community Affairs. It displays a table with columns for Name, Document Description, and MY OPB Document Name. A document named 'TEST.doc' is highlighted. Below the table, there is a section for file details with fields for File Name and Description. At the bottom, there are buttons for 'Preview', 'Download Selected Document', 'Upload to BudgetTool', 'Remove', and 'Close'. An arrow labeled 'a.' points to the highlighted document row, and an arrow labeled 'b.' points to the 'Download Selected Document' button.

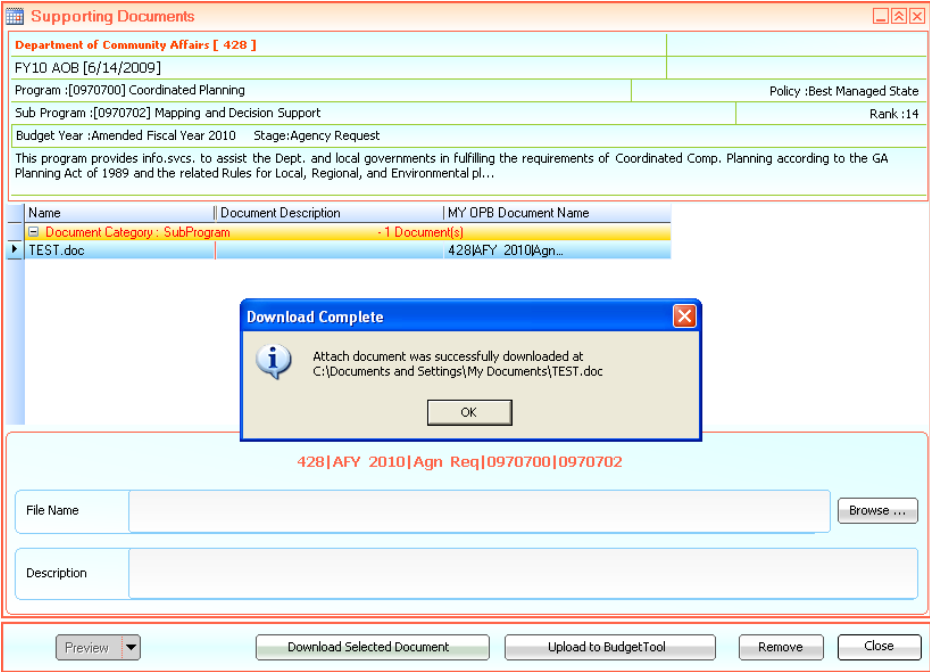
Name	Document Description	MY OPB Document Name
Document Category : SubProgram - 1 Document(s)		
TEST.doc		428AFY 2010Agn...

- c. A dialog box will appear to confirm the download.
Click **Yes** to download the file.

This screenshot is identical to the previous one, but with a 'File Download' dialog box overlaid in the center. The dialog box has a yellow warning icon and contains the text: 'TEST.doc Do you want to download this file'. It has 'Yes' and 'No' buttons.

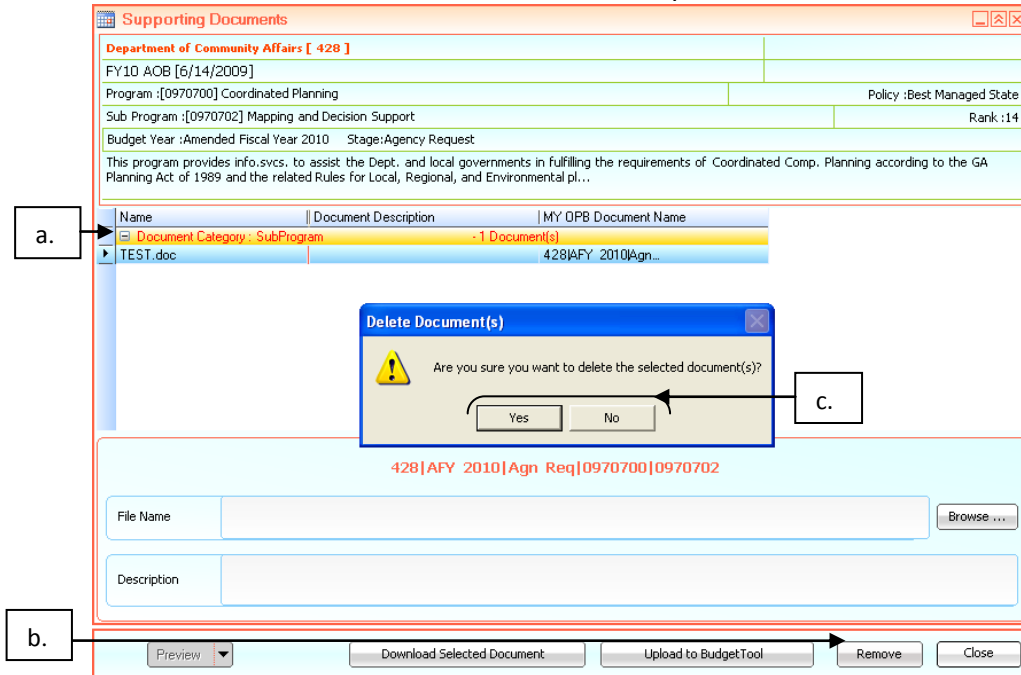
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- d. The Download Complete dialog confirms a successful download and indicates the location of the download.



C. Deleting Documents from BudgetTool

- a. Highlight the document to be deleted.
- b. Click **Remove** at the bottom of the Supporting Documents Screen
- c. A dialog box confirms the document will be deleted
Click **Yes** to confirm the delete or **No** to stop the delete.



Preliminary Check

Once an agency has produced the Base (For Amended FY2014 and FY2015, entered One-Time Deletes), they can run the State General funds Base Adjustment report (report 300) which will show the Revised Base Budget for State General Funds. This report will show the agency Base (Cutoff Amendment) and One-Time Deletes.

You can also run a Pre-Check at any time to see if all entries are in balance. Click on the Update Business Event shield; make selections for Budget Year, Stage, and Agency; click on Pre-check. (For error resolution see Submission Validation Process discussed below.) The pre-check screen provides the base and revised base budget.

Reports

A. Click the **Reports** Shield



A. Selection of Custom Reports.

Currently there are 44 reports in BudgetTool. Many these reports can be run, and customized according to the user's individual needs. However, some reports have been pre-customized and cannot be changed by the user. These have '.1c, .2.c, etc.' after the basic report number and are a customization of that basic report. All reports can be output in various formats – PDF, Excel, HTML, etc. If you mouse over a report title in the list a brief description of the reports shows at the bottom of the page. The following reports are available:

- 100 – Program Summary with Change Type Detail
- 100.1c – AOB Agency Summary Amendment Analysis
- 110 – Program Summary with Change Summary
- 200 – Fund Changes by Entry
- 200.1c - Fund Change Entries by Change Type (All Funds)
- 210 – Fund Summary Changes by Entry
- 300 - State General Funds Base Adjustment
- 400 - State General Funds Request
- 400.1c – State General Funds Lowest % Request (Not active for AFY14 and FY15)
- 400.2c – State General Funds Middle % Request (Not active for AFY14 and FY15)
- 400.3c – State General Funds Highest % Request (Not active for AFY14 and FY15)
- 500 – All Funds Request
- 510 – Summary Request by Scenario
- 510.1c – Summary Lowest % Request by Scenario (Not active for AFY14 and FY15)
- 510.2c – Summary Middle % Request by Scenario (Not active for AFY14 and FY15)
- 510.3c – Summary Highest % Request by Scenario (Not active for AFY14 and FY15)
- 510.4c – Summary Request All Agencies (Excel)

- 550 – Agency Level Program(s) Detail Summary View
- 550.1c – Object Class/Fund Source Detail Report Lowest % Request (Single Agency) N/A
- 550.2c – Object Class/Fund Source Detail Report Middle % Request (Single Agency) N/A
- 550.3c – Object Class/Fund Source Detail Report Highest % Request (Single Agency) N/A
- 600 – Stage Submission Status
- 600.1c – Budget Submission Status - Agency Request
- 600.2c – Budget Submission Status (All Stages)
- 700 – Recommendation
- 700.1c – OPB Recommendation (legal paper)
- 700.2c – OPB Recommendation w/ group descriptions
- 800 – Budget Details
- 900 – Performance Measures
- 910 – Performance Measures Multi Agency
- 940 – Program Purpose
- 940.1c – Program Purpose
- 950 – Program Recommendations
- 950.1c – Governor's Book Pages
- 955 – Program Historical Summary
- 957 – Program Historical Summary with Expenditure
- 958 – Agency Counts Summary
- 960 – Program Fund Source Summary
- 960.1c – Program Fund Source Summary
- 965 – Agency Statewide Changes Summary
- 970 – Agency Fund Source Summary
- 970.1c – Agency Fund Source Summary
- 980 – Agency Expenditure Summary
- 980.1c – Agency Expenditure Summary

Note: since there is no percentage reduction this year the reports for the Lowest %, Middle% and Highest % are not available this year. (400.1c, 400.2c, 400.3c, 510.1c, 510.2c, 510.3c, 550.1c, 550.2c, and 550.3c)

- 1) Running a Custom Report (Example report below some reports have different selections)
 - a. Double click the report you want to run
 - b. Select the **Financial Year** from the Drop Down Box
 - c. Select the **Stage**
 - d. **Agency List** – Check here to select all the agencies at once if you have more than one agency in the list (This is only for agency reports. Some reports run for all agencies and do not have an agency selection.)
 - e. To select one or more agencies individually, check the box to the left of the Agency name

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The agency list box has four fields:

Division – this is the OPB division to which the agency is assigned

Name – name of the Agency

Branch – the branch of government to which the agency belongs

Budgetary – Yes or No (Yes means it is an appropriated agency that will appear in the appropriations bill. No means it is an informational only agency usually attached to a parent agency and will show in the appropriations bill as a program in the parent.)

f. Click **Request Report Dataset**

g. Click **Customize** if you need to customize the report

The screenshot displays two windows from the Budget Tool software. The top window, titled 'Report Selection', has a list of reports on the left and an 'Agency List' table on the right. The bottom window, titled 'Report Data View', shows a data table with various columns. Callout boxes 'a' through 'g' indicate specific UI elements:

- a.** Points to the 'Description' list in the 'Report Selection' window.
- b.** Points to the 'Financial Year' dropdown in the 'Report Selection' window.
- c.** Points to the 'Agency Request' dropdown in the 'Report Selection' window.
- d.** Points to the 'Agency List' table in the 'Report Selection' window.
- e.** Points to the 'Request Report Dataset' button in the 'Report Selection' window.
- f..** Points to the 'Request Report Dataset' button in the 'Report Selection' window.
- g.** Points to the 'Customize' button in the 'Report Data View' window.

Division	Name	Branch	Budgetary
<input type="checkbox"/>	PED Aviation Hall of Fame [143]	E&E	Yes
<input type="checkbox"/>	ED Board of Regents [472]	E&E	Yes
<input type="checkbox"/>	HD Brain & Spinal Injury Trust Fund [261]	E&E	Yes
<input type="checkbox"/>	ED Bright from the Start: Georgia Department of Early Care...	E&E	Yes
<input type="checkbox"/>	PED Civil War Commission [280]	E&E	Yes
<input type="checkbox"/>	GG Commission on Equal Opportunity [237]	E&E	Yes
<input type="checkbox"/>	HD Georgia Composite Medical Board [221]	E&E	Yes
<input type="checkbox"/>	GG Council for the Arts [238]	E&E	Yes

AgencyID	SequenceNbr	Agency	StateCode	Parent Program	Sub Program	Stage	Total Base	State Funds Base	Federal Funds Base	Recovery Funds Base	Other Funds
19	81	Depar...	428	Building...	Building...	Age...	256,184	224,284			31
19	81	Depar...	428	Building...	Constructio...	Age...	207,804				207
19	81	Depar...	428	Coordinated...	Coordinated...	Age...	389,933	389,933			
19	81	Depar...	428	Coordinated...	Planning...	Age...	4,158,353	4,048,284			110
19	81	Depar...	428	Departmental...	Department...	Age...	5,137,209	1,798,806	1,611,802		1,726
19	81	Depar...	428	Environmental...	Environmen...	Age...	1,279,791	834,291	6,000		439
19	81	Depar...	428	Federal...	Americorps...	Age...	4,735,607	350,683	4,384,924		
19	81	Depar...	428	Federal...	Appalachia...	Age...	370,129	247,329	122,800		
19	81	Depar...	428	Federal...	Community...	Age...	41,926,7...	1,039,442	40,577,686		309
19	81	Depar...	428	Federal...	Federal...	Age...					
19	81	Depar...	428	Homeownersh...	CHIP / Lead...	Age...	217,664		217,664		
19	81	Depar...	428	Homeownersh...	GHFA...	Age...	4,414,327		576,499		3,837
19	81	Depar...	428	Homeownersh...	Homeowner...	Age...					

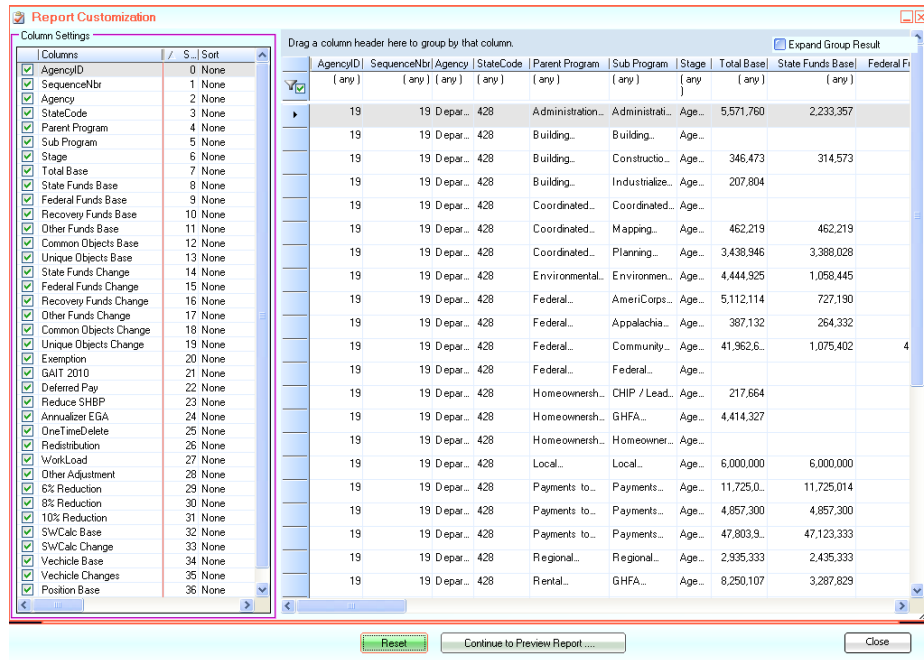
You can begin the customization process on the Report Customization screen. For instance under each column heading the word (any) appears. This means that any value in that field will appear. You can further narrow your report by selecting one value. If you only want one program in the report, click under Parent Program in the 'any' box and you get a dropdown of all parent programs. Select one and the data for all other programs goes away. In some cases such as for dollar values in the column it does not make sense to select one, but for some like program, fund source, etc. this flexibility allows you to narrow your report substantially.

You can also delete specific data from the report by un-checking the check box in the left hand column of the screen. For instance if you ran a report that has all change types and you just wanted one in the report you could un-check the other change types.

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Note: if you want to use a data field later on in the customization process you cannot delete it in this preliminary stage.

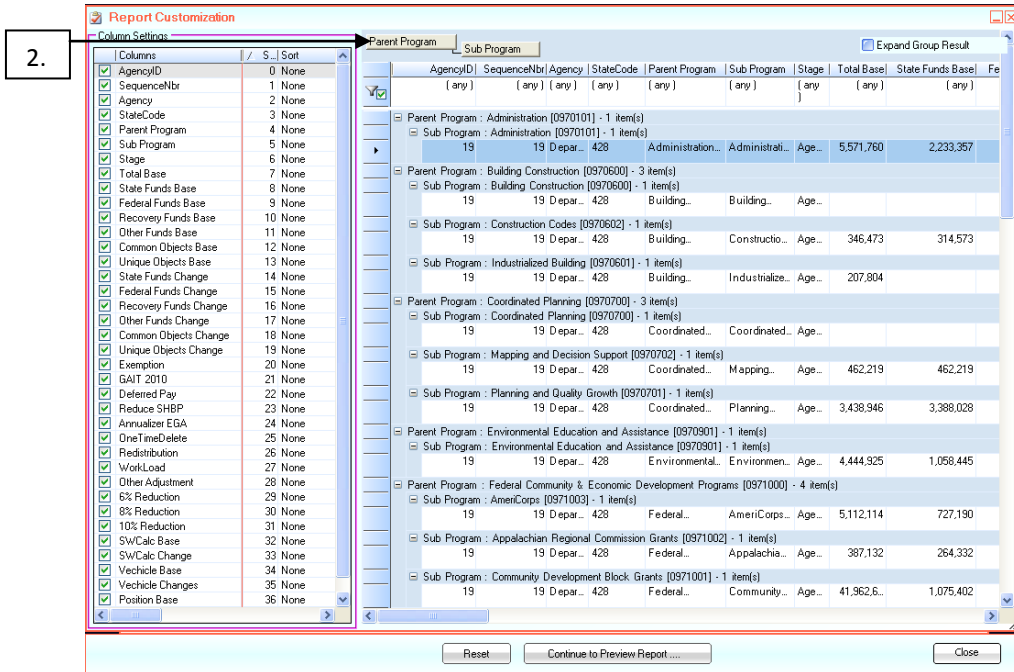
2) Customizing the Reports
a. Changing the grouping
1. Click **Customize**



1.

2. Drag a Column Header to the space above the headers to group by that column header

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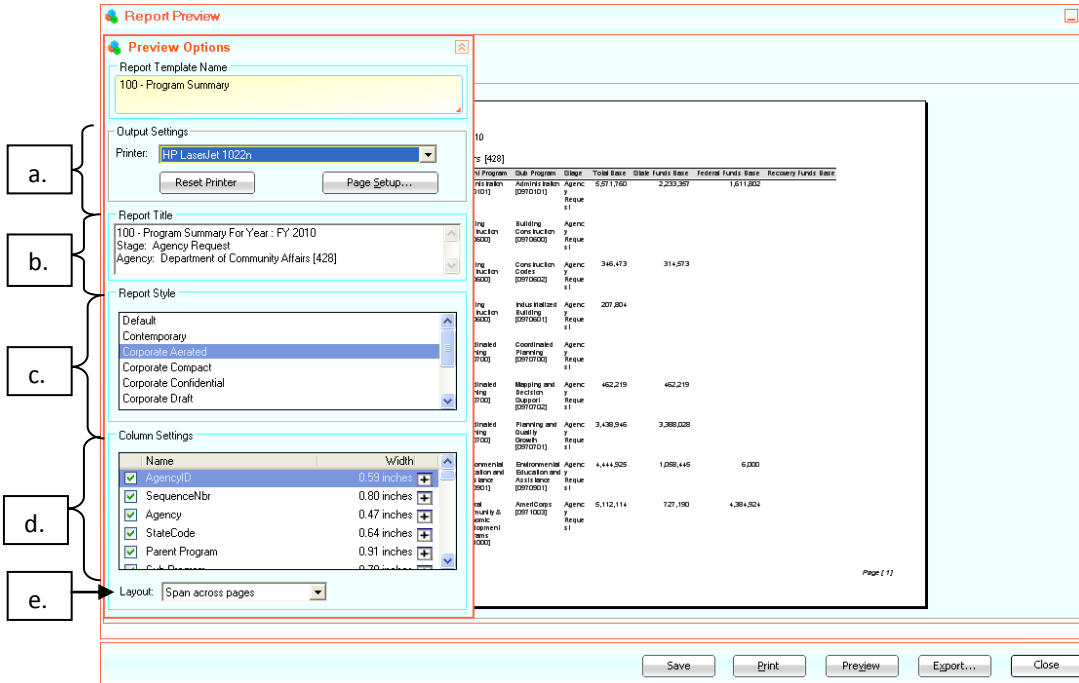


3) Report Preview and Customization – **Click on Continue to Preview Report**

Note: Many screens in BudgetTool allow the user to Preview, Print and/or Export a report to a file. The user would click Preview to see this screen

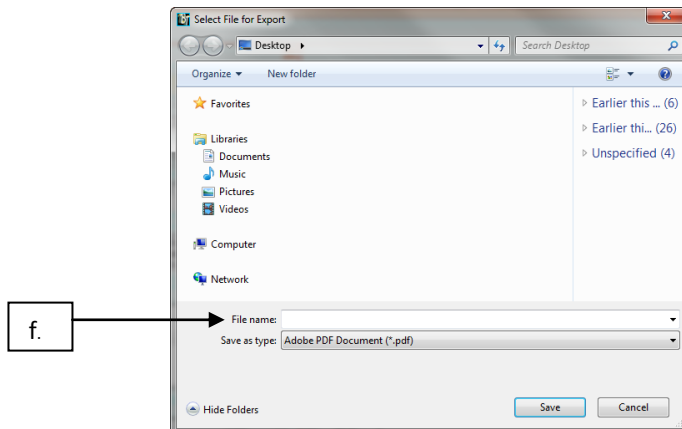
- a. Select a Printer and use Page Setup to change margins, paper size, and orientation
- b. Report Title
- c. Select a Report Style
- d. Uncheck any columns you will not need; also set the column width so you can see all data in the field. It may take several tries to get the column widths correct.
- e. Select Fit to Page or Scan across Pages

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The document can then be previewed, printed or exported.

- f. Click export and type in the file name and Select the Save location



Review Prior to Submission

Redistributions

Agencies can move funds among programs to fund those initiatives they feel that are critical to their operations. The net of redistributions by fund source must total zero for an agency. If these do not equal zero the submit process will be blocked.

Workload

Workload adjustments for state general funds are permitted for programs that are growth, workload, and enrollment driven. These specific programs will be identified by OPB. For these specific programs Federal, Recovery Funds, and Other Funds can also be included in the Workload Adjustments for the specific programs identified.

Budget Request Check

Agencies can check their total budget request by running the Agency Request State General Funds report. This report shows the Adjusted Base less Reductions, plus Redistributions, plus Workload Adjustments, plus Other Adjustment plus Exemptions which equals the Agency Request for State General Funds. See the above section Reports for instruction on how to run the report.

Agency Request = Base – One-Time Deletes + or - Redistributions +or – Other Adjustments + or - Workloads = Agency Request

Pre-check

An agency can run a pre-check at any time. A pre-check makes certain that entries have the right sign – positive or negative – for the entry type, that fund source and object class changes are in balance, that detail amounts equal the summary amounts, and for Executive Branch agencies that the state general funds are equal to the level of funding appropriated for FY 2014 (HB106). The pre-check works as follows:

Submit Validation Process

The submit validation process for the Agency Requests dataset is comprised of 5 levels. The validation process runs one level at a time meaning if at a given level an error(s) is(are) found the validation process stops, returns the error list to the user, and does not go onto the next level. You must then correct those issues and run the validation process again to proceed to find if there are any errors beyond what was previously identified.

Level 1: The first level of validation checks is on the following:

- 1.1 All one-time delete entries must be negative
- 1.2 The sum of Redistributions must equal 0 at the agency level by individual Fund Source.
- 1.3 Workload adjustments for Executive Branch agencies apply only to a specific list of programs in a specific list of agencies.

Failing to pass the pre-check will display the following:

- 1.1 The error will be written to the screen in a table with 4 columns, the first showing the Program/Sub-Program, the second the Type (fund source, count, object class), the third Name, and the fourth the Amount.
- 1.2 Will display the list of Fund Sources that do not net to zero for redistributions for the agency.
- 1.3 If a Workload adjustment exists for an agency not specifically identified to have Workload then an agency level error message will display; if a Workload adjustment exists for an agency authorized to have Workload but for a program

not on the specific list identified by OPB, the program will be highlighted in the pre-check window.

Level 2: AFY 2014 and FY 2015 Funding Levels

This validation process verifies that for Executive Branch agencies the agency total State General Funds are equal to the level of funding appropriated in FY 2014 (HB 106) less One-Time Deletes. This validation is on State General Funds only in total for the agency. **There can be redistributions on any fund source and object class but the validation only checks in total against State General Funds in the Revised Base Budget (appropriated for FY 2014 (HB 106) less One-Time Deletes).**

NOTE: This specific check does not apply to Agencies in the Legislative and Judicial branches of Government.

Level 3: Total Funds = Total Object Class Expenditures

By sub-program/single program validation process returns the discrepancies between Total Funds and Total Object Class Expenditures.

Level 4: Federal Funds/Recovery Funds/Other Funds to detail check

4.1 The Federal Fund Source Amount = Sum of Federal Fund Details amounts

4.2 The Federal Recovery Funds Amount = Sum of Recovery Funds Detail amounts

4.3 The Other Fund Source Amount = Sum of Other Fund Details Amounts

4.4 Personal Services Amount = Sum of PS 300 Detail Amounts

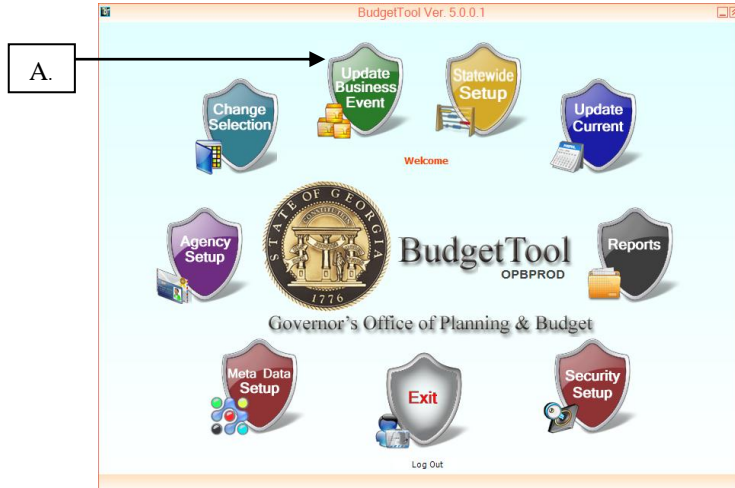
Level 5: Negative Funds Warning

If the result of Base + change amounts for a fund source is negative at the program/sub-program then the validation process returns a warning but does not prevent submission.

Note: Some agencies have programs with negative fund sources.

Pre-checks and Submit

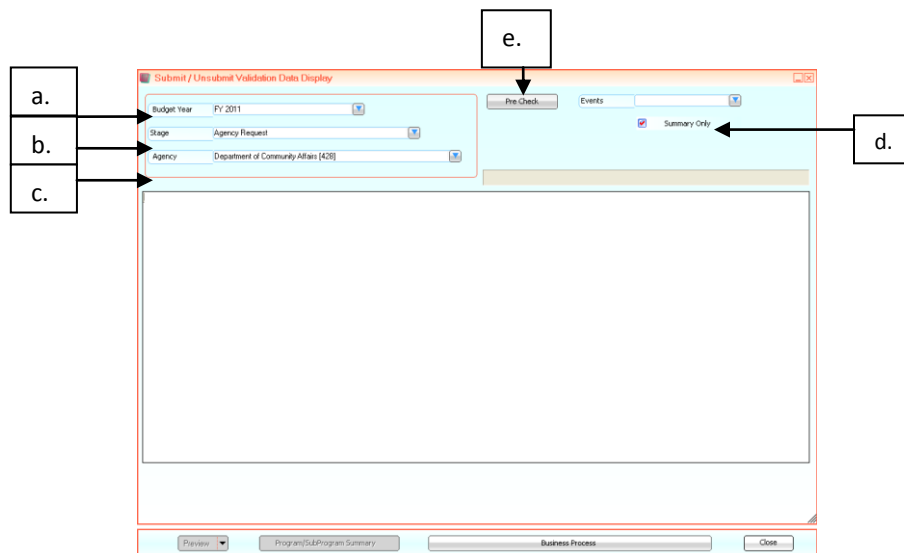
A. Click the **Update Business Event Shield**



Submit/Un-submit Validation Data Display screen

- a. Select Budget Year
- b. Select Stage
- c. Select Agency
- d. Select Summary
- e. Click Pre Check

Summary Only – Clicking here reduces the number of columns to Total Base Funds, Total Base Adjustments, Revised Base Budget, Total, Adjusted Total, Agency Request, and Parent/Sub-Program Name (Note: Attached agencies programs appear in the parent agency and are included in the pre-check)



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B. Pre Check *Summary Only*

Submit / Unsubmit Validation Data Display

Budget Year: AFY 2013
 Stage: Agency Request
 Agency: Department of Agriculture [402]

Pre Check: Summary Only:

This Agency Request is not processed

Code	Program Name	Base	Total Base Adj	Revised Base Budget	Adjusted Base	Total	Adjusted Total	% Agency Request
0740201	Athens and Titon...	2,810,149		2,810,149	2,810,149	2,810,149	2,810,149	2,810,149
0740300	Consumer Protection							
0740302	Agricultural Inputs	1,488,682		1,488,682	1,488,682	1,488,682	1,488,682	1,488,682
0740316	Agriculture and ...	210,293		210,293	210,293	210,293	210,293	210,293
0740307	Animal Health	1,065,205		1,065,205	1,065,205	1,065,205	1,065,205	1,065,205
0740312	Animal Protection	829,838		829,838	829,838	829,838	829,838	829,838
0740318	Consumer ...	3,287,672		3,287,672	3,287,672	3,287,672	3,287,672	3,287,672
0740309	Equine	721,380		721,380	721,380	721,380	721,380	721,380
0740313	Food Safety	5,703,124		5,703,124	5,703,124	5,703,124	5,703,124	5,703,124
0740315	Fuel & Measures	3,916,315		3,916,315	3,916,315	3,916,315	3,916,315	3,916,315
0740308	Livestock / Poultry	941,688		941,688	941,688	941,688	941,688	941,688
0740310	Meat Inspection	4,350,825		4,350,825	4,350,825	4,350,825	4,350,825	4,350,825
0740305	Pesticides	1,095,858		1,095,858	1,095,858	1,095,858	1,095,858	1,095,858
0740301	Plant Industry Labs	2,223,669		2,223,669	2,223,669	2,223,669	2,223,669	2,223,669
0740304	Plant Protection	1,637,964		1,637,964	1,637,964	1,637,964	1,637,964	1,637,964
0740314	Poultry Graders	4,036,980		4,036,980	4,036,980	4,036,980	4,036,980	4,036,980
0740306	Structural Pest...	1,201,299		1,201,299	1,201,299	1,201,299	1,201,299	1,201,299
0740311	Warehouse	244,328		244,328	244,328	244,328	244,328	244,328
0740101	Departmental...	4,558,992		4,558,992	4,558,992	4,558,992	4,558,992	4,558,992
0740400	Marketing and Promotion							
Grand Total: 51,352,061				51,352,061	51,352,061	51,352,061	51,352,061	51,352,061

Click on lines with yellow background (if any) to see specific precheck message.

Preview | Program/SubProgram Summary | Department of Agriculture [402] | Close

C. Successful Pre-check

- a. A dialog box will indicate a successful Pre Check
- b. Click OK in the Pre Check dialog box
- c. Items which could prevent a successful Pre Check will be highlighted in yellow.

Submit / Unsubmit Validation Data Display

Budget Year: AFY 2013
 Stage: Agency Request
 Agency: Department of Audits and Accounts [404]

Pre Check: Summary Only:

Code	Program Name	Base	Total Base Adj	Revised Base Budget	Adjusted Base	Total	Adjusted Total	% Agency Request
0850200	Audit and Assurance...							
0850203	Audits of Local...	7,393,419		7,393,419	7,393,419	7,393,419	7,393,419	7,393,419
0850202	Audits of Medicaid...	4,655,248		4,655,248	4,655,248	4,655,248	4,655,248	4,655,248
0850208	Information System...	1,429,125		1,429,125	1,429,125	1,429,125	1,429,125	1,429,125
0850209	Performance Audits	3,295,925		3,295,925	3,295,925	3,295,925	3,295,925	3,295,925
0850205	Reviews of Local...	868,262		868,262	868,262	868,262	868,262	868,262
0850201	Statewide ...	9,146,541		9,146,541	9,146,541	9,146,541	9,146,541	9,146,541
0850210	Transparency in...	33,000		33,000	33,000	33,000	33,000	33,000
0850501	Departmental...	1,639,202		1,639,202	1,639,202	1,639,202	1,639,202	1,639,202
0850801	Immigration...	20,000		20,000	20,000	20,000	20,000	20,000
0850301	Legislative Services	247,561		247,561	247,561	247,561	247,561	247,561
0850401	Statewide Equalized...	2,060,650		2,060,650	2,060,650	2,060,650	2,060,650	2,060,650
Grand Total: 30,788,933				30,788,933	30,788,933	30,788,933	30,788,933	30,788,933

Click on lines with yellow background (if any) to see specific precheck message.

Preview | Program/SubProgram Summary | Department of Audits and Accounts [404] | Close

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- D. Successful Pre-check with a negative funds warning
 - a. Select the Event using the drop down button
 - b. Click Submit if you are ready to submit the agency for approval

a.

b.

Code	Program Name	Base	Total Base Adj	Revised Base Budget	Adjusted Base	Total	Adjusted Total	3% Agency Request
0850200	Audit and Assurance...							
0850203	Audits of Local...	7,393,419		7,393,419	7,393,419	7,393,419	7,393,419	7,393,419
0850202	Audits of Medicaid...	4,655,248		4,655,248	4,655,248	4,655,248	4,655,248	4,655,248
0850208	Information System...	1,429,125		1,429,125	1,429,125	1,429,125	1,429,125	1,429,125
0850209	Performance Audits	3,295,925		3,295,925	3,295,925	3,295,925	3,295,925	3,295,925
0850205	Reviews of Local...	868,262		868,262	868,262	868,262	868,262	868,262
0850201	Statewide...	9,146,541		9,146,541	9,146,541	9,146,541	9,146,541	9,146,541
0850210	Transparency in...	33,000		33,000	33,000	33,000	33,000	33,000
0850501	Departmental...	1,639,202		1,639,202	1,639,202	1,639,202	1,639,202	1,639,202
0850801	Immigration...	20,000		20,000	20,000	20,000	20,000	20,000
0850301	Legislative Services	247,561		247,561	247,561	247,561	247,561	247,561
0850401	Statewide Equalized...	2,060,650		2,060,650	2,060,650	2,060,650	2,060,650	2,060,650
Grand Total:		30,788,933		30,788,933	30,788,933	30,788,933	30,788,933	30,788,933

The Agency Program/Sub-Program Summary Screen will now have symbols indicating the Agency has been Submitted or Advanced and the dates.

Program/Sub Program Change Entry **Advanced**

Change Selection

Council for the Arts [238]

FY09 Amendment 2 [8/25/2008]
 Program :[0600100] Council for the Arts
 Sub Program :[0600101] Access
 Budget Year :Amended Fiscal Year 2009 Stage:Agency Request

Advanced:9/9/2008 5:46:45 PM
 Submit:9/2/2008 1:59:59 PM
 Policy :Best Managed State
 Rank:0

Get Existing Change Entry
 Program/Sub Program Change View

Funds Summary			
Description	Base	Change	Request
[State G] State General Funds	4,400,905	-1,082,241	3,318,664
Sub Total:	4,400,905	-1,082,241	3,318,664
Federal Funds	635,400		635,400
Federal Recovery Funds			
Other Funds	10,000		10,000
Total:	5,046,305	-1,082,241	3,964,064

Object Class Summary			
Description	Base	Change	Request
[300] Personal Services	684,948	-267,928	417,020
[301] Regular Operating...	100,956	-80,811	20,145
[305] Computer Charges	32,500	-4,500	28,000
[307] Telecommunications	9,000	3,000	12,000
[312] Contractual Services	10,300	14,100	24,400
Sub Total:	837,704	-336,139	501,565
Unique Class Objects	4,208,601	-746,102	3,462,499
Total:	5,046,305	-1,082,241	3,964,064

Description	Base	Change	Request
Position Count	12.00	0.00	12.00
MV Count	0.00	0.00	0.00

State Funds Federal Funds Recovery Funds Other Funds PS 300 Common Obj Unique Obj SW Calc Documents Close

Agency Submit

When an agency submits their budget request to OPB (See above instructions) an email notifies both the agency and OPB and the data can no longer be changed. OPB can do two things with the agency's submission: 1. Un-submit it – that is send it back to the agency for additional detail, changes, etc. in which case the agency receives an email and can work in that stage again; or 2. Advance the data to the OPB Recommendation stage in which case an email is also sent to the agency but no further changes can be made to the agency request stage.

Section II. B: OPB Budget Development - Overview

OPB Analysts will follow the same procedures and processes as detailed above for the agency analysts to enter descriptors and will make changes to the Agency Request to develop an OPB Recommendation. (See above Section - Agency Request) Since this is a flat budget request no selection needs made for a reduction option as was done in the past.

Once the Agency Request is advanced to the OPB Recommendation no changes can be made to the original agency request. The OPB analyst can change amounts, and enter new standard or agencywide descriptors in the OPB Recommendation stage. No descriptors originating in the agency request stage can be deleted. They can be zeroed out; however, the Agency Request stage will always have the original agency request data. The OPB analyst will use BudgetTool in the same manner as the Agency Analyst to develop the OPB Recommendation. However, most of the OPB Analysts' work will be editing, changing, or clarifying the agency request. The OPB Recommendation stage is where the budget request is developed into a recommendation to the Governor.

The OPB analyst with the submit role can submit an OPB Recommendation at which time the data can no longer be changed. The OPB Division Director can either unsubmit the request or advance it to the Governor's Initial stage. No email notifications are generated in the stages after the Agency Request.

The Governor's Initial stage is the 'Working' stage for the Governor. Here further changes are made at the direction of the Governor and/or his staff. The OPB Division Director can submit the Governor's Initial. The OPB Executive User can either unsubmit it or advance it to the Governors Final stage.

Section II. C: Executive Budget Recommendation

The executive user is the only user that can advance the Governors Initial to the Governors Final stage.

Once the data is in the Governor's Final stage no changes can be made.