



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

**BUDGET TOOL**

**USER MANUAL**

**Section I – Getting Started Guide**

**270 Washington Street, SW, 8<sup>th</sup> Floor  
Atlanta, Georgia, 30334  
404-656-3820**

**[www.opb.georgia.gov](http://www.opb.georgia.gov)**

## Preface

The purpose of this BudgetTool User Manual is to provide detailed instructions for using the BudgetTool application. All agencies will use BudgetTool to submit their budget requests to the Governor's Office of Planning and Budget (OPB). The manual is organized by 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.

## Overview

BudgetTool is an application developed by the Governor's Office of Planning and Budget (OPB) to be used by all state agencies to submit their Amended and General budget requests. OPB will use BudgetTool to develop the Governor's budget recommendations to the legislature. BudgetTool is written in a relatively new technology and is intended to provide better information management, functionality, faster speed, and user friendly report writing tools.

BudgetTool's security model will enable agencies to setup their own users and maintain their fund source and object class program associations. Much less detailed data entry will be required than in the past. Instead, word documents, spreadsheets, and/or templates can be attached to explain the specific details of the agency budget request. Program fund source and object class entries will be made on the same screen at the same time.

Note that on the right side of the BudgetTool homepage (<http://budgettool.opb.state.ga.us/>) are links to the documents you will need to prepare your budget request:

- AFY and FY Budget Instructions
- BudgetTool Manual – Section 1 – Getting Started (this section)
- BudgetTool Manual – Section II.A – Agency User's Guide

BudgetTool Manual – Section II.B – OPB Budget Development Guide  
BudgetTool Manual – Section III – Measures

## **Section I: Getting Started**

### *Purpose*

The purpose of this section of the BudgetTool User Manual is to provide all users with orientation and instructions for the following areas:

- Technical Requirements
- Application Setup
- Accessing the Application
- Navigation Overview

It is anticipated that Section I will be read first. The topics covered here are common topics that apply to all users and are not repeated in the other sections. It is necessary to read this section before reading the other sections.

## **Section I. A: Technical Requirements**

This section defines the technical requirements for BudgetTool - such as, browser version, display settings, operating system, administrative rights to install, etc.

### **Technology**

BudgetTool was developed as a Microsoft “Smart Client” application using the Microsoft “.Net” development platform. Smart Client applications combine capabilities of desktop client applications with the power and reach of web based “thin client” applications. Smart Client applications are deployed and automatically maintained through the use of a web browser.

### **BudgetTool Prerequisites**

**Browser** - Microsoft Internet Explorer 6.0 or higher

**Operating System** - Windows XP with the latest service pack(s), or  
Windows 2000 workstation with the latest Service pack(s)

**Prerequisites** - MS .Net Framework version 4.0 or higher with latest service pack  
(Note: instructions for installing the MS .NET framework are in Section I.B.2 below.)

**Display resolution** - Minimum 1024 x 768

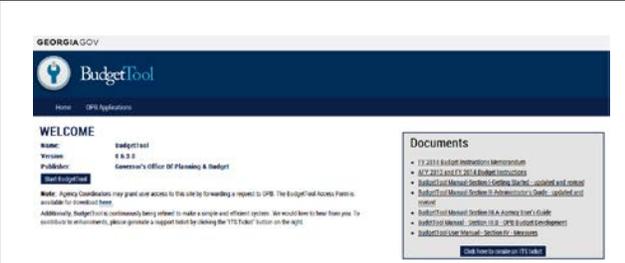
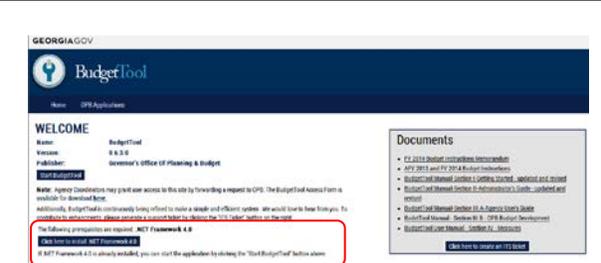
## Section I. B: Setup

BudgetTool is only compatible with Internet Explorer which is already installed on most computers. The MS.NET Framework is an application which must be installed on your computer to enable BudgetTool to function. You may already have .Net installed, but if you do not, the detailed instructions on how to complete this task are described below. (See Section I.B.2 below) This installation is necessary only once.

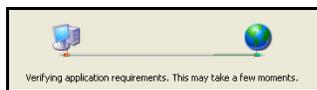
### Section I.B.1: Starting BudgetTool

Start your Internet Explorer browser and copy this link to your browser:

<http://budgettool.opb.state.ga.us> Alternatively, BudgetTool can be accessed from the OPB public web site home page ([www.opb.georgia.gov](http://www.opb.georgia.gov)) under "Links – OPB Applications."

 <p>If this screen appears, the .NET Framework is already installed. Please proceed to the Step 1.</p>	 <p>If this screen appears, the .NET Framework is <b>NOT</b> installed on your computer. Please see installation instructions (Section I.B.2) for instructions on installing the .NET Framework.</p>
--	---

1. Select Start BudgetTool and allow it to launch on your desktop.
2. The *Launching Application* dialog box appears. BudgetTool is verifying from the server if there are any updates for the application.

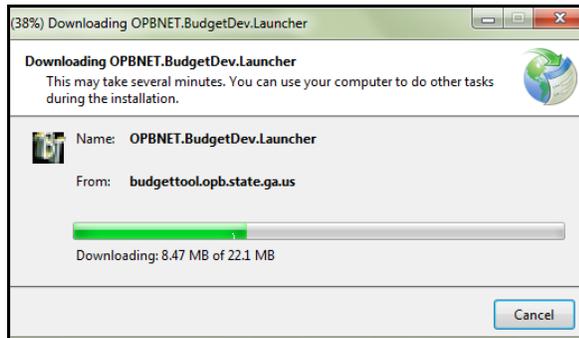


2. This dialog box will appear for new users.
3. Click **Run** to install the BudgetTool application.

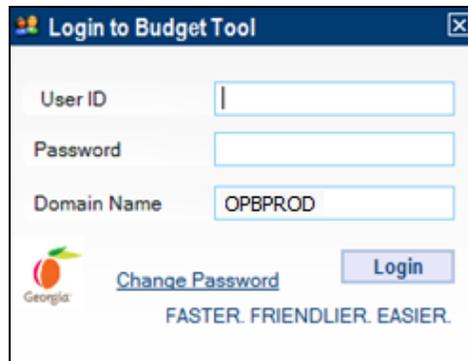
GOVERNOR'S OFFICE OF PLANNING AND BUDGET  
BUDGETTOOL USER MANUAL  
SECTION I - GETTING STARTED



4. A dialog box will indicate the progression of the launcher.



5. On successful completion of the launch, the Login Screen of the BudgetTool application will appear.



6. User ID requests and Password resets.

If you have forgotten your User ID select **Log In Help** and **Forgot UserName**. Enter your email address and your User ID will be emailed to you.

If you have forgotten your password select **Log In Help** and **Forgot/Reset Password** and enter your User ID. A password reset email will be sent to you.

GOVERNOR'S OFFICE OF PLANNING AND BUDGET  
BUDGETTOOL USER MANUAL  
SECTION I - GETTING STARTED

**GEORGIA**GOV

 BudgetTool

Home | OPB Applications | **Log In Help**

**WELCOME**

**Name:** BudgetTool  
**Version:** 0.6.1.3  
**Publisher:** Governor's Office Of Planning & Budget

[Start BudgetTool](#)

**Note:** Agency Coordinators may grant user access to this site by forwarding a request to OPB. The BudgetTool Access Form is available for download [here](#).

Additionally, BudgetTool is continuously being refined to make a simple and efficient system. We would love to hear from you. To contribute to enhancements, please generate a support ticket by clicking the "ITS Ticket" button on the right.

**Documents**

- [FY 2014 Budget Instructions Memorandum](#)
- [FY 2013 and FY 2014 Budget Instructions](#)
- [BudgetTool Manual - Section I - Getting Started - updated and revised](#)
- [BudgetTool Manual - Section III.A - Agency User's Guide](#)
- [BudgetTool Manual - Section III.B - OPB Budget Development](#)
- [BudgetTool User Manual - Section IV - Measures](#)

[Click here to create an ITS ticket](#)

## Section I.B.2: MS .NET Framework Installation



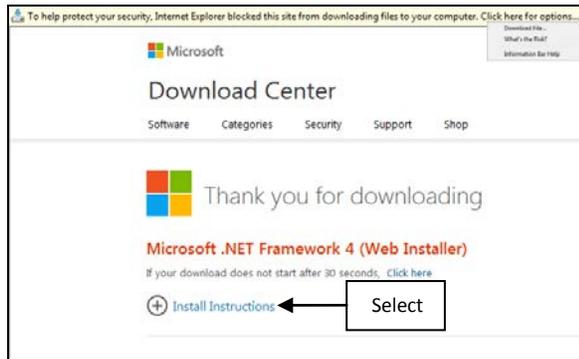
Select the hyperlink **Click here to install .Net Framework.** The .NET Framework only needs to be installed one time.

1. You will be directed to the Microsoft Download center. Select Download to install the .NET framework.

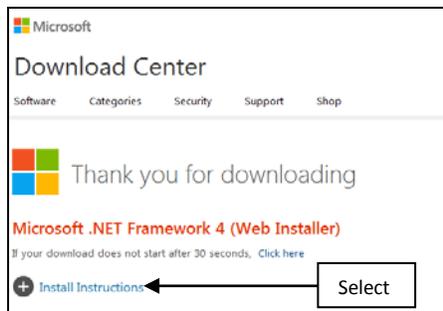


2. Select "No thanks" and continue for any Microsoft recommendations.
3. Internet Explorer may block the installation of the .Net framework. If this happens click on the ribbon and select "Download File..."

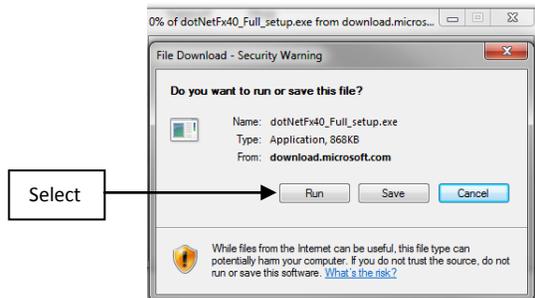
GOVERNOR'S OFFICE OF PLANNING AND BUDGET  
BUDGETTOOL USER MANUAL  
SECTION I - GETTING STARTED



4. The download dialog box should appear. If the box does not appear select "Click here".



5. Select "Run" to start the Download.



6. Select "Run" to start the Framework setup wizard.



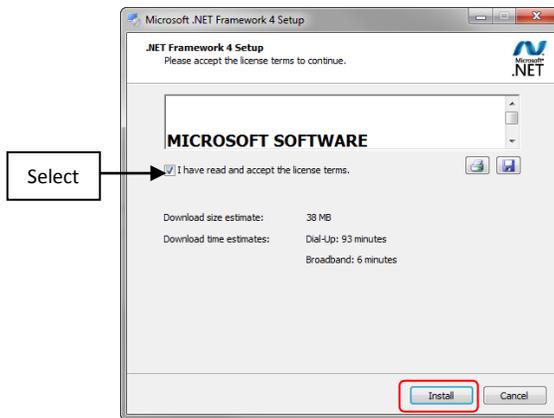
7. The Framework will then begin to install.



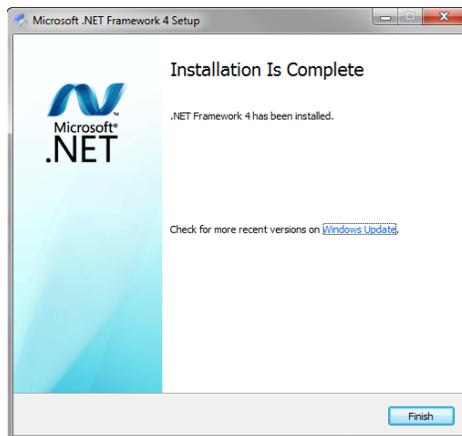
8. If the error ‘...No administrative privileges were detected’ is received, the computer may not be able to download .NET Framework at this time due to agency policies. Contact your agency IT Help Desk or IT staff who will contact OPB to resolve this issue.

9. If no errors, the install dialog box appears.

10. Select the check box to accept the terms of the License Agreement and Click the **Install** Button to install the Framework.



11. On successful completion, the Installation Complete dialog box appears.



Close the browser and go back to Section I.B.1. to start BudgetTool.

GOVERNOR'S OFFICE OF PLANNING AND BUDGET  
BUDGETTOOL USER MANUAL  
SECTION I - GETTING STARTED

**Section I. C: Access**

Agencies must complete the Agency Agreement form for access to the BudgetTool application. This form must be signed by the Fiscal Officer or Agency Head. Return the form via fax to OPB.

State of Georgia	Governor's Office of Planning and Budget	
<b>BudgetTool</b>		
<b>Agency Agreement</b>		
State agencies must submit this Agency Agreement signed by the Agency Head or Fiscal Officer before a Request for Access to the BudgetTool application can be processed.		
<b>Official Name of the Agency</b>	<b>Parent Agency, if an Attached Agency</b>	
<b>Agency Fiscal Officer</b>	<b>Telephone Number</b>	<b>E-Mail Address</b>
<b>Fax Number</b>		
<b>If the Agency needs access to any of their Attached Agencies, please list the name of each Agency:</b>		
The Agency must assume responsibility for the security of the BudgetTool application by maintaining agency user information to include assigned IDs and passwords. The Agency must protect the integrity of the application by entering IDs and passwords only for those employees that will actually use BudgetTool and removing those that become inactive.		
Signature of Agency Head or Fiscal Officer: _____		
Date: _____		
<b>Please fax completed forms to Bruce Zents at 404-656-7916.</b>		
All further correspondence concerning BudgetTool will be directed to the Agency Head or Agency Fiscal Officer named above. (One form per agency)		
Revised: 05-28-08		

GOVERNOR'S OFFICE OF PLANNING AND BUDGET  
 BUDGETTOOL USER MANUAL  
 SECTION I - GETTING STARTED

After completing the Agency Agreement Form, agencies must request that their Agency Administrators and Agency Submitters have their access set up in BudgetTool.

State of Georgia	Governor's Office of Planning and Budget
<b>OPB Application Request Form</b>	
<p>The Agency Head or the Agency Fiscal Officer must approve a request form for each person within the agency requesting access to an application below.</p> <p>Users may request access to their attached agencies if necessary. Please list the attached agencies for which access is needed on the form.</p> <p>Please enter one user per form.</p> <p>For each application the following information is <i>required</i>:</p>	
<b>Full Name of User: (ex: William D. Smith)</b>	<b>Title:</b>
<b>Agency Name (and Attached Agency if applicable)</b>	<b>Telephone:</b>
<b>Division:</b>	<b>E-mail Address:</b>
<b>BudgetNet</b>	Is access requested for read-only (no edit capabilities?) Yes ___ No ___ Please check the type of access required: BudgetNet ___      BudgetNet Submit Access _____ Allotments ___      Allotments Submit Access _____
<b>BudgetTool</b>	Please check the type of access required: Agency Administrator _____      Agency Budget Submitter _____
<b>User Fee Tracking System</b>	Please check the type of access required: Agency Administrator (___)      User Fee Editor (___)      View Only Access (___)
Signature of user: X _____      Date: _____	
Signature of Agency Head or Agency Fiscal Officer: X _____      Date: _____	
Please fax completed forms to OPB at 404-656-7916	
Revised: 05-29-13	

These BudgetTool forms can be found on the OPB homepage link: <http://www.opb.georgia.gov>.  
 Select "Links – OPB Applications," then select 'BudgetTool'.  
 In the paragraph below the 'Start BudgetTool' button there is a link to download the access forms.

Return the form via fax to OPB.

## Section I. D: Navigation

Below is the BudgetTool homepage from which navigation is accomplished to all the different functional areas of the application. Although all users will see all of the shields as displayed below, many of the shields will not be active for the various types of users that are in BudgetTool. Below is a high level narrative which explains the functionality of each shield and what tasks can be accomplished by clicking on a specific shield.

### BudgetTool Homepage for Navigation



#### Section I. D. 1: Meta Data Setup

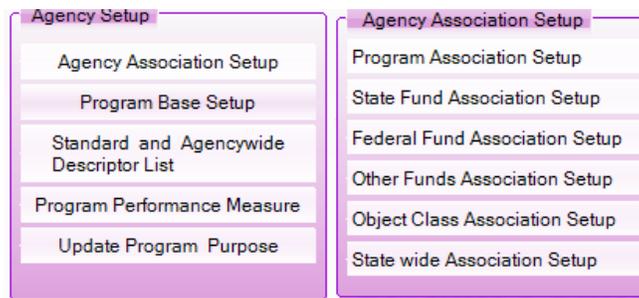
The OPB IT administrator uses the Meta Data Setup to make application level changes. Stage initiation and high level maintenance changes are also done using this section. This section is maintained by the OPB IT Administrator.



### Section I. D. 2: Agency Setup

The OPB Division Administrator can use the Agency Setup section to associate Fund Sources and Object Classes to Agencies.

The Agency Administrator will use this Agency Setup section to associate Fund Sources and Object Classes to Programs.

A screenshot of a web application window titled 'Programs Association'. The window has a dark blue header with the title and standard window controls (minimize, maximize, close). Below the header, there are three dropdown menus: 'Budget Year' (set to 'AFY 2014'), 'Stage', and 'Agency'. A 'Get Program Association' button is centered below these fields. The main content area of the window is currently empty.



### Section I. D. 3: Change Selection

The Change Selection area allows the user to view a detailed summary of the agency at the program and subprogram levels. Changes are made by adding new change entries or editing existing change entries.

A screenshot of a web application window titled "Change Selection". The window has a blue header bar with the title and standard window controls (minimize, maximize, close). Below the header, there are three dropdown menus: "Budget Year" (set to "AFY 2014"), "Stage", and "Agency". Below these is a checkbox labeled "Include attached agencies" which is currently checked. The main content area is a large, empty white space with a vertical scrollbar on the right side.

### Section I. D. 4: Update Business Event

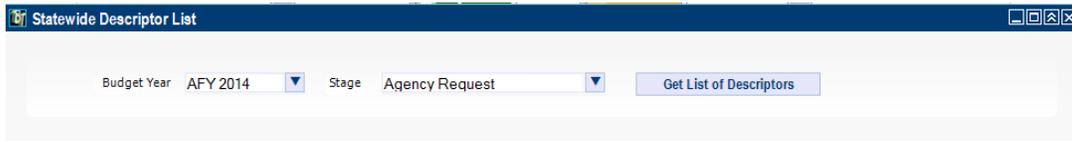
Pre-checks are done in this area. This allows users to determine that entries are in balance: Federal Funds, Recovery Funds and Other Funds detail equals the total amount entered and the object class totals equals the sum of the fund sources. The submission review, approval, and advancement of agency requests are also done in this section. Please see Section II.A – Security Model - **Application Tasks** for a detailed explanation of role assignments for each stage.

A screenshot of a web application window titled "Submit / Unsubmit Validation Data Display". The window has a blue header bar with the title and standard window controls. Below the header, there are three dropdown menus: "Budget Year" (set to "AFY 2014"), "Stage", and "Agency". To the right of these is a dropdown menu labeled "Events". Below the "Events" dropdown is a checkbox labeled "Summary Only" which is checked.



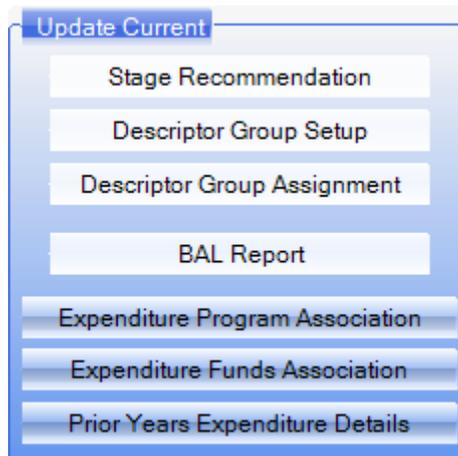
### Section I. D. 5: Statewide Setup

Statewide descriptors can be added and edited in this area. The ability to make these changes is based upon the user's assigned role. Only OPB Executive users can set up Statewide descriptors. Use of these descriptors is covered in Section II of the User's Guide.



### Section I. D. 6: Update Current

This section is used only by OPB to make stage recommendations, to set up descriptor groupings, and to assign the grouping to programs. Functionality has also been added in this area to permit OPB Analysts to enter historical costs by parent program and fund source.





### Section I. D. 7: Reports

The user will generate reports using this section. Most reports can be easily customized for each user's specific needs. Reports can be printed or exported as an Excel, PDF, JPEG, HTML or Tiff image.

**Report Selection**

Report / Template Name

- 100 - Program Summary
- 100.1c - AOB Agency Summary Amendment Analysis
- 110 - Program 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 (INACTIVE)
- 400.2c - State General Funds Middle % Request (INACTIVE)
- 400.3c - State General Funds Highest % Request (INACTIVE)
- 500 - All Funds Request
- 510 - Summary Request by Scenario
- 510.1c - Summary Lowest % Request by Scenario (INACTIVE)
- 510.2c - Summary Middle % Request by Scenario (INACTIVE)
- 510.3c - Summary Highest % Request by Scenario (INACTIVE)
- 510.4c - Summary Request All Agencies (Excel)

100 - Program Summary

Financial Year: AFY 2014      Stage: Agency Request

Agency List

Division	Name	Branch	Budgetary
<input type="checkbox"/>	ED Board of Regents [472]	EXE	Yes
<input checked="" type="checkbox"/>	ED Bright from the Start: Georgia Department of Early Care...	EXE	Yes
<input type="checkbox"/>	HHS Commissioner of Insurance [408]	EXE	Yes
<input type="checkbox"/>	PS Court of Appeals [432]	JUD	Yes
<input type="checkbox"/>	PED Department of Administrative Services [403]	EXE	Yes
<input type="checkbox"/>	PED Department of Agriculture [402]	EXE	Yes
<input type="checkbox"/>	GG Department of Audits and Accounts [404]	LEG	Yes
<input type="checkbox"/>	PED Department of Banking and Finance [406]	EXE	Yes

1 / 73

Request Report Dataset

**Report Data View**

AgencyID	SequenceNbr	Agency	StateCode	Parent Program	Sub Program	Stage	Total Base	State Funds Base	Federal Funds Base	Recovery Funds Base	Other Funds Base
4	21	Bright...	469	Child Care	Child Care	Age...	230,872...	55,451,852	175,405,351		15,000
4	21	Bright...	469	Nutrition...	Nutrition...	Age...	122,000...		122,000,000		
4	21	Bright...	469	Pre...	Pre...	Age...	312,336...	312,173,630	162,400		
4	21	Bright...	469	Quality...	Quality...	Age...	25,271,3...		24,300,000	846,338	125,000

One to all agencies; Preformatted; run on Agency Request or OPB Rec; sorted by agency, program, sub-program; provides base for state, federal, recovery, other funds, and counts; provides base adjustment change types only

Customize
Preview
Close



### Section I. D. 8: Security Setup

This section will be used by the IT division for maintenance.



### Section I. D. 9: Exit

Click the **Exit Shield** if you would like to leave the BudgetTool application.



### Log Out

Click **Log Out** if you are leaving BudgetTool for a short period of time. The Login screen will appear which will allow you to login to the system quickly when you return. Clicking the **Exit** shield closes the application.

### Section I. E. 1: Technical Assistance

#### ITS Ticket

If you have any difficulty accessing the system or run into system errors, you can request technical assistance by using the **ITS Ticket** button on the BudgetTool Homepage <http://budgettool.opb.state.ga.us/>

#### A. Generating an ITS Ticket

1. Select **Click here to create an ITS Ticket.**

GOVERNOR'S OFFICE OF PLANNING AND BUDGET  
BUDGETTOOL USER MANUAL  
SECTION I - GETTING STARTED

GEORGIA.GOV

BudgetTool

OPB Applications | Log In Help

### WELCOME

**Name:** BudgetTool  
**Version:** 6.0.2.0  
**Publisher:** Governor's Office Of Planning & Budget

[Start BudgetTool](#)

**Note:** For user access to BudgetTool, please read [Getting Access to BudgetTool](#) and submit a BudgetTool Access Form form to OPB. [Click here to download the BudgetTool Access Form.](#)

Additionally, BudgetTool is continuously being refined to make a simple and efficient system. We would love to hear from you. To contribute to enhancements, please generate a support ticket by clicking the 'ITS Ticket' button on the right.

### Documents

- [FY 2015 Budget Instructions Memorandum](#)
- [AFY 2014 and FY 2015 Budget Instructions](#)
- [BudgetTool Manual-Section I-Getting Started - updated and revised](#)
- [BudgetTool Manual-Section II.A-Agency User's Guide](#)
- [BudgetTool Manual - Section II.B - OPB Budget Development](#)
- [BudgetTool User Manual - Section III - Messages](#)

[Click here to create an ITS ticket](#)

2. Complete the ITS ticket with as much detail as possible
  - a. Reported By (Required Field): Enter your name.
  - b. Your email (Required Field): Enter your email address.
  - c. Phone #: Enter your phone number.
  - d. Subject (Required Field): Provide a brief statement of the issue.
  - e. Description of Issue (Required Field): Type in your question, suggestion or issue. Please be as detailed as possible.
  - f. A document can also be attached by clicking the **Attachment** icon in the top right corner of the screen.

### SUBMIT A NEW TICKET

\*Mandatory field

**YOU ARE REPORTING AN ISSUE WITH THE FOLLOWING APPLICATION:**  
**BUDGETTOOL**

**REPORTED BY:**

**YOUR EMAIL:**

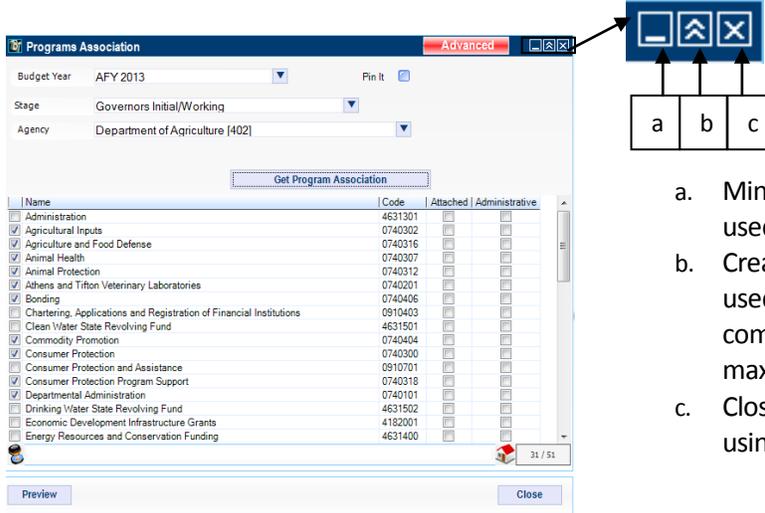
**PHONE NUMBER:**

**SUBJECT:**

**DESCRIPTION OF ISSUE:**

3. Click the **Save/Exit** icon in the bottom right corner of the screen to generate the ticket number and submit the ticket. BudgetTool generates the ticket number automatically.

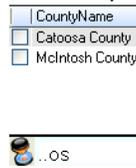
**I. F. 1: BudgetTool Navigation Tools**



- a. Minimizes the screen currently being used.
- b. Creates a bar of the screen being used so that it can be easily compared to other screens when maximized.
- c. Closes the screen you are currently using.



**Hourglass** - A very helpful lookup tool used to do quick searches for items in a list. If you see the hourglass you can use the following techniques to do quick searches.



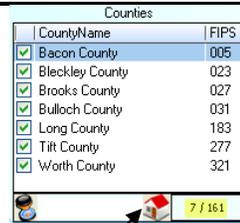
**Type in one or more letters or numbers to search for a particular name or number.**

**Type in “..” and one or more letters or numbers to search for the occurrence of this sequence of letters or numbers within an item in the list.**

**Individual Selections**



(7/161) 7 selections have been made from the list of 161

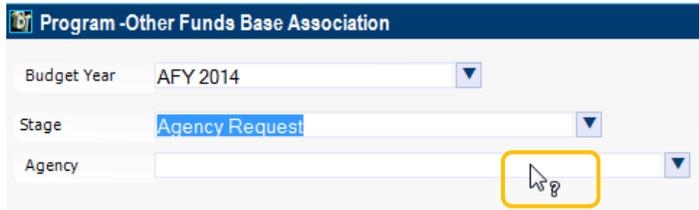


Click the house to return to the list of all the items.

Click inside this box to get a list of the selected items.

### Question Mark Pointer

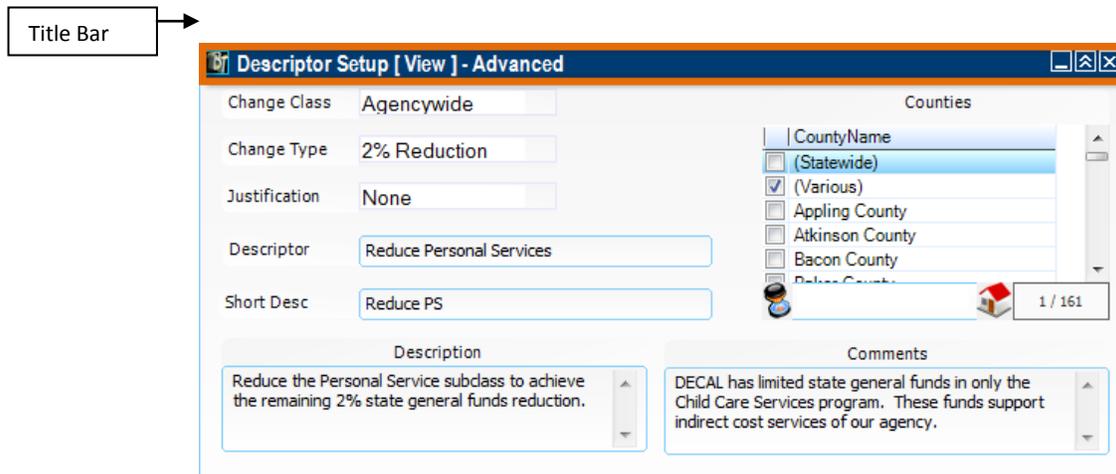
The question mark is shown whenever a selection can be made in a drop down menu.



### Title Bar

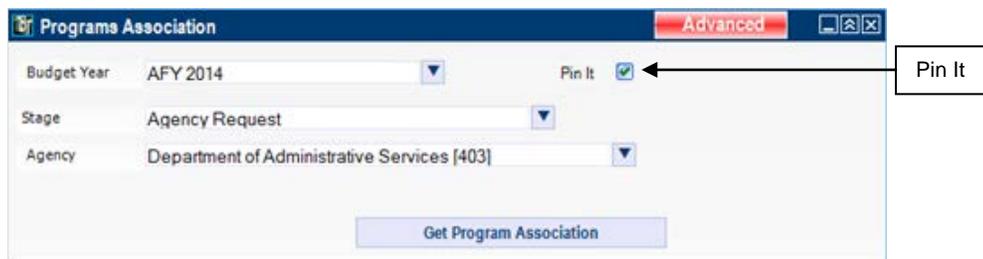
The Title Bar in BudgetTool will indicate the mode you are working in on most screens.

**Example:** The following is **View** mode. No changes, additions or deletions can be made on this screen



### Pin It

Selecting "Pin It" allows the user to move between shields and pages without selecting the Agency each time. Deselect the "Pin It" box to change the Agency selection.



Example: **Pin It** was selected in the *Change Selection*. The Agency remains selected when the user chooses the *Agency Setup* and the *Update Business Event* shields or when you return to the change selection window from another window.

The screenshot shows a window titled "State Funds Association" with a red "Advanced" button in the top right corner. The main area contains three dropdown menus: "Budget Year" set to "AFY 2014", "Stage" set to "Agency Request", and "Agency" set to "Department of Administrative Services [403]". To the right of the "Budget Year" dropdown is a "Pin It" checkbox which is checked.

### Preview

Many windows have a button at the bottom titled 'Preview'. This button allows the user to generate a report for the information displayed on the screen. Clicking the downward arrow produces a dropdown menu with two options:

Preview – provides a report of the screen that is not customizable but can be formatted like any other report.

Customize - provides a report of the screen that can be customized and formatted like any other report.

The screenshot shows a window titled "Submit / Unsubmit Validation Data Display". It features several dropdown menus: "Budget Year" (AFY 2015), "Stage", and "Agency". There is also an "Events" dropdown and a "Summary Only" checkbox which is checked. A large empty text area occupies the center of the window. At the bottom, there are two columns of text boxes, one labeled "Reason". The bottom of the window contains a toolbar with buttons for "Preview", "Customize", "Program/SubProgram Summary", "Submit", and "Close". The "Preview" and "Customize" buttons are highlighted with a yellow rectangular box.