

TeamBudget

www.multco.us/budget/teambudget

Narrative & Performance Measures Training Handout Version 1.1

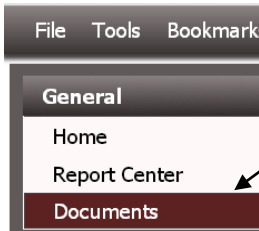
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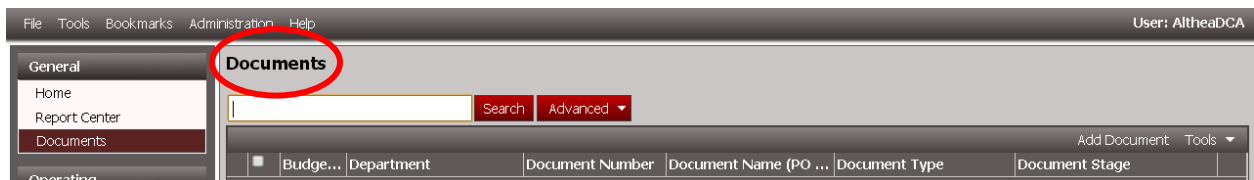
TeamBudget Narrative & Performance Measures

FIND/OPEN A PROGRAM OFFER

1. From the Home Screen, click on “Documents” in the left menu.

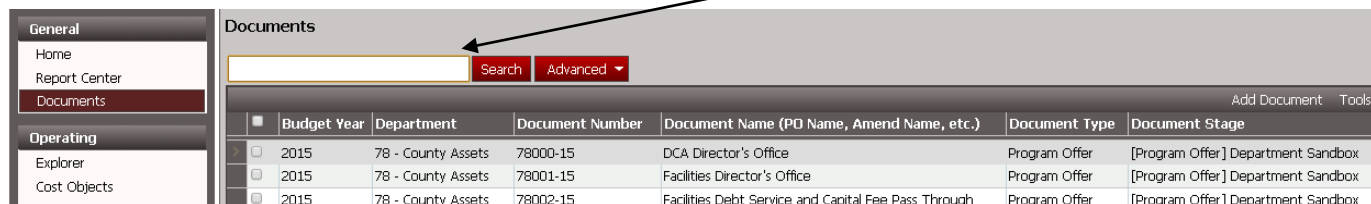


2. The appearance of your left-most TeamBudget tab will change to the Documents Screen.

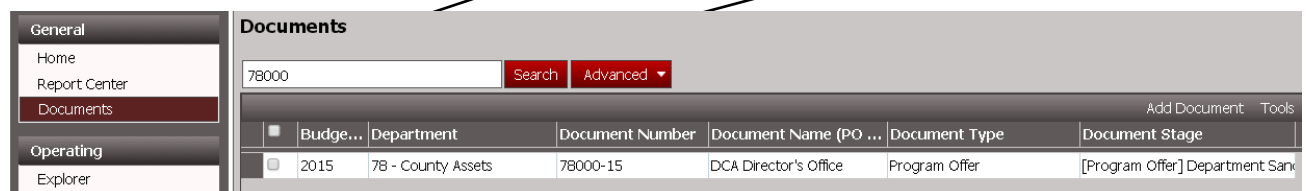


To Search:

1. To pull up all program offers for your department, click “Search” without typing anything.



2. To pull up a specific program offer, type the program offer number or relevant word(s) into the blank box – then click “Search.”



3. In the resulting grid, double-click the row of the document you want to view. The document will open either in a new tab or in a separate window.

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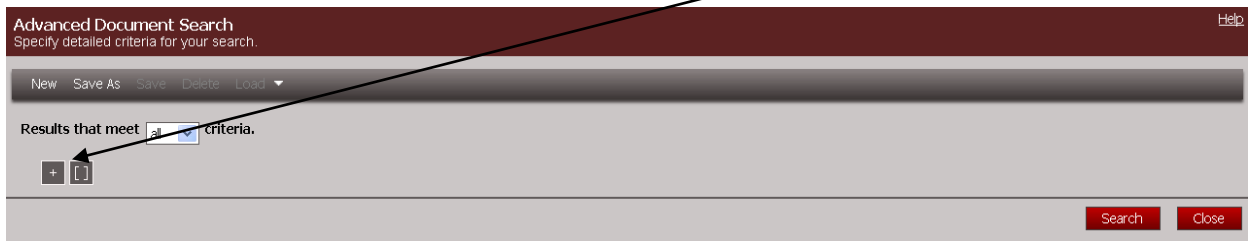
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Advanced Search

1. To conduct more complex searches, click “Advanced” and select “Advanced Search...” from the dropdown.

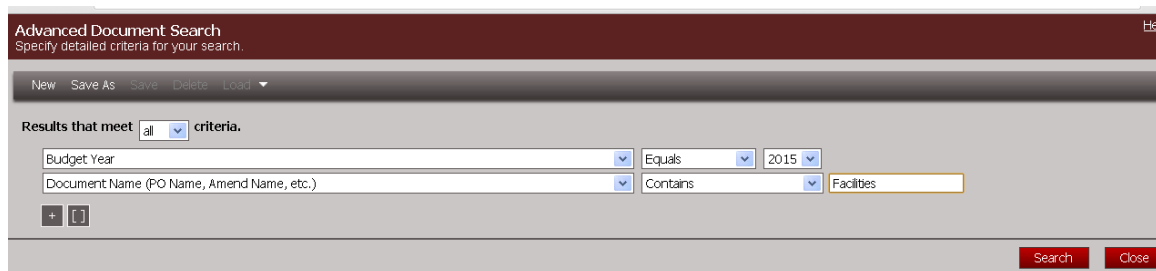


2. This will take you to the Advanced Document Search screen where you can create your advanced search. Click on the plus sign to add parameters.

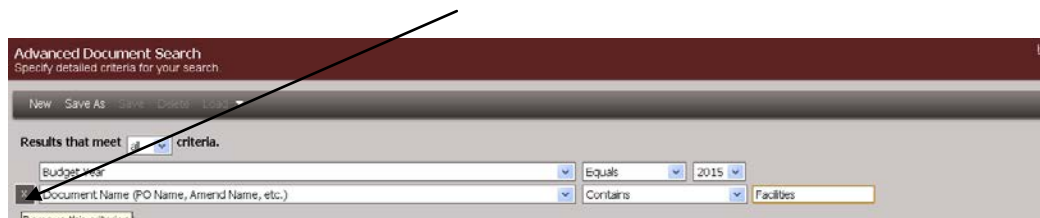


3. Click on “Search” to run your advanced search.

The example below will search for all FY 2015 documents with the word “Facilities” in their title.



Note: To delete a search parameter, hover your cursor to the left of it and click on the “x” that appears.

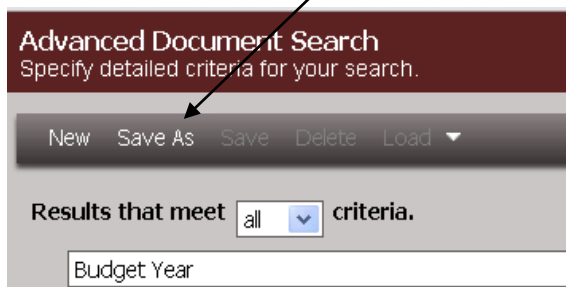


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To save your advanced search:

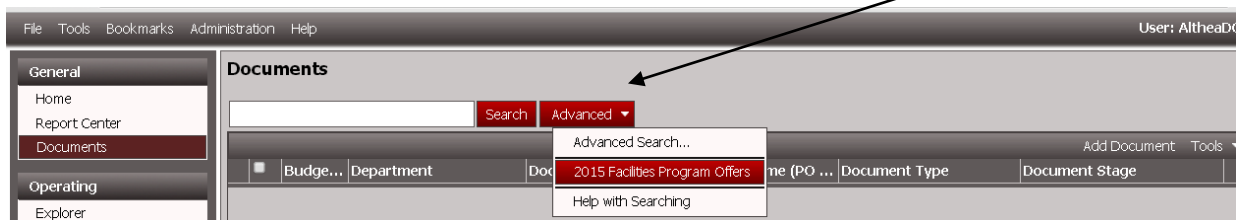
1. Open TeamBudget in Mozilla Firefox or Internet Explorer.¹ Create your advance search. Click on “Save As”.



2. Type a name for your search in the new screen, then click “Save”.



3. The next time you go to the Documents Screen and click on “Advanced,” your saved search will appear in the dropdown list.



Reminder: To open the program offer, double-click the row of the document you want to view.

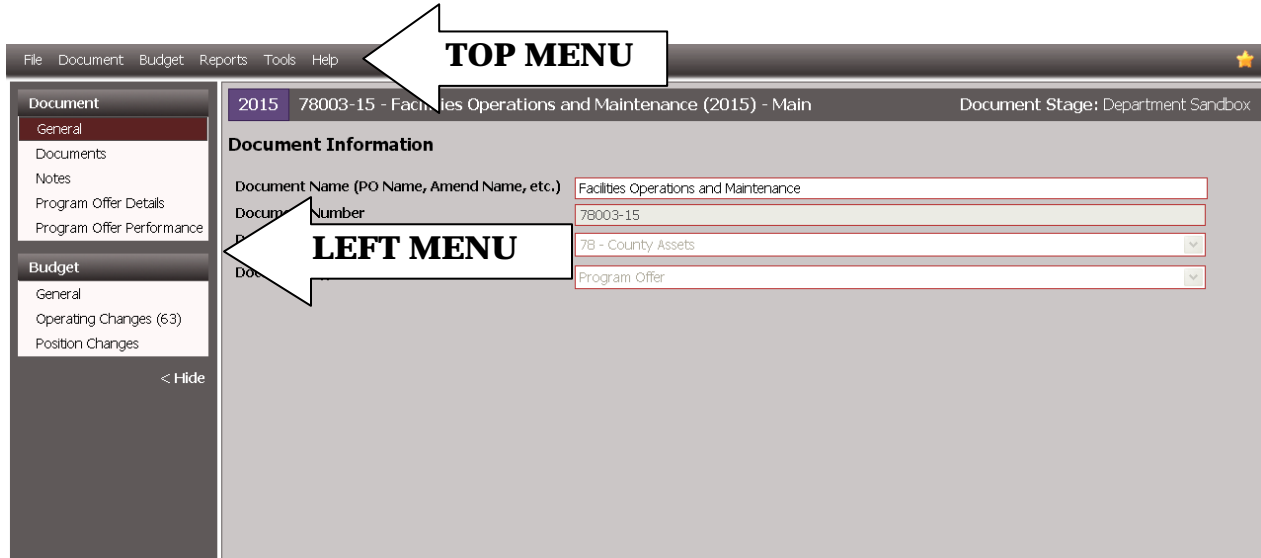
¹ The current version (2014) of TeamBudget does not save searches in Chrome. Once you save the advanced search in another browser (Firefox or Internet Explorer), you can view it in any browser.

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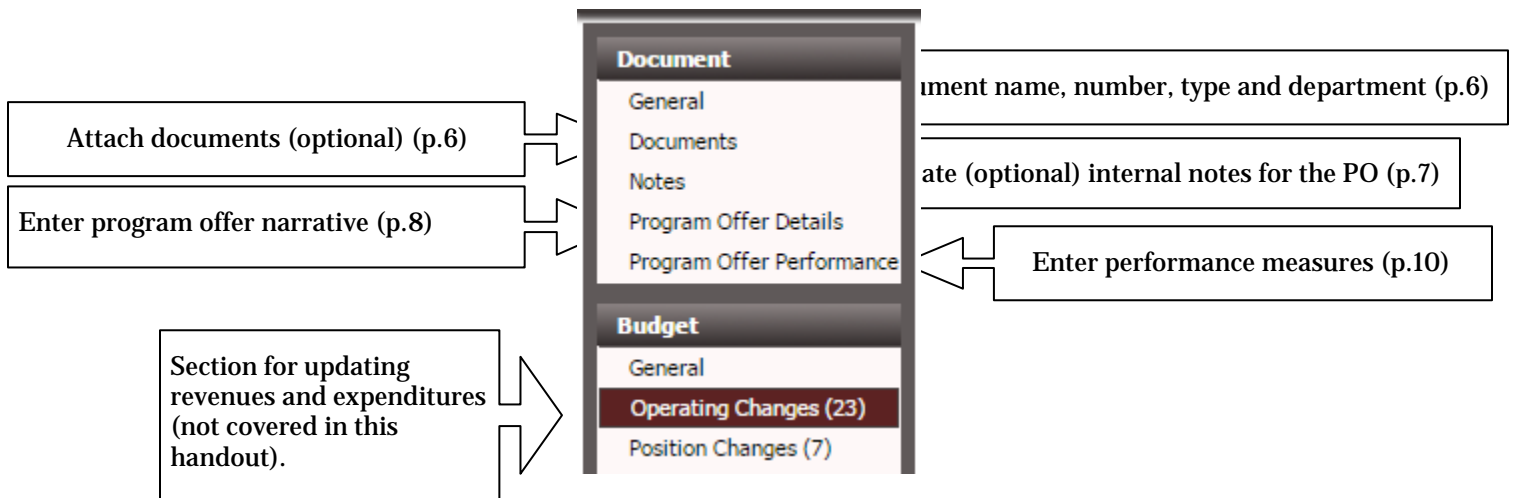
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PROGRAM OFFER SCREEN

To verify that you are on the program offer screen (as opposed to the home screen), check the left and top menus.



Left menu details

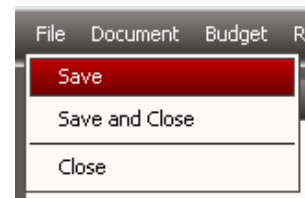


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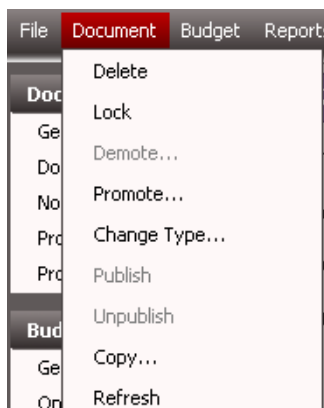
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Save or Delete a Program Offer

Select “File” from the left-hand side of the top menu on the program offer screen to Save, Save and Close, or Close program offer.



To delete, lock and perform other actions to the Program Offer document, select “Document” from the top menu.



Please note: Delete permanently deletes program offer (Note: Not recommended.)

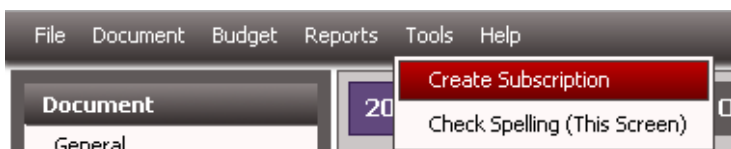
QUICK TIPS

- ✓ **Narrative preparers only have access to the “Delete” function.**

Set Email Alerts

You can set email alerts to be notified about changes to a Program Offer:

1. Click “Tools” -> “Create Subscription” in the program offer top menu.



2. A new window or tab will appear. In this new window or tab, you will tell the system when you would like to receive alerts.
3. In the “Inbox”, choose either “Anybody” or the name of a specific user from the dropdown menu using the arrow to the right of the box.

Subscribe to a Document

Perform actions when this Document changes.

Email me an Alert

Whenever: Anybody

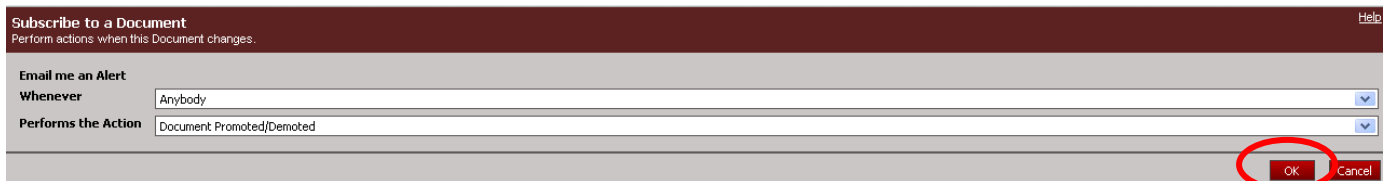
Performs the Action:

- Document Promoted/Demoted
- Document Modified
- Document Deleted
- Document Promoted/Demoted
- Budget Created
- Active Budget Changed
- Budget Modified
- Budget Deleted

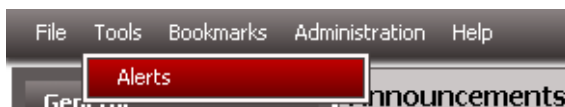
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4. In the “Performs the Action” box, choose the action for which you would like to be notified.
5. Click “Ok” after you have made your selections (in the example below, user will receive an email when the program offer is promoted/demoted).



If you leave the program offer and go to the TeamBudget Home Screen (the tab or window titled “TeamBudget”), you can see your saved alerts by clicking in the top menu – “Tools” -> “Alerts”.

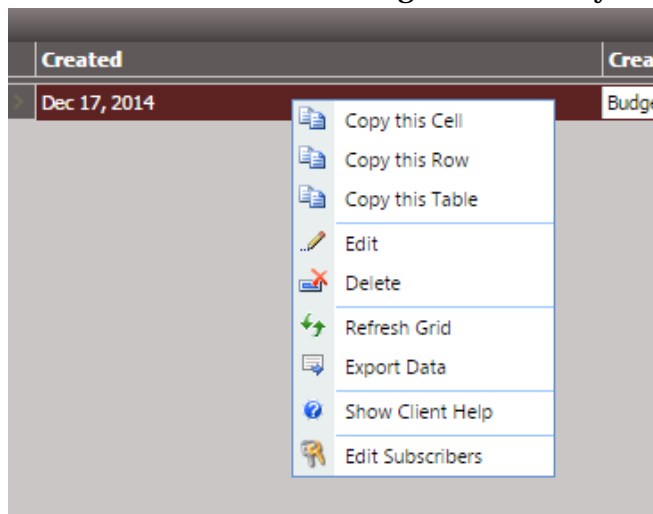


On the Alerts screen that opens, you can edit, delete, or disable an alert.

Alerts			
Show			
Created	Creator	Description	Enabled
Oct 01, 2013	Budget Office-Althea Gregory (DCA) (AltheaDCA)	"78003-15 - Facilities Operations and Maintenance (2015)": Document Promoted/Demoted	<input checked="" type="checkbox"/>

To disable, click on the box in the “Enabled” column to the right of the alert.

To edit or delete the alert, right click with your mouse on any of part of the alert in the grid.



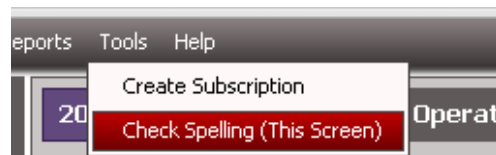
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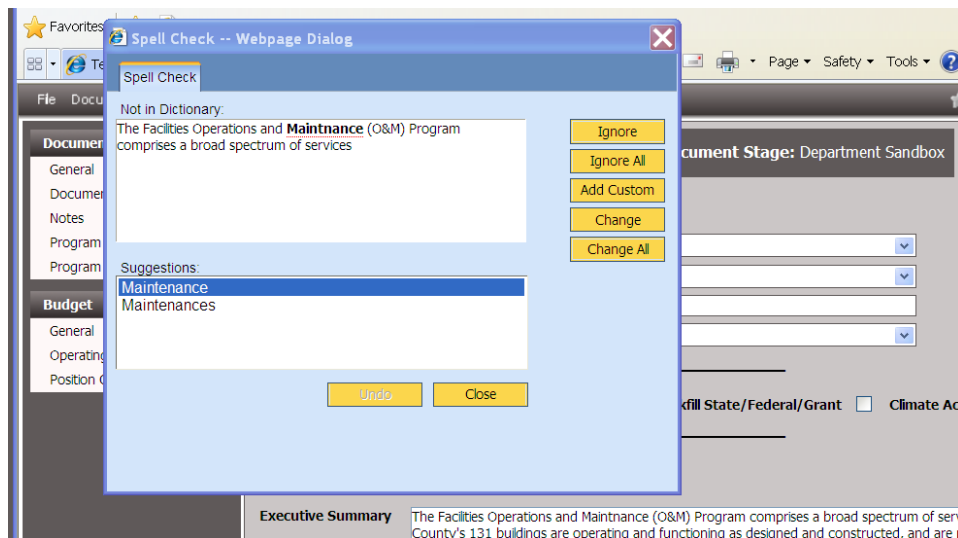
Spell Check

Available for Internet Explorer users (Chrome and Mozilla have in-browser spell checks).

1. Select “Tools: -> “Check Spelling (This Screen)” from program offer top menu.

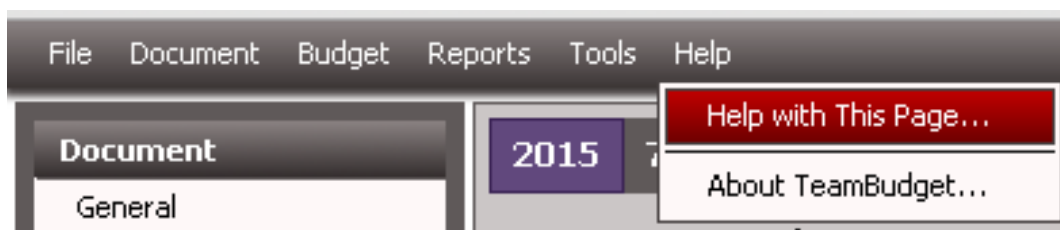


2. Follow directions on “Spell Check – Webpage Dialog” screen.



Access Help Menu

1. In top menu of current screen, select “Help” -> “Help with This Page...”



2. A new screen will appear with information provided by the Budget Office.

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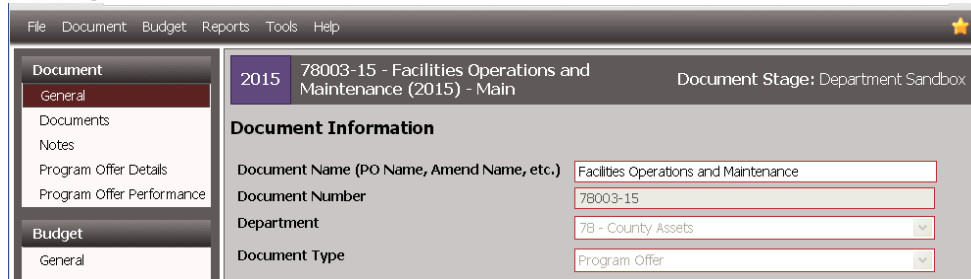
CREATING OR UPDATING NARRATIVE INFORMATION

View and Update General Document Information

Select “General” from the left-hand menu. Only the Document Name is editable by Department. Document Number can be changed by Budget Office, if necessary (contact your Business Manager).

QUICK TIPS

The TeamBudget color scheme may be different from year to year, so screenshots may appear slightly different than what you see on your screen.



Attach Documents

Select “Documents” from the left-hand menu. This is an optional tool for internal use only (attach materials such as spreadsheets, contracts, memos, additional details on performance measures, etc. – viewable by others in your department and the Central Budget Office, but will not be published.)

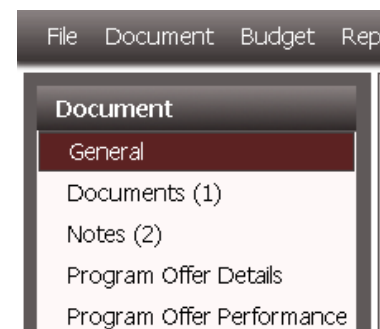


Add Notes

Select “Notes” from the left-hand menu. This is an optional tool for internal use only (viewable by others in your department and the Central Budget Office, but will not be published).



A number will appear next to “Documents” and/or “Notes” in the Program Offer Left Menu to show if something is attached (sample to the left has one document attached and two notes). Documents and Notes *do not display* in program offer report.



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Add/Edit Program Offer Details

On this screen, you will fill in the details of your program offer. This section will walk you through the areas to edit in the program offer.

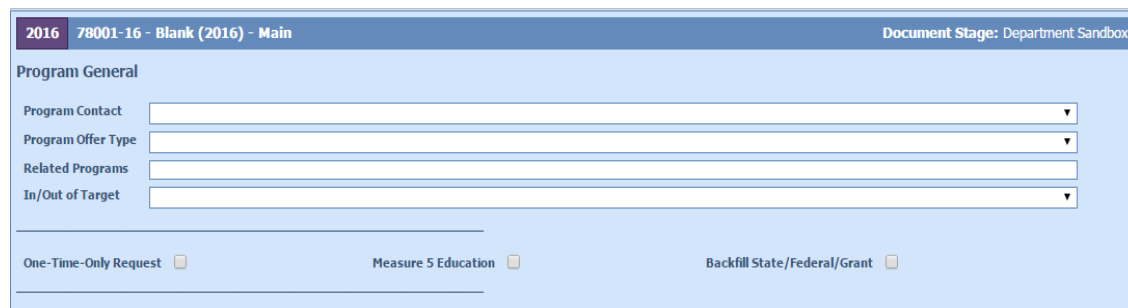
For details on what each field means and tips on content to include in your program offer, please refer to the “Preparing Your Budget Submission” section of the Budget Manual located on the [Budget Office website](#).

QUICK TIPS

- ✓ **Remember to save frequently.**
- ✓ **To save, choose File -> Save from the top menu bar.**

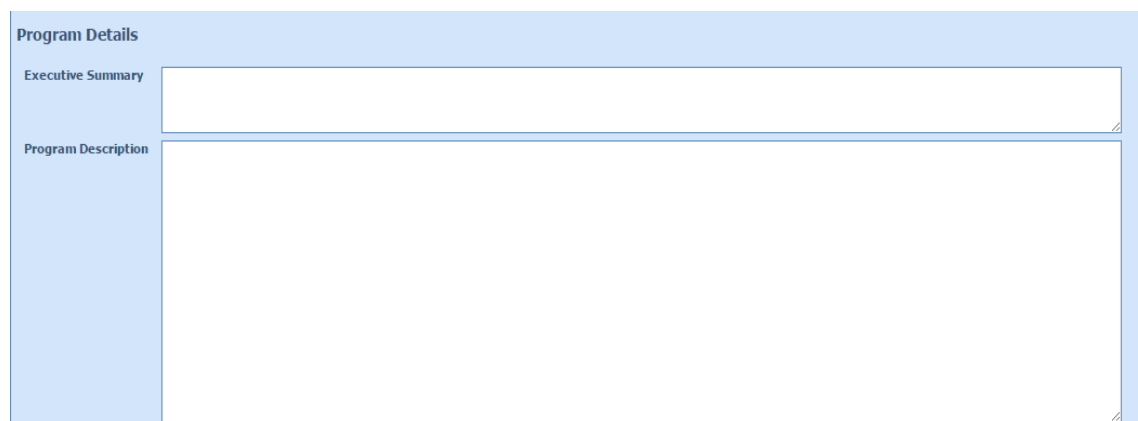
Program GeneralSection

To change “Program Contact”, choose from the dropdown menu and select the correct contact. If you need to add a new contact, tell your business manager. “Program Offer Type”, “Related Programs”, and “In/Out of Target” should all be filled out. Check “One-Time-Only Request”, “Measure 5 Education” and “Backfill State/Federal/Grant” only if applicable (reminder: Budget Manual contains details on all of these items).



Program Details Section

Information in this section will be on the first page of your program offer report in the final budget document. Although TeamBudget has no word count limit, the space in the program offer report is limited. Use the space allotted in TeamBudget as a guide – if your text goes on beyondthe box, it may not be visible. Use the “Program Offer Report Contextual” (details on p.XX) to ensure that your text displays properly.



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Program Details – Page 2

Information you enter in this section will appear on the second page of the program offer report in the final budget document.

QUICK TIPS

The Budget Manual (at <https://multco.us/budget>) contains explanations of all program offer terms and tips for content.

Program Details- Page 2	
Legal/Contractual Obligations	<div></div>
Explanation of Revenues	<div></div>
Last year this program was:	<div></div>
Program has Significantly Changed	<input type="checkbox"/>
Significant Program Changes	<div></div>

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Add/Edit Program Offer Performance Measures

Performance measures information you add here will appear on the first page of the program offer report in the final budget document. For help crafting performance measures, see the Performance Measure Appendix in the Budget Manual (www.multco.us/budget in the Budget Preparer's section).

2015	78023-15 - IT Public Safety Application Services (2015) - Main	Document Stage: Department Sandbox
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Performance Measure 1 - Output
 Measure Type: Output
 Measure:
 Previous Year Actual:
 Current Year Purchased:
 Current Year Estimate:
 Next Year Offer:

Performance Measure 2 - Outcome
 Measure Type: Outcome
 Measure:
 Previous Year Actual:
 Current Year Purchased:
 Current Year Estimate:
 Next Year Offer:

Performance Measure 3 - Optional
 Measure Type:
 Measure:
 Previous Year Actual:
 Current Year Purchased:
 Current Year Estimate:
 Next Year Offer:

Performance Measure 4 - Optional
 Measure Type:
 Measure:
 Previous Year Actual:
 Current Year Purchased:
 Current Year Estimate:
 Next Year Offer:

Performance Measure- Description
 Performance Measure Description:

You are required to add at least two performances measures: one output and one outcome.

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To create or update a performance measure:

1. Select the Measure Type. [You cannot change measure types for the first two measures. To change measure types for the optional measures (3 and 4), select the arrow to the right “Measure Type” and choose from the dropdown menu.]
2. Type in a title for your performance measure.
3. For each performance measure, enter the current year actual, current year purchased, current year estimate, and next year offer in the appropriate boxes.

QUICK TIPS

Hyperlinks for web addresses will automatically be added when the Program Offer is uploaded to the web as a PDF.

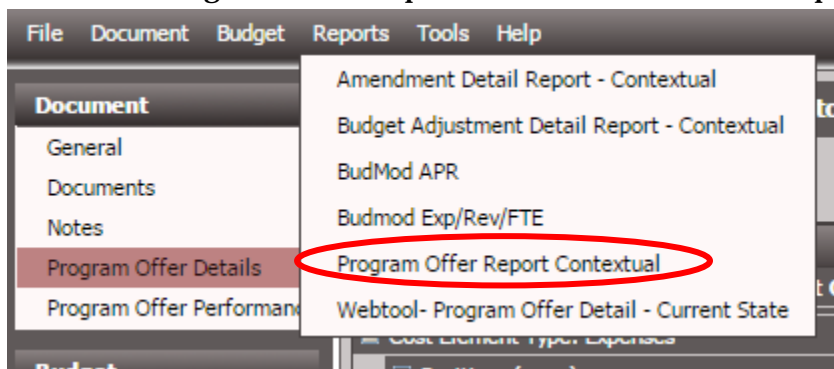
At the bottom of the screen, enter a description of your performance measures. You can also provide links related to documents posted on the web by typing in a web address – the web address will be converted to a hyperlink when the program offer report is converted to a PDF.

VIEW OR PRINT YOUR PROGRAM OFFER

Use the “Program Offer Report Contextual” report for you to use to verify that your program offer will be properly formatted when printed as part of the official County budget document.

You can view the Program Offer Report Contextual directly from the Program Offer screen.

1. Click on “Reports” in the top toolbar.
2. Select “Program Offer Report Contextual” from the Report top menu item.




3. A new tab or window will open with the report screen. In order to view the report, you will need to select report parameters (located to the left of the “Please Select Parameters” screen).

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QUICK TIPS

To view the parameters sidebar if not visible, click the

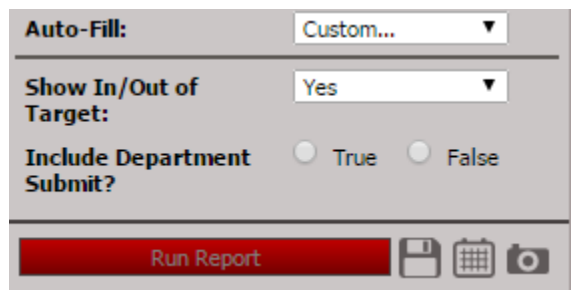
dark grey arrow () midway down the leftside of the report screen.



Select report parameters here.




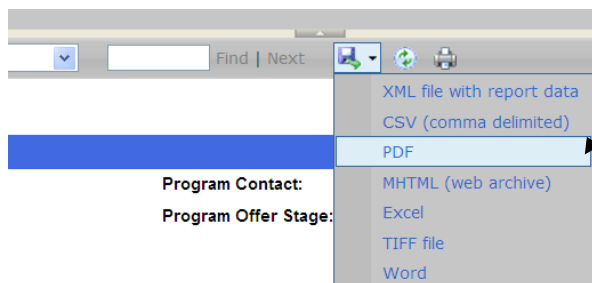
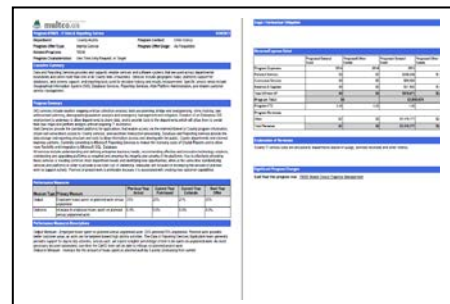
4. Select “Yes” or “No” for “Show In/Out of Target:” (this determines whether in/out of target will appear on the printed document).
5. Select “True” or “False” for “Include Department Submit?”



(Note: select “False” while building Department Requested budget – use true option to view the impact of changes to the budget in the Proposed, Adopted, or Revised stages of the Budget before submitting them to the Budget Office.²)

6. Click “Run Report.”

7. Click on floppy disc icon () and select “PDF” to see the program offer as it will appear online or in the printed budget book.

² Note: For details on the budget process and the stages of the budget, please see the Budget Manual, available at www.multco.us/budget.