



Office of Financial Management

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Activity Description
System Name

Activity Description For OFM & Agency Users

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Logging On

Open Microsoft Edge or Google Chrome and enter the login address <https://budgetlogon.ofm.wa.gov/Logon.aspx> in the address bar of the browser.

Enter your login ID and password to log into BudgetWorks. If you do not have access please use the [Security Request Form](#) to request it through the OFM Helpdesk at HereToHelp@ofm.wa.gov. The menu will only show the applications that the user has permission to access.

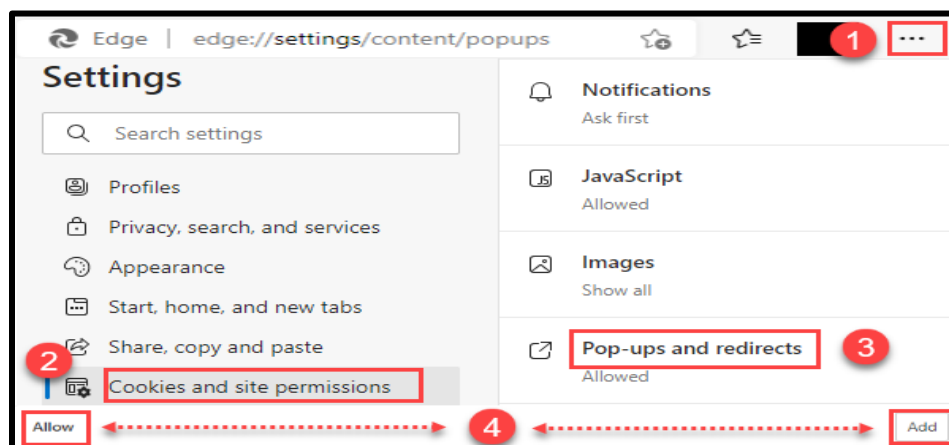


How to Disable Pop-Up Blockers

CBS has pop-up notifications and instructions, to enable pop-ups or verify pop-ups are allowed, please follow the steps below.

1. Beside the address bar, select the ... which will display a drop-down menu
2. Select **Settings**, this will open a new menu, on the left side select **Cookies and site permissions**
3. Scroll down to **Pop-ups and redirects**, **Allow**
4. Select **Add**, enter the site <https://budgetlogon.ofm.wa.gov> and click **Add** again.

In Edge:

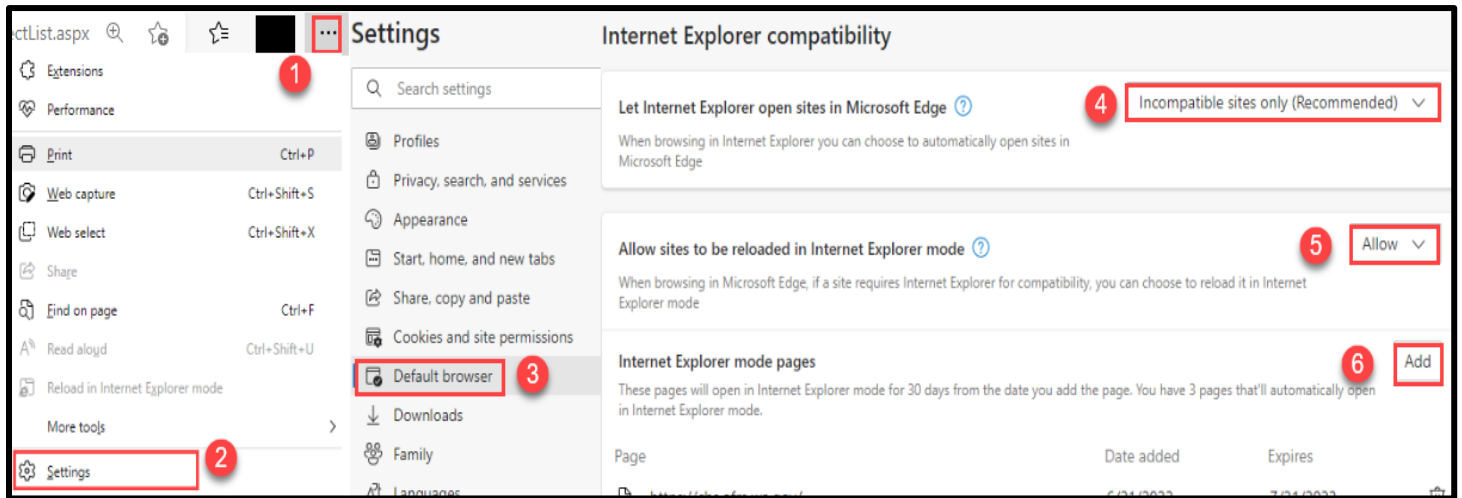


Note: Documents downloaded in Edge may appear in a new browser tab instead of a document reader such as Adobe or Excel and the following warning may appear.

Internet Explorer Compatibility Mode

For Edge:

1. Beside the address bar, select the ... which will display a drop-down menu
2. Select **Settings**, this will open a new menu, on the left side select **Default Browser**
3. Scroll down to **Internet Explorer Compatibility, Incompatible Sites Only**
4. Select **Allow**, enter the site **address**, and click **Add**



Once the steps are complete, the address bar should display the IE in the address bar.

Note: IE7 may vary depending on which IE version has been downloaded by the agency.



Getting to know Activity Descriptions

User Roles

Activity Descriptions are used by the Office of Financial Management (OFM) and state agencies. Each type of user has unique capabilities based on the role assigned. Role assignment is determined by OFM (for OFM roles only) or each agency (for agency roles only).

OFM Roles & Capabilities

- **Budget Operations:** Add activities, delete, or update locked/unlocked activities, and change a list order
- **Budget Analyst:** Add activities, delete, or update unlocked activities, and change a list order

Agency Roles & Capabilities

- **Budget Operations:** Update unlocked activities and change a list order
- **Budget Analyst:** Update unlocked activities and change a list order

Activity Description Menu

The screenshot shows the 'Activity Descriptions' interface. At the top right, a menu contains 'Enterprise Reporting', 'Contact', 'Help', and 'Close' (callout 1). Below this, a navigation bar includes 'Activity Management' and 'Activity Locks' (callout 2). The main content area features a 'Save' button (callout 7), a 'Biennium: 2023-25' dropdown (callout 3), and a '20 Records' indicator (callout 4). A toolbar with 'Add', 'Update', 'Reorder', 'Delete', 'Reset', 'Clear Sort', and 'Reset Default Sort' is visible (callout 5). The main table has columns for 'Select', 'List Order', 'Code', and 'Title' (callout 6). The table lists activities such as 'Accounting Services for Other Agencies', 'Administrative Activity', 'Forecasting and Research', 'Enterprise Financial Systems Support', 'Collective Bargaining', 'Governor's Budget Development', 'Governor's Office for Regulatory Innovation and Assistance (ORIA)', 'Personal Service and Client Service Contracts', 'Risk Management', 'K-20 Education Network', 'Statewide Accounting Policies and Reporting', 'Statewide Policy Development for Governor's Office', 'Serve Washington', 'Rules and Appeals', 'Results Washington', 'State Facilities Oversight', and 'Enterprise Classification and Compensation'.

1. Outside Options

- **Enterprise Reporting:** Find Activity, budget, and other reports
- **Contact:** Contact information for the OFM Help Desk
- **Help:** Opens the Budget Works Library
- **Close:** Logs the user out and closes Activity Descriptions

2. Activity Management & Activity Locks

- **Activity Management:** Main Screen (Default; shown above) Add, update, delete, or change list order.
- **Activity Locks (OFM Only):** Lock Activities based on Agency and Biennium

3. Biennium user selected

4. Total number of Records in the Activity List

5. Functions (based on permissions)

- **Add:** Add an Activity (OFM Only)

- **Update:** Update an Activity
 - **Reorder:** Reorder the Activities in the list, to keep this view click save.
 - **Delete:** Delete an Activity (OFM Only)
 - **Reset:** Set the list back to the last saved view
 - **Clear Sort:** Clear sort for all columns
 - **Reset Default Sort:** Sets the list of Activities back to the default view
6. **Activity List Column Names (and actions)**
- **Select:** Select an Activity for action
 - **List Order:** Reorder the list numerically
 - **Activity Code:** 4-character, alpha-numerical unique identifier
 - **Activity Title:** Title of the Activity
7. **Save:** save changes

Add a New Activity

OFM Budget Analysts can add activities for an agency. Contact the agency's [assigned budget analyst](#) for assistance. If a new activity is needed continue with this section to provide the information needed by budget analysts. If not, skip this section and go to [Update an Activity](#) for more agency actions.

Select the **Add** icon from the **Activity Management** screen, this opens **Manage Activity**, complete the **Agency Details** screen (default). A red * indicates a required field

Select	List Order ▲1	Code	Title
<input checked="" type="checkbox"/>	1	A001	Accounting Services for Other Agencies

1. * **Code:** 4-character, alpha-numeric unique identifier
2. * **Title:** Use up to 100 characters for a unique title.
3. * **Description:** Description of the Activity; Activities are things an organization does to accomplish its goals and objectives. An activity consumes resources and produces a product or service for customers that leads to results that those customers want. OFM does not restrict the amount of text in an activity description. However, a best practice should be to begin the activity description with a clear, plain-English statement of what the activity does before expanding on objectives or operational details.
4. **Related Statewide Results:** Create or select a statewide result related to the activity
 - **Filter Data**
 - **Reset Default Filter**
 - **Display Supported Only:** Uncheck and **Apply Filter** to see all results

Activity Management > Manage Activity

Budget Session: 2023-25 Agency: []

Save Reset Cancel

Biennium: 2023-25 | Activity: [No Code] - [No Title]

Go to Section: Activity Details Activity Inventory Questions

Activity Details

Agency

List Order


[New]

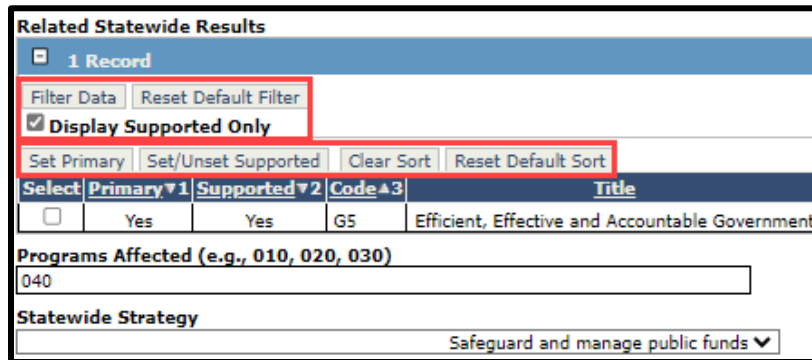
Code

The code cannot have an O or I

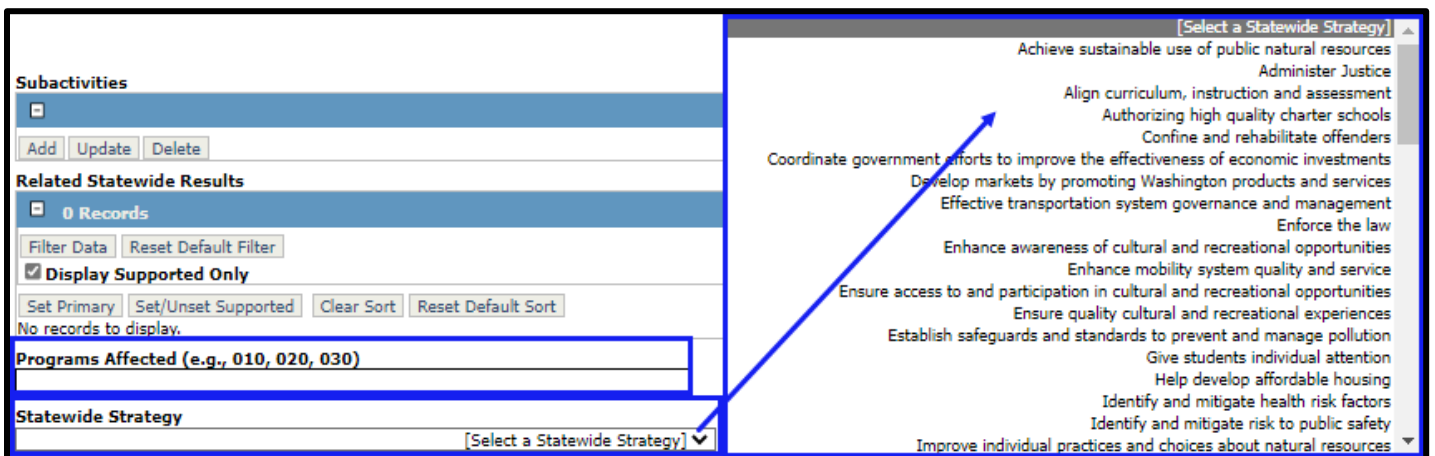
Title

Description

- **Set Primary:** Check the selected statewide result and click Set primary
 - **Set/Unset Supported:** Toggle whether selected statewide results are supported
 - **Clear Sort**
 - **Reset Default Sort**
-  **Note:** One primary Related Statewide Result is required

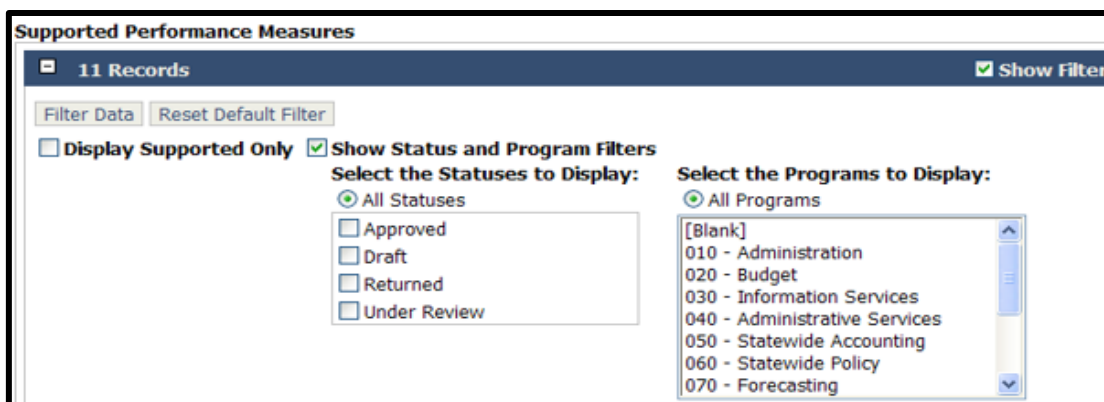


5. **Programs Affected:** Add any affected programs
6. ***Statewide Strategy:** Choose one option per Related Statewide Result listed in the dropdown



7. Supported Performance Measures

- **Display supported Only**
- **Show Status and Program Filters:** Select specified criteria to narrow down results.
- **Set/Unset Supported:** Choose whether the performance measure is supported or not



- **View:** Select one or more performance measures on the grid and click View. This opens the Results through Performance Management System to the Performance Measure Details screen as read-only.

- Clear Sort
- Reset Default Sort

Set/Unset Supported		View	Clear Sort	Reset Default Sort	
Select	Supported ▾ 1	Code ▲ 2	Title	Status	Program
<input type="checkbox"/>	Yes	000211	Helpdesk problem resolution	Approved	030

Note: If the performance measure in the “Results through Performance Management (RPM)” system has both an approved and draft status for the same performance measure the only status that will appear in this grid is the draft performance measure. If the Approved checkbox is selected, the Approved performance measure that has both statuses of draft and approved will not appear. However, All performance measures usage types (Budget, Internal, GMAP, and Economic Stimulus) for the agency will appear in the Supported Performance Measures grid.

8. Expected Results: Every activity should have an Expected Results Statement. Results are what policy makers, citizens, customers, and stakeholders want government to accomplish. A good results statement should communicate outcomes that take place because of the activity and suggest ways that an agency could measure success for this work.

A simple “so-that” logic model may be useful for helping come up with pertinent results statements. (For information on logic models, see OFM’s [Performance Measure Guide](#).)

Expected Results
<input type="text"/>
Agency Priority
<input type="text"/>
OFM Priority
<input type="text"/>

9. Agency Priority: Optional numeric priority of 1 - 40 or not recommended

10. OFM Priority: Optional numeric priority of 1 - 40 or not recommended

11. Save, Reset, or Cancel: Save, reset activity, or cancel which will clear the screen and navigate to the previous screen. Though it is the last step, the icons are at towards the top, below Budget Session / Agency.

Update an Activity

Unlocked Activities can be updated by most users, locked (grayed out) Activities and fields can be updated by OFM Budget Operations/Analysts and Agency Budget Operations/Analysts. Detailed content instructions in the [OFM Activity Guide](#) should be considered while updating agency activities

Note: Activity updates are subject to OFM review and approval. OFM will consider change requests to add, combine, split, or update activity descriptions prior to the recast due date. Please consult with the Agency’s [OFM Budget Analyst](#) prior to making updates.

- Update:** Check the Select box next to the Activity to edit and click the update tab. A lock will appear next to the fields that are not editable after saving a new activity. For step instructions please see the section above.
- Save, Reset, or Cancel:** Save, reset fields, or cancel which will clear the screen and navigate to the previous screen. If required fields are not completed, saving is paused, and a message will indicate there are missing required fields.

Code
A002

Title
Administrative Activity

Description
The administrative activity represents the OFM Director's Office. Staff includes the director, deputy director, legislative liaison, communications director and legal counsel.

Subactivities
0 Records

Related Statewide Results
1 Record

Programs Affected (e.g., 010, 020, 030)
010

Statewide Strategy
Provide data, information, and analysis to support decision-making

Supported Performance Measures
1 Record

Expected Results
Overall strategic and administrative leadership for the agency and all its divisions on behalf of the Governor.

Agency Priority

OFM Priority
0

Reorder Activity Descriptions

Reorder can be used to reorder lists and save them for future use. Reorder can also be used when there are several changes made to list order and verification is done prior to saving the results. Reports will use the order as displayed.

1. Select the List Order drop-down for the activity to update.
2. Select the numerical sequence for the order

Note: There can be more than one list in the reorder by starting with 1 again and continuing the sequences.

Activity Descriptions

Activity Management | POG Priority | Activity Management | Activity Locks

Activity Management

Budget Session: 2023-25 | Agency: 105 - Financial Mgmt

Add | Update | Reorder | Delete | Reset | Clear Sort | Reset Default Sort

Select	List Order	Code	Title
<input type="checkbox"/>	1	A001	Accounting Services for Other Agencies
<input type="checkbox"/>	2	A002	Administrative Activity
<input type="checkbox"/>	3	A004	Forecasting and Research
<input type="checkbox"/>	4	A005	Enterprise Financial Systems Support
<input type="checkbox"/>	5	A006	Collective Bargaining
<input type="checkbox"/>	1	A008	Governor's Budget Development
<input type="checkbox"/>	2	A009	Governor's Office for Regulatory Innovation and Assistance (ORIA)
<input type="checkbox"/>	3	A010	Personal Service and Client Service Contracts
<input type="checkbox"/>	4	A012	Risk Management
<input type="checkbox"/>	1	A410	K-20 Education Network
<input type="checkbox"/>	2	A013	Statewide Accounting Policies and Reporting
<input type="checkbox"/>	3	A015	Statewide Policy Development for Governor's Office
<input type="checkbox"/>	4	A016	Serve Washington
<input type="checkbox"/>	5	A119	Rules and Appeals
<input type="checkbox"/>	6	A018	Results Washington
<input type="checkbox"/>	1	A019	State Facilities Oversight
<input type="checkbox"/>	2	A112	Enterprise Classification and Compensation

There are multiple #1s indicating the beginning of a new list

Deleting an Activity

Note: An Activity cannot be deleted if it is tied to a decision package of the same biennium. Deleting an Activity is only available to assigned OFM users and should be done before the activities are tied to any decision packages. If a request is made to delete an Activity that is tied to one or more decision packages, a message will populate asking if the user wants to view a report. The report will list all associated decision packages for the biennium being worked. The message will also ask to verify the request to delete.

Activity Descriptions

POG Priority | Activity Management | Activity Locks

Activity Management

Budget Session: 2023-25 Agency: 105 - Financial Mgmt

Add Update Reorder **Delete** Reset Clear Sort Reset Default Sort

Select	List Order	Code	Title
<input checked="" type="checkbox"/>	1	A001	Accounting Services for Other Agencies
<input type="checkbox"/>	2	A002	Administrative Activity
<input type="checkbox"/>	3	A004	Forecasting and Research
<input type="checkbox"/>	4	A005	Enterprise Financial Systems Support
<input type="checkbox"/>	5	A006	Collective Bargaining

activitydescription.ofm.wa.gov says

One or more of the selected records are associated with at least one Decision Package, and can not be deleted.

Do you want to view a report of the associated records?

Print Close

Activity Associated Decision Packages for Biennium 2019-21, Agency 105

Code	Title	System	Version	Code	Decision Package Code	Decision Package Title
A006	Collective Bargaining	WinSum	36		9Z	Recast to Activity

Additional Information – Help Desk



For additional information about TALS – AMR please contact the OFM Help Desk at HereToHelp@ofm.wa.gov or call 360.407.9100