



Additional Information – Help Desk

For additional information about Capitol Budget System (CBS) contact the OFM Help Desk.



HereToHelp@ofm.wa.gov 360.407.9100

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### General Questions

#### What is the Capital Budget System (CBS)?

- ✓ CBS allows for the online development of the agency's capital budget request. It supports multiple budget versions so agencies can easily develop various scenarios. A project estimation tool is available within the application that calculates the necessary costs for completing a capital project including automatic calculations for inflation factors, taxes, etc. Security levels are built in to ensure that only users with the appropriate level of authority have the ability to make changes after records are locked.

#### How do I get access to CBS?

- ✓ You can gain access by filling out a Security Request Form located at <https://budgetlogon.ofm.wa.gov/library/security.pdf>.

#### How can I see who in my agency has CBS access and what their security levels are?

- ✓ A report is available if you have access to the Budget Reports within the Reporting Portal. Steps to get report:
  1. Select the Budget Reports Folder
  2. Then select Agency Access Reports
  3. Double click on the report "List Budget Login ID" to schedule the report. It will default to your agency. You can use the "Sort List By" to sort by "Budget System" and then click Schedule.
  4. The report will show the status and will auto refresh until it has successfully completed.
  5. Double click on the line for the report and it will open. You can then click on CBS from the Group Tree. This will take you to the CBS section where you can view your agency users for each security level.

#### How can I add or delete CBS users or change their security level for my agency?

- ✓ Complete and submit a BudgetWorks Security Request Form and mail it to [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov).

#### Are there preferred browser types or compatibility settings that I need to know about?

- ✓ CBS works best with current versions of Microsoft Internet Explorer. Follow your agency standard processes for browser settings/preferences. For example, you may need to use your browser tools to adjust pop-up blocker settings.

#### How can I disable pop-up blockers?

- ✓ In order for CBS to work, you must disable your pop-up blocker for this site. This is a two-step process that you need to do from Internet Explorer:
  1. Select Tools, Pop-up Blocker, TURN OFF POP-UP BLOCKER
  2. Select Tools, Compatibility View Settings. Once in the Compatibility View Setting you will see \*.wa.gov in the "Add this Website". If you have administrative rights to your machine, you will be able to click the "ADD" icon. (Note: If this is greyed out, you will need to work with your internal IT staff.)

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### Help and Resources

#### Does CBS include a user manual?

- ✓ CBS Job Aids replaced the CBS Tutorial in May 2019. Every effort was made to ensure the CBS Job Aids and OFM Capital Budget Instructions match. In cases where a discrepancy exists, the OFM Capital Instructions take precedence.



### **Does CBS include access to online help?**

- ✓ Yes. The Help link in the upper right corner will navigate you to the BudgetWorks System Help & Tutorials page. You can also access the page directly through the following link: <https://budgetlogon.ofm.wa.gov/library/default.htm>

### **Is CBS training available?**

- ✓ Sign up for CBS training in the Learning Management System. A PowerPoint presentation is also available on the OFM site under IT Systems.

### **Where are the CBS budget instructions?**

- ✓ The CBS instructions are available from the OFM website ([ofm.wa.gov](http://ofm.wa.gov)).

### **Is there a distribution list for news and updates about budget modernization activities?**

- ✓ Sign-up for news and updates via GovDelivery subscriptions on the OFM website. For example, subscribe to Budget Systems Modernization via <https://public.govdelivery.com/accounts/WAGOV/subscriber/topics>.

### **Is there a distribution list for news and updates about CBS?**

- ✓ Sign-up for news and updates via GovDelivery subscriptions on the OFM website. For example, subscribe to Capital Budget System under Budget, Legislative & Executive Applications via <https://public.govdelivery.com/accounts/WAGOV/subscriber/topics>.

### **Who do I contact if I need help using CBS?**

Contact the OFM Help Desk at [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov) or 360-407-9100.

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## **Log In / Log Out / Change Password**

### **What is the BudgetWorks website?**

- ✓ The new BudgetWorks site replaces the old Budget Portfolio Systems (BPS) and uses the same web address <https://budgetlogon.ofm.wa.gov/Logon.aspx>. BudgetWorks includes quick links to budget-related information, budget systems and support, password change request, and a form to request access for new users.

### **What is my CBS log in ID/password?**

- ✓ Use the quick links on BudgetWorks (<https://budgetlogon.ofm.wa.gov/Logon.aspx>). The system will send information and current password rules to your email address. If you do not receive an email, check your junk email settings to ensure you have not blocked email from 'no-reply' or 'OFM'.

### **How do I change my password? What if I forgot my log in ID/Password?**

- ✓ Use the Forgot your Login ID or Password quick link on BudgetWorks (<https://budgetlogon.ofm.wa.gov/Logon.aspx>). If you request a new password, the system will send information and current password rules to your email address. If you do not receive an email, check your junk email settings to ensure you have not blocked email from 'no-reply' or 'OFM'.

### **How do I get my account unlocked?**

- ✓ Use the Forgot your Login ID or Password quick link on BudgetWorks (<https://budgetlogon.ofm.wa.gov/Logon.aspx>). If you need help, contact the OFM Help Desk at [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov) or 360-407-9100.

### **How do I log out from CBS?**

- ✓ Select Log Out near the top right of the CBS page.



**Why did my session timeout?**

- ✓ Users may receive 'Your session has timed out' or 'The website cannot display the page' when CBS can no longer authenticate your account. If this occurs, close the internet browser then launch a new internet browser and navigate to the BudgetWorks logon page.

**Navigation**

**What tabs are available in CBS?**

- ✓ System features and data views depend on the CBS security access you have been granted by your agency.

Tab →		Ten-Year View		Cost Estimate	Capital FTEs	Versions	Facility Users	Reports	Settings
Your Agency Role ↓	Projects		Reappropriations						
Agency Budget Operations	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Agency Budget Edit Access	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes
Agency Division	Yes	Yes	No	Yes	No	Yes	No	Yes	Yes
Agency Facility	Yes	Yes	No	Yes	No	No	No	Yes	Yes

**Projects**

**What is the Projects tab?**

- ✓ The Project List screen provides budget personnel a means to view a list of projects and subprojects that they are considering to include in a budget. This list and its fields will be read-only and provide the ability to link to the project detail data for established projects. From the Project List screen users have the ability to enter project detail information for projects to be considered in the next budget.

**What rules apply to project titles?**

- ✓ All users can change project titles until it is locked by the system when a released project is accepted by the reviewer. A locked project title can reside in an unlocked agency version and a locked project title can exist for an unlocked project.

Only Agency Operations can update non-locked project titles that are submitted by lower level (Facility/Division user) in versions controlled by the Agency Budget Group. A project must be accepted by a higher level prior to the title being locked at the lower level. For a project submitted but in Pending or Review status the Project title will not be locked, but will appear in a read-only view.

A lock icon will appear next to the Project Title on the Project Detail tab when the project title is locked. A Subproject(s) title will retain the same attributes as the parent (i.e. when the parent project title is locked, all associated subprojects titles will be locked). When a parent's project title is updateable, so will the subprojects.

Agencies cannot change titles after the project has been released to OFM. OFM Operations user can change a locked title for non-enacted projects. For any non-enacted projects submitted to OFM, OFM Operations can change the project title upon an agency's request.

When a project is copied: 1) If the project title is locked in the 'original' project and is copied within the same version, a new project number is assigned and the project title is not locked. 2) If the project title is locked in the 'original' project and is copied to a new version, the same project number is retained and the project title is locked.



If a subproject is being created, make sure the title is entered prior to selecting a parent project. If a parent project is selected that has a locked project title, any associated subprojects will also have locked project titles. The tiered effect of the project title lock will not allow for the subprojects title to be editable when the parent project has a locked title. A project title is locked when a project has been submitted to an individual with higher security level than the submitter, and the project has been accepted by the reviewer.

### **What rules apply to subprojects?**

- ✓ The parent project is based upon the biennium and version of the subproject being created.
- ✓ Only draft projects will display in the list of available projects for selection to be parent projects.
- ✓ A project class of Grant-Pass Through cannot have subprojects and will not display in the list available to be parent projects.

### **How do I enter a statewide project on the Additional Info tab of the Project Details?**

- ✓ The location requirements are different based on the Project Class selection. For a Parent Project the location for County, City and Legislative district should be statewide or left blank, and each Subproject should have the specific location information.

### **Is it possible to run an edit check before releasing?**

- ✓ Yes, you can run a pre-release edit check at any point, by selecting the project(s) from the Projects tab and clicking Prerelease. All the edits for your security level will be displayed as of that point in time.

### **How do I select a Second Supplemental project for Reappropriation?**

- ✓ Since Second Supplemental versions are created in unison with Regular, there is the need to create the Second Supplemental request then include that request as a reappropriation in the ensuing regular budget. From the Ten-Year View, select the **Set/Unset Valid for S2 Reappropriation** button in the Second Supplemental version on any project that you desire to request a reappropriation on in the Regular ensuing version.

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## **Ten-Year View**

### **What is the 10 Year View tab?**

- ✓ This screen will provide tools to identify costs for a project and the ability to look at the funding as a whole. Users can view and update funding, round project amounts, slide dollars out or in, and view agency totals.

### **What is the “User Defined” field on the Ten Year View tab?**

- ✓ The “User Defined” field is available to agencies to enter whatever information helps you to further define their projects.

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## **Reappropriations**

### **What is the Reappropriations tab?**

- ✓ The Reappropriation tab provides the ability to select projects and their funding from a previous enacted budget session to be carried forward. Available projects will display in a list similar to the Project List and will be populated by user selected biennium, budget type, and version.

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## **Cost Estimates**

### **What is the Cost Estimates tab?**

- ✓ The Cost Estimate List screen provides budget personnel a means to estimate a project’s cost. This will include the ability to estimate for buildings, non-building and infrastructure projects.

### **Where can I find cost estimating resources?**



## Frequently Asked Questions (FAQs) Capital Budget System (CBS)

- ✓ You can go to the Office of Financial Management (OFM) website for the Capital Budget. Some of the topics available on this site are: Capital Budget Instructions, Capital Plan Instructions, A/E Fee Guidelines, A/E Fee Schedule, and Pre-design Manual.

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### Capital FTEs

#### What is the Capital FTE tab?

- ✓ The Capital FTE tab provides the ability to enter FTE amounts and dollars for a capital version. This screen will also display the previous biennium's capital FTE enacted amounts by job classification title and dollar amounts by account.

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### Versions

#### What is the Versions tab?

- ✓ This screen will provide the ability to: create, round, copy, refresh the Date As Of for the most current reappropriation data including actuals, lock/unlock, and delete versions. All projects and their associated cost estimates are contained within a version for a biennium, and budget type (Regular, Supplemental 1, and Supplemental 2.)

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### Facility Users

#### What is the Facility Users tab?

- ✓ This screen will provide the ability to assign all of a facility user's projects to another facility user. It will also provide a means to copy all of a facility user's projects to a version that you have access to.

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### Reports

#### What is the Reports tab?

- ✓ This screen will provide the ability to run the CBS001, CBS002, CBS003, and CBS004 reports from within the application with your desired criteria. This is in addition to being able to run the relative reports from their current place within specific tabs in the system.

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### Settings

#### What is the Settings tab?

- ✓ The Settings tab allows you to set the report preference when running reports from within the application. Setting to .PDF, .DOC, or .XLS will automatically run the report in that format when ran through the system.

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