

# AZ Budget Database Training

## AZ Database General Background Knowledge – Module 2

### Slide: Welcome Screen (1)



### Slide: Instructor slide (2) - Mark



My name is Mark Harner. I am a budget analyst at the Arizona State Office. As part of my duties, I deal with all aspects of the budget planning and execution process. Also, I assist database users on a daily basis fielding questions and providing assistance. Additionally I provide budget-related training on a quarterly basis via Online Webex Sessions.

## Slide: Lesson Objectives (5) - Patrick



By the end of this lesson, employees will be able to demonstrate a general knowledge of the basic functions of the database. They will be able to explain what the database is and why it is important; give examples of the benefits; identify who is required to use it; describe where the database is located and when it should be used and describe the physical makeup of the database. The user will also be able to discuss the task sheet, why it is important, who uses it, when it is used and what it looks like. They will be able to identify the types of reports available in the database and give examples of some of its future capabilities. This lesson is important because you will gain the knowledge and the tools necessary to obtain access and login to the database and ultimately begin to create and access the vast amount of data available to you as a database user. Mark, how will we go about achieving these objectives?

**Slide: Main Point #1 - Budget Database General Knowledge (7) - Patrick**



**Slide: (8) Relational Database Definition - Mark**



There is a really good description of a relational database to be found at Wikipedia. If you are interested, please feel free to go there and take a look. There are several pages which delve deep into the process and my geek side found it very interesting, but other than understanding the inner workings of database management, it would be for informational purposes only.

## Slide: (10) Why is it Important? - Patrick



There are several reasons that make using the budget tool important. By incorporating data from FBMS and PMDS into the Budget Tool, we can query ONE data base to get reports that show and compare how we plan operations and labor, how and where we are spending our dollars, and how these expenditures fit into our Workload Targets. It creates a One-Stop-Shopping experience!! This incorporation also ensures that when reports are run, the data used looks the same from district-to-district. It also creates statewide transparency by allowing any user to see what is planned, spent and completed in other offices. Next, we will discuss the benefits of using the database.

**Slide: (12) Who is Required to Use it? - Patrick**



All employees are required to take this training. Not all employees will be required to use the Database, although all employees will be encouraged to do so!! In fact, once you see how easy this Database is to use – you’re going to really want to use this tool. Anybody that has a role in the planning, tracking, managing or providing guidance in how we get our work done, will be required to know how, and actually use the AZ Budget Data Base Tool. This direction will be incorporated into a State Wide IM.

**Slide: (13) When Will it be Used? – Mark**



Basically, the database will be utilized year-round as it is no longer just a Budget Planning tool. It will now be used for planning the budget, but now it can also be used for tracking the budget throughout the Fiscal Year. Any BLM employee will be able to pull reports from the database including their own labor comparisons between planned and spent. This information can be used to ensure that the proper coding is used on current Time & Attendance sheets.

**Slide: (14) Where is it Located? - Mark**



The database itself is housed on a BLM Server at the National Operations Center (NOC) and can be accessed thru any BLM network internet browser. The actual link can be typed in and saved as a favorite for future use. Another option is to go to the BLM Arizona home page and find the Budget & Performance section with a link to the Budget home page. Once there, simply click



## Slide: (20) PE Table - Mark



The next table we will take a brief look at is the Program Element table. It cannot be overstated the PE table is the key to the entire database. By keying the PE code to a variety of other tables, we can tie planned funding and actual costs directly to the BLM Strategic Matrix, Arizona Themes and Strategies, and other components. This is important to help Arizona to tell its story of required funding. Soon we will also be able to tie all of this information to PMDS Workload Measures and even the office's resource plans. Perhaps you can start to see just how powerful the use of this relational database can be.

## Slide: (21) Themes and Strategies - Mark



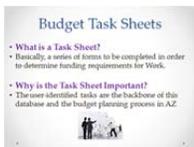
This slide is just a quick example of how using the PE as a key creates relationships between the tables for determining a vast amount of information simply by selecting a single PE on a Task Sheet. All of the legwork is completed for the user through the support tables already populated in the database.

## Slide: (24) Storefront – Front Door of the Database - Patrick



Alright, now that we know all about the back of the store, let's check out the store front. This is the part that is important to you and I in the field. It is also where we are going to do all our planning, tracking, comparing and reports shopping.

## Slide: (25) Task Sheets – What & Why - Patrick



The Task Sheets are where we enter our planning data. They are a series of forms that allow us to determine funding requirements for work to be completed. They also help us plan how many units we will accomplish and the workforce we need to complete them. The Task Sheets identify the user, the individuals that will be involved in the work and can be spread over multiple years. They are the “Backbone of the database and budget planning process.

## Slide: (27) Task Sheets – What Does it Look Like - Mark



As discussed, much of the previous data covered so far in this session is already maintained in the database by administrators in the budget office. Now we can discuss some specifics of how the user accesses all this data in order to create a budget plan based on individual task sheets.

However, since we will be devoting a full session online now to the task sheet process, this will only be an overview of the format and capabilities. It must be emphasized that data entered into these forms **by the user** directly rolls up from every office in Arizona to generate the budget plan for the entire state. Through this single form, the user is able to plan all anticipated costs for a given task and when combined with other tasks within an office, generates that office's budget plan.

As you can see on this slide, there were currently 1850 tasks for the State as of the recording of this session. Each of these tasks has taken into account a number of factors including Labor, Travel, Supplies and Vehicle Usage necessary to complete that task for the current fiscal year.

## Slide: (28) Task Sheet - Summary - Patrick



Each Task Sheet provides the option for any or all of 6 distinct elements to be defined and funded for this particular task. Again, we will only be providing an overview of these during today's session. There is much more to come in future sessions. Please take a moment to read thru this slide and feel free to pause if you need more time. The first element is the Main Task tab.

**Slide: (31) Task Sheet – Ops Tab - Mark**



Here the user can select a mandatory Minor Category and optional Budget Object Class (BOC) from the pull-down list and plan specific costs that will be required to complete the given task. Once a minor category is selected, only those BOCs related to that category are available to the user. The example on the slide shows telephones selected and only the 233 BOCs are available. As in all of these screens, there is an Optional Comments block available for the user to provide additional information regarding each specific cost. All of the requirements listed will be tallied up for a total Ops cost of this task. Next is the GSA Vehicles tab.

**Slide: (32) Task Sheet – GSA Vehicle Tab - Mark**



Here the user can select specific GSA vehicles from a pull-down list and plan estimated mileages and portions of the monthly lease rate that will be required to complete the given task. As with other tabs on the Task Sheet, the first option of the pull-down list will be vehicles belonging to the user's office or district or division. If the user is planning to use other vehicles (outside his or her office) for this task, a single click will make all of the state vehicles available on that pull-down list. All of the requirements listed will be calculated based on current lease and mileage rates for that vehicle and tallied up for a total GSA Vehicle cost of this task. Finally it is the Interior Owned Vehicles tab.

### Slide: (35) Budget Reports – Types - Patrick



There are currently two major types (or Main Categories) of reports in the database. They are the standard Budget Planning reports, plus many new reports which came over from the Budget Cruncher portion of the database. Information regarding the implementation of Budget Cruncher functionality will be addressed in the 4<sup>th</sup> video of this first set of training modules. Both types of reports have many sub-categories of reports covering the areas of Allocations, Operations, Labor and much more. All will be discussed in great detail during a future session.

### Slide: (36) Budget Reports – Multi-Year Functionality - Patrick



A huge advance made with this recent system upgrade is the ability for users to generate Multi-Year reports. Data can now be compared from various fiscal years in a single report. This feature has far-reaching value for many planning purposes as well as telling our story.

### Slide: (37) Budget Reports – Selection Criteria - Patrick



A key advantage held over from previous versions of the database is the ability of users to narrow their search parameters by selecting only the criteria that is relevant to their reporting needs. While the available fields may vary by report, the general structure and operation of this screen remains the same for all reports.

**Slide: (41) Database Access – Data Entry - Mark**



The final level determines whether the user has access to enter and modify Tasks or ONLY pull reports. All users have access to pull reports for any office within the State.

**Slide: (42) Access Request - Mark**



To request database access, simply email the budget shop and include your office and the level of access required. We ask that the email go thru your supervisor just to maintain control of the applicable levels of access. It is expected that there will soon be training required for database access. This will simply include these online computer based training sessions to familiarize new users. Once the request is approved, there will be an automated email generated which will contain all of the login information.

**Slide: Main Point #3 – Future Capabilities of the Budget Database (43) - Patrick**



Now that you have the basics of the planning side of the current data base, let's look at the third main discussion of this training, what will be added over the rest of the year. We will be releasing two more Modules this fiscal year - the Performance Management Data System (PMDS) and incorporation of Resource Management Plans into the Database.

## Slide: (46) Conclusion/Objectives - Patrick



In conclusion, as mentioned earlier, the objectives of this lesson was for each employee to be explain what the database is and why it is important; give examples of the benefits; identify who is required to use it; describe where the database is located and when it should be used and describe the physical makeup of the database. Employees will be able to discuss the task sheet, why it is important, who uses it, when it is used and what it looks like. Employees will be able to identify the types of reports available in the database and give examples of some of its future capabilities.

In order to reach that objective, I introduced the basics concepts involved in a relational database and discussed the behind the scenes Support Tables and Lists which are administratively maintained by the Budget Shop. We briefly covered various aspects of the Database Sheets and Reports in an effort to familiarize new users in the functions, but also indicated that these will be covered in far greater depth in future sessions.

## Slide: (47) Key Takeaways - Mark



Before I conclude this lesson, I'd like to go over a few key takeaways. 1) The Arizona Budget Database is a powerful tool used to formulate and track the budget within all levels of BLM Arizona. 2) This process utilizes Task Sheets to initiate and modify funding requirements from the field offices right up through the state office. 3) Unfunded Needs can be easily identified and addressed within the workings of the database. 4) There is an easy to use Reporting system which is available to analyze budget requirements and plans at each level of the state.