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Activity Description User Interface
Activity Descriptions is used by both OFM and Agencies. There are 4 user types:

- **OFM Budget Operations** – Can Add, Delete, Update locked activities and change list order.
- **OFM Budget Analyst** – Can Add, Delete unlocked activities, Update unlocked activities and change list order
- **Agency Budget Operation** – Can Update unlocked activities and change list order
- **Agency Analyst** – Can Update unlocked activities and change list order

There is one version of activity descriptions, per biennium for both OFM and BDS users. Only OFM can add or delete activities.

Please refer to the Operating Budget Instructions for more guidance on activity descriptions and performance measures.
2. **Activity Management and Activity Locks**
   
   **Activity Management** – Is displayed on both the Activity Description list order screen and the Activity Detail screen
   
   **Activity Locks** – This tab is only available to OFM Budget Operation. OFM Budget Operations users can click on this tab; they will go to the Activity Locks applications for the biennium and agency they are working in.

3. **Users Name** and **Agency Title**
4. **Biennium** the user is logged into
5. **Number of Activities** in the Activity list
6. **Function tabs:**
   
   - **Add** – Only OFM users can add activities
   - **Update** – All users can update unlocked activities. OFM Budget Operation users can update locked activities
   - **Reorder** - after a user creates a list order, they can select the Reorder tab to verify the activities are in the expected order. **Reorder does not save** the list order. The user must select the Save button (see #11).
   - **Delete** – Only OFM users can delete and activity. The user can select a single activity or multiple activities to delete
   - **Reset** – this will set the list order back to the state at the last save
   - **Clear Sort** – This will clear the sort for all columns
   - **Reset Default Sort** – This will bring the screen back to the default sort. The default sort is List Order.

7. **Selection Box** – the user can click in the box to select or deselect an activity
8. **List Order** - By default, the activity list order is in ascending. The user has the ability to change the list order.
9. **Activity Code** – The activity code is a 4 character, alpha-numeric code. The code must be unique.
10. **Activity Title** – The activity title will allow up to 100 characters. The title must be unique.
11. **Save** – The Save tab will save changes.
Lesson 2 – Reorder Activity Descriptions

The user has the ability to reorder the Activity lists. **Note:** The reorder does not save the new order. Once the list is in the expected order the user must select the Save button to save. **Note:** You can also change the list order and click on the Save button without using the Reorder. The reorder is mainly used when the user has several changes to the list order, but wants to verify before saving. **Note:** All users can change and save the activity list order. This list order is the order the activities will appear in reports.

1. To perform the reorder function, first select the List Order drop down for the activity you want to change; **select the number** that you want for the activity order. **Note:** If you want activity code A005 to be List Order number one, click on the drop down and select number one. Notice that there are now two activities with the number one (A002 and A005 – see example b). When you select the Reorder tab, activity A005 will become list order one and activity A002 will become activity list order two. If this is what you are expecting, select the Save button in order to save changes.
2. Select the Reorder tab. Note: As per the example in step #1, now A005 will be List Order number one and the previous List Order number one is now List Order number two and all other activities will move down one number. Note: The List Order will be reordered, but not saved.

3. Select the Save button to save the new List Order.

Lesson 3 – Add a new Activity

Only OFM users have the ability to add new activities. When an agency user needs to add an activity, contact your OFM Analyst and they can add the activity to the system.

Only an OFM user can add an activity. Select the Add button from the Activity Management screen and the Manage Activity screen will open.

![Activity Management Screen](image_url)
1. After changes have been made, the user has the option to **Save, Reset or Cancel**. On the **Save**, required fields must meet the requirements. If not, the user will receive a message stating the problem.

2. **List Order** – This field is disabled and will auto fill on the save. The list order for this activity will be the last in the list.

3. **Code** – This is a required field, must be 4 alphanumeric characters and must be unique

4. **Title** - This is a required field, must be unique and allows up to 100 characters

5. **Description** – This is a required field with unlimited number of characters

6. **Related Statewide Results** – Having a Primary Statewide Result is required. The user can set the Primary and Supported Statewide Result area here. By default the “Display Supported Only” checkbox will be checked. Since this is a new activity and the Statewide Result has not been selected yet, you will not see the list.

   ![Related Statewide Results](image)

   a. **Display Supported Only** – To see all Statewide Results, uncheck the “Displayed Supported Only” checkbox and click on the “Apply Filter” button. You can now see the entire list of Statewide Results. To see only Primary and Supported Statewide Results only, check the checkbox and click on the “Apply Filter” button.

   b. **Apply Filter** – Each time you check or uncheck “Display Supported Only”, you will need to click on “Apply Filter”, to change the filter.

   c. **Set Primary** – To set the Primary Statewide Result, check the checkbox and click on the Set Primary button. **Having a Primary Statewide Result is required.**

   d. **Set/Unset Supported** – To set or unset supported Statewide Results; check or uncheck the checkbox and then click on the Set/Unset Supported button. You can have multiple supported Statewide Results.

   e. **Show Filter** – When the Show Filter is uncheck the Display Supported Only section is collapsed. When the Show Filter is checked the Display Supported Only section is available

   f. **+ and –** Opens and closes the Related Statewide Results

7. **Programs Affected** – This is an optional field. Agencies can enter program information in this field.

8. **Statewide Strategy** – This is a required field. Click on the drop down box, the user can select one Statewide Strategy.
9. **Supported Performance Measures** – This is an optional field. By default the Display Supported only check box is checked.

To see the supported performance measures, uncheck “Display Supported Only” check box and click on Apply Filter.

To set or unset supported performance measure, check or uncheck the check box for the performance measure and then click the Set/Unset Supported tab.

The user may want to narrow the viewable performance measure list by certain statuses or programs. This can be accomplished by performing the following steps:
Check the Show Status and Program Filters check box and click on Apply Filter. By default, All Statuses and All Programs are selected. You can narrow the viewable performance measures in the list by selecting certain statuses or program and then click on Apply Filter. 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 you select the Approved checkbox, the Approved performance measure that has both statuses of draft and approved will not appear. Note: All performance measures usage types (Budget, Internal, GMAP and Economic Stimulas) for the agency will appear in the Supported Performance Measures grid.
The user may also want to view performance measure details. This can be accomplished by selecting one or more performance measures from the Supported Performance Measures grid and then select the View tab. The RPM system will open up into the Performance Measure detail screen as read-only. The user can scroll through the performance measures that were selected from the Supported Performance Measure grid.

10. **Expected Results** – This field is an optional field. You can have up to 100 characters of text.

11. **Agency Priority** – This is an optional field. The agency can prioritize their activities as needed. Currently this field is not being used.

12. **OFM Priority** – This is an optional field. OFM can prioritize activities as needed. Currently this field is not being used.
Lesson 4 – Update an Activity

All users (OFM Budget Operations, OFM Budget Analyst, Agency Budget Operation and Agency Edit Access users) can update activity fields that are unlocked.

- Only OFM Budget Operations users can update locked activities fields.
- OFM Budget Analysts, please contact OFM Budget Operations to either unlock the activity fields or have OFM Budget Operations make the updates.
- Agency Budget Operation and Agency Edit Access, please work with your OFM Budget Analyst to unlock the activity so that you can update the activity or give OFM Budget Analyst your update information and they can update the activity fields for you.

Select the Update button from the Activity Management screen and the Manage Activity screen will open.  

Note: The only fields that are updateable to users, are the fields that do not have a lock indicator.  

Note: OFM Budget Operations users can update locked fields.
1. After changes have been made, the user has the option to Save, Reset or Cancel. On the Save, required fields must meet the requirements. If not, the user will receive a message stating the problem.

2. **Scrolling** – The user can scroll through activities. They can scroll to the first, last or one activity at a time.

3. **List Order** – This field is auto filled. To make changes to the list order, you will need to go to the Activity Management screen to make changes.

4. **Code** – This field is auto filled and cannot be changed

5. **Title** - This is a required field, must be unique and allows up to 100 characters

6. **Description** – This is a required field with unlimited number of characters

7. **Related Statewide Results** – Having a Primary Statewide Result is required. The user can set the Primary and Supported Statewide Result area here. By default the “Display Supported Only” checkbox will be checked.

   a. **Display Supported Only** – To see all Statewide Results, uncheck the “Displayed Supported Only” checkbox and click on the “Apply Filter” button. You can now see the entire list of Statewide Results. To see only Primary and Supported Statewide Results only, check the checkbox and click on the “Apply Filter” button.

   b. **Apply Filter** – Each time you check or uncheck “Display Supported Only”, you will need click on “Apply Filter”, to change the filter.

   c. **Set Primary** – To set the Primary Statewide Result, check the checkbox and click on the Set Primary button. **Having a Primary Statewide Result is required.**

   d. **Set/Unset Supported** – To set or unset Supported, check or uncheck the checkbox and then click on the Set/Unset Supported button. You can have multiple supported Statewide Results.

   e. **Show Filter** – When the Show Filter is uncheck the Display Supported Only section is collapsed. When the Show Filter is checked the Display Supported Only section is available.

   f. **+ and –** Opens and closes the Related Statewide Results

8. **Programs Affected** – This is an optional field. Agencies can enter program information in this field.

9. **Statewide Strategy** – This is a required field. Click on the drop down box, the user can select one Statewide Strategy.
10. **Supported Performance Measures** – This is an optional field. By default the Display Supported only check box is checked. To see the supported performance measures, uncheck “Display Supported Only” check box and click on Apply Filter.

To see the supported performance measures, uncheck “Display Supported Only” check box and click on Apply Filter.

To set or unset supported performance measure, check or uncheck the check box for the performance measure and then click the Set/Unset Supported tab.

The user may want to narrow the viewable performance measure list by certain status or programs. This can be accomplished by performing the following steps:
Check the Show Status and Program Filters check box and click on Apply Filter. By default, All Statuses and All Programs are selected. You can narrow the viewable performance measures in the list by selecting certain statuses or program and then click on Apply Filter. 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 you select the Approved checkbox, the Approved performance measure that has both statuses of draft and approved will not appear. Note: All performance measures usage types (Budget, Internal, GMAP and Economic Stimulas) for the agency will appear in the Supported Performance Measures grid.
The user may also want to view performance measure details. This can be accomplished by selecting one or more performance measures from the Supported Performance Measures grid and then select the View tab. The RPM system will open up into the Performance Measure detail screen as read-only. The user can scroll through the performance measures that were selected from the Supported Performance Measure grid.

11. **Expected Results** – This field is an optional field. You can have up to 100 characters of text.
12. **Agency Priority** – This is an optional field. The agency can prioritize their activities as needed. Currently this field is not being used.
13. **OFM Priority** – This is an optional field. OFM can prioritize activities as needed. Currently this field is not being used.

### Lesson 4 – Delete An Activity

Only OFM users have the ability to delete an activity. Agency users please contact your OFM Analyst when you want to delete an activity. **Note:** An activity can not be deleted when the activity is associated to a BDS decision package or Winsum decision package for the biennium the user is working in. When the user attempts to delete an activity that is associated to a decision packet, the user will receive a message asking if they want to view a report that will identify the associated decision packages for the biennium you are working in. The best time to delete activities are before decision packages are associated to activities.

1. Select an activity by clicking in the Select check box, and then select the **Delete** button.
   a. When decision packages are associated to an activity, the user will receive the following message:
   b. When there are no decision packages associated to the selected activity, the OFM user can delete the activity.
2. Select the OK button and the following report will open. Note: There is one version of activities per biennium. Note: This report identifies the activity code, activity title, system, version code, decision package code and decision package title for the biennium that is associated to the selected activity. Note: The best time to delete an activity is before decision packages are associated to an activity. Note: The other option is to unassociate decision packages for the selected activity. Note: This report can be printed.
TUTORIAL EVALUATION

This tutorial was helpful in getting me through the business process
1 2 3 4 5

This tutorial was helpful in getting me through the system technical processes
1 2 3 4 5

Additional training was not necessary given the structure and content of this tutorial
1 2 3 4 5

The steps of the tutorial successfully anticipated the special needs of my agency
1 2 3 4 5

The tutorial was clear, concise, and easy to understand
1 2 3 4 5

I did not need to request additional assistance to complete the business process
1 2 3 4 5

It was easy to find answers to my specific question in this tutorial
1 2 3 4 5

The best feature of this tutorial is: __________________________________________

The worst feature of this tutorial is: __________________________________________

I found errors (grammar, punctuation, spelling, conceptual, technical) on the following pages:

____________________________________________________________________________

Other comments: _____________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

Thank you for taking the time to complete this survey. This information will be used in revising this tutorial as well as developing future BASS tutorials. Please remit to:

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