

AGENCY BPM – FAQs

QUICK STEPS

Question	Answer/Solution
Why can't I access any menu options in BPM?	Security access has not been properly set up in BPM . Contact the Agency Security Designee to request the appropriate security access.
Why can't I see my planning center in My Planning Workspace?	Security access has not been properly set up in BPM . Contact the Agency Security Designee to request the appropriate security access.
I submitted my budget as a Preparer but can't find it as a Reviewer – why?	Security access does not include the Reviewer role. Contact the Agency Security Designee to request the appropriate security access.
How do I unlock a planning center?	When a working version of a scenario/activity is open for editing, that working version is automatically locked. Other people at the agency cannot edit a locked working version. To unlock the scenario/activity after making edits, simply click the Unlock button for that version line item on the My Planning Workspace page.
What do I do if I have an issue when trying to submit my budget to OBM?	Check targets to make sure they have been accurately entered and also make sure all Preparer planning centers have been submitted.
How do I resolve a target issue?	Reject the budget request back to the Preparer to reduce the budget request below the target amount. Or, if appropriate, contact OBM Budget Analyst to request an increase to the target (per guidelines in OBM Operating Budget Guidance).
What do I do if I think my reports are not accurate?	Log a CRM ticket with the BI team, using the OAKS helpdesk: Oaks.helpdesk@das.ohio.gov .
How do I request a new ChartField or Tree or changes to existing ChartFields or Trees?	Refer to the FIN Process Manual for instructions.
How can I validate what ChartFields are available for me to use?	Run the GL-00075 report in BI.
How do I revise or delete ChartField strings?	New functionality in My Planning Workspace allows users to either delete the ChartField string or revise the ChartFields all on the same screen.

<p>What is the budget portal and how is it used with BPM?</p>	<p>This is the narrative portion of the budget request. Refer to the OBM Budget Guidance for instructions.</p>
<p>What is the language portal and how is it used with BPM?</p>	<p>Either permanent or temporary Ohio Revised Code language requests. Refer to the Budget Guidance for instructions.</p>
<p>Do I need to submit all scenarios/planning centers, even if we are not requesting anything?</p>	<p>Yes, all planning centers must be submitted even if no budget request is being made.</p>
<p>What do I do about rows with \$0?</p>	<p>Either leave and submit as \$0 or delete the item if you do not want it to show up on reports.</p>
<p>What do I do when a fund balance is negative in the fund balance calculation report in BPM?</p>	<p>Ohio is constitutionally required to have a balance budget. Agency needs to reduce the operating request or if appropriate verify the REV and TRF estimates have been entered accurately.</p>
<p>How do I track a bill through the legislature?</p>	<p>BPM-0007 is the Variance Analysis report and is updated with all of the budget versions as they go through the legislature. Agencies can run report and compare their requested budget to the OBM recommendations or to the legislative versions.</p>