

Reference Guide

Budget Detail Form – Department Overview

Use the "Department Overview" tab to detail your department's mission, objectives, vision, current initiatives, and to present proposals in narrative form.

1 **Department Name:** Enter the name without using "department," "division," or "office." For example, "Office of Budget and Evaluation" becomes "Budget and Evaluation." This ensures consistency throughout the form.

Department Head: Input the name of the current department head.

Department Description and Objective: Provide a comprehensive description of your department. Include background information, duties and responsibilities, objectives, and your mission and vision. Highlight how your department's objectives align with county-wide strategic goals.

Current Initiatives: List all initiatives your department is currently pursuing.

Proposal Narrative: Reflect on all requests made in the Budget Detail Form and articulate them in a narrative format. This narrative should demonstrate alignment with county objectives and detail the priority and urgency of your requests.

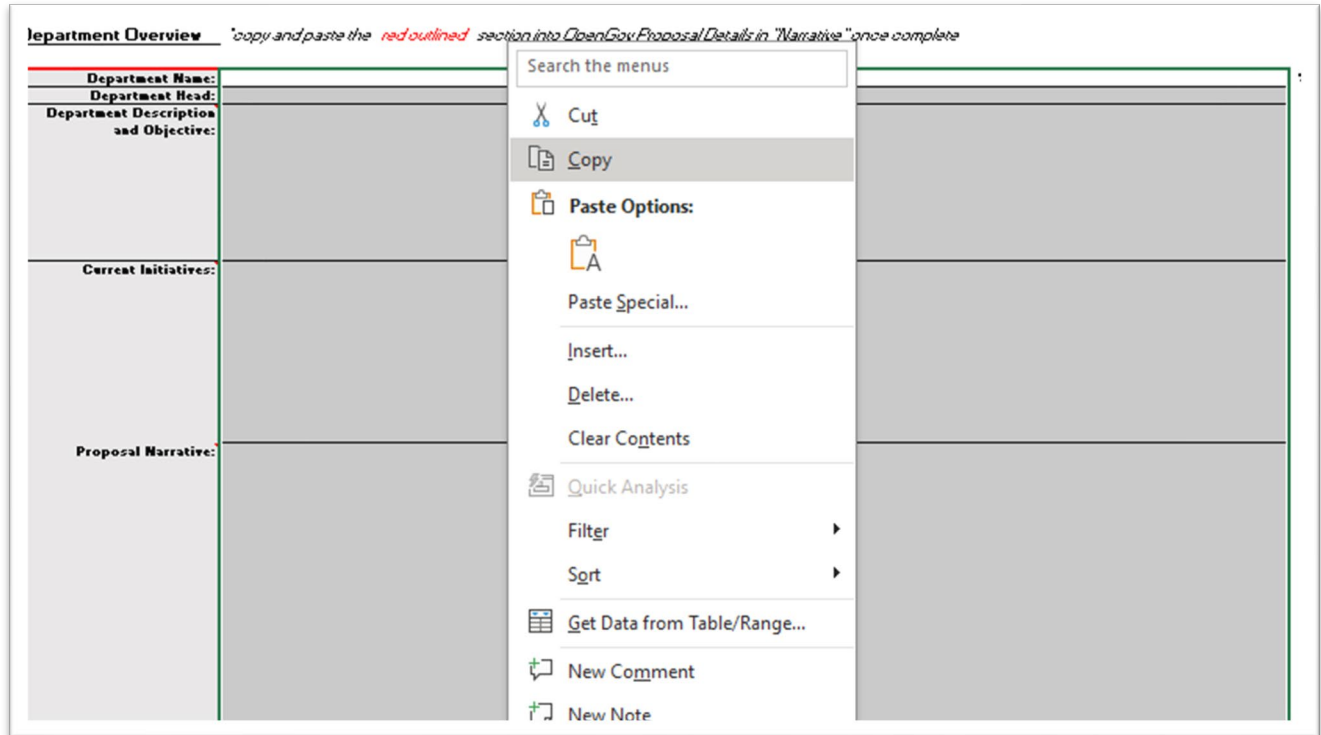
Department Overview *copy and paste the red outlined section into OpenGov Proposal Details in "Narrative" once complete

Department Name:	
Department Head:	
Department Description and Objective:	
Current Initiatives:	
Proposal Narrative:	

- 2 **After filling out these fields:**
Copy the information from cells B3 to B7

Department Overview *copy and paste the red outlined section into OpenGov Proposal Details in "Narrative" once complete*

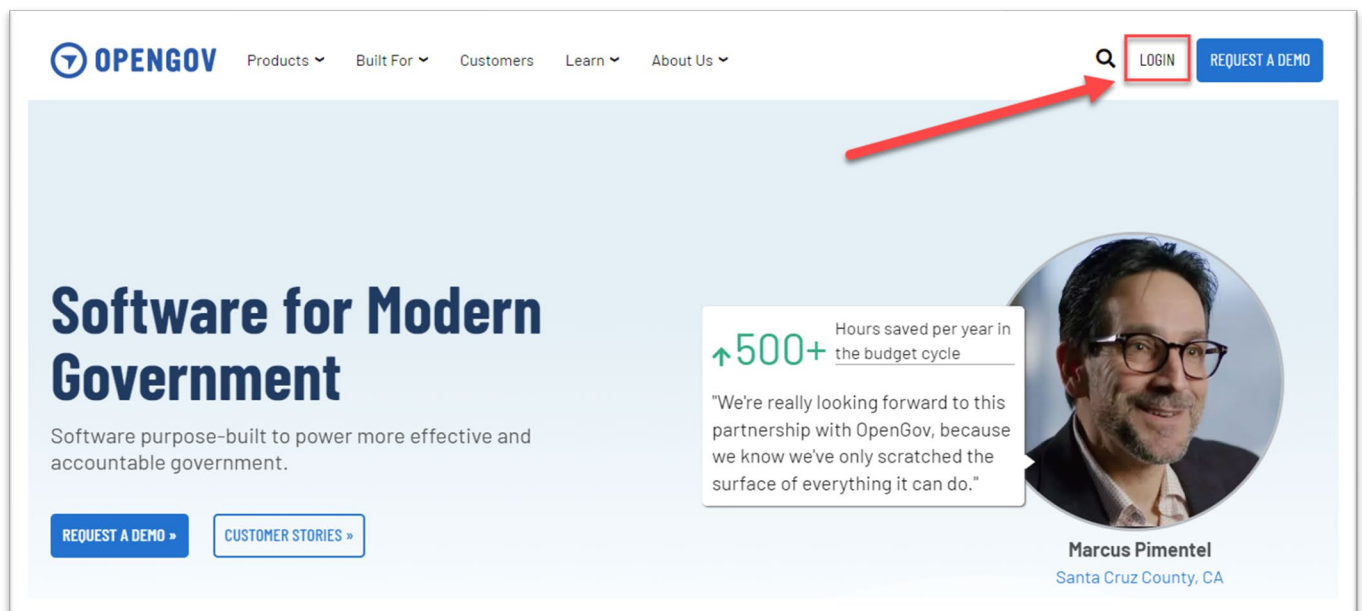
Department Name:	
Department Head:	
Department Description and Objective:	
Current Initiatives:	
Proposal Narrative:	



- 3 **After filling out the required fields in the "Department Overview" tab, follow these steps to submit your proposal narrative in OpenGov:**

Log into OpenGov:

Navigate to opengov.com. Find and click the "Login" button located at the top-right of the screen.



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SEARCH LOGIN REQUEST A DEMO

Software for Modern Government

Software purpose-built to power more effective and accountable government.

REQUEST A DEMO » CUSTOMER STORIES »

↑500+ Hours saved per year in the budget cycle

"We're really looking forward to this partnership with OpenGov, because we know we've only scratched the surface of everything it can do."

Marcus Pimentel
Santa Cruz County, CA

- 4 Enter your work email address in the email address field and click "Continue".

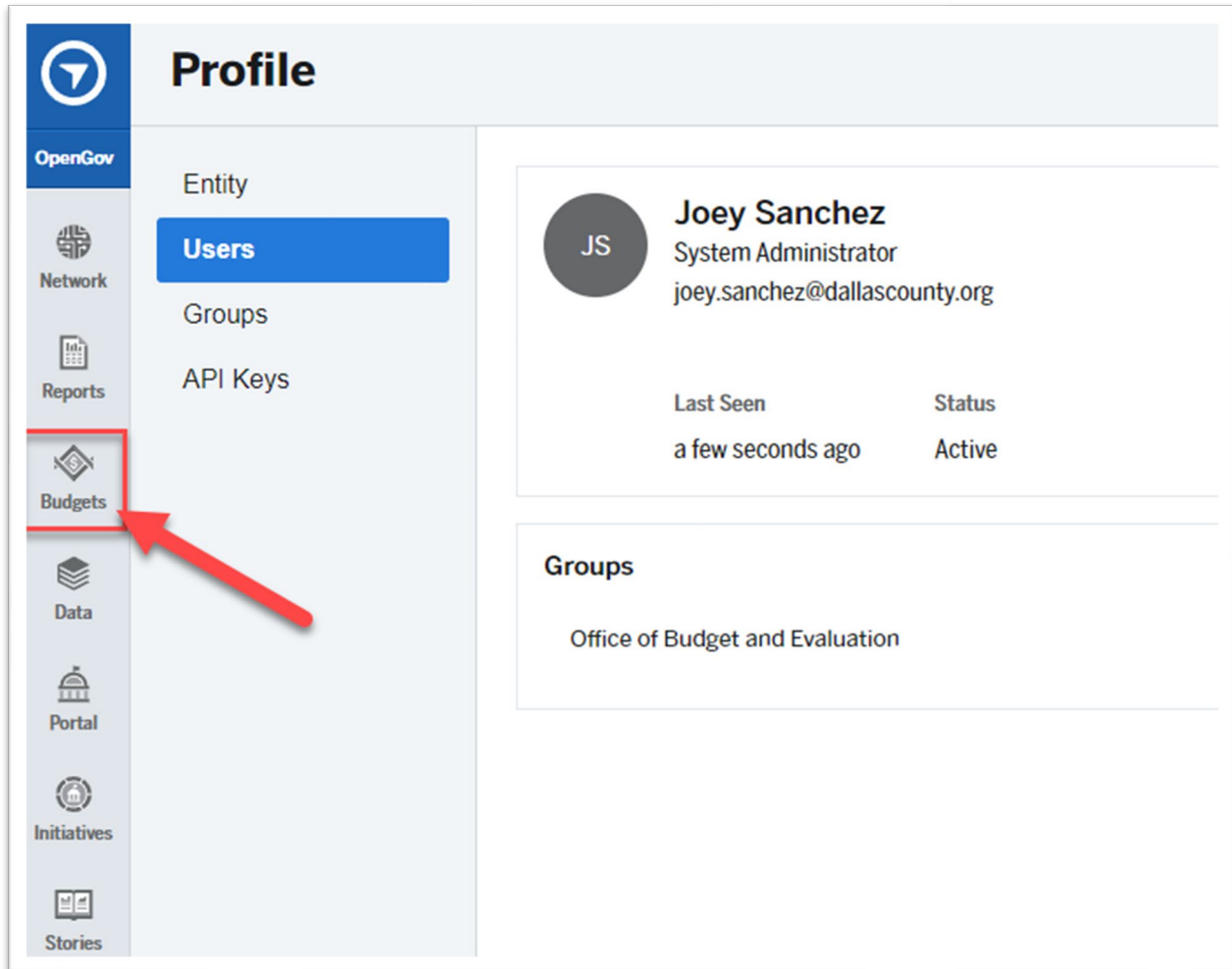
The screenshot shows the OPENGGOV Login page. At the top is the OPENGGOV logo. Below it is the word "Login". There is an email address input field with a red border and a red arrow pointing to it. The field contains the text "Email address". Below the field is a blue button labeled "Continue". A second red arrow points to the "Continue" button.

- 5 Input your password in the password field and click "Login".

The screenshot shows the OPENGGOV Login page. At the top is the OPENGGOV logo. Below it is the word "Login". There is an email address input field containing "joey.sanchez@dallascount". Below it is a password input field with a red border and a red arrow pointing to it. The field contains the text "Password". Below the password field is a link labeled "Reset Password". At the bottom is a blue button labeled "Login". A red arrow points to the "Login" button.

6 Access Budget Submission:

Click on "Budgets" in the left-hand pane.



The screenshot displays the OpenGov user interface. On the left is a vertical navigation menu with icons and labels for: OpenGov, Network, Reports, Budgets (highlighted with a red box and a red arrow pointing to it), Data, Portal, Initiatives, and Stories. The main content area is titled "Profile" and contains a sub-menu with "Entity", "Users" (highlighted in blue), "Groups", and "API Keys". To the right of the sub-menu is a user profile card for "Joey Sanchez", System Administrator, with email joey.sanchez@dallascounty.org. Below the profile card is a table with columns "Last Seen" and "Status", showing "a few seconds ago" and "Active". At the bottom of the main content area is a "Groups" section listing "Office of Budget and Evaluation".

7 Select the options icon (three horizontal lines) at the top-left corner.

The screenshot shows the OpenGov interface for a budget submission. At the top left, there is a navigation menu with icons for Network, Reports, Budgets, Data, and Portal. The main header area displays the title "FY2025 Department Submission (March 6, 2024 - May 3, 2024)" with a star icon. Below the title, there are tabs for "Overview", "Proposals", "Worksheets", and "Line Items". A red box highlights the options icon (three horizontal lines) next to the title, with a red arrow pointing to it. Below the tabs, there are two main action cards: "Enter Adjustments" (Make changes to budget through adjustments in worksheets) and "Create Proposal" (Proposal allows for justifying revenues and funding requests). Below these cards, there is a section for "Type: Operating" and "Phase: Setup" with a "Move to Next Phase" button. At the bottom, there is a "Budget Overview" section with the text "Learn how the budget is faring by understanding its value propositions".

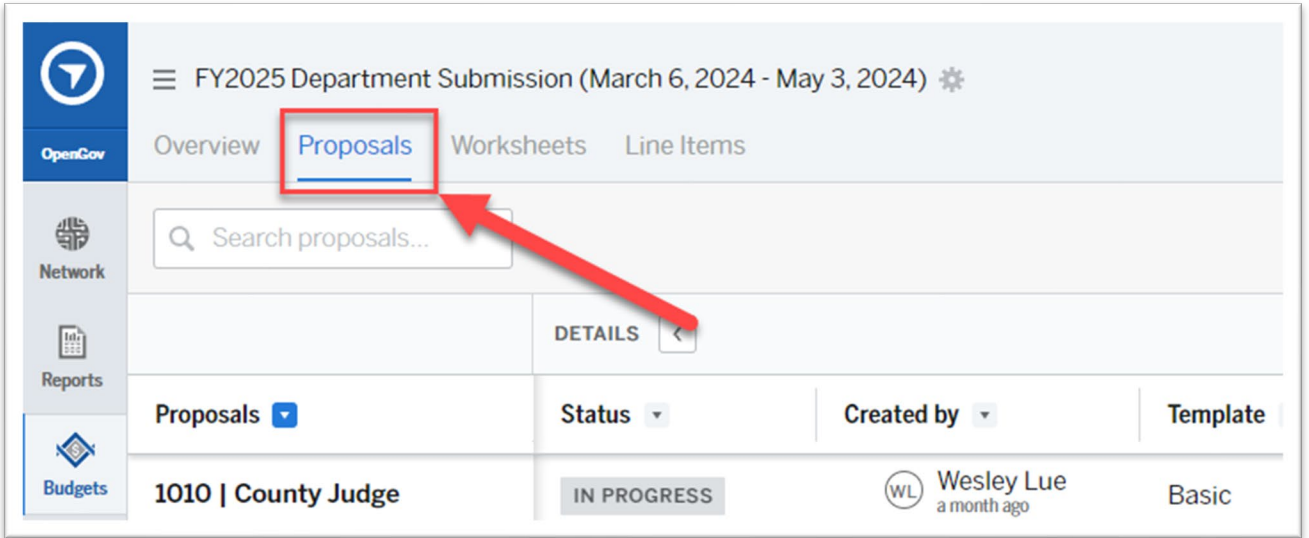
8 In the pop-out menu, select "FY2025 Department Submission (March 6, 2024 - May 3, 2024)".

The screenshot shows the OpenGov interface for the "Budgets" section. The header area displays the title "Budgets" with a close button. Below the header, there is a search bar and a "GROUP BY" dropdown menu set to "Budget Year". There are two buttons: "Settings" and "New Budget". Below the search bar, there is a table with columns for "Name" and "Type". The table has a dropdown menu for "2024-25" and a list of budget items. The first item is "FY2025 Department Submission (March 6, 2024 - May 3, 2024)" with a "Type" of "Operating". A red box highlights the budget name, and a red arrow points to it.

9

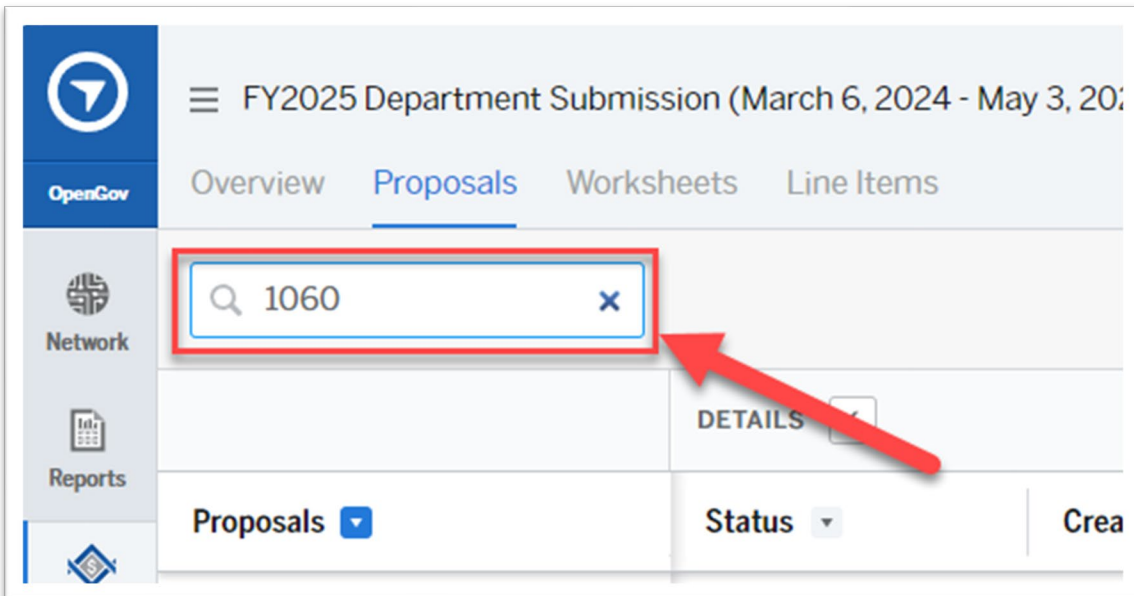
Submit Proposal:

Click on "Proposals".



10

Use the "Search Proposals" search bar to type your department name or cost center, filtering the list of proposals.



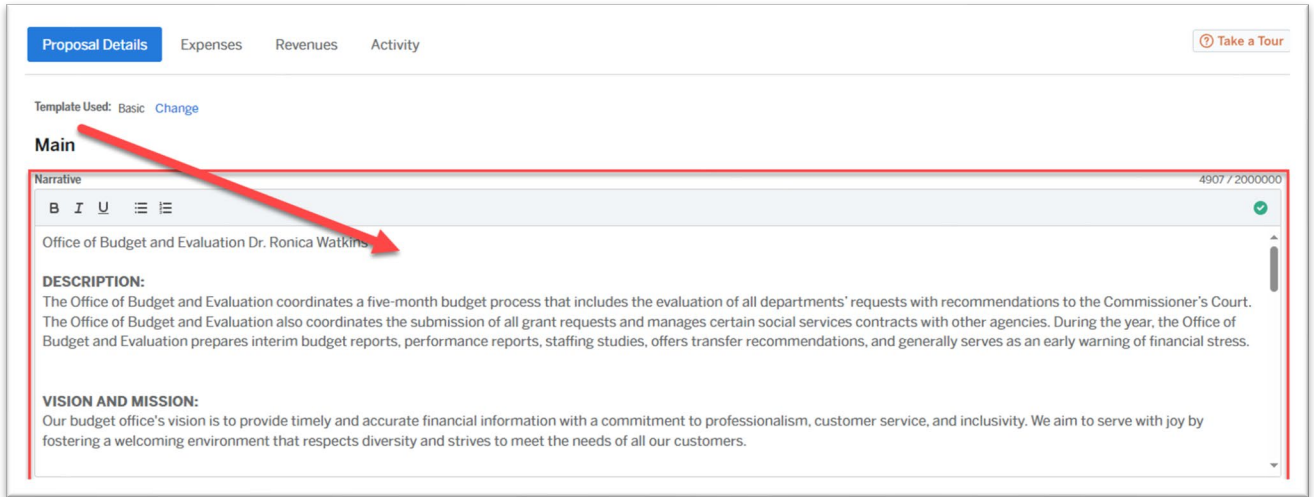
11 Select your department or cost center from the list.

The screenshot shows the OpenGov interface for a 'FY2025 Department Submission (March 6, 2024 - May 3, 2024)'. The 'Proposals' tab is selected. A search bar contains '1060'. A list of proposals is displayed, with the first one, '1060 | Office of Budget and Evaluation', highlighted in blue. A red arrow points to this proposal. The status is 'IN REVIEW' and the creator is 'Joey a mont'. Below it, a partially visible proposal '1000 | Office of Budget and Evaluation' is shown.

12 Once the proposal is open, ensure the "Proposal Details" tab is selected.

The screenshot shows the 'Proposal Details' tab selected. The breadcrumb trail is 'FY2025 Department Submission (March 6, 2024 - May 3, 2024) / Proposals / 1060 | Office of Budget and Evaluation'. The 'Proposal Details' tab is highlighted in blue, with a red arrow pointing to it. Other tabs include 'Expenses', 'Revenues', and 'Activity'. Below the tabs, the 'Template Used' is 'Basic' with a 'Change' link. The 'Main' section is visible, showing a 'Narrative' field with a rich text editor toolbar containing 'B', 'I', 'U', and list icons.

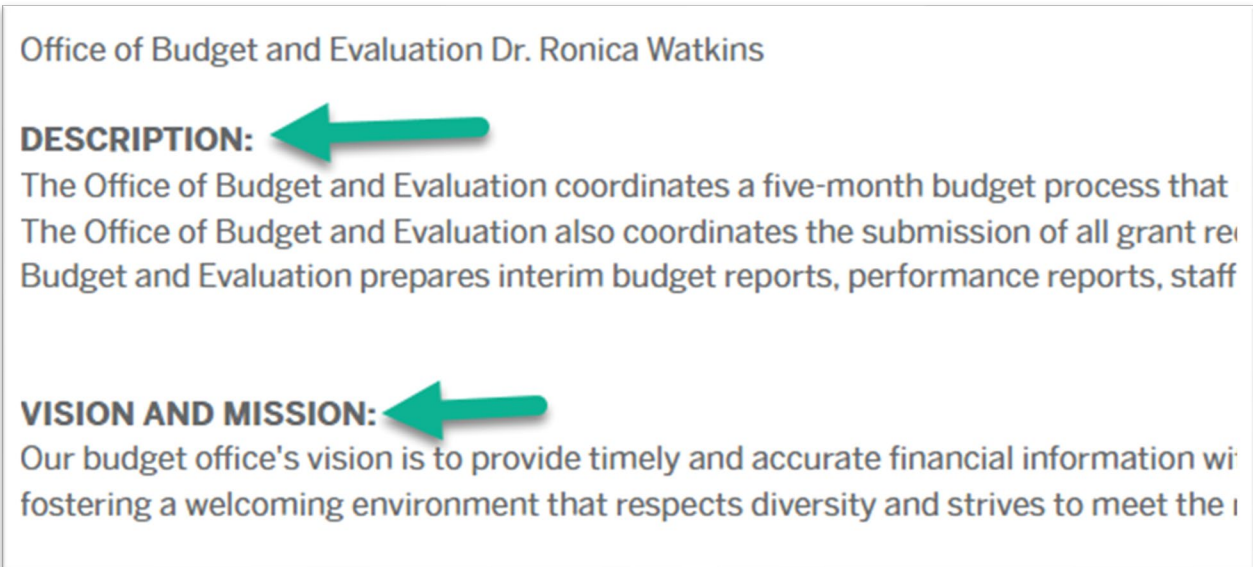
13 Paste the text copied from the Budget Detail Form into the Narrative field.



14 **Finalize Submission:**

After pasting, review the formatting to ensure the text is clear and legible. Ensure paragraphs are properly separated, and text that needs emphasis is either bolded or underlined.

Once formatting is confirmed, the task of filling out the narrative section is complete.



Office of Budget and Evaluation Dr. Ronica Watkins

DESCRIPTION:

The Office of Budget and Evaluation coordinates a five-month budget process that
The Office of Budget and Evaluation also coordinates the submission of all grant re
Budget and Evaluation prepares interim budget reports, performance reports, staff

VISION AND MISSION:

Our budget office's vision is to provide timely and accurate financial information wi
fostering a welcoming environment that respects diversity and strives to meet the i