

# Budget building tips and tricks



## #1 View Proposal Activity

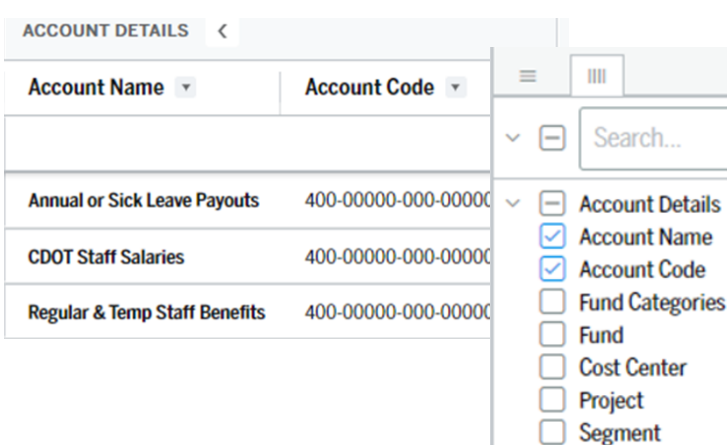
- The Activity tab provides a comprehensive audit of all changes that have been made to a proposal and by whom
- To view the activity for a proposal, click the Activity tab on the proposal screen

Proposal Details Expenses Revenues Activity

CK Celeste Kopperl adjusted an amount in "Accounting & Finance Misc (Leave Payouts, Capital Eq & HPTE Fee for Service)" for the 1st period

## #2 Filter Out Columns in Worksheets

- Within your worksheet, if you want to reduce the length of the line item to view only essential columns, OpenGov has a filtering option for users:
  - click the small black downward arrow on the upper lefthand side of your worksheet to the left of account name
  - Choose the vertical line tab and then de-select the boxes you don't need, including "Account code", "ledger type" and "total change." You may also temporarily de-select future fiscal years if you do not plan to edit those



## #3 Use the Search Bar

- You can search the line items in a worksheet by entering a search term in the search field to the right of the worksheet title

ACCOUNT DETAILS <		FY 2024-25 ADJUSTMENTS <			
Account Name	Account Code	Proposed	Base	Adjustment Input	Adjustment
		\$5,592,932	\$5,592,932	0	\$
Equipment Purchase CAP	400-00000-000-00000-0...	50,000	50,000	0	\$
ADP Equipment CAP	400-00000-000-00000-0...	0	0	0	\$

## #4 Make Line Item Adjustments to Worksheets

- You may adjust the base amount in each budget line to more accurately reflect your planned expenditures for FY24
- Use the "replace" option on the drop down list under adjustment input to enter the new amount for the budget line

Vendor Personal Services BUD00	Expenses	0	0	0	\$
CDOT Staff Salaries BUD000006	Expenses	0	0	0	\$
Consultant Professional Services	Expenses	4,000,000	4,000,000	0	\$

## #5 Itemizing and Comments

- To add itemized lines to a worksheet, do the following:
  - Click the plus sign to the right of the description field (to the left of the trash can)
  - Update amounts on itemized lines. These roll up to the original row
  - Add descriptive information about budget increases or decreases in the "Description" field shown below

0	0	0	N/A	0	Description	+	🗑️
					Description		🗑️

### Links and Resources:

- [OpenGov Login Page](#)
- [OpenGov User Guide](#)
- [OFMB Website](#)