GovMax V5

User Manual - Hampton

Revised 7/15/2016

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ACCESSING THE SYSTEM

Departments will be able to access **GovMax** through the internet at https://ham.fiscalgov.com

PASSWORD/SECURITY

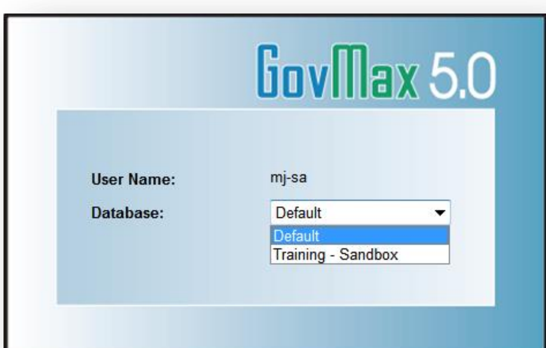
There will be multiple levels of security. Each user will need to enter their username and password to gain access to the **GovMax** system. If you have forgotten either one of these items, contact Karen Bento, your System Administrator, to obtain this information. **The GovMax system will not allow you to enter an area that you are not authorized to be in.**

After typing the web address, the following screen will appear.

Complete the two fields with your **user name** and **password**. Initially you will be given a password, after familiarity with the login process you will want to change your password.

The next screen displays the databases available. The first option should be **Default**, which is the production version of GovMax.

You may also see a Training database which can be used as a sandbox. Anything you do in this training database will NOT affect your production.

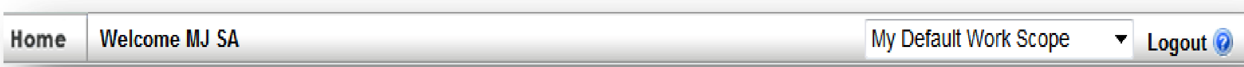


MAIN WORKSPACE

The main workspace has several components such as a breadcrumb at the top, icons in the center to select modules, left navigation, and global announcements at the bottom of the workspace.

BREADCRUMB

The breadcrumb displays your name, the work scope you are currently using, an option to log out of GovMax, and a Help icon which displays help topics for each of the modules in GovMax.



As you move through the GovMax application, you will see the breadcrumb expand to display the sub modules with links to move back up through these levels.

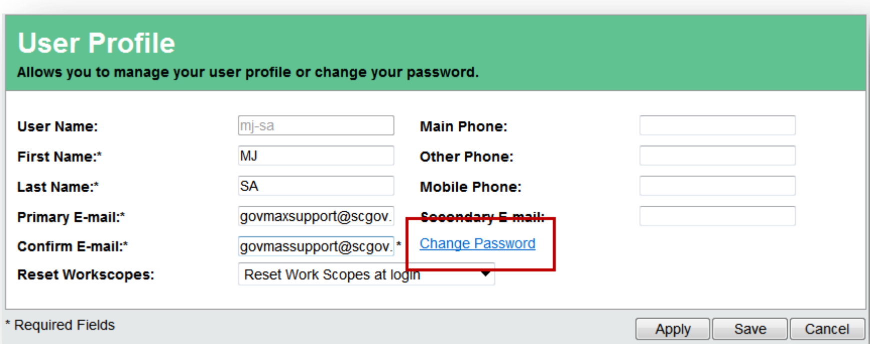
ICONS

The icons are used to access the various modules in GovMax:

Depending on the permissions you have, you may or may NOT see all of the icons listed above.

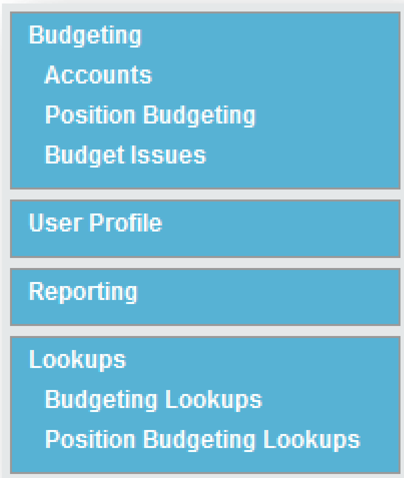
Budgeting	Manage the budgeting areas: Accounts, Position Budgeting, Budget Issues and Grants.
Capital Projects	Plan and mange your capital expenditures arising from long-term work programs.
My Work Scope	Manage your assigned work scope. Custome your work scope by creating new work scopes and filtering by department, division, service, etc.
Performance	Manage the objectives, measures, challenges and actions of the organization.
User Profile*	Manage your user profile or change your password.
Reporting	Provides access to the reporting area of GovMax.
Lookups	Manage the background parts for the Accounts, Positions, Budget Issues, Grants, and Capital Project workspaces.
Settings	Options to modify GovMax settings and user permissions.

NOTE* It is important that you change your password as soon as possible to maintain proper security. You can do this under User Profile.



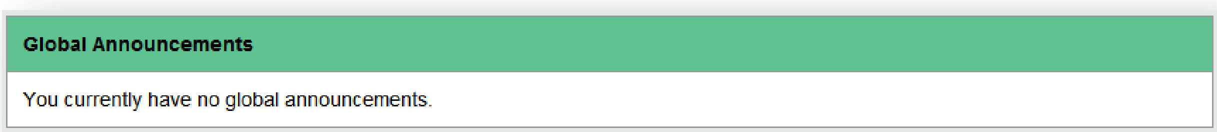
LEFT NAVIGATION

The left navigation allows you to quickly access areas of GovMax that are used most often. For example, rather than clicking on the Budgeting icon in the middle of the workspace, then clicking on Accounts, simply click on Accounts in the left navigation to go directly to that module.



GLOBAL ANNOUNCEMENTS

The System Administrator may publish announcements such as deadlines or system maintenance.



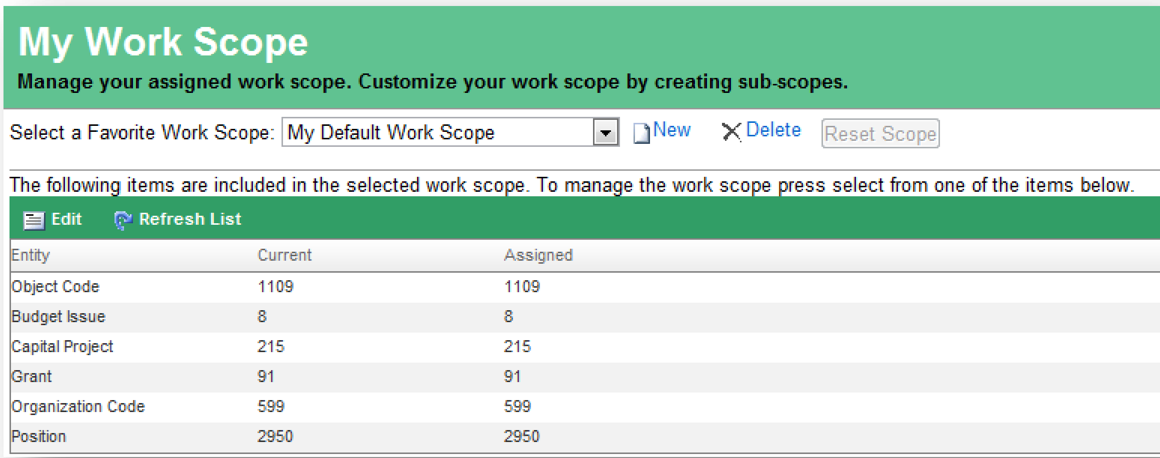
NOTE: when you first log in, make sure you check Global Announcements for any messages that may have been posted.

MY WORK SCOPE

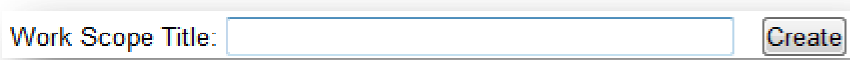
(Home – My Work Scope)

The work scope workspace allows you to manage and customize your assigned work scope. All users have a default work scope which cannot be modified. The default work scope only filters the service and position items, as all other items are not filtered on the service. You can create new work scopes based on your default.

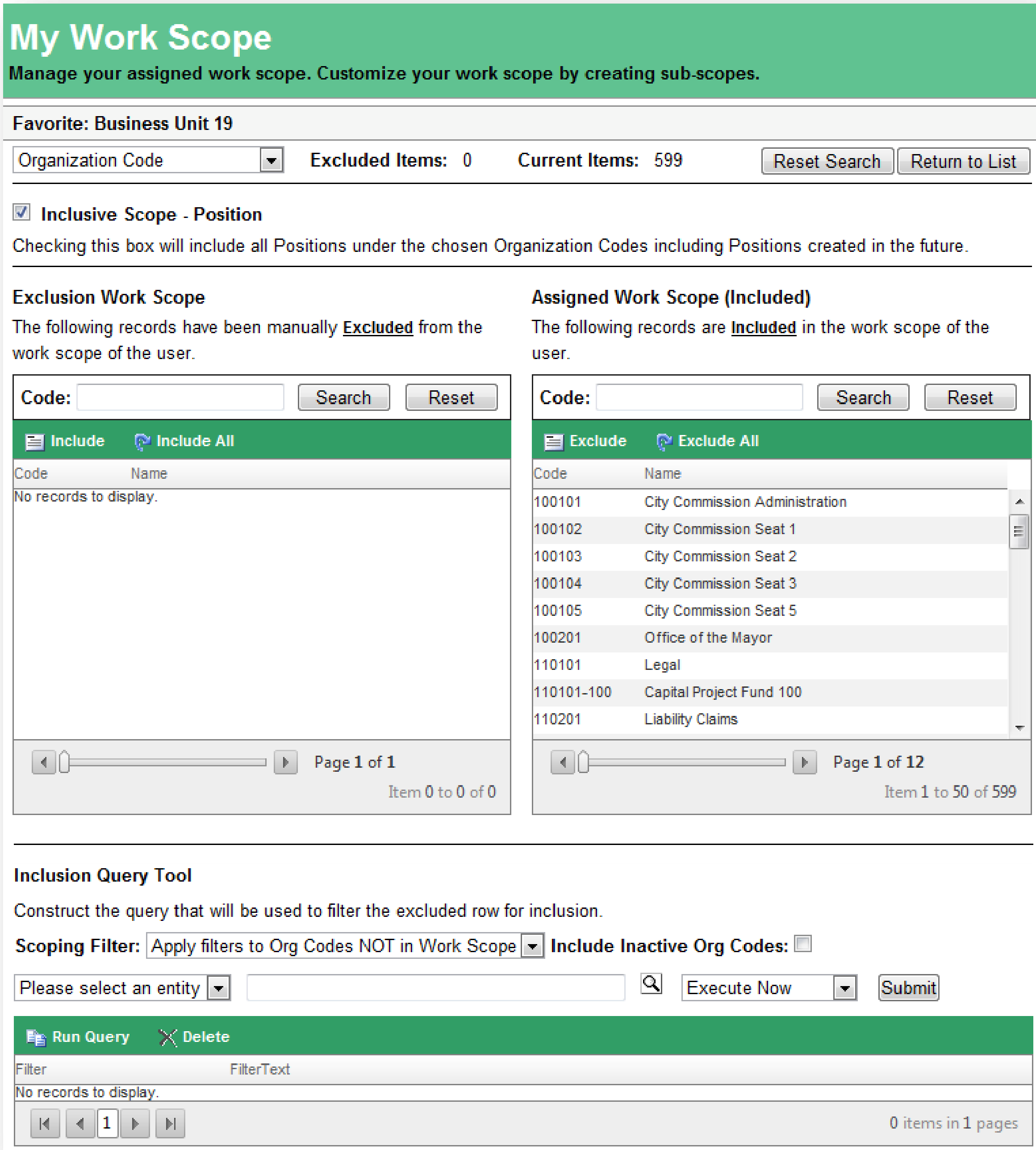
The main my work scope page has a drop down list with all your work scopes. Below that is a grid displaying all work scope items for the work scope selected in the drop down list. Changing the selection in the drop down list will change the records displayed in the grid.



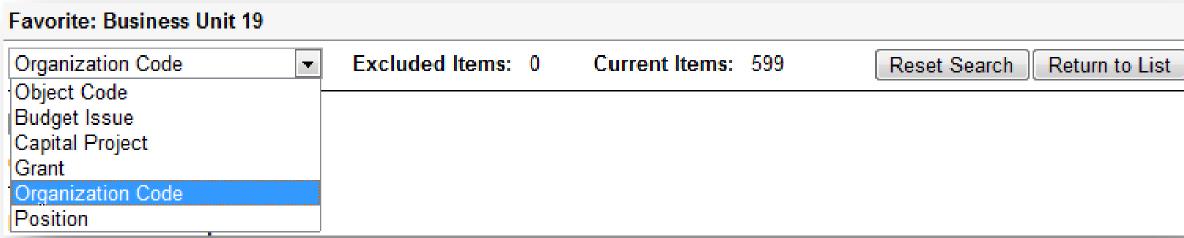
To create a new work scope, select the New button. The drop down list switches out with a textbox to enable you to enter a work scope title. Enter the work scope title and select the create button.



The new work scope is added to the drop down list. The new work scope is an exact replica of the default work scope when first created. To modify the work scope, select the item in the grid and select the edit button or double click the record. The add/edit work scope page is displayed with the drop down list at the top of the page defaulted to the item selected from the grid.



The drop down list contains the six items that can be work scoped. Changing the selection in the drop down list will update the rest of the page to display the work scope data for the selected item. The name of the selected work scope is displayed above the drop down list, with the number of excluded and assigned items to the right. Selecting the return to list button will redirect the user back to the main my work scope page.



Selecting the reset scope button will reset the work scope selected from the drop down list to match the default work scope. Selecting the delete button will delete the selected work scope. The default work scope cannot be deleted.

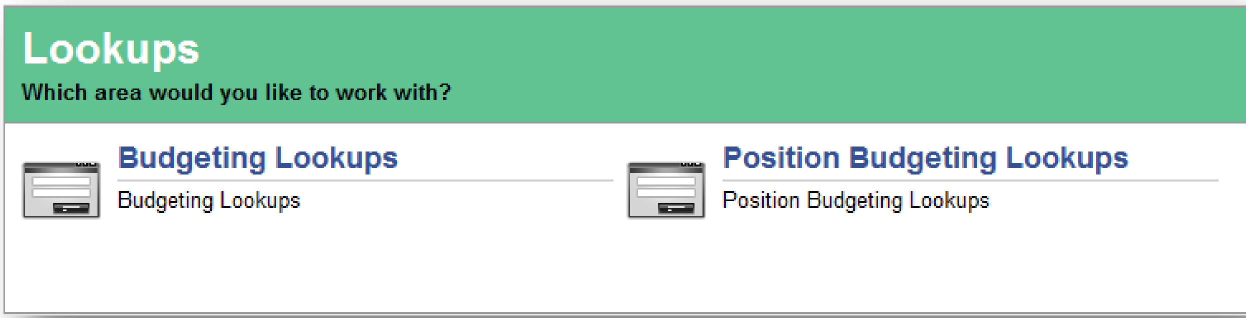
If you update the default work scope, all custom work scopes will be deleted and you must create your work scopes again.

LOOKUPS

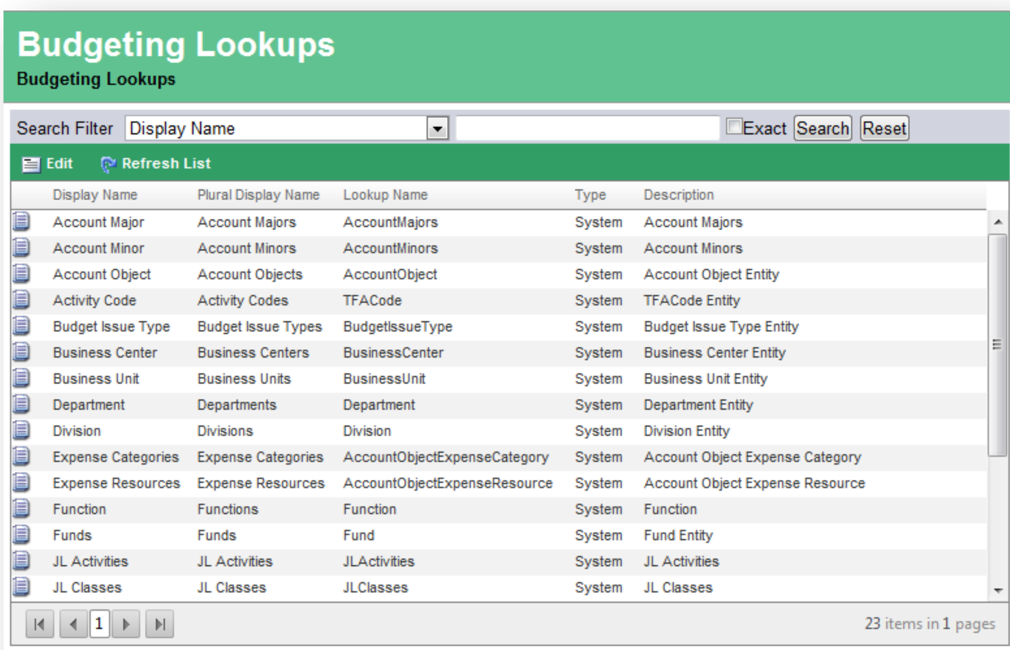
(Home – Lookups)

Workspaces have been created for the following lookup groups:

- Budgeting
- Position settings



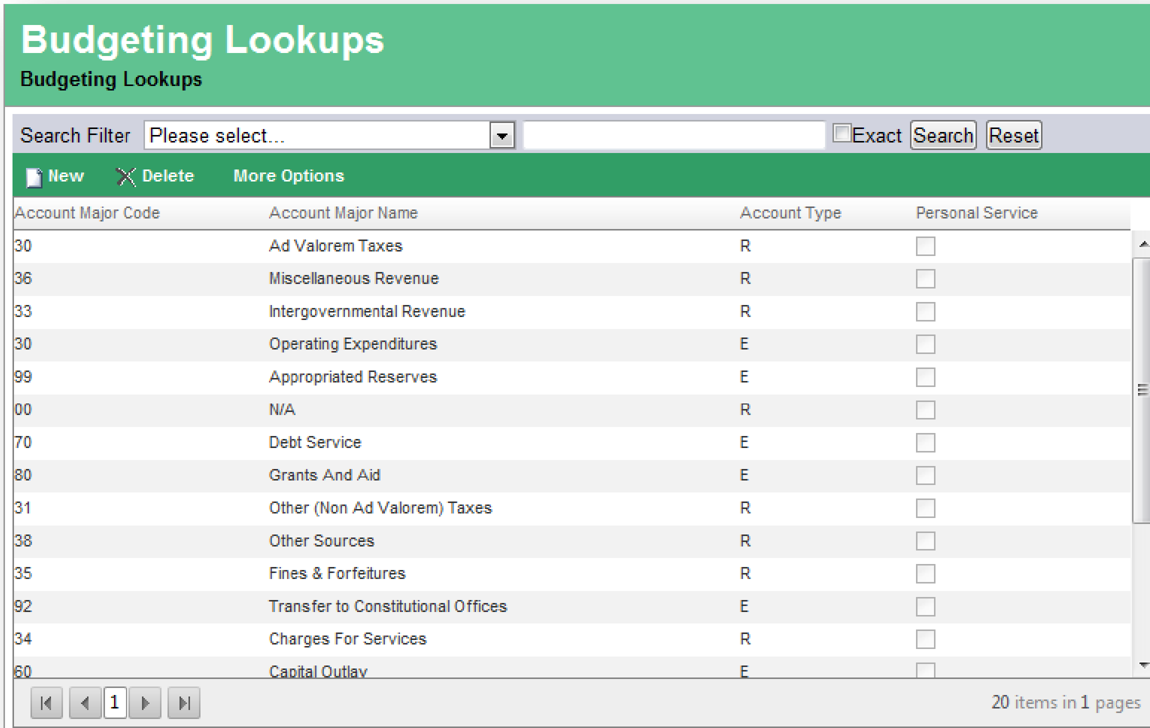
You can either click on the Lookups link in the left navigation or double-click on the Lookups option from the main workspace.



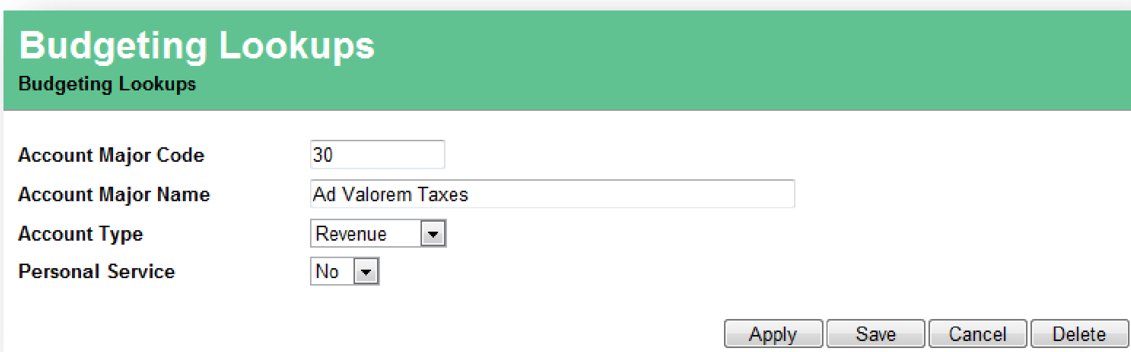
Display Name	Plural Display Name	Lookup Name	Type	Description
Account Major	Account Majors	AccountMajors	System	Account Majors
Account Minor	Account Minors	AccountMinors	System	Account Minors
Account Object	Account Objects	AccountObject	System	Account Object Entity
Activity Code	Activity Codes	TFACode	System	TFACode Entity
Budget Issue Type	Budget Issue Types	BudgetIssueType	System	Budget Issue Type Entity
Business Center	Business Centers	BusinessCenter	System	Business Center Entity
Business Unit	Business Units	BusinessUnit	System	Business Unit Entity
Department	Departments	Department	System	Department Entity
Division	Divisions	Division	System	Division Entity
Expense Categories	Expense Categories	AccountObjectExpenseCategory	System	Account Object Expense Category
Expense Resources	Expense Resources	AccountObjectExpenseResource	System	Account Object Expense Resource
Function	Functions	Function	System	Function
Funds	Funds	Fund	System	Fund Entity
JL Activities	JL Activities	JLActivities	System	JL Activities
JL Classes	JL Classes	JLClasses	System	JL Classes

Within each of the main lookup spaces is a grid containing a list of all entities/lookups in the system.

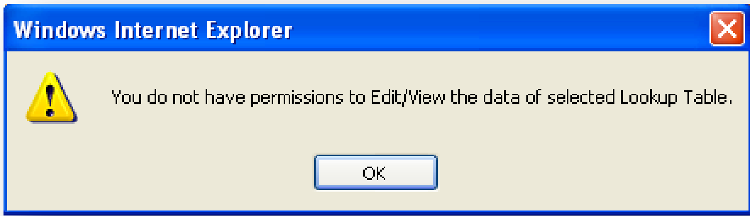
Double clicking on a lookup from the lookup grid will display another grid displaying the data for that lookup.



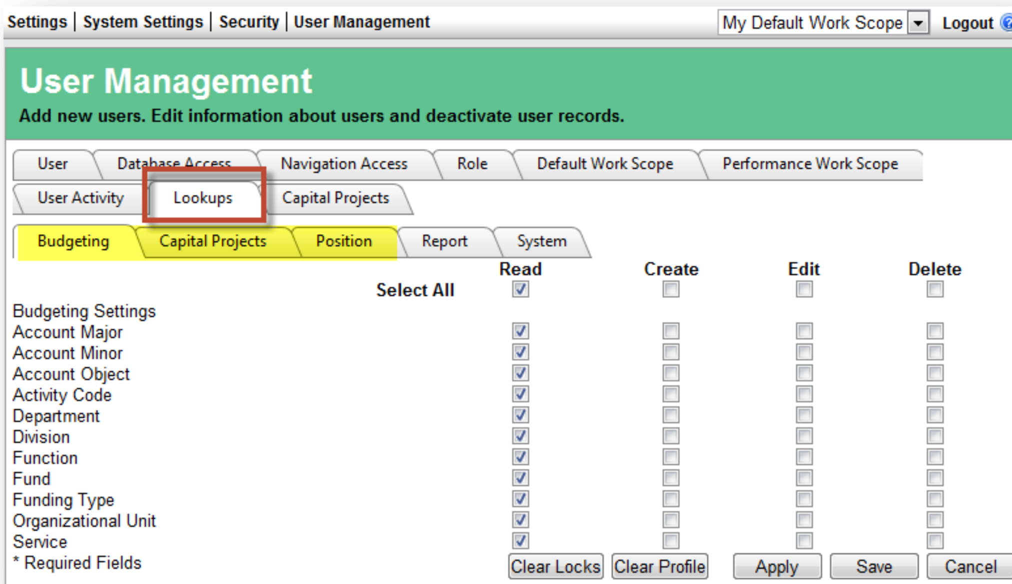
Double clicking a row in the lookup grid will display the add/edit page. This page may be read-only depending on the user's permissions.



In addition, if the user does not have permission to view an entity, a pop up will display.



Note that the System Administrator can set user permission for the three lookup tables in User Management.

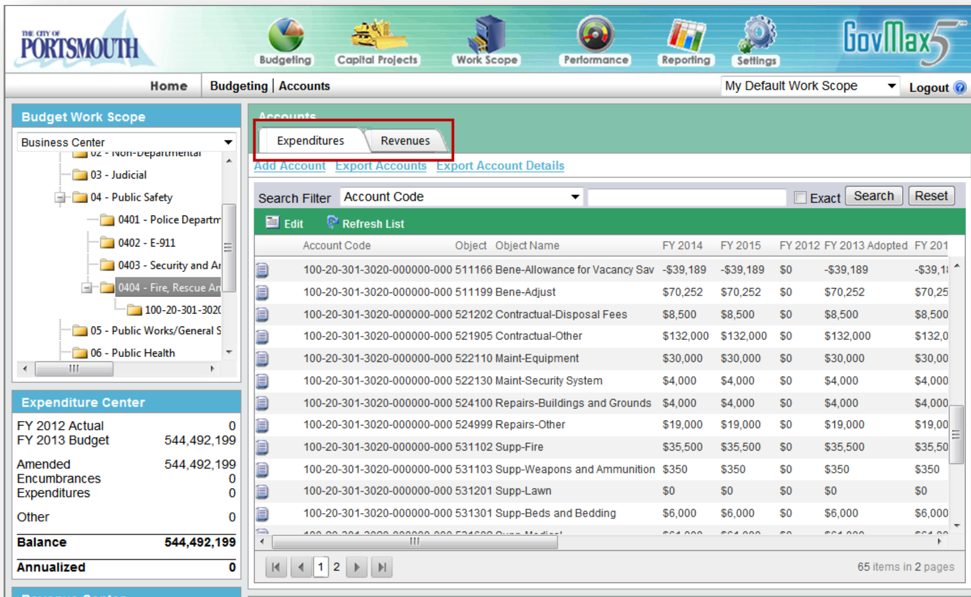


ACCOUNTS

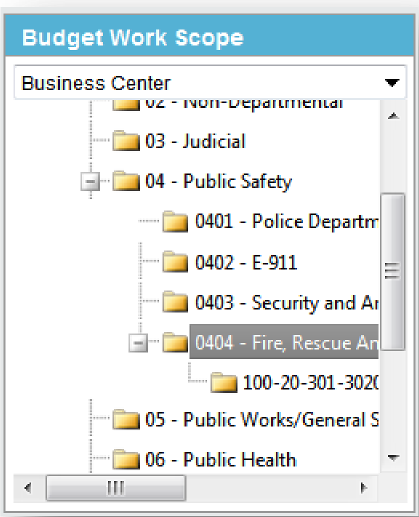
(Home – Budgeting – Accounts)

ACCESSING ACCOUNTS

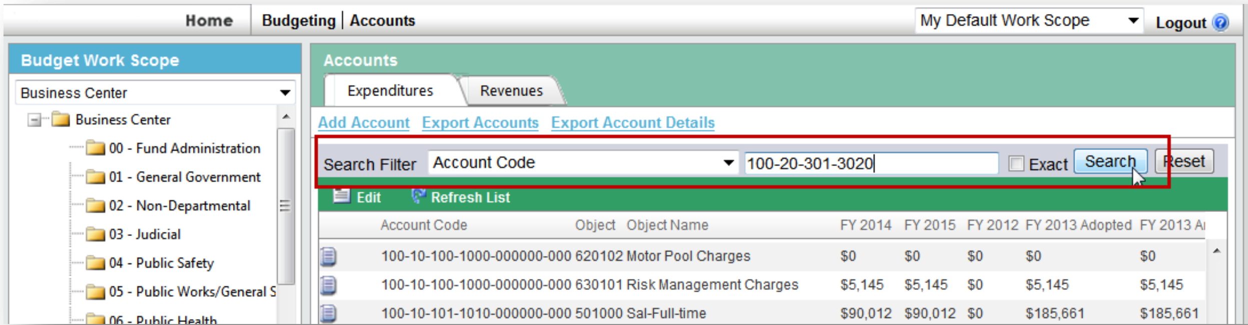
The Account grid below displays a single line for each account, which is separated by Expenditures and Revenues (tabs at top of grid).



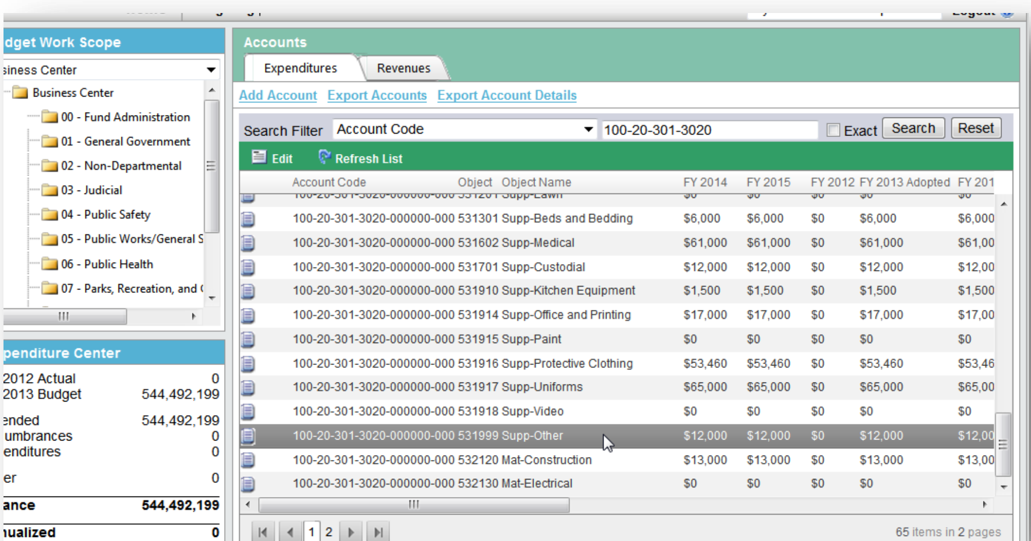
To edit an account, you can drill in using the tree on the left side.



Or use the Search Filter to filter by Account Code, Line item, etc.



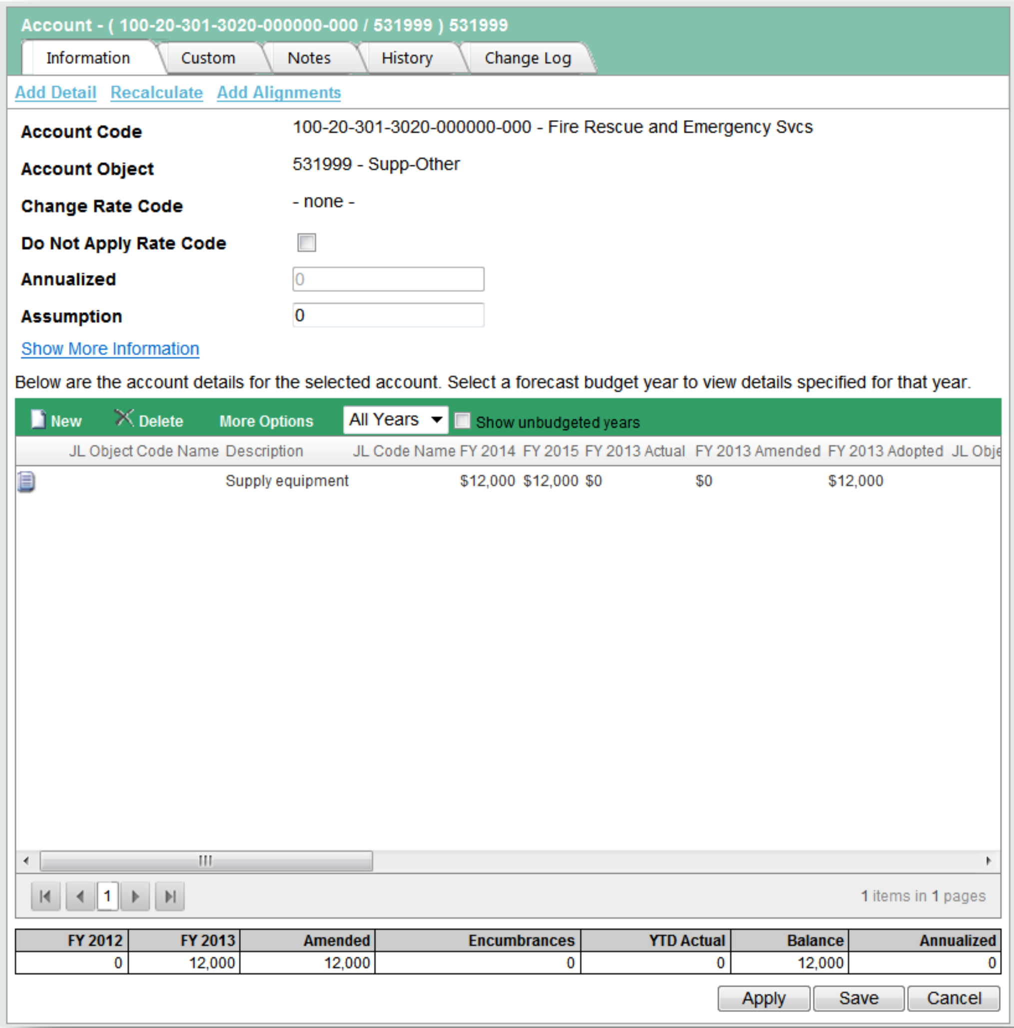
Once you find the account, double-click on it to edit.



The service, line item code and the name of the selected account is displayed in the header at the top of the add/edit section.

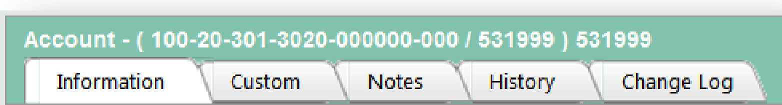
The account displays in short format so that more details will display in the Account Detail grid. If you want to view additional information on this account, click the Show More Information link.

There is also a totals grid which holds the totals for the account details listed for the selected account.



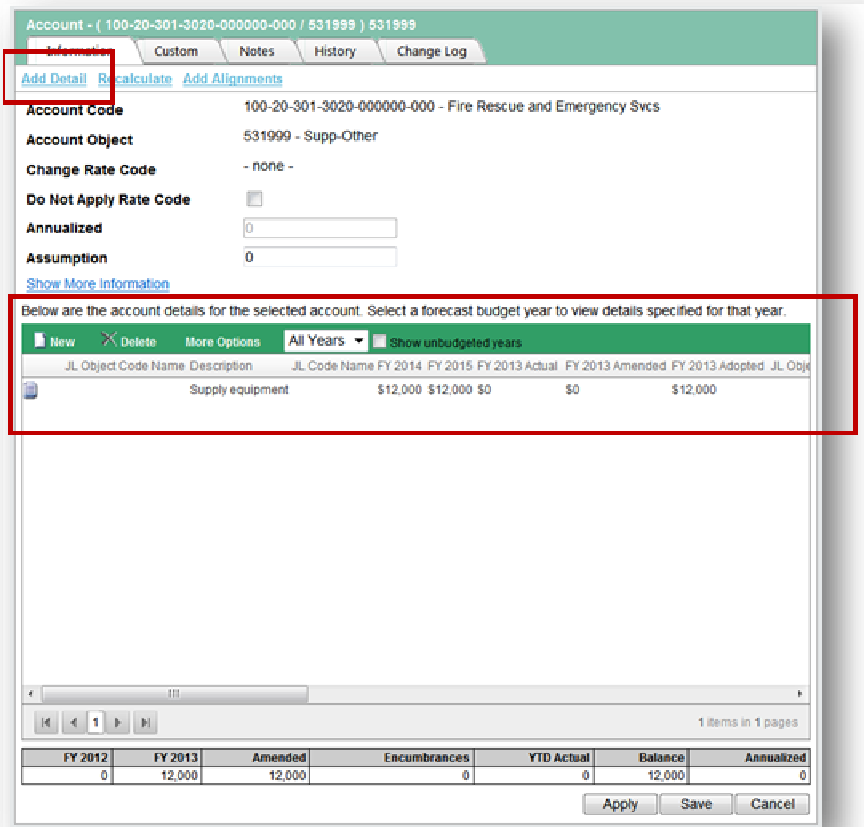
TABS

There are five tabs on the account screen, each of which holds data pertaining to the selected account.



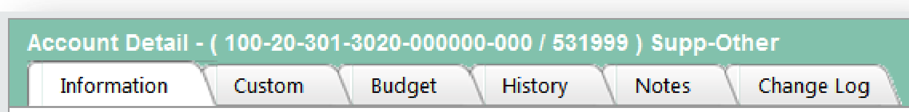
EDITING ACCOUNT DETAIL

The account detail grid on the add/edit account screen contains a list of all account details associated with the account.



Double clicking an account detail, or clicking the row and selecting the edit button from the more options menu item will display the account detail in edit mode.

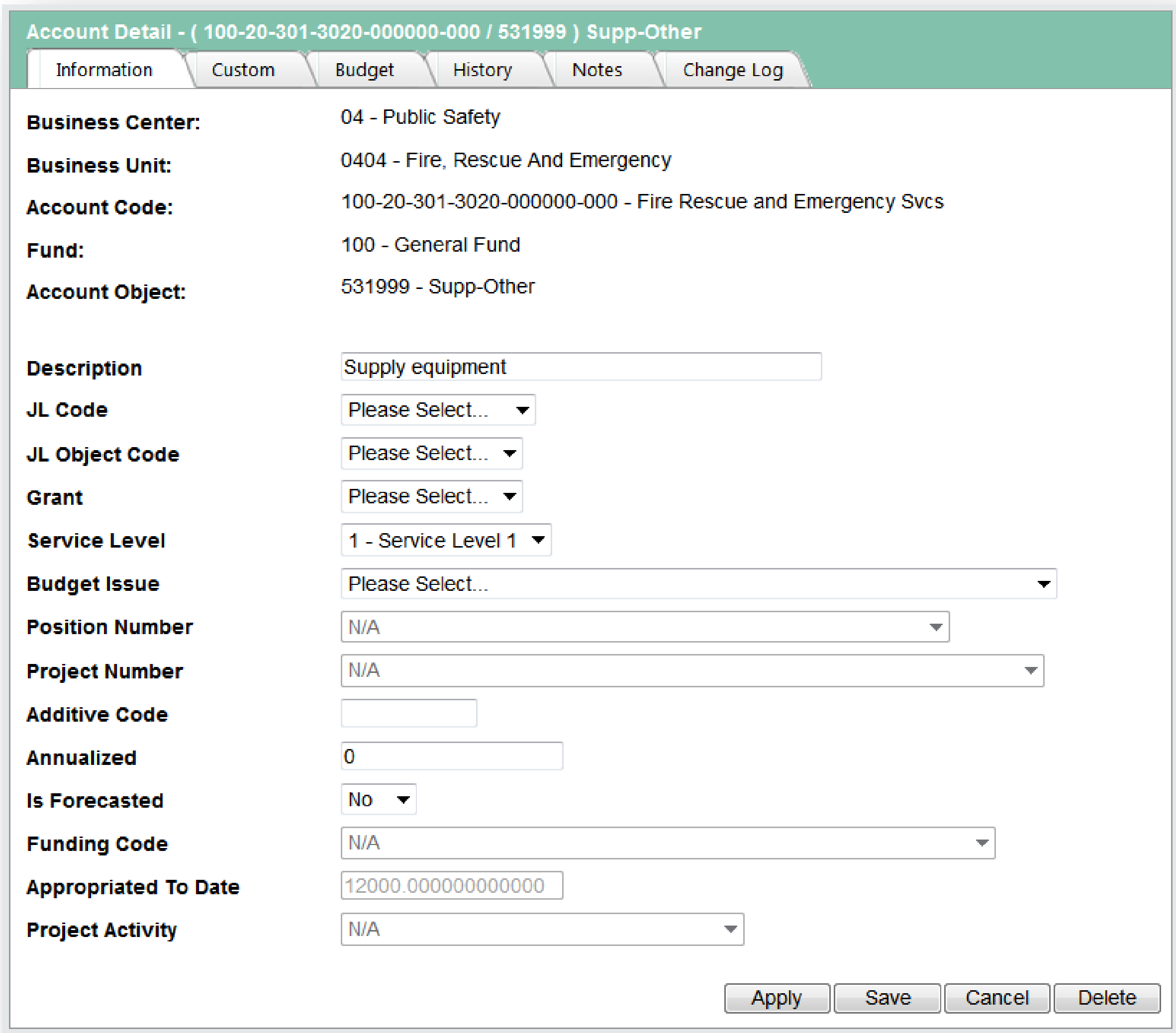
The account detail section contains six tabs at the top of the screen.



Screens that you will be using are explained below.

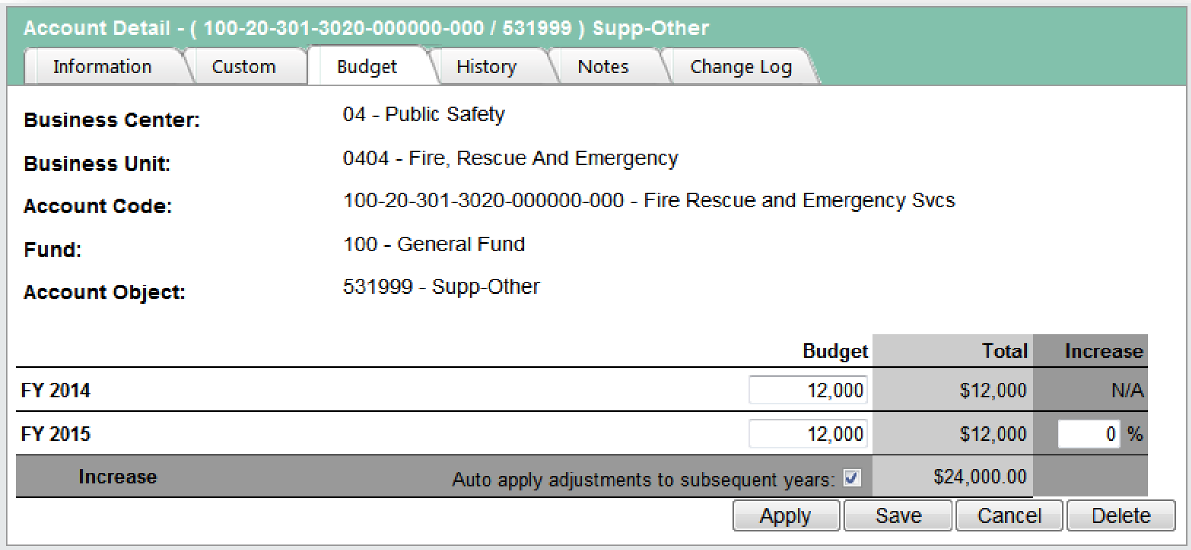
INFORMATION

The information tab displays the account data at the top of the screen. This data is read-only. Below is the account detail data which can be edited by the user.



BUDGET

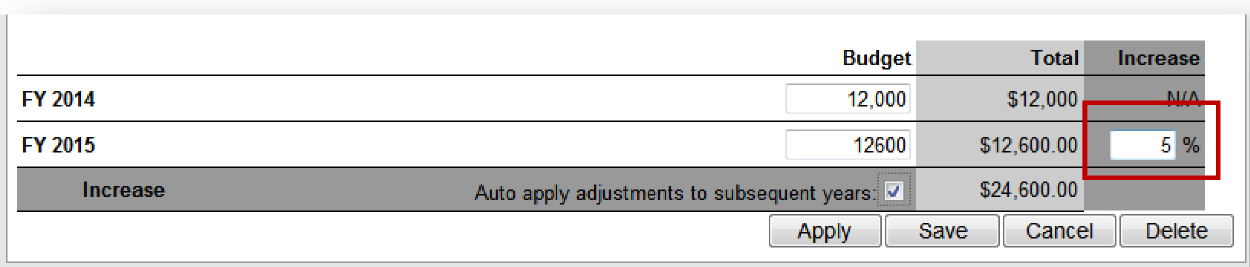
The budget tab displays a grid holding all the budget values for the selected account detail.



You can enter the annual budget value and press tab on the keyboard to divide the value evenly to each of the budget columns. If the value entered cannot be evenly divided in the budget columns, the application will round the value up so the amount can be evenly dispersed among each of the budget columns. The budget value can also be entered directly into any of the budget columns.

There is also functionality in the grid to add a percentage increase to the budget values either by budget period or by fiscal year. This can be achieved by typing the percentage number into the increase textbox and pressing tab on the keyboard.

For example, in the above visual, to increase the amount in FY2015 by 5%, enter 5 into the textbox located in the right column of the grid in the FY2015 row and press tab.

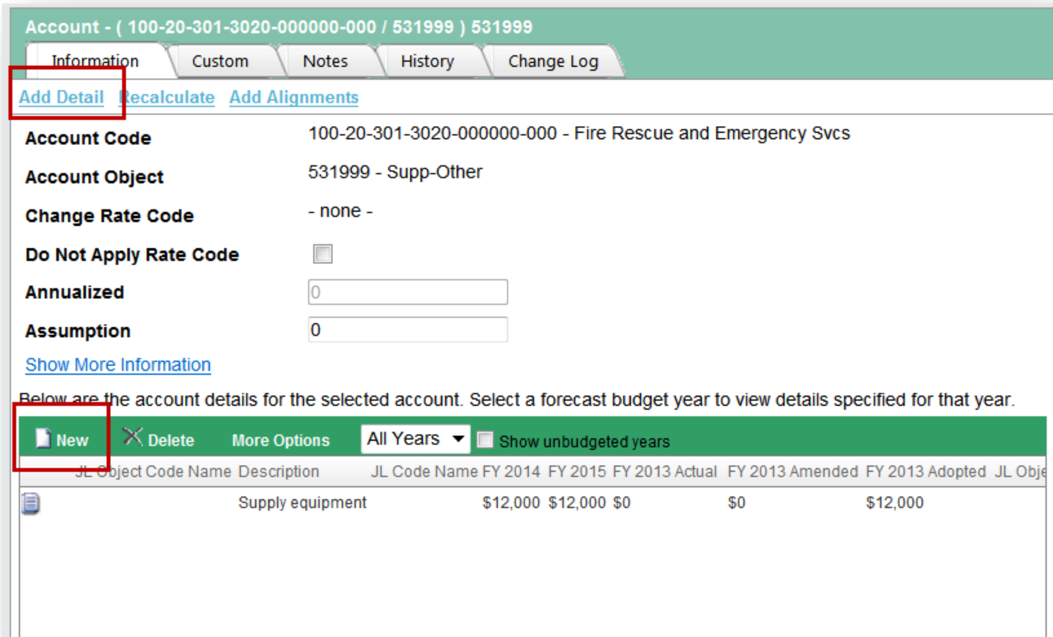


Notice that the amount in the FY2015 field is increased by 5%, and the totals are also updated to show the changes.

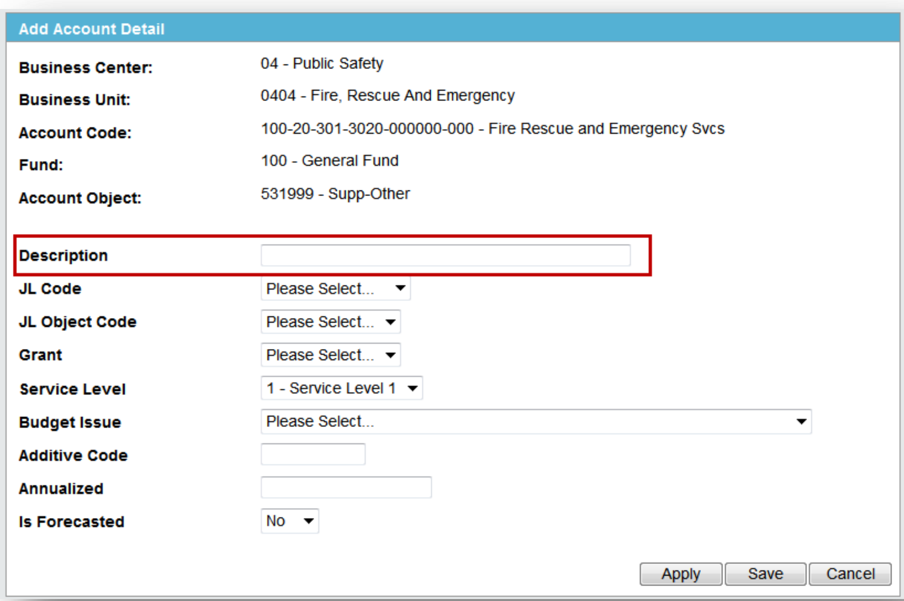
Select the Apply button to save the changes to the database and remain on the page or select the Save button to save the changes and return to the Accounts page.

ADDING ACCOUNT DETAIL

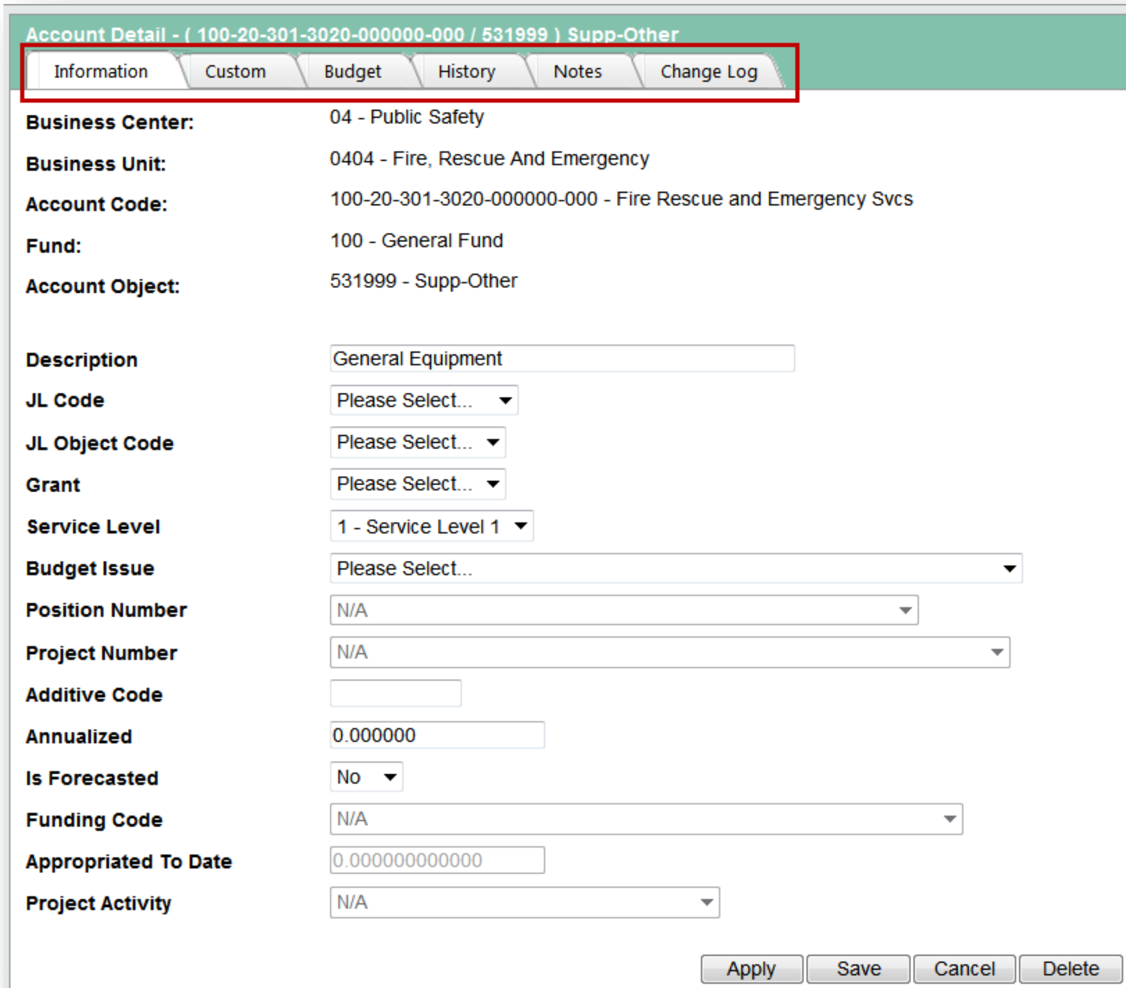
To create new account detail, you can either select the **Add Detail** link at the top of the account or click the **New** button in the green bar above the account detail.



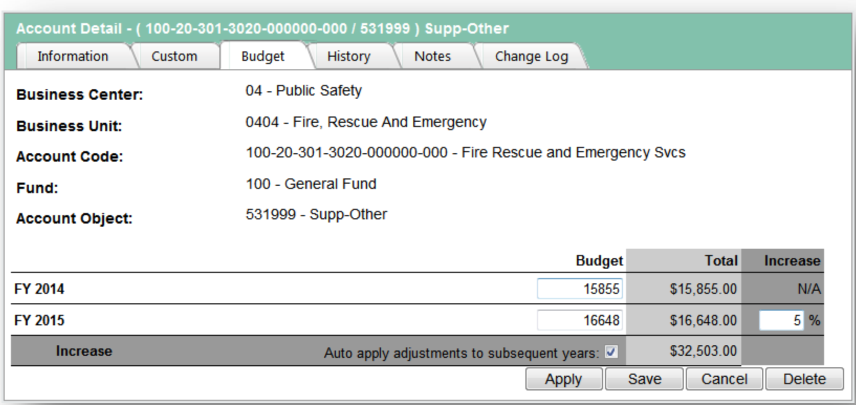
Add a description for this detail.



Click the **Apply** button. You will see additional tabs display.

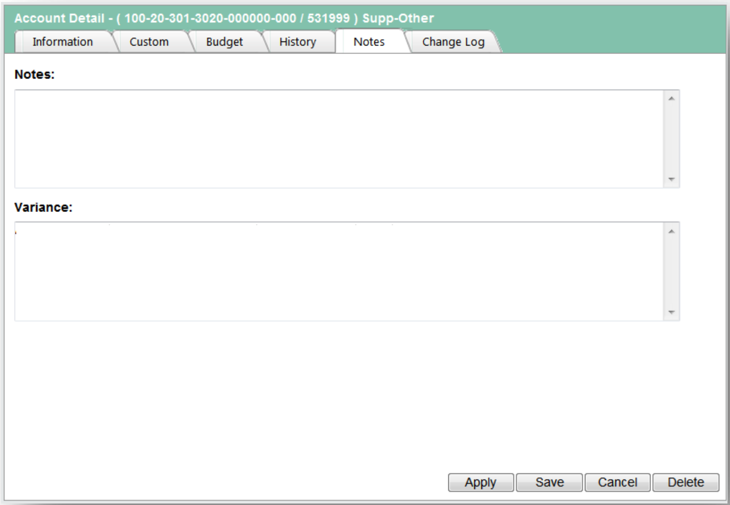


On the **Budget** tab, add the budget and click the **Apply** button.



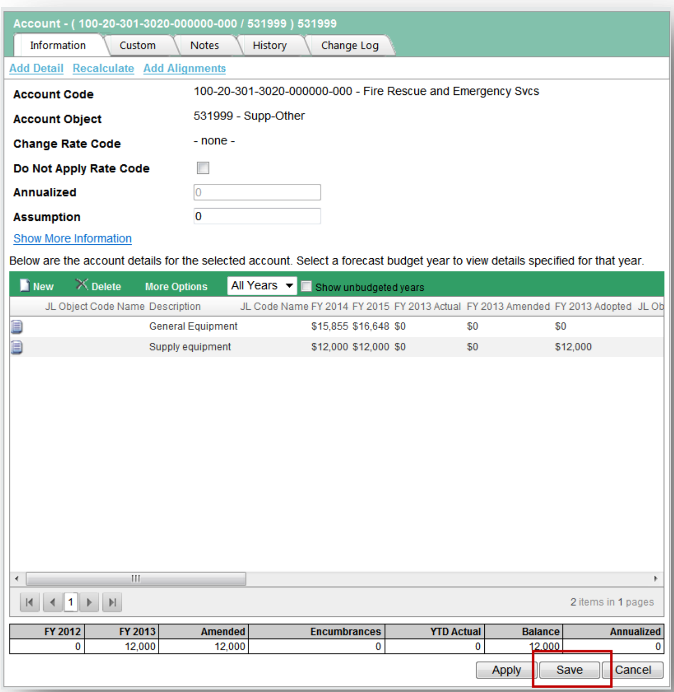
On the **Notes** tab, add notes to the Notes field.

NOTE: make sure you provide as much detail explanation as needed to justify your request. The notes should be quantified and equal the amount requested. Amounts not justified will be evaluated and may be reduced or eliminated.



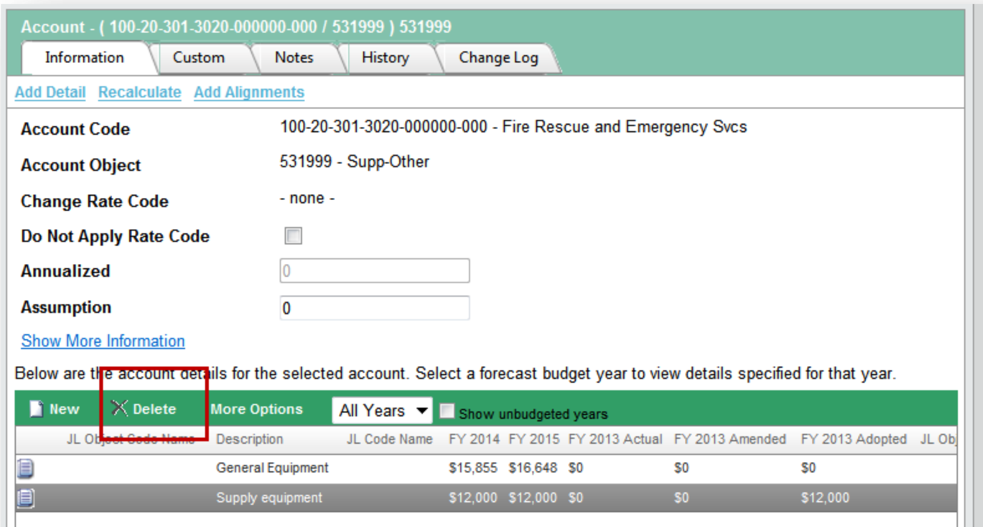
Click the **Save** button.

This will take you back to the **Account** screen. Click the **Save** button to save and exit the account.

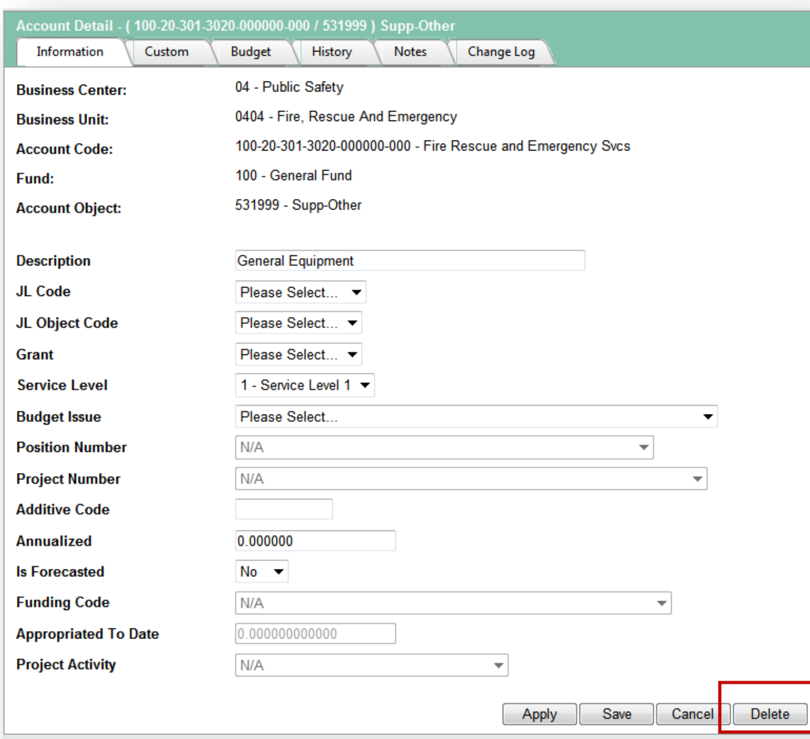


DELETING ACCOUNT DETAIL

You can delete the account detail by selecting the detail then clicking the Delete button in the green bar.



Or use the Delete button in the account detail.



REPORTING

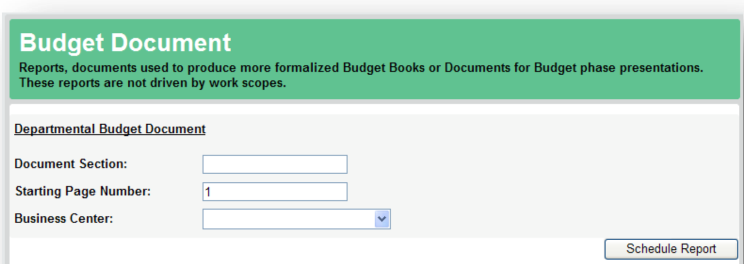
(Home – Reporting)

The reporting workspace contains a list of all area's containing reports.

Note that your custom reports may be in the specific category for that type of report, such as Expenditure, or it may be in the Custom category.

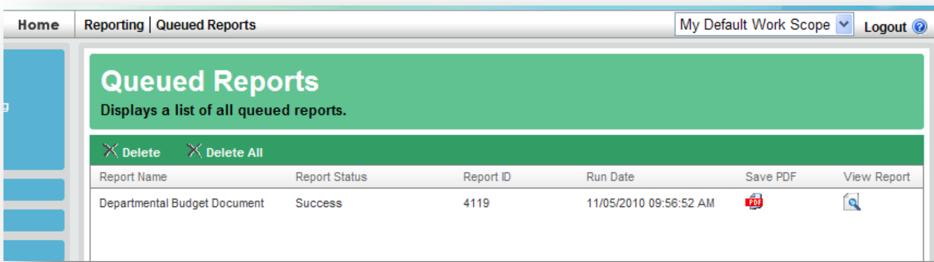
QUEUED REPORTS

Reports are set to queue to reduce system overload. When you select one of the documents, you will see a button called Schedule Report.



After clicking the Schedule Report button, you will be redirected to the Queued Reports work space. The Report Status displays in progress until the report completes.

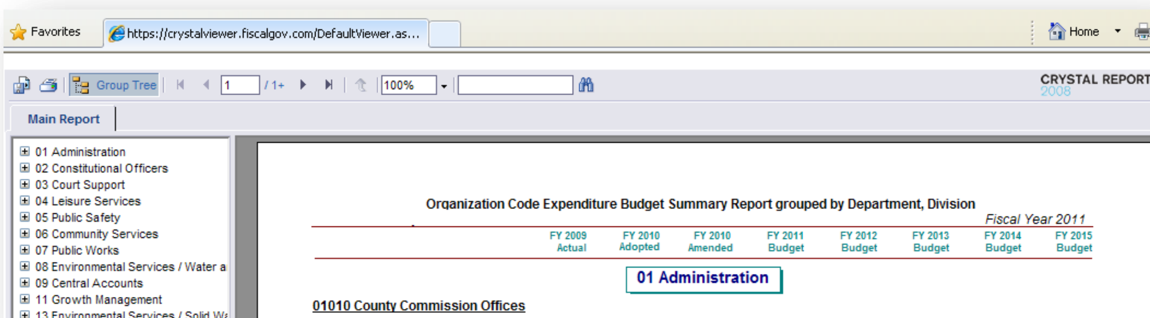
As with the archive database and the position recalculation queues, you can click the Queued Reports in the breadcrumb to refresh the screen in order to see the updated Report Status.



Once the report completes, you have the option to Save PDF or View Report.

VIEW REPORT

The View Report option opens the report in the crystalviewer. Options at the top include export, print, navigation, and search.



SAVE TO PDF

The Save to PDF option redirects you to file download options to either open or save the file as a pdf.