

OBRS (Online Budget Request System) User Guide

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OBRS Basics

The Online Budget Request System (OBRS) website, <https://obrs.lbo.ms.gov>, runs in a web browser with data stored in the OBRS database at LBO.

Logging Into the OBRS Website

To log in, enter your LBO-supplied **User Name** and your password. If you do not have an OBRS User Name yet, or forget your password, please email ObsLoginHelp@lbo.ms.gov.

The first time you log in (or if your password has been reset to the default “pa\$\$word”), you will be required to change your password. Refer to the orange text on the right side of the **Change Password** screen that lists the password requirements.

In OBRS, if you want to logout, use the **Logout** button located in the upper right corner of most screens.



Log Out

Note: After 10-15 minutes of inactivity, you will be logged out of OBRS. Any unsaved changes on the current screen may be lost. Save often!

OBRS Home Logo Button



Click the State seal logo to the left of any screen title to return to the **OBRS Home** screen.

Click the blue down arrow to the right of any screen title, if available, to return to the **OBRS Home** screen, or the **Budget Request Browse** screen.

“Back To:” Links

Back to: [20xx Bureau of](#)

Some screens have no data to change, but may have underlying data calculations and will show the current Budget Request name as a blue link at the top of screen. Click the blue Budget Request name to return to the previous screen.

Command Buttons

Many screens have command buttons in the gray screen footer. Click a button to take an action or go to another screen. If the gray command button footer disappears from your browser window, simply scroll down to display it.



Screen Help

Many screens have on-screen help available with the **Help** icon in the gray command buttons footer. Click outside the Help box to hide / remove it.



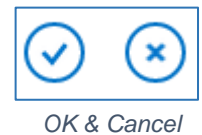
Save / Discard Buttons

When navigating the OBRS screens, **DO NOT use the browser Back button** if any of the navigation options listed below are on a screen. Using the browser Back button could discard changes made on the screens. The options listed below allow you to save data and safely navigate screens in OBRS.

Screens that contain data entry fields or grids will have **Save (Diskette)** and **Discard (X)** buttons in the top right corner. Clicking either button will exit the screen, but only the **Save** button will save changes made on the screen.



Some screens have **OK (✓)** and **Cancel (X)** buttons which close the screen and returns to a screen with a **Save** button. The **OK** button **does not** save any data – **only** the **Save** button actually saves data changes.



When changes are made on a screen, a yellow warning will display to remind you to click the **Save** button when finished making changes on the screen.

Screen has unsaved Changes!

During the **Save**, and some other processes, a gray wait screen will display with a spinner. Data is being saved to or retrieved from the OBRS database.



Data Entry Fields

Data entry fields are always left justified, even for numbers; this is normal for all web browsers. (Display-only numbers, such as totals can be displayed right-justified.)

Agency/Budget Name

To enter dollar amounts correctly, type the whole number *without commas or decimals*, then press the **period / decimal** key, and the commas will be inserted.

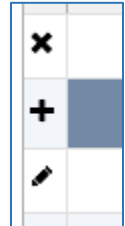
Use the **Tab** key to exit the field and go to the next entry field. (Using the **Enter** key will simply confirm the entry in the field and will *not* move to the next field.)

Data Entry Grids

Data entry fields inside of grids will right-justify numeric fields (item numbers, dollar amounts). See **Data Entry Fields** on how to enter dollar amounts correctly, and using the **Tab** key.

	Item Number	Employee Name
	1.0	<input type="text"/>

When an item is added, edited or deleted, a symbol will appear in the left-most column of the grid: a **pencil** icon for data changed, a **+** icon for a new item added, and a **X** icon for an item to be deleted. The **Screen has unsaved Changes!** warning will also be displayed. Click the **Save (Diskette)** button to save all changes made in the grid.



You can make changes on multiple rows in a grid, and you can add or delete multiple rows. However, **clicking the Save button often** is the safest way to ensure that data is not lost.

NOTE: *Editing data on multiple new rows that have been added (that have the **+** icon on that row) **MAY** cause the screen to crash. To safely add a new item, enter data for only the new row, then click the **Save** button. Then return to that row to make any additional changes.*

When adding new items to a grid, the new records will always appear at the top of the grid, regardless of the **Item Number** value you entered. This is normal, and after clicking **Save**, the grid will refresh with all records in numerical order by **Item Number**.

Import Data from CSV File

Several Major/minor object screens offer the ability to import a large number of items from a specifically formatted CSV file built in Microsoft Excel (or other spreadsheet programs).

- See the **Budget Request System** page of the LBO website to download sample CSV templates to use to import data. The body of each CSV template contains directions on how to input and save data in the CSV file so it can be imported into OBRS.
- **Note:** ***DO NOT CHANGE the names in the first row or the order of the columns in the CSV file or the import will fail.***
- **Note:** *The CSV import will **not** work with **Microsoft Internet Explorer 9.0 or older**. Also, the CSV import may not work if the CSV file is currently open in Excel.*
- **Note:** *The CSV files are **NOT** uploaded on the **Generate Reports** screen – that is for uploading PDF files that have been formatted to look like final MBR form.*

When data is imported from a CSV file, the items will initially appear in grid in reverse order of the CSV file – this is normal. Click the **Save** button, and when you return to the screen, items will then appear in the same order as the CSV import file.

MS OBRS Home Screen

- Click **Budget Requests** to browse and work with your budget requests (one per fiscal year per budget unit).
- Click **Agency Budget Units** (if available) to browse and set up your budget unit(s).

Agency Budget Setup Screen

- Select a Budget Unit and click **Edit**.

Note: *Make sure all fields contain correct data – several fields will print on the main MBR-1 form.*

- Enter a **Board/Commission Name** to activate the **A. Explain...**, **B. Estimated...**, **C. Identify...** data entry regions, and to activate the **Add Board Member** button on the **Board Members** tab.

Budget Requests Browse Screen

- Change the **Fiscal Year** to view budget requests for a prior fiscal year.

Note: *Budget Requests from prior fiscal years cannot be edited.*

- Select a budget request in the list to activate the available command buttons; or click **Add New** to start a new budget request. (*Note: only “Admin” users see the **Add New** button.*)
- Click **Open Budget Request** to edit the details the **Budget Request Main Screen**.
- Click **Refresh Budget Data** to get the latest budget data from the OBRS database.

Add New Budget Request Screen

Note: *Each FY you will need to add a Budget Request for each Budget Unit you have.*

- Click the dropdown icon above the **Budget Unit Name** field to pick an agency budget unit.
- **IF** you are adding a Consolidation budget into which other budgets will be consolidated, then slide the **Main Consolidation Budget?** option to “Yes”. (This is NOT for the budgets that will be consolidated INTO a parent/consolidation budget.) **Note:** *This setting is required to consolidate “sub-budgets” into the “parent” consolidated budget request.*
- Click the dropdown icon above the **Fiscal Year** to select the current fiscal year of the budget request. **Note:** *you cannot have more than one budget request for the same budget unit in a fiscal year.*
- Click the **Save** button to add the new budget request.

Copy Budget Button

- Use this to Copy everything you have entered for the current Budget Request to another Budget Request in the SAME Fiscal Year. This is useful if you have several budgets that all have the same Funding Sources and other details.
 - Select a Budget Request from the **Copy TO Budget Request** dropdown. (**Note:** *If the selected budget is locked, you will **not** be able to copy to it.*)
 - Follow the on-screen instructions highlighted in green to perform the copy; or, click the 'X' button to cancel the copy.
 - If the Budget Request you are copying into already has items in it, those items will not be deleted, and the new items will be added to them. Dollar amounts are not copied.
 - If you need to re-do a copy, you must Delete and re-Add the Budget Request to be copied into.

Delete Budget Request Button

- If you choose to **Delete** a Budget Request, the Budget Request and ALL data for the Budget Request will be **permanently** deleted, and cannot be recovered. You will be asked *twice* to confirm this action.

Note: *To re-start the consolidation of a Consolidated Budget, you must first delete the existing consolidated Budget Request, then re-Add it as a Consolidated budget.*

Budget Request Main Screen

If a budget request has been completed or locked by an administrator, “(Locked for editing)” will display next to the name. Locked budget requests cannot be edited.

- Click a Major Object button on the left to work with it.
- On each Major Object screen that you enter data, click the **Funding Source ...** button to enter the source of funds for the expenditures.
- Click the **Major Object Funding Sources ...** button on this screen to view the total funding sources allocated in the major object screens – you cannot edit data on this screen.

Travel Screen

- **Out Of State Travel Details Tab**
 - **Import From CSV** – for help, see the **Import Data from CSV File** section of this guide.

Contractual, F. Fees Screen

- Click **Add Fee** to add expenses for a contractual fee item. The new item will appear at the bottom of the table with the **Item Name** of “NEW – SELECT TO EDIT.”
 - Select the new item, then click **Edit Expenses** to enter individual expenses.
 - On the **Contractual Fee Expenses** screen, enter the correct **Commitment Item** and **Item Name**.
 - Click **Add Expense** to enter an individual expense.
- **Import From CSV** – for help, see the **Import Data from CSV File** section of this guide.

Capital Equipment, Lease Purchase

- *Starting in FY2022 (June 2020), Lease Purchase information is entered on the Subsidies screen in minor item “F. Lease Purchase.”*

Vehicle, A. Passenger / Work Vehicles Screen

- Click **Add Veh. Category** to add a new vehicle category. The new item will appear at the bottom of the table with the **Item Name** of “NEW – SELECT TO EDIT.”
 - Click **Request Details** to enter individual requested vehicles for the selected category.
 - On the **Vehicle Request Details** screen, enter the correct **Commitment Item**, **Item Name**, **# in Inventory**, etc., for all edit fields above the data grid.
 - Click **Add** to enter an individual vehicle detail record.
 - In the **(R)eplcmt / (N)ew** column, enter ‘R’ if this vehicle is replacing a current vehicle; enter ‘N’ if it is a new vehicle to the inventory.
- Click **Vehicle Inventory** to enter details about all vehicles currently in inventory.
 - **Import From CSV** – for help, see the **Import Data from CSV File** section of this guide.

Subsidies, D. Debt Service Screen

- Entering any **Subsidies, F. Lease Purchase** items with interest paid will cause a record to be added or updated with the **Item Name** of “Interest on Lease Purchase (DO NOT DELETE).” **Note: Please do not delete this record or change the amounts.**

Subsidies, F. Lease Purchase Screen

- Click **Add** to add a new lease type. The new item will appear at the bottom of the table with the **Item Name** of “NEW – SELECT TO EDIT.”
 - Select the new item, then click **Lease Details** to enter individual lease items.

- On the **Subsidies Lease Details** screen, enter the correct **Commitment Item**, **Item Name**, **Act(ual) FY Num(ber)**, and **Est(imated) FY Num(ber)** of items leased.
- Click **Add** to enter an individual lease detail record. *Note: you may need to stretch or maximize the browser window to see all the columns.*

Note: The totals of the three **FY Int(erst)** columns will cause a **Subsidies, D. Debt Service** record to be added with the **Item Name** of “Interest on Lease Purchase (DO NOT DELETE).” This amount is included in the expenditure totals for those fiscal years.

Funding Details Screen

This screen details all funds available to you for expenditures, categorized by types of funds. Scroll down the screen to see the four different fund type sections.

Note: For each budget request please upload a PDF version of the supplemental “Agency Revenue Source Report” into OBRS. See the Budget Request System page of the LBO website for a link to download the Excel file. After downloading the file, fill it in, save it as a PDF, then upload it into OBRS on the Generate Reports screen.

Use either the **State Supt Sources**, etc. tabs at the top or the **SSSF Sources...**, etc., buttons on the screen to access the detailed data entry screens for the different fund types. The **Save** and **Discard** buttons on any of the tabs will save data changes on all tabs of the screen.

As you are entering Funding Details amounts, you will be warned when **Funding Totals do not match Expenditures**, and for which fiscal year. *Note: Total Expenditures amounts come from the Major Object Fund Sources screens.*

- The **Appropriation Received ...** and **General Fund Lapse** amounts are not added into the Actual FY total funding amount; only the **Appropriation Spent** amount is added.
- The **General Fund Lapse** field will be automatically calculated (the **Appropriation Received** amount minus the **Appropriation Spent** amount).

Note: The **General Fund Lapse** amount can be changed in the event of a Re-Appropriation.

- **State Supt. Sources** Tab / Button
 - The names of the **State Support Funds** are fixed and cannot be changed.
- **Other Special Fund Sources** Tab / Button
 - The **Consolidated Names** are enabled for editing only when more than four (4) Other Special Funds sources have been added. Until then, each **Consolidated Name** will contain the **Fund Name** of the Other Special Fund items 1-4. These four **Consolidated Names** and their totals will appear on the **Details** tab of this screen, all the Major Object Fund Sources screens, and the **MBR-1** Budget Request summary form.

Note: On the Fund Details screen, when you Delete an item on any grid, the delete will be permanent when you click ‘Yes’. Click ‘No’ to cancel the Delete.

Program Budgets Screen

Program Budgets is the third “view” of a Budget Request. Program Names and Performance Measure names are controlled by LBO Budget Analysts and cannot be changed by OBRS agency users. They will be automatically loaded into your Budget Request when you first add it (p. 5). Please contact your LBO Budget Analyst to discuss any name or measure changes.

- Select a program budget on the left side, and click a data entry button on the right side.
- Select the **99 Summary of All Programs** to see total amounts for each button on the right.
- The **Total Request** screen displays the total of the **Appropriated** screen **plus** the **Escalations By DFA** screen **minus** the **Non-Recurring Items** screen **plus** all **Decision Units**.
- **Decision Units** specify increases / decreases ONLY to the **Appropriated** year amounts.
- For any Decision Unit with an **Activity Code** of “New Activities”, please click the **New Activities Questions ...** button to view/add/edit Answers to the **Elements of Quality Program Design** questions.
 - Select one of the Answer items in the list, click **Edit**; enter the **Answer** for the **Question** of that Element (e.g., 1.a, etc.).

NOTE: To save Answers, click the **OK (✓)** button on this screen, and the **OK (✓)** button on the Browse screen. On the “Decision Unit Details” screen, click the **Save (Diskette)** button to fully save the New Activity Answers.

NOTE: DO NOT TRY to Answer all the New Activity Questions at one time! Only enter/edit a couple of Answers and then Save them (see note above) to prevent a database timeout and data loss!

Note: Each New Activity Questions must be answered to pass the Error Validation.

Note: A PDF of additional / supplemental information can be uploaded on the **Generate Reports** screen.

- To determine the total **3 Percent GF Reduction** amount, select program **99 Summary of All Programs**, then click the **3 Percent GF Reduction** button. The amount shown in **red** must be distributed, at your discretion, among individual program budgets in the Major Objects **General Fund** column of the **3 Percent GF Reduction** screen.
- Select the **Performance Measure ...** buttons to enter Performance Measure values for the pre-loaded Measures.
 - The **Description** field contents on the **Performance Measure** screen are read-only.
 - The **Act FY Appropriated, Actual, Estimated** and **Projected** column fields allow entry of numbers with two (2) decimal places for percentages or money amounts.
 - Use the on-screen Help button for information on the **Act FY Appropriated** value.

Fund Balances Screen

This is a display-only screen that shows the balance of your entire budget request. Colored 'X's, if visible, indicate numbers that do not match in the three sections. For example, in the **General Funds** column, the three **Actual FY** row values must be equal. If not, a red 'X' will display next to those numbers in all three rows. Unmatched **Estimated FY** numbers will display blue 'X's; and unmatched **Requested FY** numbers will display green 'X's.

- Click the blue Budget Request **Name** to return to the main **Budget Request Screen**.

Narratives Screen

All narratives for the Budget Request (except Program Budget narratives) are contained on this screen. Line breaks can be inserted with the **Enter** key. Use the **Tab** key to exit one narrative field and move to another. Text of any length can be pasted into any of the fields.

Note: The **Budget Request Narrative (Major Object)** can be uploaded as a **PDF** on the **Generate Reports** screen, using the **Add** button next to that report name. Enter "(see upload file)" in the data box on this screen.

Generate Reports Screen

This screen displays provides the ability to generate the MBR forms in PDF format which can be printed. Until the Budget Request has been Approved by the LBO Analyst (or **Revision Accepted**) on the **Status Update** Screen, all MBR PDF forms will be generated with a "DRAFT" watermark. After **Approved** or **Revision Accepted**, the option will appear on this screen for **Final Print**, which will generate the PDFs without the "DRAFT" watermark, and the PDFs are stored in the database so they can be printed from the OBRS Public Reports website (coming soon).

- Some forms/documents can be uploaded and stored in OBRS for printing later. To do this, click the green **Add** button to the right of the form name. **You can ONLY upload a single PDF file per report;** any file type other than PDF will not upload. After a successful upload, **View** and **Delete** buttons will appear so you can view or delete the PDF that was uploaded.

Note: If you upload a PDF in the place of a standard OBRS form (for example, Budget Request Narrative), that PDF will print and not the standard OBRS form. For uploaded Narratives, you will need to enter "See uploaded document" on the Narratives screen.

- Click **Select All** option to check all the reports and generate PDFs for all MBR forms; otherwise click the checkbox next to the report(s) you want to generate, and click **Print** at the bottom.
- Click **Final Print** (if available) to generate non-Draft, permanent PDF forms.

Error Validation Screen

This screen displays detailed Budget Validation errors.

- Any **previous** validation errors will display when the screen starts, along with the **Last Validated On** date.
- Click the **Validate Now** button to check for **current** validation errors. This may take several seconds.
- Click the **Print Errors** button to send the current screen list to a PDF file for printing.

Consolidate Budgets Screen

On the **Budget Requests Browse** screen, click the **Consolidate Budgets** button, if visible. Consolidation is the process of literally adding budget requests together into a Consolidated budget request. By default, the Program Budget Measures are **not** included – slide that option to **Yes** to add in the measures of the “child” agency to list already in the “parent” agency.

Budget Request Submit Status Screen

On the **Budget Requests Browse** screen, click the **Submit Status** button. The Budget Request Submit Status screen is used by the agency Budget Officer and the LBO Analyst for the process of approving a budget request and eventually creating the Final (non-Draft) MBR printed forms.

During the budget request approval process, this screen will progressively display a series of action/status buttons and dates, highlighted with green background for agency Budget Officer actions, and yellow for LBO Analyst actions.

Agency Action	Analyst Action
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- The possible steps/states of the budget request approval process are:
 - 1) **Submitted To LBO** Analyst by Agency;
 - 2) **Rejected** by LBO Analyst;
 - 3) **Updated** by Agency;
 - 4) **Approved** by LBO Analyst;
 - 5) **Revision Allowed** by LBO Analyst;
 - 6) **Revision Submitted** by Agency; and,
 - 7) **Revision Accepted** by LBO Analyst.
- Click the **Status History** command button to generate a PDF of the entire history of the budget request status events in date and time sequential order.

- Only when a budget request is in a state of **Approved** or **Revision Accepted** can the agency print **Final** (non-Draft) versions of the MBR forms. In these two states, the budget request is Locked for editing.
- The selected budget request must be Validated with no Errors. The screen will tell you if the budget request has **ERRORS**.
- If you have made changes to your budget request since the last Validation, the screen will display **NEEDS VALIDATION**. Go to the **Error Validation** screen to validate.
- When the budget request is Validated with no Errors, fill in the **Submitted By (Name)**, **Submitted By (Title)**, and **Approved By** fields, and click the **Submit To LBO** button.

Note: If you leave the **Submitted By (Name)** empty when you click the **Submit To LBO** button, OBRS will fill that field with the name of the **Budget Officer** from the **Agency Budget Unit Detail** screen. If you leave the **Submitted By (Title)** empty, OBRS will fill that field with the words “**Budget Officer**.”

- A pop-up message will display saying the LBO Analyst will be emailed that this budget request has been submitted for review. Click **OK** to continue, and the **Status** screen will close.
- The next time you come to the **Status** screen, several fields and dates will possibly display:
 - **Date Submitted** – where the **Submit To LBO** button was previously;
 - **Reasons for Reject** – will contain text from the LBO Analyst if the budget request is rejected by the LBO Analyst;
 - **Date Rejected** – date the LBO Analyst rejected the budget request; the agency Budget Officer will be emailed if this occurs (using the **Budget Officer Email** field on the **Agency Budget Unit Detail** screen.
 - **Date Approved** – the date the LBO Analyst approved the budget request; the agency Budget Officer will be email when this occurs.
- If the LBO Analyst **Rejects** the budget request, you will need to make corrections to the budget request, Validate the budget request, and come to the **Status** screen for the next step:
 - Click the **Submit Updated Budget** button. A message will display that the LBO Analyst will be emailed that this **Updated** budget request has been submitted again for review.

Note: This cycle of **Reject** by the LBO Analyst and **Submit Updated Budget** by the agency may occur more than once, depending on the accuracy of changes made. The **Reject Reasons** and **Date Rejected** fields will only display the most current values.

- When the LBO Analyst **Approves** the budget request, you will be notified by email of this action, and that you may now print the Final (non-Draft) versions of all the MBR forms. See

the **Print Reports** screen for this. From this point on the budget request is **Locked** for editing.

- After the budget request has been approved, if you or the LBO Analyst discover that further revisions are needed to the budget request, the LBO Analyst will have to **Allow Revisions** to the budget request. If the LBO Analyst takes this action, you will be notified by email that the budget request has been UnLocked and revisions can now be made to the budget request.
 - When you have made the necessary revisions, click the **Submit Revision** button. The LBO Analyst will be emailed of this action, and will review the budget request for acceptance.
- When the LBO Analyst **Accepts** the Revised budget, you will be emailed of this action, and reminded to do a Final (non-Draft) print of all MBR forms that were revised.
 - Or, you may be notified by the LBO Analyst of further revisions necessary before the revisions can be accepted.
 - The cycle of **Allow**, **Submit**, and **Accept Revision** may occur more than once, and only the latest of these dates will be shown on the screen.