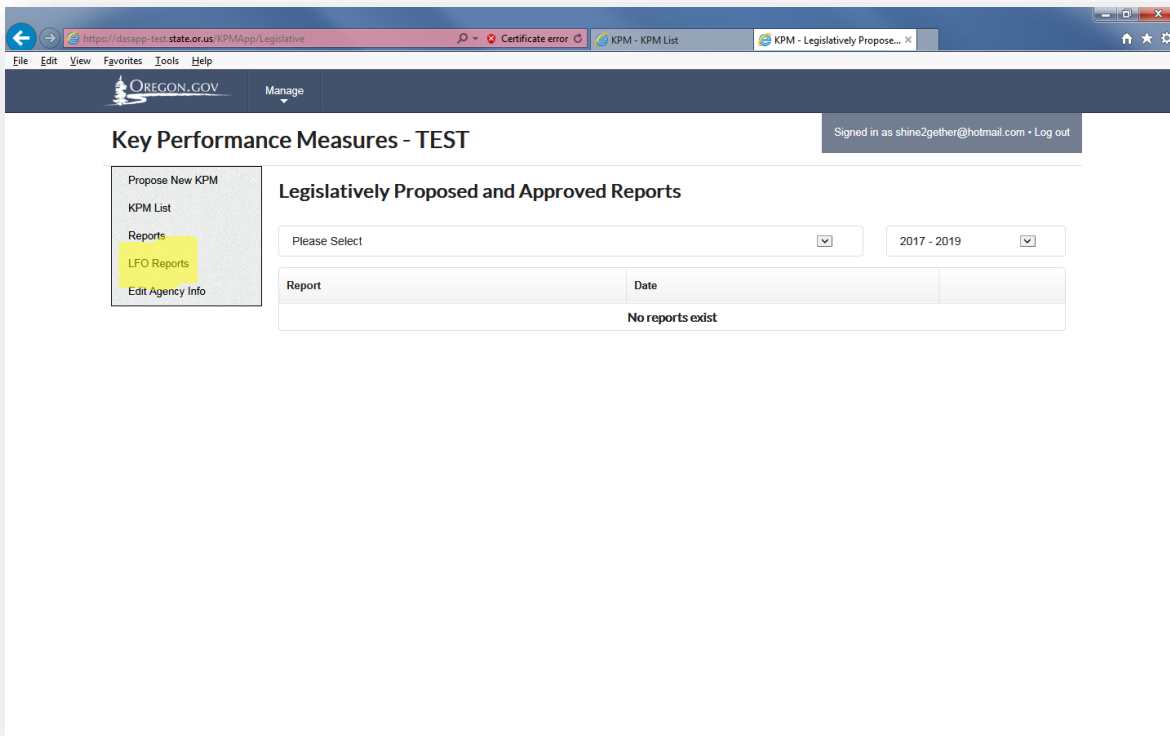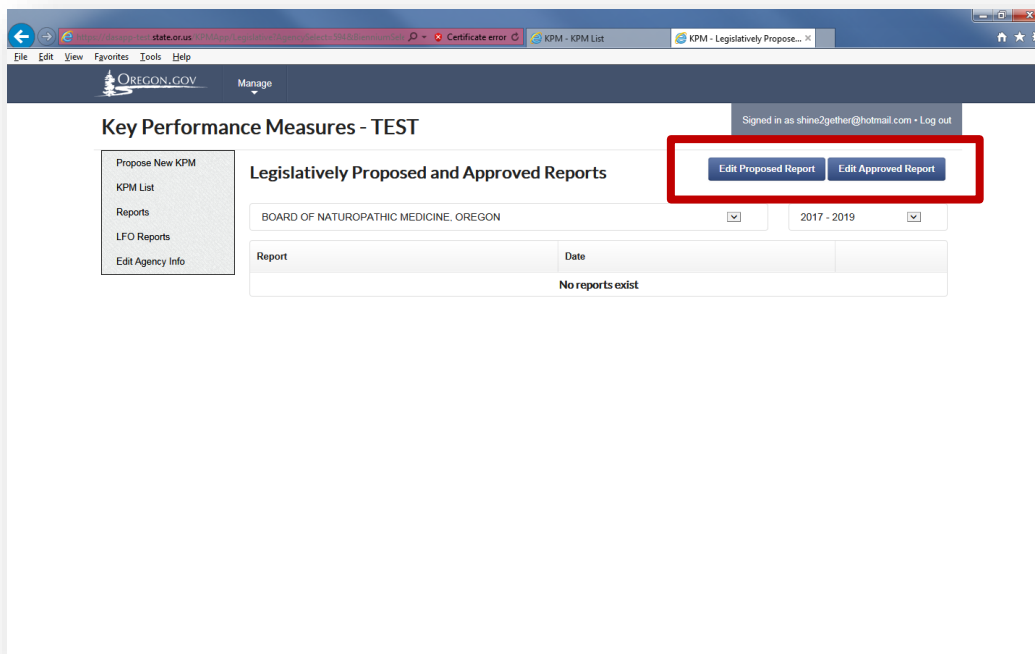# CREATING LFO REPORTS
Legislatively Proposed KPM Report
&
Legislatively Approved KPM Report

- Click on the **LFO Reports** link in the left navigation (highlighted in yellow above) to created/edit the Legislatively Proposed or Legislatively Approved Reports.
- Select an agency from the dropdown labeled "Please Select" at the top center of the screen.
- Once an agency is selected the "Edit Proposed" and "Edit Approved" buttons will display in the top right of the screen.

Click on the **"Edit Proposed Report"** button to begin to create this report.

The screen will open to the page Legislatively Proposed Report data entry screen.

Legislative Proposed Report - Create/Edit Report

Edits available here include the following fields:
- Mission Statement
- KPM Title
- KPM Description
- Targets for the next biennium
- Status updates
- LFO Recommendation
- Sub Committee Action

Changes requested to KPM's include:
- **Propose a New KPM:** Used when proposing a brand new KPM which is NOT replacing an existing one.

- **Propose a Deletion of a KPM:** Used when proposing to completely delete a KPM.

- **Propose a Replacement of a KPM:** this proposes the deletion of the KPM you are replacing and provides you with the ability to enter the info for the new one.

- **Proposing Target change:** one may enter the 2018 and 2019 proposed changes under the KPM itself, however it will be subject to change in working with your LFO and LRO Budget Analyst.

  - **Approved KPM's -** may be altered to "Proposed Delete"
  - **Proposed Delete KPM's -** may be altered back to "Approved"
  - **Proposed New KPM's -** may be altered to "Delete" which deletes the proposal completely.
    - If you delete a proposal and want it to come back contact your system administrator to fix it for you.

EDIT ANOTHER AGENCY PROPOSED REPORT

- Select the agency from the "Agency" dropdown
- Click on "View Preview" button

Change an Approved KPM to Proposed Delete
- Click on the "Approved" status dropdown and select "Proposed Delete"
- The KPM will status will update to Proposed Delete and the KPM will minimize on the screen.
- The KPM will display in the Legislatively Proposed Report as a Proposed Delete.

Change a Proposed Delete measure back to APPROVED status
- Click on the "Proposed Delete" status dropdown and select "Approved"
- The KPM will status will update to Approved and the KPM will maximize on the screen to fill in additional fields.
- The KPM will also display in the Legislatively Proposed Report as a Proposed Delete.
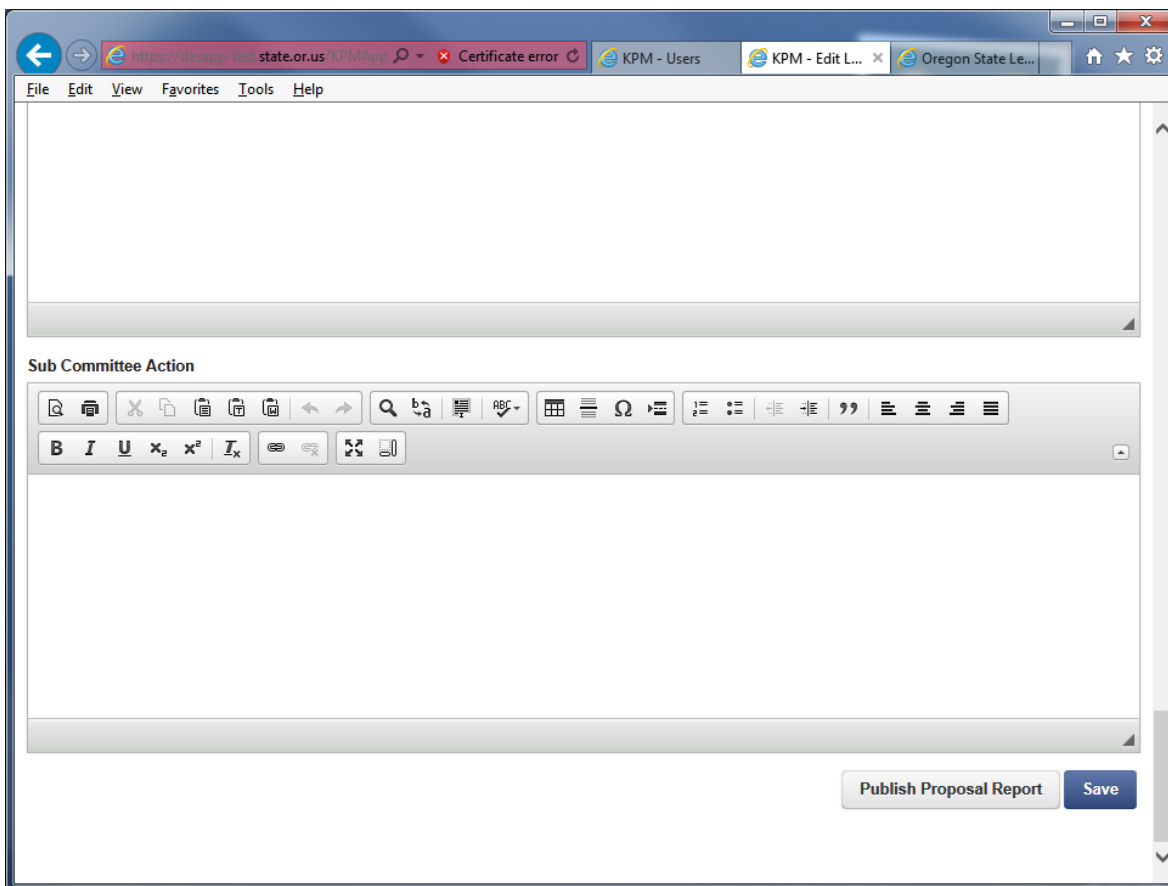
Delete a Proposed New KPM

- From the KPM List, under status dropdown, select "Delete" for KPM with a "Proposed New" status
- The proposed New KPM is deleted and no longer displays in your KPM List
- If you accidentally deleted the measure, send a message to the KPM System Administrator to make it appear again.

Proposing Target Changes

- To propose a target change enter the new targets in the future biennia displayed.
    - EX #1: if the current year is 2016, the new biennia would be 2018 and 2019
    - EX #2: if the current year is 2018 the new biennia would be 2020 and 2021
- The new biennia target would be proposed for would display in the odd year prior to the Full Session.

SAVE Report or PUBLISH Proposal Report

- **SAVE:** Click the "save" button to save your report as it is in progress
    - To edit the report once you've exited you would click the "Edit Proposed Report" button

- **PUBLISH PROPOSAL REPORT:** Once you are ready to finalize the proposed report, click the "Publish Proposal Report" button.
    - A copy of the report will be generated and display on the main LFO reporting screen

Propose a New KPM

A new KPM may be proposed by either replacing an approved measure on KPM Edit screen (as described in the direction above) or by clicking on "Propose New KPM" in the left navigation.

Update the KPM data elements on the screen:

- **Number** – the KPM number you wish to assign to the KPM
- **Title** – short title of KPM
- **Description** (short description)
- **Data Collection Period for the measure** – timeframe your data is collected for the measure (Ex: Jan 1 – Dec 31st or July 1 – June 30th)
- **Metric(s)**
  - Enter the metric Name
  - If multi-dimensional click "Add Metric" button to add more dimensions. An example of a multi-dimensional measure is the Customer Service Measure where we measure accuracy, timeliness, helpfulness etc.
  - Target 2018
  - Target 2019
- **Alpha order** – enter only if you are tracking more than one metric
- **Upward Trend:** Check off "Upward Trend" if an upward trend is good, otherwise leave blank.
- Click "Create" button
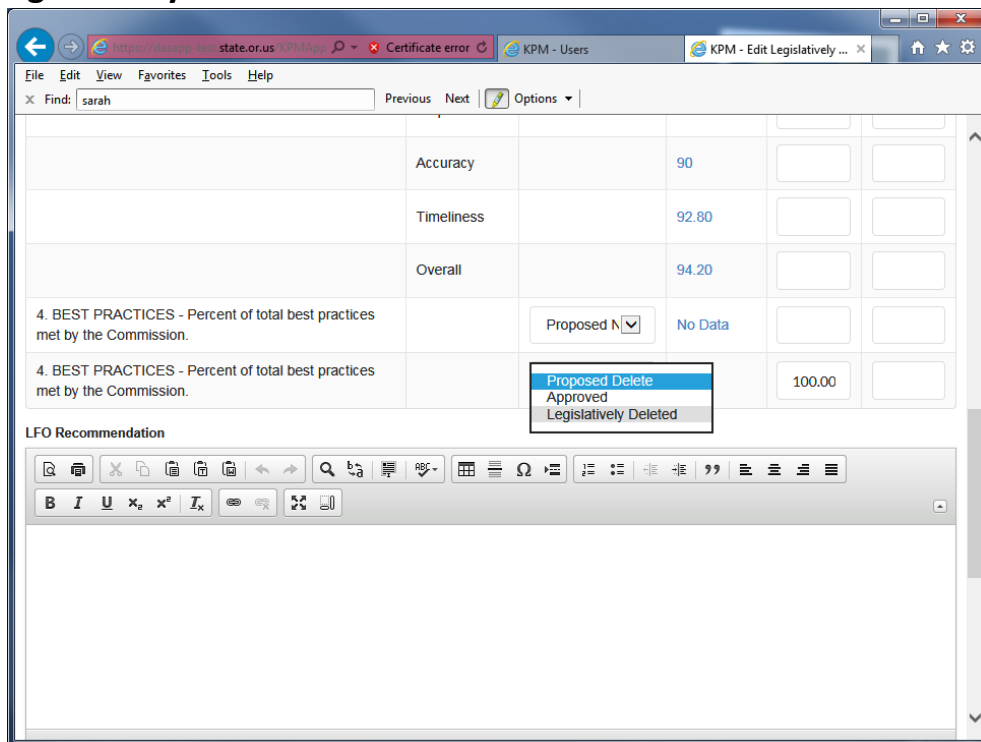- KPM will display in your KPM list as a "Proposed New" KPM

Legislative Approved Report - Create/Edit Report

The process is the same as creating the proposed report however, you will click on the "Edit Approved" button.

Approving Proposed Measures

- **Measures that are carrying over (already have "Approved" status)** - do nothing
- **Measures with "Proposed New" status** - select "Approved" from the status dropdown if they were approved by the JWM Committee

Legislatively Delete Measure

- **Measures with "Proposed Delete" status -** select "Legislatively Deleted" from the status dropdown if it was approved for deletion by the JWM Committee.

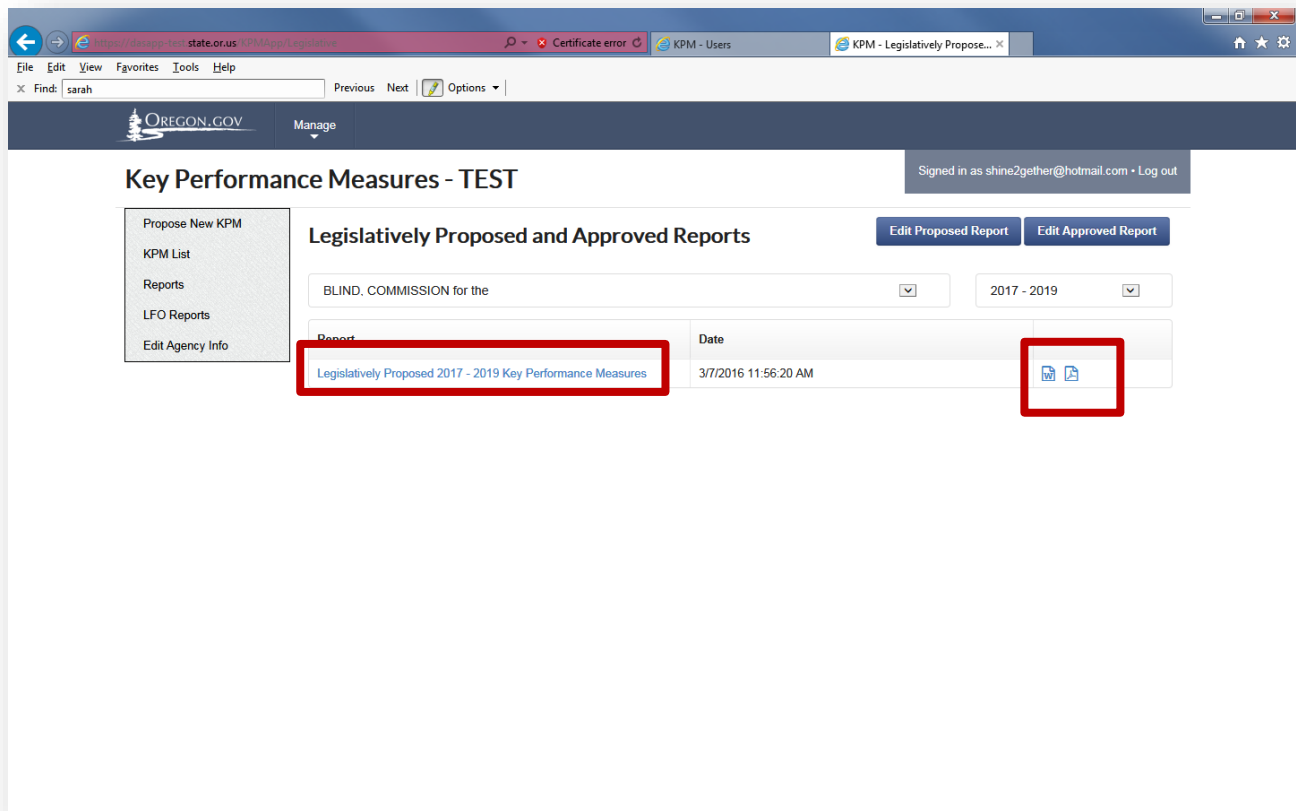## SAVE Report or PUBLISH Proposal Report

SAVE: Click the "save" button at the bottom of the screen to save your report as it is in progress
  - To edit the report once you've exited you would click the "Edit Proposed Report" button

PUBLISH APPROVAL REPORT:

Once you are ready to finalize the proposed report, click the "Publish Proposal Report" button.
  - A copy of the report will be generated and display on the main LFO reporting screen

- **Click on the Report name link** - preview of the report will open in the browser.
- **Click on "Word" or "PDF" Icon -** opens "Word" version of doc or "PDF" version of the report.