

BUDGET SYSTEMS BASICS

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LEARNING OBJECTIVES

- Accessing BFM (Budget Formulation Management) & PatternStream
- Basic Navigation
- Structure & Key Concepts
- Accessing Additional Training

WHAT ARE BFM & PATTERNSTREAM?

BFM is the City's budgeting & performance reporting software	PatternStream is the City's budget publishing software
Both are cloud based and best accessed using Google Chrome	
Users input data into BFM to build the budget	Users input narrative information to develop the published budget
BFM receives data and sends some data to SAP	PatternStream has no connection to SAP
BFM sends data to PatternStream to populate budget data tables in the published books	PatternStream only receives incoming information from BFM

WHO USES BFM & PATTERNSTREAM?

- Bureau Finance Staff (end users)
 - Finance staff/teams enter data into forms in BFM during budget development as well as budget monitoring
 - Finance staff enter narrative data into PatternStream to fully develop the requested and adopted budgets
- Bureau Performance Management Staff (end users)
 - Performance managers in bureaus enter data in forms throughout the year
- City Budget Office (CBO)
 - CBO staff use BFM as a reporting tool
 - CBO uses PatternStream to publish budgets

ACCESSING BUDGET SYSTEMS

- BFM & PatternStream are cloud based- this means users access them through the internet

Chrome is the recommended

browser for accessing BFM & PatternStream

BFM: <https://portland.bfm.cloud/bfmprod/default.aspx>

PatternStream: <https://portland.patternstream.cloud/pads-ui/#/>

GETTING A LOGIN

- Requesting a login from CBO is easy
- **Managers should reach out to the CBO analyst assigned to the bureau**
- Please provide the name of another end user with the same desired permissions as the person you are requesting a login for

SECURITY IN BFM & PATTERNSTREAM

- Security in both are controlled:
 - By organization (**bureau-users can only see forms and reports for the organization they belong to**)
 - By action (what buttons users can see)
 - By menu or book (what menus or books bureaus can see)

LOGGING IN TO BFM

- Navigate to: <https://portland.bfm.cloud/bfmprod/default.aspx>

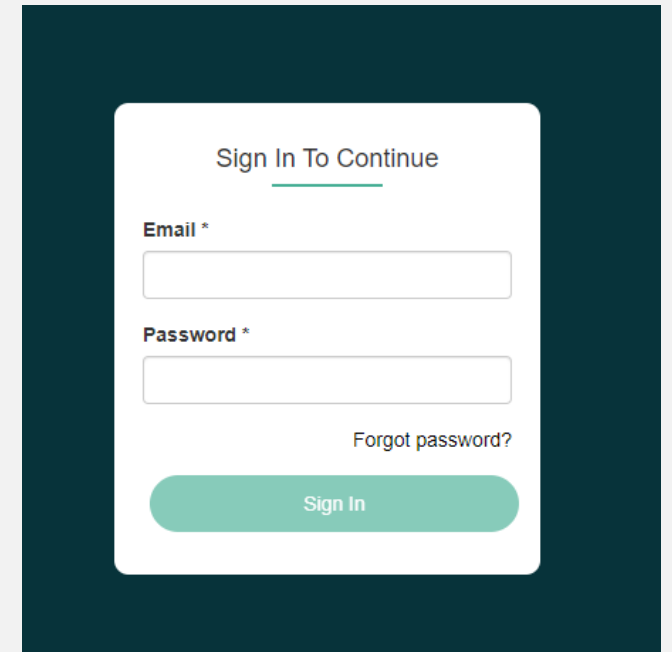
- Use the drop down to log in
 - Usernames are always First.Last
 - Usernames are not cap sensitive



- BFM will prompt you to change your password. Please remember this. If your password, your CBO analyst can re-set it for you

LOGGING IN TO PATTERNSTREAM

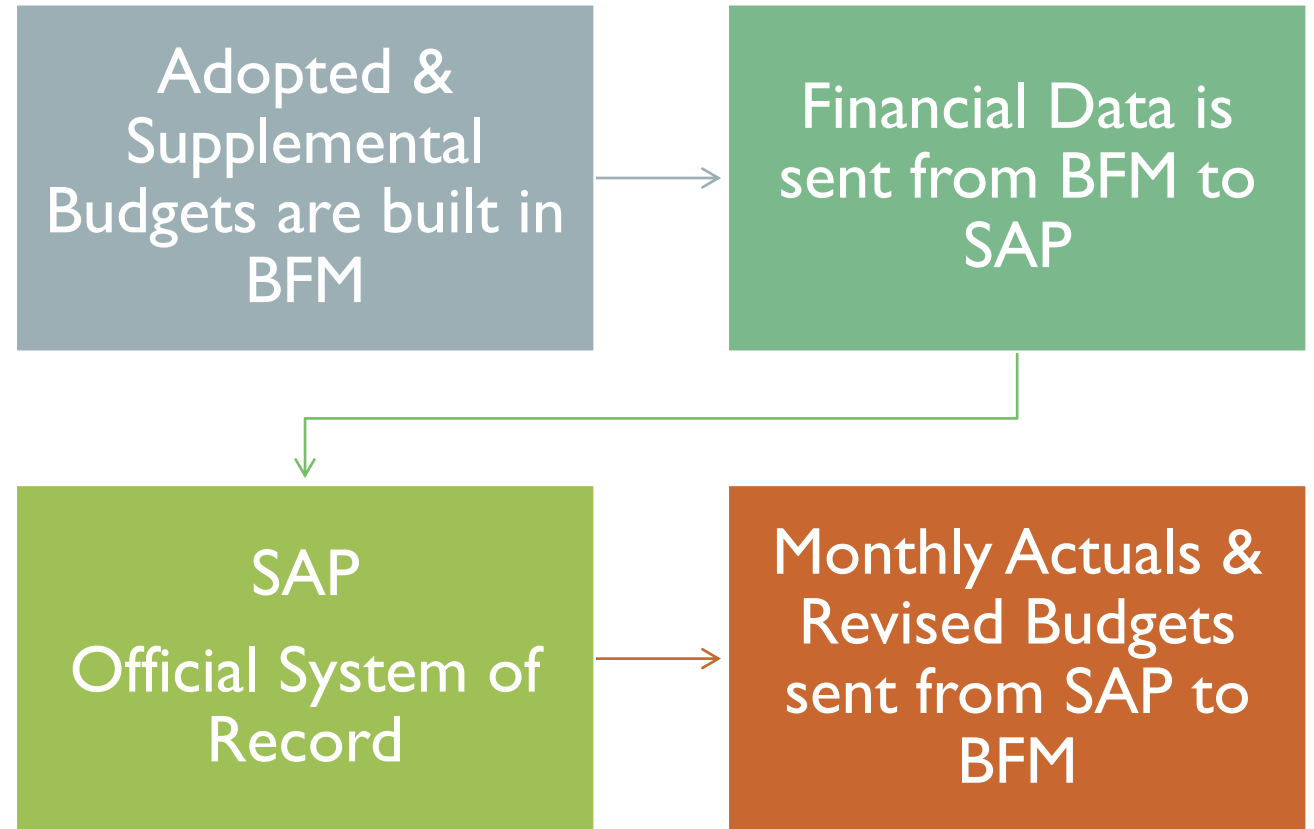
- Navigate to: <https://portland.patternstream.cloud/pads-ui/#/>
- Email is your City email
- You set your password



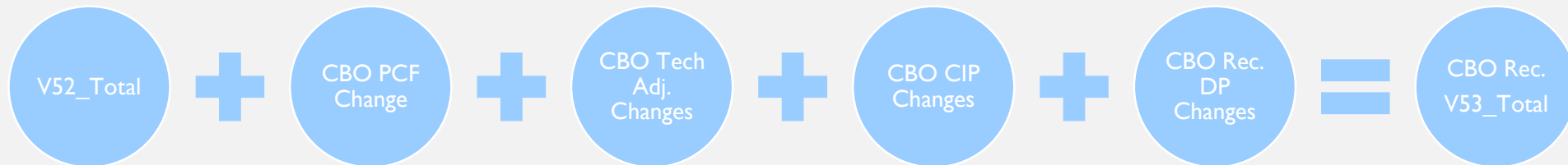
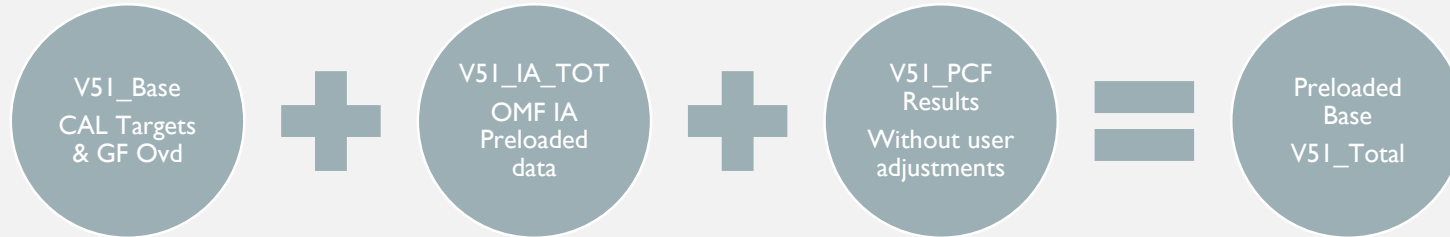
The image shows a login form titled "Sign In To Continue" on a dark teal background. The form is white and contains the following elements:

- The title "Sign In To Continue" is centered at the top, with a green underline under "In".
- The label "Email *" is positioned above a white input field.
- The label "Password *" is positioned above another white input field.
- The text "Forgot password?" is located to the right of the password input field.
- A green rounded rectangular button with the text "Sign In" is centered at the bottom of the form.

BUDGET DATA PROCESS



BUDGET DEVELOPMENT COLUMNS FROM A BASE BUDGET TO CBO RECOMMENDED



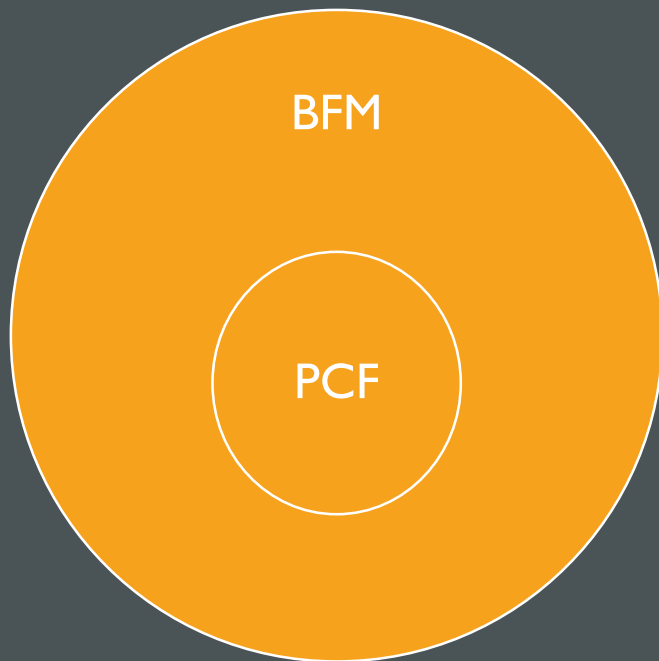
BUDGET DEVELOPMENT COLUMNS MAYOR'S PROPOSED TO ADOPTED

V53_Total + Mayor's Proposed PCF Change + Mayor's Proposed Tech Adj. Change + Mayor's Proposed CIP Change + Mayor's Proposed DP Changes = Mayor's Proposed V54_Total

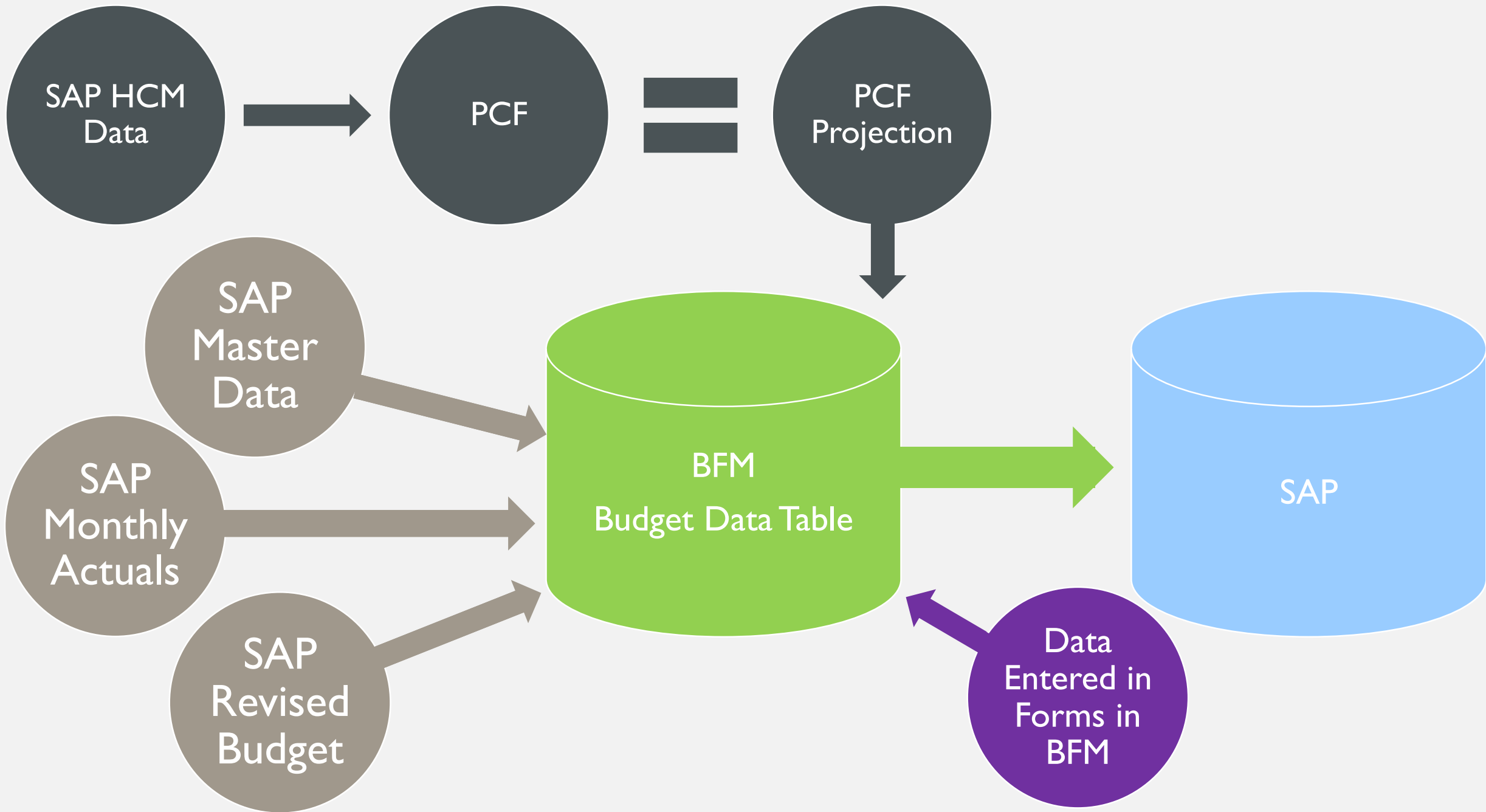
V54_Total + Approved PCF Change + Approved Tech Adj. Change + Approved CIP Change + Approved DP Changes = Approved V55_Total

V55_Total + Adopted PCF Change + Adopted Tech Adj. Change + Adopted CIP Change + Adopted DP Changes = Adopted V56_Total

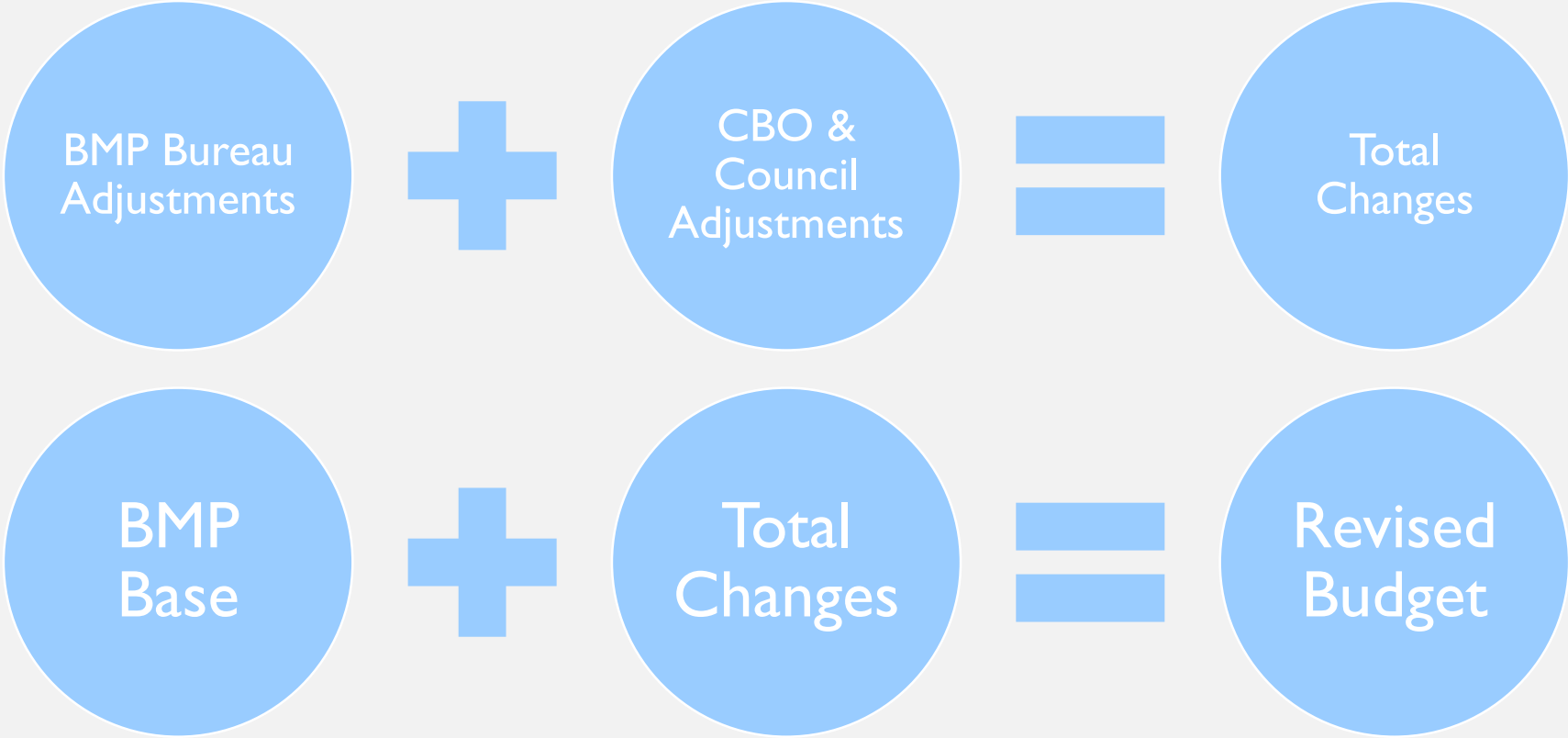
BFM VS. PCF



BFM	PCF
<ul style="list-style-type: none">• The core budgeting database	<ul style="list-style-type: none">• PCF lives within BFM
<ul style="list-style-type: none">• One big table of data	<ul style="list-style-type: none">• Salary & Benefits Forecasting Tool
<ul style="list-style-type: none">• Fed by forms, preloaded data, and PCF projections	<ul style="list-style-type: none">• A tool for <i>estimating</i> personnel services costs
	<ul style="list-style-type: none">• A very complex cost projection engine
	<ul style="list-style-type: none">• Projection results are summarized and 'posted' to BFM as expenses
	<ul style="list-style-type: none">• Fed by SAP-HCM data and user adjustments
	<ul style="list-style-type: none">• Not a personnel management tool



BMP COLUMNS



LEARNING RESOURCES

- Manuals
 - Budget Manual
 - BMP Manual
- uPerforms
 - <https://up.portlandoregon.gov/gm/folder-1.11.18610?mode=EU>
- Online
 - [BFM Training and Support](#)
- City Budget Office analysts
- Demo Environment
 - https://portland.bfm.cloud/bfmprt_dev/default.aspx