



Carl Vinson **Institute of Government**

The University of Georgia

## **Local Government Financial Documents Web Site**

The Carl Vinson Institute of Government has completed development of the web site to post local government financial documents, including adopted budgets, audited financial reports, and asset forfeiture reports as required by House Bill 122. The site is now part of the Tax and Expenditure Data Center at the Vinson Institute. The purpose of this initiative is to increase government accountability and transparency by making financial information available and easily accessible. The site was developed by the Information Technology and Outreach Services Division of the Carl Vinson Institute of Government at the University of Georgia.

Local governments are responsible for uploading their adopted budgets to the web site within thirty days of adoption; audited financial statements as soon as practical after they are completed; and asset forfeiture reports from their law enforcement agencies when they are submitted with the agency's budget request. The law currently does not require amended budgets to be uploaded during the course of the fiscal year. Documents uploaded to the site must be in portable document format (PDF). Once uploaded to the site and reviewed by the site administrator, the documents will be available to anyone with an Internet connection. The URL for the site is:

<https://ted.cviog.uga.edu/financial-documents/>

If you have any questions about the web site, please contact:

**Dr. Wes Clarke**

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## Local Government Users

### Creating a New Account

Entering the URL takes the user to the web site home page shown in Figure 1. From the menu in the red box on the left, select Local Government User Login to access a page for creating a user. Click the Create New Account tab and enter the information required to establish a local government user account (see Figure 2). After you enter the information and click the Create New aAccount button, the user's account request is submitted to the administrator. [Note that this button at the bottom of the screen is not visible in Figure 2.]

We recommend that each local government establish user accounts only for those persons they designate as responsible for posting documents. There is no limit set on the number of accounts that can be created, and our process for approving an account is by determining that the person is an employee of the entity. This will generally be determined by the e-mail address. If there is any question about the validity of an account request, the administrator will contact the local government's finance director. Any document uploaded to the site by a user is reviewed by the administrator prior to be made available at the site.

**Figure 1. HB122 Web Site Home Page**

The screenshot shows the TED House Bill 122 website. At the top left is the logo for the Carl Vinson Institute of Government, The University of Georgia. To the right is a banner that says 'PROMOTING EXCELLENCE IN GOVERNMENT'. Below this is a red header with 'TED | House Bill 122'. On the left is a navigation menu with items like Welcome, Users, Search Users, Pending Users, Budgets and Financial Reports, All Documents, Pending Documents, Upload Document, My Documents, and Log Out. The main content area has a section titled 'LOCAL GOVERNMENT FINANCIAL DOCUMENTS ONLINE' with a welcome message and a 'VIEW OUR BUDGET DOCUMENTS' link. Below that is an 'UPLOAD BUDGET DOCUMENTS' section with instructions on how to log in. At the bottom is an 'ABOUT THE TED CENTER' section. On the right side of the main content area is an image of several coins. The footer contains the Public Service & Outreach logo, the address '201 North Millledge Avenue, Athens GA 30602', phone and fax numbers, the copyright year '©2010 Carl Vinson Institute of Government', and the University of Georgia logo.

**Figure 2. User Account Creation**

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PROMOTING EXCELLENCE IN GOVERNMENT

**TED | House Bill 122**

- Welcome
- Users
  - Local Government User Login
  - Budgets and Financial Reports
  - Open or Download Documents

### USER ACCOUNT

Please create a username and password for your account. Also select a government entity for which you will be uploading documents. After creating your account, your account will have to be approved by an administrator before being able to log in. You will receive an email afterward containing information about how to log in, set your password, and other details.

**Account information**

**Username: \***

Spaces are allowed; punctuation is not allowed except for periods, hyphens, and underscores.

**E-mail address: \***

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

**Password: \***

**Confirm password: \***

Provide a password for the new account in both fields.

**Account Details**

**First Name: \***

**Last Name: \***

**Position or Title:**

**Phone:**

**Government Entity: \***  
County: Appling

Choose a government entity that you will be uploading documents. Whatever entity is chosen will be verified by an administrator.

The administrator reviews all account requests and approves them or determines that more information is needed. The user is updated at each step with e-mails alerting them that the account is under review and that it has been approved, or that additional information is needed.

Once the account is approved, the user will receive an e-mail from the administrator confirming that the account is active. From the login tab on the Local User Page (Figure 3), the user may log onto the system where they will be able to change their account details, upload documents, or view documents in the system.

**Figure 3. Local User Page**

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**PROMOTING EXCELLENCE IN GOVERNMENT**

**TED | House Bill 122**

- Welcome
- Users
  - Local Government User Login
- Budgets and Financial Reports
- Open or Download Documents

**USER ACCOUNT**

Create new account **Log in** Request new password

**Username: \***

Enter your TED HB 122 username.

**Password: \***

Enter the password that aocompanies your username.

Log in

Public Service & Outreach  
THE UNIVERSITY OF GEORGIA

201 North Milledge Avenue, Athens GA 30602 | P: 706.542.2736 | F: 706.542.9301

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## Uploading Documents

Selecting the Upload Document menu option takes the user to the screen shown in Figure 4. From this screen the user should select the fiscal year for the file they wish to upload. The user may type in the location and name of the file they want, or they can use the browse function to select the file from their hard drive or network location. Once selected, the user should click the Upload button; the file name and details will appear on the screen. If the user determines that they have selected the correct file, they select the file type (Budget, Financial Report, Asset Forfeiture Report), then click the Save button at the bottom of the screen. The document is then uploaded to the site and submitted for review. Once submitted, the document listed as a pending document for review by the administrator. Once it is approved, its status is changed from “pending” to “published” and it is made available to any user.

Budget documents and financial reports should be uploaded as one single file. Do **NOT** upload the budget or financial report in multiple files. Files up to 40mb may be uploaded to the site. If you have your budget document in multiple files, combine them into a single file. If that file exceeds 40mb, contact Dr. Wes Clarke at the Vinson Institute.

**Figure 4. Document Upload Utility**

**CREATE BUDGET DOCUMENT**

Fill out this form with the fiscal year, document, report type, and the government entity of the documentation you are uploading. Help for each field is provided next to that item.

→ **Revision information**

**Fiscal Year: \***  
2000

Please pick the fiscal year that pertains to the document you are uploading.

**Document: \***

Maximum file size: 40 MB  
Allowed extensions: pdf

Select the file that you want to upload by clicking "Browse."  
After your selection, click "Upload."

**Report Type: \***

Budget Report  
 Financial Report  
 Asset Forfeiture Report

Select the type of document this will be, either a budget report or a financial report.

**Workflow: \***  
Needs Review

**Government Entity: \***  
County: Appling

**Comments:**

## Viewing and Downloading Documents

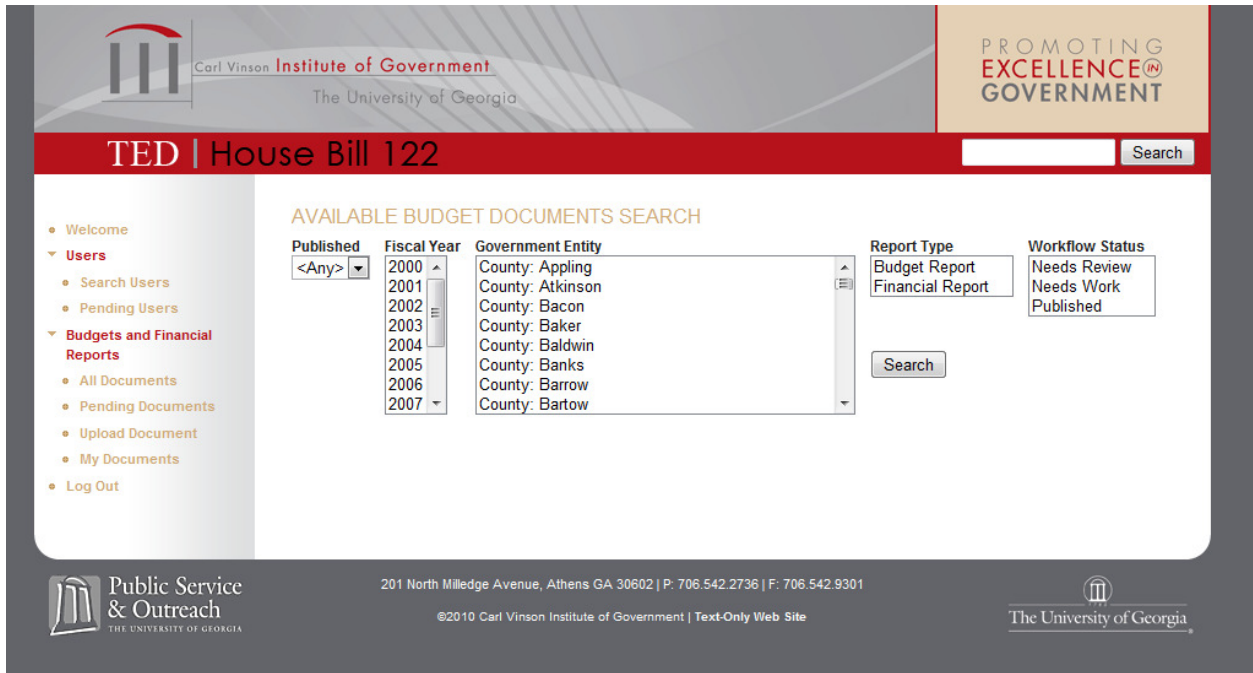
The home page contains information about the site and a list of menu options in a red box on the left side of the page. Users who want to download documents will select the option View Documents.

Figure 5. HB122 Web Site Home Page

The screenshot shows the home page of the TED | House Bill 122 website. At the top left is the logo for the Carl Vinson Institute of Government, The University of Georgia. At the top right is the slogan 'PROMOTING EXCELLENCE IN GOVERNMENT'. A red banner below the header reads 'TED | House Bill 122'. On the left is a navigation menu with the following items: Welcome, Users (with a dropdown arrow), Search Users, Pending Users, Budgets and Financial Reports (with a dropdown arrow), All Documents, Pending Documents, Upload Document, My Documents, and Log Out. The main content area is titled 'LOCAL GOVERNMENT FINANCIAL DOCUMENTS ONLINE' and contains the following text: 'Welcome to the TED House Bill 122 website, where you can view annual operating budgets of Georgia cities, counties, and school districts that are one million dollars or above.' Below this is a section 'VIEW OUR BUDGET DOCUMENTS' which states: 'Any of our approved budget documents are viewable by the public without having any credentials or needing to log in. Just click on the Budget Documents link on the right of the page. You are able to search for budget documents by fiscal year, document type, and by county, city, or school district.' The next section is 'UPLOAD BUDGET DOCUMENTS' which says: 'If you need to upload any budget documents to this system, you need to log in. You can gain access to the system by going through the account creation process by clicking Local Budget Login and following the directions there.' The final section is 'ABOUT THE TED CENTER' which reads: 'The TED Center is a place to learn more about local fiscal conditions in Georgia. This Center is part of the State's commitment to providing an open government for Georgians. The University of Georgia develops and maintains this Center in partnership with the Georgia General Assembly to provide community specific financial information to the public.' To the right of the text is an image of several coins on a green background with a grid pattern. The footer contains the logo for Public Service & Outreach, The University of Georgia, the address '201 North Milledge Avenue, Athens GA 30602 | P: 706.542.2736 | F: 706.542.9301', the copyright notice '©2010 Carl Vinson Institute of Government | Text-Only Web Site', and the University of Georgia logo.

This will take the user to a page that allows them to find the document they want by selecting a government entity, fiscal year, and document type. They can simply select an entity and click the search button to see all available documents for that entity. Under the time constraints of the development, a single menu box is used. Future versions will allow users to select entity type, then a specific entity within that type.

**Figure 6. Document Search Utility**



The screen images that follow are from a beta testing site and show documents that were loaded during testing. The live site has slightly different graphics, but is essentially the same. Selecting a document from this list of available files allows them to open or save the file. Whether the document opens in their browser or in another program depends on their settings and preferences.



Figure 7. Search Results Page

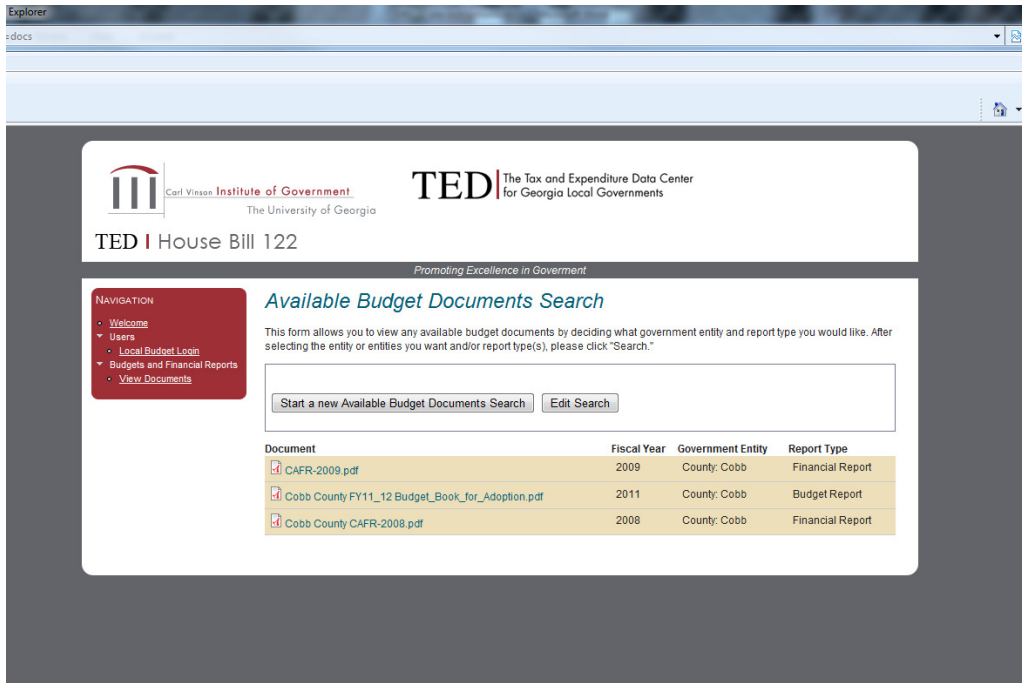


Figure 8. Document Download/Save Dialogue Box

