

e-Controlling Board

**Guide for
Controlling Board Members,
Aides, and LSC Analysts**

March 2005

e-Controlling Board

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1. Overview of the e-Controlling Board Process

1.1. e-Controlling Board

- Is a recent addition to the state's initiative to expand the use of electronic processing.
- Provides agencies with a tool to enter, route, and manage their Controlling Board requests via the Web. Using e-Controlling Board workflow, all documents are entered and transmitted electronically. Controlling Board request packages are routed from the agency to the Board of Regents and Controlling Board Office as applicable.
- Provides a means for electronically attaching and archiving all necessary supporting documentation.
- Provides public access to scheduled and approved requests and non-confidential supporting documents. Vendor IDs in the Waiver Information section of the request are not displayed to the public.

1.2. Functionality

- Request forms are very similar to the previously used paper versions with the exception that multiple waiver and/or funding information will appear on the front page.
- Request numbers for many agencies begin at 101. Other agencies may begin at 201, 301, etc. based on their current numbering schema.
- Approval signatures are electronic images of the approver's name.
- Vendor IDs, ALIs and funding codes are validated to CAS codes but not required.
- Page numbering occurs as the request is printed. Page margins and orientation may need to be set by the user based on the user's printer.
- A pdf version of the request includes the form, required explanation (Summary and Subsequent paragraphs), list of attachments, release and permit information, and required information questions. Attachments and the project budget require the user to print them separately. The user's printer configuration must be set to landscape orientation to print the project budget.
- Each web page includes page-level online help.
- Sessions will **time-out** after 45 minutes of inactivity (from the last moment that you opened a request or executed a query).
- **Avoid** clicking the browser's **Back** button and pressing the **Enter** key. Instead, use on-screen prompts and buttons to navigate in e-Controlling Board.
- **Pop-up windows must be enabled** (i.e., all pop-up blockers must be disabled).
- Records retention: records will be retained online for the current and previous two fiscal years.
 - Current paper records are archived and retained for five fiscal years previous to online records.
 - Older records are purged consistent with DAS retention schedules.

2. Accessing the e-Controlling Board Application

2.1. Public Access

The public and users access the e-Controlling Board application via the web:
www.ecb.ohio.gov

Controlling Board - State of Ohio - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://test.ecb.ohio.gov/public/default

Welcome to the State of Ohio **e-Controlling Board** Monday, March 14, 2005

Controlling Board Meetings

Agendas	Minutes
03/14/2005	03/14/2005
02/28/2005	02/28/2005
02/07/2005	02/07/2005
01/24/2005	01/24/2005

1 2 3

Archives

Meeting Schedule

March 2005						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today Meeting Date

[Meeting Dates/Submission Deadlines](#)
[Board of Regents Submission Deadlines](#)

Important Information

- Welcome to e-Controlling Board Training
- e-Controlling Board application launched February 2005
- Glossary
- Ohio Revised Code, Section 127.
- Capital Budget
- Executive Budget FY 06/07

[About the Board](#)
[Members](#)

The e-Controlling Board application will support Internet Explorer 5.5 and Netscape 6.2 and above. Optimum screen resolution of 1024x768 pixels. If you have installed any software to block pop-up windows, please [disable](#) while using this application.

Search Requests

Enter criteria to search requests approved after April 1, 2005.

Organization:

Description:

Vendor Name:

State Fiscal Year:

July 1, 2003 to June 30, 2004
July 1, 2004 to June 30, 2005

Capital Requests Approved By OBM

e-Controlling Board Login

The e-Controlling Board portal is for the State of Ohio agencies and institutions.

User ID:

Password:

State of Ohio, Controlling Board
30 East Broad Street, 34th Floor Columbus, Ohio 43215-3457 (614) 466-5721 FAX:(614) 466-3813

Trusted sites

The public home page includes:

2.1.1. Controlling Board Meetings

This section contains links to the agendas, LSC briefing documents, and minutes.

- *Agendas* - displays meeting dates and links to published agendas. Click a linked date to display the published agenda. Controlling Board requests opened from the selected agenda do not display vendor IDs on the request form, nor confidential attachments.
- *LSC Briefing Document* – click the document icon right of the agenda date to display the LSC Briefing Document (i.e., green sheets) for the selected date.

- *Minutes* - displays meeting dates and links to published meeting minutes. Click a linked date to display the published meeting minutes.
- *Page Numbers* – displays page numbers to view lists of meeting agendas and minutes.
- *Archives* – displays links to Controlling Board meeting agendas and minutes from fiscal year 2003 through the March 28, 2005 meeting.

2.1.2. Meeting Schedule

This section displays a dynamic calendar with meeting dates and submission dates for both the Controlling Board and the Board of Regents.

2.1.3. Important Information

This section displays links to current important information that the Controlling Board Office has entered.

2.1.4. Search Requests

This section provides search criteria by agency and description of the Controlling Board request. The user is linked to appropriate data as determined by selection or search criteria.

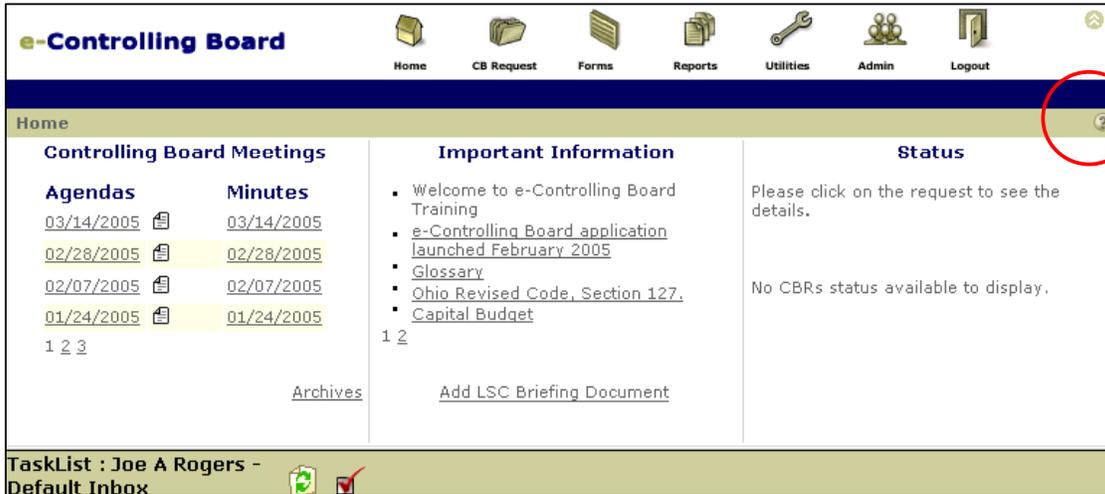
2.1.5. e-Controlling Board Login

The e-Controlling Board portal is for the State of Ohio agencies and institutions to prepare, review and approve requests. Controlling Board members, aides, and analysts review requests online by logging into e-Controlling Board:

- e-Controlling Board systematically generates the user ID and password when the user profile is created by OBM.
- An email is sent to the user containing the login information.
- Enter a valid user ID and password.
- You will be prompted to change your password on the first login attempt.
- Passwords are case-sensitive, must be a minimum of six characters and a maximum of 15 characters, and contain at least one number and one letter. Passwords expire every 60 days.

2.2. Getting Online Help

Page-level online help is available to all users by clicking the help icon  that is displayed in the upper right section of each page:



The screenshot shows the e-Controlling Board website interface. At the top, there is a navigation bar with the following items: Home, CB Request, Forms, Reports, Utilities, Admin, and Logout. Below this is a dark blue header bar with the text "Home" on the left and a help icon (a question mark inside a square) on the right, which is circled in red. The main content area is divided into three columns: "Controlling Board Meetings", "Important Information", and "Status". The "Controlling Board Meetings" column has sub-sections for "Agendas" and "Minutes", with a list of dates and links. The "Important Information" column contains a bulleted list of links and a "Add LSC Briefing Document" link. The "Status" column contains two paragraphs of text. At the bottom of the page, there is a footer bar with the text "TaskList : Joe A Rogers - Default Inbox" and two small icons.

2.3. The User Web Page

e-Controlling Board

Home CB Request Forms Reports Utilities Admin Logout

Home

Controlling Board Meetings		Important Information	Status
Agendas	Minutes	<ul style="list-style-type: none"> Welcome to e-Controlling Board Training e-Controlling Board application launched February 2005 Glossary Ohio Revised Code, Section 127. Capital Budget 	<p>Please click on the request to see the details.</p> <p>No CBRs status available to display.</p>
03/14/2005 02/28/2005 02/07/2005 01/24/2005 1 2 3	03/14/2005 02/28/2005 02/07/2005 01/24/2005 Archives	1 2	

TaskList : John B Member - Default Inbox

Records : 1 - 0 of 0 , Pages : 1

Task	Process	Status	Responsible	Start Date
State of Ohio, Controlling Board 30 East Broad Street, 34th Floor Columbus, Ohio 43266-0411 (614) 644-6441 FAX:(614) 466-3813				

General Information on the User Web Page

2.3.1. Controlling Board Meetings

Contains links to the agendas, LSC briefing documents, and minutes. Opening the requests from the agendas will display the vendor IDs on the request forms and allow access to the confidential attachments.

2.3.2. Important Information

Same as the public web page.

2.3.3. Status

For the Controlling Board members, aides, and LSC users, this section will not display any requests. For agencies, this section displays a list of all requests where the status has changed within the past 120 days.

2.3.4. Workflow TaskList

This section will not display any workflow tasks for Controlling Board members, aides, and LSC users.

2.3.5. Menu Items

Icons for the following menu items are displayed on the template of each screen. Each menu item is linked to the appropriate section of the application for ease of navigation.

Guide to the e-Controlling Board Process

Office of Budget and Management

Updated 3/18/05



Home - contains information for Meetings/Agendas, Important Information, Status, and the users' Workflow TaskList Default Inbox (if applicable).



CB Request - contains options for opening new requests, viewing current requests, performing inquiries, checking status of requests, viewing release/permit data and deleting requests. Only the Inquiry link from this page is accessible by Controlling Board members, aides and LSC analysts.



Forms - provides a menu listing of the Controlling Board request forms and manuals.



Reports - provides a listing of Controlling Board printable reports and an online inquiry option.



Utilities - provides instructions for changing passwords and delegating tasks.



Admin - includes items to navigate authorized users to pages for functional, security, and technical administration.

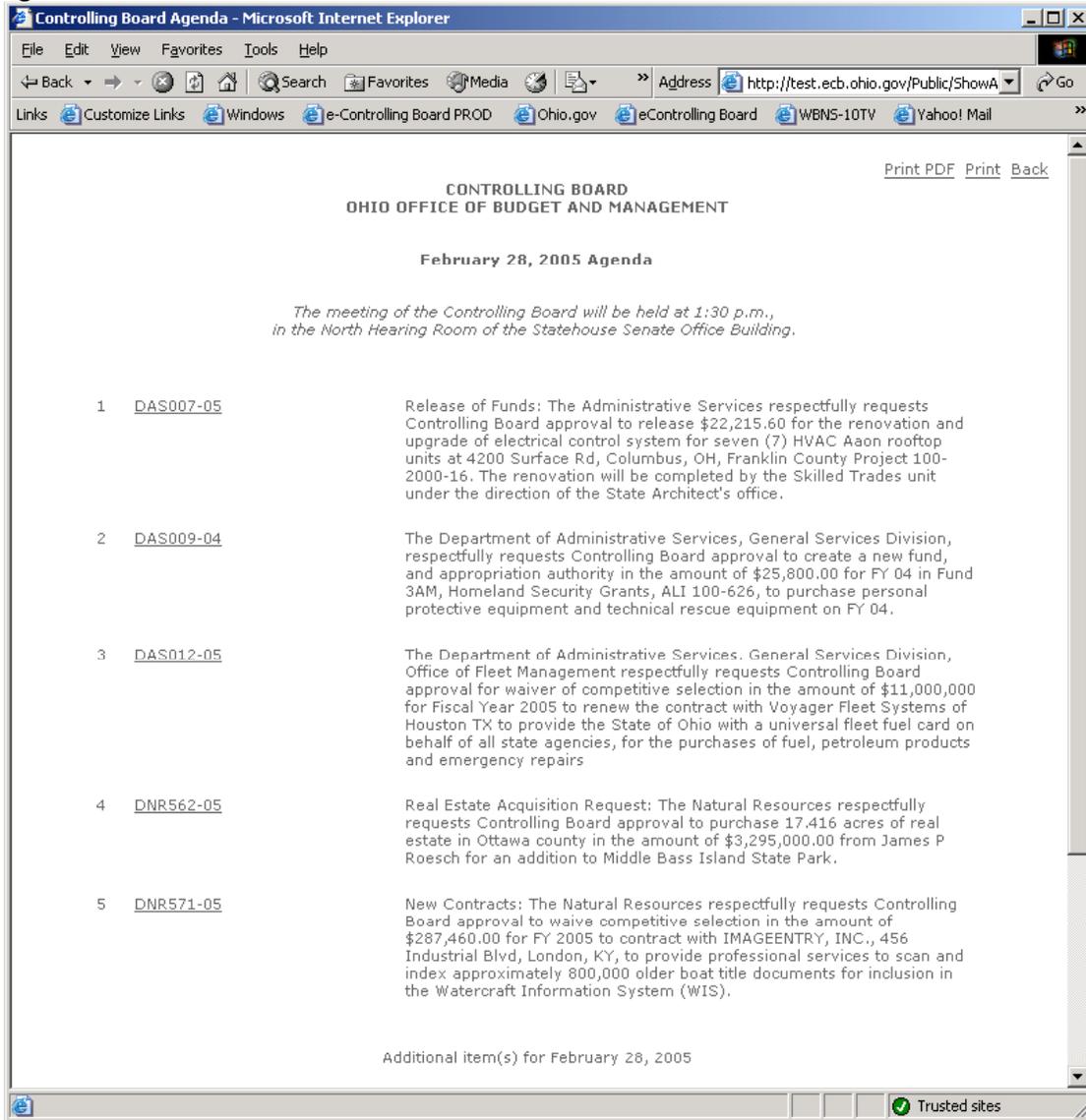


Logout - provides a means to logout of the current view and return to the login screen.

3. Opening and Printing Agendas and Requests

3.1. Open the Published Agenda

While displaying the home page, click the linked agenda date to display the selected agenda.



3.2. Print the Agenda

Click the [Print PDF](#) link to create a pdf version of the agenda that can be saved to your local or LAN directory.

Click the [Print](#) link to send the agenda to your printer.

3.3. Return to the Home Page

Click the [Back](#) link to close this window displaying the agenda and return to the home page.

3.4. Open the Request

Click the request number to display the printable version of the request. The printable version of the request includes the request form, summary and subsequent paragraphs, list of attachments, release and permit information, and completed required information questions.

State of Ohio - Controlling Board Request - Microsoft Internet Explorer

Project Budget Attachments Print Print PDF Close

STATE OF OHIO
 CONTROLLING BOARD
 30 East Broad Street, 34th Floor
 Columbus, Ohio 43215-3457
 (614) 466-5721 FAX:(614) 466-3813

CAPITAL REQUEST

Controlling Board No.
TOS086

Status: Approved
 Meeting Date: 11/29/2004

GENERAL INFORMATION

Agency Treasurer of State's Office Division/Institution Treasurer of State's Office Eligible for Local Administration? No	<input type="radio"/> Real Estate Acquisition <input type="radio"/> Release of Capital Funds (R.C.Sec. 127.14G) <input type="radio"/> Transfer of Capital Funds (R.C.Sec. 127.14G and/or Sec. 127.15) <input type="radio"/> Higher Education Authorization Request (Sec. 3333.071) <input type="radio"/> Other Statutory Authority/Bill Section: <input checked="" type="radio"/> Capital Request <input type="radio"/> Release of Capital Funds (R.C.Sec. 127.14G) <input type="radio"/> Transfer of Capital Funds (R.C.Sec. 127.14G and/or Sec. 127.15) <input type="radio"/> Waiver of Competitive Selection (R.C.Sec. 127.16B) <input checked="" type="checkbox"/> No Competitive Opportunity <input type="checkbox"/> Agency Released Competitive Opportunity <input type="radio"/> Release Percent for Arts (R.C.Sec. 3379.10) <input type="radio"/> Other Statutory Authority/Bill Section: <input type="radio"/> Other:	Fiscal Year(s) 2005 Bill No. Eligible for OBM Director Approval? No
---	--	--

WAIVER INFORMATION

For	Vendor ID	FY	Amount	Name	Address	County
TOS	260002521	2005	\$6,500,000.00	EASTERN DESIGN & DEVELOPMENT	22 W WOOD ST YOUNGSTOWN , OH 44503	Cuyahoga
TOS	160845824	2005	\$5,006,500.00	SNYDER OF BERLIN	5944 EXECUTIVE BLVD DAYTON , OH 45424	Cuyahoga

TRANSFER INFORMATION

From	To	FY	Fund Group	Fund Code	Appropriation Line Item	Appropriation Line Item Name	Transfer Amount	Prev Rel Amount

FUNDING INFORMATION

Fund Group	Fund Code	Appropriation Line Item	Appropriation Line Item Name	Total Amount
GRF	123	090-609	TOS ADMINISTRATIVE FUND	\$5,000,000.00
GRF	042	090-611	TREASURY EDUCATION	\$568,200.00

SIGNATURES

(cont'd on next page)

State of Ohio - Controlling Board Request - Microsoft Internet Explorer

SIGNATURES

<i>Joseph T. Deters</i>	11/30/2004
Agency Director or Authorized Agent	On The Date Of
11/23/2004	<i>Lisa H. Dodge</i>
Date	Controlling Board President/OBM Director

AGENCY CONTACT

Name: Kevin J Talty	Title:
Phone: (614) 466 - 8358	Fax: () -
	E-Mail: Tracy.Cabot@OAKS.STATE.OH.US

REQUIRED EXPLANATION OF REQUEST

The Treasurer of State's Office respectfully requests Controlling Board approval to release \$5,000,000.00 for the Construction of Building #2 project in Columbus, OH. DAS/GSD/SAO project number for DAS-administered projects: SAO-01-025-0.

This is the subsequent paragraph for TOS086

Attachments	Controlling Board Request No.: TOS086
--------------------	--

Confidential	Attachment Type	Attachment Description
	Bid tabulations/price quotations	Bid tabs from 5 vendors
	Pre-approval letter authorizing agency administration	Letter dated January 2, 2005 from DAS
Confidential	Other	Memo from the Governor's Office

Release and Permit Information						
Name	FY	Amount	R & P #	R & P Date	Issued By	Comments
EASTERN DESIGN & DEVELOPMENT	2005	\$6,500,000.00	RP01012		Not Required	
SNYDER OF BERLIN	2005	\$5,006,500.00	TP0132580		State Purchasing	

Capital Request Required Information	Controlling Board Request No.: TOS086
---	--

Architect, engineering, or other professional service contracts - EASTERN DESIGN & DEVELOPMENT

1. Type of Service to be provided: The services to be provided are specified in the contract attached to this request.
2. Selection Process:
 - a. Explain how the Request for Proposal (RFP) was publicized or advertised.

Note the links at top right (of screen capture on page 8). Each of these links are explained below.

3.4.1. View the Project Budget

1 If the request is a Capital Request, click the Project Budget link to open the project budget.

Project Budget Print PDF Print Close

Project Name: Construction of Building #2 SAO Project No: SAO-01-025-0 Controlling Board Request No.: TOS086
 Local Project No: LOS-05050 CAS Project No: CAS05
 Project County(s):

County	Release Amount
Carroll	\$5,000,000.00
Guernsey	\$500,000.00
Auglaize	\$32,200.00
Champaign	\$36,000.00
Total Release Amount: \$5,568,200.00	

	Estimated Amount	Est %	Revised Amount	Actual Amount	Act %	Prev Rel Amount	Amount this Request
Estimated Cost of Construction	\$7,000,000.00		\$7,200,000.00	\$200,000.00		\$200,000.00	\$6,000,000.00
Construction Services							
SNYDER OF BERLIN 160845824	\$50,000.00	0.71	\$50,000.00	\$50,000.00	25.00	\$50,000.00	\$50,000.00
COVINGTON & BURLING 530189411	\$500,000.00	7.14	\$5,000,000.00	\$100,000.00	50.00	\$100,000.00	\$100,000.00
Professional Services							
EASTERN DESIGN & DEVELOPMENT 260002521	\$650,000.00	9.29	\$650,001.00	\$50,400.00	25.20	\$54,000.00	\$5,444,500.00
Allowances and Change Order Fees	\$50,000.00	0.71	\$50,000.00	\$50,000.00	25.00	\$50,000.00	\$500,000.00
Local Admin / SAO Fees	\$40,000.00	0.57	\$41,000.00	\$41,000.00	20.50	\$40,000.00	\$1,000.00
Percent For Arts	\$0.00	0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Equipment	\$0.00	0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Contingency & Pre-Bid Expenses	\$0.00	0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Other1	\$0.00	0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Other2	\$0.00	0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Total	\$1,290,000.00		\$5,791,001.00	\$291,400.00		\$294,000.00	\$6,095,500.00

3.4.2. Print or Close the Project Budget

Click the [Print PDF](#) link to create a pdf version of the project budget that can be saved to your local or LAN directory.

Click the [Print](#) link to send the project budget to your printer. Your printer's page setup must be set to landscape to print the project budget. See section 10.2 for browser settings.

Click the [Close](#) link to close this window.

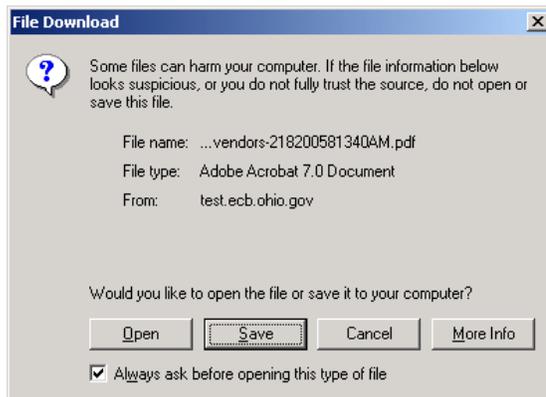
3.4.3. View or Print the Attachments

 Click [Attachments](#) to display a window that includes links to the attached documents.

Controlling Board No. **TOS086** [Close](#)

Attachment Type	Attachment Description
Bid tabulations/price quotations	Bid tabs from 5 vendors
Pre-approval letter authorizing agency administration	Letter dated January 2, 2005 from DAS
Other	Memo from the Governor's Office

When logged in as a user, both confidential and non-confidential attachments are accessible. Click the attachment description to open the attachment. A dialog box (example follows) displays.



Click **Open** to open the document. Click **Save** to save the document to your local or LAN directory.

Click Close to close the Attachments window.

3.5. Print the Request

- 3 Click the Print PDF link to create a pdf version of the request that can be saved to your local or LAN directory.
- 4 Click the Print link to send the request to your printer. See section 10.2 for browser settings.
- 5 Click the Back link to close this window displaying the request and return to the home page.

4. Forms Screen

The Forms screen contains hyperlinks to files that may be downloaded by the user. Some, like the Private Business User Form, can be downloaded, completed, and then attached to the request. Other forms, like the Operating Request form, can be downloaded and used solely as a worksheet.

e-Controlling Board

Home CB Request Forms Reports Utilities Admin Logout

Forms **Forms** Manuals

Controlling Board Request Forms

Select the request form below to download a blank form to your computer.

- [Allowable Capital Expenditure Guidelines](#)
- [Private Business Use Guidelines](#)
- [Private Business Use Report](#)
- [Reimbursement Guidelines](#)
- [Reimbursement-Declaration of Official Intent](#)
- [e-Controlling Board Security Form - Agency](#)
- [e-Controlling Board Security Form - Approver](#)
- [Operating Request*](#)
- [Operating Transfer Request*](#)
- [Capital Request*](#)
- [Real Estate Acquisition Request*](#)
- [Fund Appropriation Request*](#)

*These forms are provided as worksheets only. Do not complete and submit these forms.

5. Manuals Screen

The Manuals screen contains hyperlinks to instructional materials that may be downloaded by the user. These include the Controlling Board Manual, e-Controlling Board Online Help, e-Controlling Board Help (downloadable version), and training materials.

e-Controlling Board

Home CB Request Forms Reports Utilities Admin Logout

Forms **Forms** Manuals

Controlling Board Manuals

Select a document below to download to your computer.

- [Controlling Board Manual \(December 1997\)](#)
- [e-Controlling Board Online Help](#)
- [e-Controlling Board Help \(download version\)](#)
- [e-Controlling Board Training in Power Point Presentation](#)
- [Agency Guide to the e-Controlling Board Process](#)

6. Reports Screen

The Reports screen contains a listing of several executable reports. Agencies can select and print any report.

The following reports are available by agency or for all higher education institutions. In addition, the [Inquiry](#) menu provides dynamic search functionality.

Reports

Report:

Organization:

All Higher Education

Date Range: To:

An organization or the All Higher Education checkbox must be selected for all reports except Report By County - Capital Release Requests and Summary Report - All Statuses. Both the start date and end date must be entered in the mm/dd/yyyy format. See the online help for additional information.

- Select report type from the drop-down list.
- Select Organization or check All Higher Education.
- Enter starting date and ending date in mm/dd/yyyy format.
 - For Approved Request reports, all requests for the organization are retrieved based on when the date the request was approved by the Controlling Board or OBM Director.
 - For Summary Request reports, all requests for the organization of the current user are retrieved based on the date range entered. This report is not available to Controlling Board members, aides, and LSC analysts.
- Click **Run Report** to run the report. Report displays in new browser window.

State of Ohio e-Controlling Board Report [Print](#) [Close](#)

Organization: Natural Resources
Report Type: Transaction Report - Waiver Requests (Approved)
For: 01/01/2004 to 3/9/2005 11:59:59 PM
As of: 3/14/2005 2:20:34 PM
By: tamra.satkowski

CBR No	OBM Director / CB Approval Date	Division	Request Type	Description	Vendor Name	Waiver Amount	Comp. Opp.
DNR567	10/18/2004	DNR - Office of Information Technology	Operating Request	DSWC SWIMS Project	LINNET GEOMATICS INTERNATIONAL	\$360,000.00	No
DNR571	02/28/2005	DNR - Division of Watercraft	Operating Request	Watercraft Title Scanning Project	IMAGEENTRY, INC.	\$287,460.00	
DNR572	11/30/2004	DNR - Division of Wildlife	Operating Request	Great Lodge	Greatlodge.com, Inc	\$.00	No

Total Amount: \$647,460.00

- Click [Print](#) to send the report to your computer printer (Note: User may have printer options displayed in a dialog box. Make a selection and click OK or Print to print the report).
- Close the window by clicking [Close](#).

Report names include either *Approved* or *All Requests* to the right of the report name. e-Controlling Board reports include the following:

- Capital Projects (Approved)
- OBM Approval of Specific Capital Requests (Approved)
- Transaction Report-Waivers (Approved)
- Transaction Report-Waivers with No Competitive Opportunity (Approved)
- Transaction Report-Waivers with Agency Released Competitive Opportunity (Approved)
- Transaction Report-Fund Report (Approved)
- Transaction Report-Transfer Requests (Approved)
- Transaction Report-Capital Release Requests (Approved)
- Transaction Report-Operating Release Requests (Approved)
- Transaction Report-Real Estate Acquisition Report (Approved)
- Summary Report-All Request Types (Approved)
- Summary Report-All Statuses (All Requests)
- Report by County-Capital Release Requests (Approved)
- Summary Report-Waiver Requests (Approved)

7. Inquiry Screen

The Inquiry screen provides a means to execute queries about specific Controlling Board requests by meeting date or various criteria.

7.1. Meeting Date Inquiry

The meeting date drop-down list includes the dates of all Controlling Board meetings.

- Select the Controlling Board meeting date.
- Select the Go button.

CBR No.	Decision Date	Status	Request Explanation
DAS012-05	02/28/2005	Approved	The Department of Administrative Services, General Services Division, Office of Fleet Management respectfully requests Controlling Board approval for waiver of competitive selection in the amount of \$11,000,000 for Fiscal Year 2005 to renew the contract with Voyager Fleet Systems of Houston TX to provide the State of Ohio with a universal fleet fuel card on behalf of all state agencies, for the purchases of fuel, petroleum products and emergency repairs
DNR571-05	02/28/2005	Approved	New Contracts: The Natural Resources respectfully requests Controlling Board approval to waive competitive selection in the amount of \$287,460.00 for FY 2005 to contract with IMAGEENTRY, INC., 456 Industrial Blvd, London, KY, to provide professional services to scan and index approximately 800,000 older boat title documents for inclusion in the Watercraft Information System (WIS).

A window displays all requests approved or denied by the Controlling Board at the meeting. The requests are listed in the same order as the meeting's agenda. The

Controlling Board request number, meeting (decision) date, status (decision) and the explanation of the request is displayed. Requests deferred are not included.

Click the [Print](#) link to print the report.
 Click [Close](#) to close the window.

7.2. Ad Hoc Inquiry

Users can execute queries to search for requests based on any combination of criteria provided for inquiry.

The search criteria include Controlling Board Request number (CBR No), Appropriation Line Item (ALI No), ALI Name, Vendor ID, Vendor Name, Release & Permit Number, Status, Project Number, Keywords, and Date Status Changed. Use Keywords to search the entire Summary Paragraph for the string of words entered. The Summary Paragraph cannot be included in the search results, but the request can be opened to view the Summary Paragraph.

The screenshot shows the 'e-Controlling Board' web application interface. At the top, there is a navigation bar with icons for Home, CB Request, Forms, Reports, Utilities, Admin, and Logout. Below this, the 'Reports' section is active, and the 'Inquiry' tab is selected. The 'Meeting Date Inquiry' section allows users to select a meeting date (currently '02/28/2005') and click 'Go'. The 'Ad Hoc Inquiry' section provides a search form with fields for Organization, Vendor ID, Status, CBR No, Vendor Name, Release & Permit #, ALI No, Project Number, and Keywords. There are 'Search' and 'Export' buttons. Below the search form is a 'Search Results' table with the following data:

CBR No	CB Type	Auth Type	Short Desc	FY	ALI No or Vendor ID	ALI Name or Vendor Name	Amount	Status	Date Status Changed
TOS055	Capital Request	Funding	TOS test request		090-524	POLICE AND FIRE DISABILITY PENSION	\$80,000.00	Approved	10/19/2004
TOS055	Capital Request	Funding	TOS test request		090-524	POLICE AND FIRE DISABILITY PENSION	\$5,000,000.00	Approved	10/19/2004
TOS055	Capital Request	Waiver	TOS test request	2005	130871985	INTERNATIONAL BUSINESS	\$6,789,999.00	Approved	10/19/2004
TOS056	Fund Request	Funding	test request by Tamra	2005	090-401	COMMISSIONERS OF THE SINKING FUND	\$88.00	Denied	10/19/2004

The data contained in the search results can be sorted by selecting a column heading.

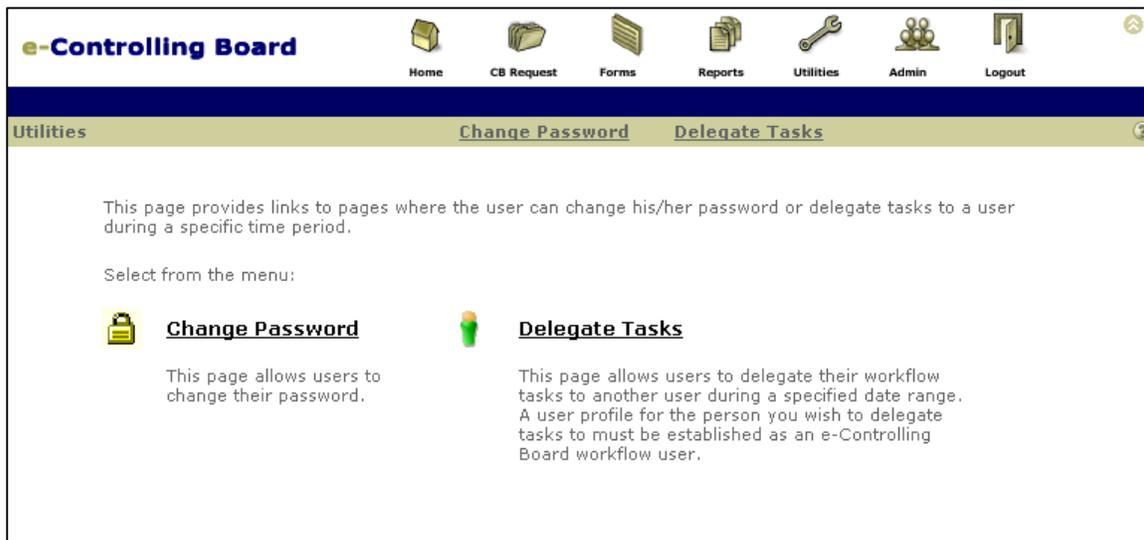
The search results display each waiver and funding record associated with a request. In the example above, request TOS055 is a capital request with two funding records and one waiver record.

Click on the linked request number to display the printable version of the request.

The search results including additional information can be exported to Microsoft Excel by selecting the Export button.

8. Utilities Screen

The Utilities screen provides a means for users to change their password or delegate their tasks.



Select the [Change Password](#) link to open the page that allows users to change their password.

The Delegate Tasks option is available only to users in a designated workflow path. This option is not available to Controlling Board members, aides, or LSC analysts.

8.1. Change Password

All users must have a secure password to enter the e-ControllingBoard site and are required to change their password every 60 days.

The screenshot shows the 'e-Controlling Board' interface. At the top, there is a navigation bar with icons and labels for Home, CB Request, Forms, Reports, Utilities, Admin, and Logout. Below this, a sub-menu is visible with 'Utilities' selected, and 'Change Password' and 'Delegate Tasks' are also visible. The main content area contains instructions for changing a password: 'To change your password, enter a new password using any combination of alpha and numeric characters (no special characters). The password must be a minimum of 6 characters and a maximum of 15 characters and contain at least one alpha and one numeric character. The new password must be different than the current password and the password is encrypted as it is entered.' Below the instructions, there is a form with a yellow background. The 'Login Name' field is populated with 'John.Member'. There are three text input fields for 'Current Password', 'New Password', and 'Confirm Password'. At the bottom of the form is a button labeled 'Update Password'.

When Change Password is selected, a menu item labeled Change Password is displayed with a page containing the user's login name and text boxes for entry of:

- Current password
- New password
- Password confirmation

Enter a new password using any combination of alpha or numeric characters (no special characters).

- Password must be a minimum of six characters and a maximum of 15 characters (must include at least one alpha character and one numeral).
- Password is encrypted as it is entered.
- New password must be different than current password.

When the “**Update Password**” button is selected, a prompt appears to indicate whether the password was successfully or unsuccessfully changed. Select a menu item to navigate to the desired page.

9. LSC Briefing Document

The screenshot shows the e-Controlling Board Home page. The navigation bar includes icons for Home, CB Request, Forms, Reports, Utilities, Admin, and Logout. The main content area is titled 'Home' and is divided into three columns: 'Controlling Board Meetings' (with sub-sections 'Agendas' and 'Minutes'), 'Important Information' (with a bulleted list of links), and 'Status' (with a message). At the bottom, there is a 'TaskList' for Joe A Rogers and a 'Default Inbox'.

The [Add LSC Briefing Document](#) link is displayed on the home page for users assigned to the LSC Analyst workflow role. Select this link to open the LSC Briefing Document screen.

The screenshot shows the LSC Briefing Document upload screen. The navigation bar is the same as the home page. The main content area is titled 'LSC Briefing Document' and contains instructions for uploading a file. It includes a 'Select meeting date' dropdown menu (set to 04/11/2005), a 'Select LSC Briefing Document' text input field with a 'Browse...' button, and an 'Upload LSC Briefing Document' button.

This screen enables authorized users to upload to the e-Controlling Board database a file containing the LSC briefing document associated with the requests included in a meeting agenda.

To add an LSC briefing document to the Controlling Board database:

- Select a meeting date from the drop-down list.
- Click the **Browse** button and search for the file containing the briefing documents for the date selected. Select the file.
- Click **Upload LSC Briefing Document** button. A message displays when the upload is complete. The file is immediately linked to the e-Controlling Board home page. The link is displayed to the right of the respective meeting agenda date.

10. Technical Requirements for e-Controlling Board

The e-Controlling Board web site is best viewed with MS Internet Explorer 5.5 or higher and with display screen resolution of 1024x768 pixels. Optionally, Netscape Navigator version 5.0 or higher or display screen resolution of 800x600 pixels can be used. If you have installed any software to block pop-up windows, please disable while using this application. If you print a Controlling Board request, the appearance of the footer and header is dependent upon your browser settings.

10.1. Workstation Requirements

The end-user workstation configuration requirements to access the e-ControllingBoard application are as follows:

IBM Compatible PC

Hardware:

Processor: Pentium III or above
Memory: 128 MB+
Hard Drive Available Space: 20MB
Display Resolution: 800x600 or higher

Software:

Operating System: Windows 98, 2000, XP (Note: Windows 95 is not supported)
Browser Software: Internet Explorer 5.5, 6.0, Netscape 6.2 +, Firefox 1.0

Network Connection: Broadband or Higher (56KBPS will be still supported)

Apple Macintosh

Software:

Operating System: System IX, X
Browser Software: IE 5.0+, Netscape 6.2+ (Note: Safari is not supported)
Display Resolution: 800x600 or higher

Network Connection: Broadband or Higher (56KBPS will be still supported)

10.2. Printing Settings

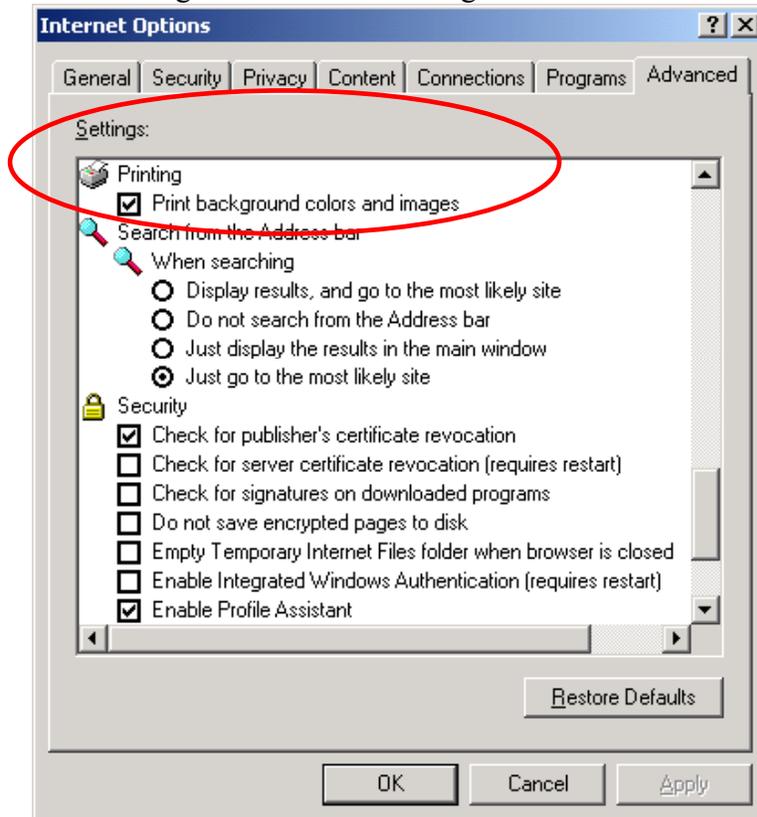
The background printing of colors and images should be enabled for the best quality printing of Controlling Board requests.

10.2.1. Microsoft Internet Explorer

Select **Tools** in the browser's menu bar, and then select **Internet Options**.

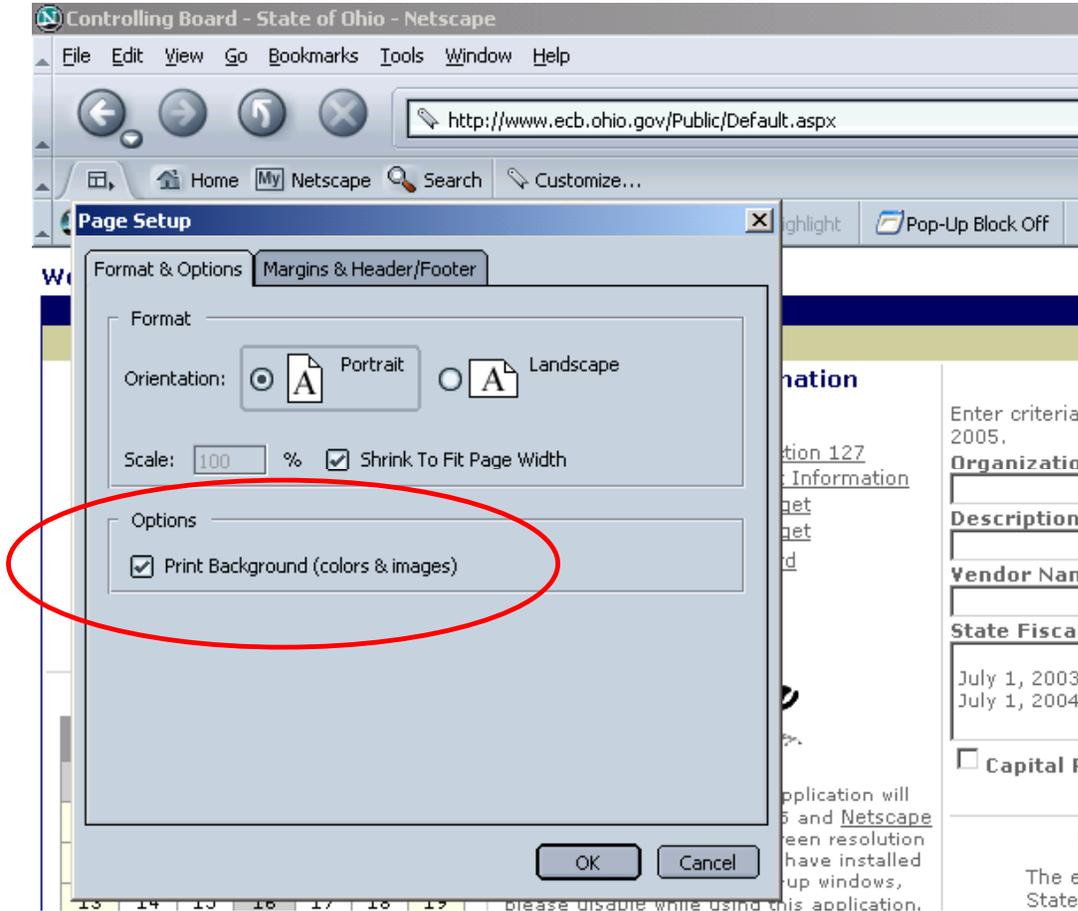


Select the **Advanced** tab, scroll down to view the Printing options, and verify that the "Print background colors and images" check box is checked.



10.2.2. Netscape 7.2

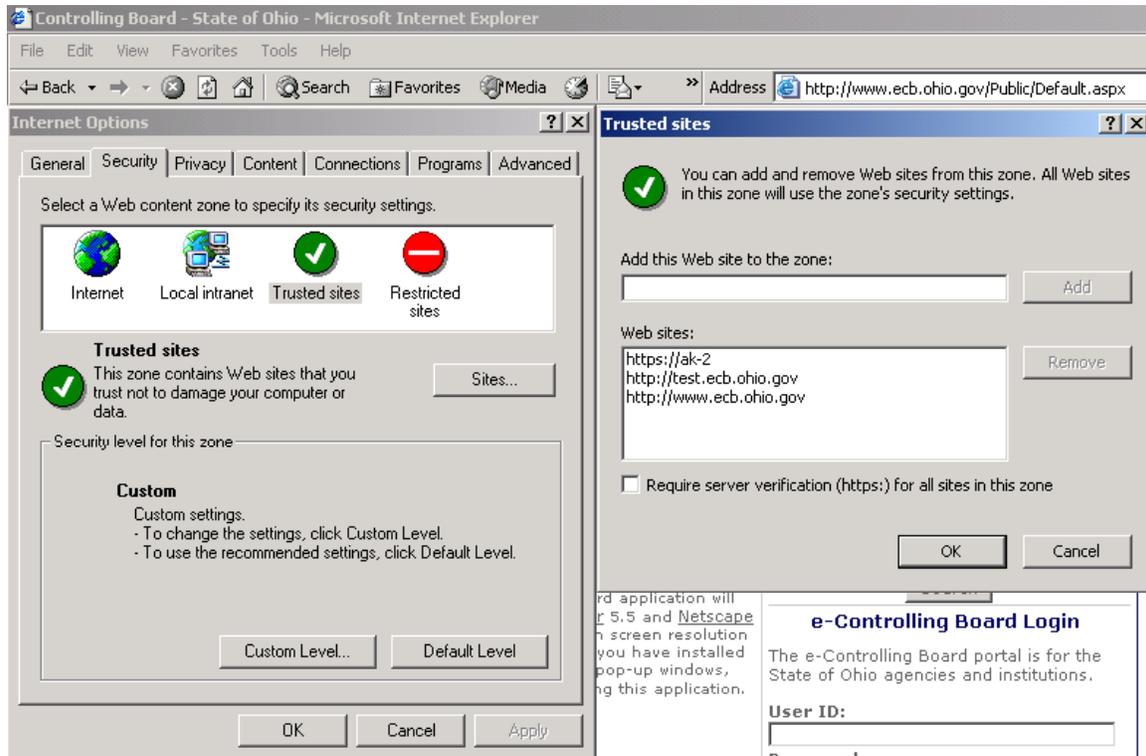
Select **File** and **Page Setup**. Ensure that the Print Background (colors and images) check box is checked



10.3. Setting Trusted Internet Sites

10.3.1. Microsoft Internet Explorer

To identify the e-Controlling Board site as a trusted Internet site, click the **Security** tab, click **Sites**, enter the web address www.ecb.ohio.gov and click **Add**. The Web site address should be included in the list (see image below).

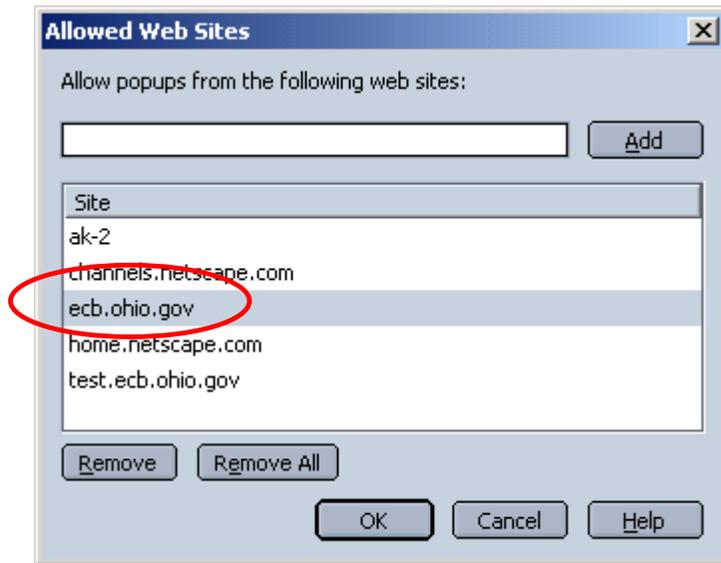


10.3.2. Netscape 7.2

To allow pop-up windows to display, select **Tools** and **Popup Manager**. Select **Allow Pop-ups From This Site**.



Click **Manage Popups** to display this dialog box:



If ecb.ohio.gov is not in the list, type ecb.ohio.gov in the Allow popups text box and click **Add**.