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2. General Budget Development System

The sections below outline the general interactions that a user will have with the Budget Development System.

2.1. Accessing the Budget Development System

- To access the Unity Client, the user must first log into the multi-factor log in page at https://gateway.sc.gov/ You may be required to download Citrix. See Downloading Citrix section for instructions.

- After the user has logged in, the user will be required to two-factor authenticate with DUO.
• If you get the following error message, see the section below for the instructions for Registering with Duo.

![Error Message Image]

We’re sorry, access is not allowed because you are not enrolled. Please contact your organization's IT help desk for assistance.

• Once logged on, the Citrix page with OnBase will appear. Depending on the user’s role, there may be additional apps available to the user in Citrix.
• To access the Unity Client the user will click on the OnBase 18 Production Unity logo.

![OnBase 18 Production Unity Logo]

• If you see this logo instead, it is likely that you logged on using your SCEIS User ID. Please log off and log back in using your EBO BDS assigned User ID.

![OnBase Full Client Production Logo]
• This is the screen the user should see when logging in for the first time.

![Login Screen](image)

• To access the EBO Budget Development System, the user will click on the EBO Budget Management Tab and then click on the filters icon.

![Filters Icon](image)

• The user will then see the list of available filters based on their user group(s).

![Filter List](image)

2.2. Custom Configuration

The first time a user accesses the EBO Budget Development System, the user may want to configure the system to make the EBO Budget Development System their Home Page (i.e. the first screen the user will see each time they log in).

• To make the solution the user's permanent Home Page, go to the Home Tab and click the small black arrow under the house and choose Make this layout my Home Page.

![Home Tab](image)
2.3. Downloading Citrix

Please note that Citrix Workspace must be installed to use the gateway. To install Citrix Workspace, follow the steps provided below. You may need to contact your IT department to assist.

1. Click the **Detect Receiver** to allow Citrix to check your workstation to determine if Citrix Workspace is installed.

![Detect Receiver](image)

2. If Citrix Workspace is already installed on your workstation, the “Application Shortcut” screen will display within a few moments.

![Application Shortcut](image)

3. If Citrix Workspace is not installed, you will be prompted to install the application.
4. Check the box next to the Citrix license agreement notice, then click **Install**.

![Install Citrix Receiver](image)
5. Click **Save**.
6. When the download completes, click **Run** to install the Citrix Workspace app.
7. If prompted for permission to install Citrix workspace, click **Yes**.

![Confirm installation is complete](image1.png)

8. Click **Start** to proceed.

![Welcome to Citrix Workspace](image2.png)

9. Check the “I accept the license agreement” box, then click **Install**.

![License Agreement](image3.png)
10. Check the Enable Single Sign-on box, then click **Install**.

11. When the Installation Successful window appears, click **Finish** to close.

### 2.4. Registering with Duo

Navigate to the [https://sceismfa.sc.gov](https://sceismfa.sc.gov) DUO Registration site. Note: You must be on a state network (connected in the office or are using the VPN to log into the network to access this site).
Enter your EBO Budget Development System User ID and Password.
You should be presented with the two-factor setup screen. Click Start Setup

Select the type of device you are adding. Usually this will be the Mobile phone option to register your work assigned phone.
Enter the phone number of your work phone in the field after selecting United States and select the type of phone in the next dialog shown below.
If you already have DUO Mobile for iOS installed, click the I have DUO installed button.

Click the Continue to Login button. Ensure the Ask me to choose an authentication method pulldown is selected.
Log in using the User ID and password you will use to access the OnBase Application on the Multi Factor Login Page.

In most cases you will want DUO to “Send me a Push” option so click the Send me a push method.
2.5. Changing a Password

Click the Manage Your Password link on the log on page or navigate to [https://scpasswordreset.sc.gov/PMUser](https://scpasswordreset.sc.gov/PMUser) to change your password. If you are a new user, you may be prompted to change your password on your first log on.

On the Password Management site, you will enter your EBO BDS OnBase assigned User ID (not your SCEIS User ID).

You will have a few options for password management. You will need to complete the series of questions asked in order to gain access to change your password or have it reset if you have forgotten your password.
2.6. Common OnBase Buttons

- **Magnifying Glass**: The Magnifying Glass represents the field that has a database look up associated with it. Click on the icon to see a list of available inputs or start typing an input and select it from the drop down that appears.
- **Pencil**: The Pencil Icon is used when editing data in a table. To begin editing click on the icon. Once the user is finished editing the data, they will click the pencil icon again to lock in their changes.
- **Save**: If the user sees the icon in the ribbon the user can click on it to save what they are working on and come back to it later. To access the data later navigate to the appropriate filter it is stored in.

3. Agency Role

The sections below outline the interactions that an agency user will have with the Budget Development System.

3.1. Form Packet

The sections below serve as a guide to creating a form packet, filling out budget forms, and submitting a form packet.

3.1.1. Creating a Form Packet

- To create a form packet for the new budget year, the agency user will navigate to the EBO Budget Management Tab and click on the Form Packet button.
• The Packet Information tab will be auto filled based on the current budget year and the top agency the agency user is assigned to. The user can click on the magnifying glass under agency name to select a different agency if the user is assigned to multiple agencies, this will auto fill Agency Code and Agency Section.

3.1.2. Filling out Budget Forms

• Form text fields allow for formatted text.

• To fill out a form B1, B2, C, or D Form click the ‘+’ icon in the table.
• Some forms will have a table input like the one below. To add rows to the table, click the ‘+’ icon.

<table>
<thead>
<tr>
<th>Agency Name:</th>
<th>Sea Grant Consortium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Code:</td>
<td>P260</td>
</tr>
<tr>
<td>Section:</td>
<td>48</td>
</tr>
</tbody>
</table>

• If the user creates a B1, B2, C, D that form will enforce the required fields to be filled out to submit the form packet.

• All printable PDF or Word forms will have a header at the top of the document.
Form A

- Form A is a required form and will be required to be filled out by every user.
  - If Not Requesting Changes is checked under the B1 section, no B1 forms must be submitted.
    - If any of the top two boxes are checked there must be at least one B1 form submitted with the packet.
  - If Not Requesting Changes is checked under the B2 section, no B2 forms must be submitted.
    - If any of the top two boxes are checked there must be at least one B2 form submitted with the packet.
  - If No Changes is checked under the C section, no C forms must be submitted.
    - If Capital Projects Requested is checked there must be at least one C form submitted with the packet.
  - If Not requesting any proviso changes is checked under the D section, no D forms must be submitted.
    - If any of the top two boxes are checked there must be at least one D form submitted with the packet.
Sometimes a user will create a B1 form or a B2 form and the related form may not have been created yet. The system allows for a temporary TBD form placeholder to denote that there will be a form related later.

To relate a form the user will click on the related request drop down and select a related form from the list.
### Form C

**Agency Priority**

- **Title**: Provide the Agency Priority Ranking from the Executive Summary

**Capital Request**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>$100,000.00</td>
</tr>
<tr>
<td>Federal</td>
<td>$50.00</td>
</tr>
<tr>
<td>DSS-funded</td>
<td>$5.00</td>
</tr>
<tr>
<td>Restricted</td>
<td>$5.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$100,000.00</td>
</tr>
</tbody>
</table>

**More detail is requested for this project in the Pervious Year?**

No

**CPFP Priority**

Identify the project's CPFP plan year and priority number, along with the first year in which the project was included in the agency's CPFP. If not included in the agency's CPFP, please provide an explanation.

If the project involves a request for appropriated state funding, briefly describe the agency's contingency plan in the event that state funding is not made available in the amount requested.

**Other Approaches**

Did efforts have already been obtained? Are there additional approaches that must be pursued in order for the project to succeed? (Institutional Board, AMR, FAA, etc.)
Form D

- Form D forms allow for the generation of Word Forms. To generate a Word form, the user will click on the Generate Word Form button.

This will open the Word form in a separate window.
Form E and F

- If the user fills out the title field on form E or F the form will enforce required fields to be filled out to submit the form packet.

Technical Forms

- Technical forms are how the user will account for things like restructures and realignments. *This should only be used as an additional form from the Executive Summary.* See Executive Summary section below.

- The user can select the type of form from the form type drop down.
3.1.3. Submitting a Form Packet

- To submit a Form Packet, the agency user will navigate to the tasks tab and click the Submit button. REVIEW submission carefully before clicking the icon below.

- Once the form packet is submitted it will move on to the analyst review.

3.1.4. Saving a Form Packet

- If the agency user is not ready to submit a form packet, they can save their changes and come back to it later by navigating to the tasks tab and clicking on the save icon.
  - Note that this does not submit and approve the packet it will only save it so that the user can come back to it later.

- To access saved packets the user will navigate to My Form Packets and click on the packet they wish to make changes to.
3.1.5. Generate Printable Form and Form Packet

- At any point in the budgeting process the agency will be able to generate a printable form or form packet.

  **Printable Form**: To generate a single item printable form, the user will navigate to the form and click on the Generate Printable Form button.

  **Printable Form Packet**: To generate a printable form for the entire packet, the user will navigate to the Packet Information tab and click on the Generate Printable Packet button. This will open the PDF version of the form packet.

3.2. Executive Summary

- To access the Executive Summary the agency will navigate to the My Executive Summaries filter.
  - This will show an OnBase tabular view of the form packets that were submitted. The user can double click the packet submitted to view the data in OnBase.
3.2.1. Printing and Exporting the Executive Summary

- To print the Executive summary the user will click on the Print Executive Summary button. This will generate a printable PDF.
- Additionally, the user can click on the green arrow below the Print Executive Summary button to export the Executive Summary as an Excel file.

Below is an example of what the Executive Summary export will look like.
3.2.2. Line Item Detail Entry

- There are 3 ways to add a budget line item detail:
  1. **Clicking on the ‘+’ icon in the Executive Budget Summary Table:**
     - This will open the Budget Line Item Detail Window where the user can input the budget data. This is the best way to enter the detail data.

  2. **Clicking the pencil icon and typing in each field:** Once the user is done editing the Details table, they must click the pencil icon again to lock in the changes made.
3. Importing List:
   - The user will click on the arrow button in the details section to export the excel template.
   - Once the user has added data to the template and saved it, the user can click the Import Line Item Details button in the executive summary window.
     - This will open the import window
       - The user will click browse and navigate to the Excel file with the budget detail information.
       - The user can see a preview of what the file will look like and can do a visual check to ensure the data is accurate.
       - The user will click the import button to import the detail budget line item data.
3.2.3. Line Item Detail Submission

- At any point during the line item detail entry the user can click the save button in the top left corner. This will save their changes until they can come back to it at a later time.
- The amount and FTEs must balance to the form totals by source of funding. A visual of a green bar and a red bar has been added to let the user know if (green) they can submit, or (red) they need to still balance items.

- To submit the budget line items the user will click the tasks tab, and then click the Budget Line Items Complete button. This will send the items to the analyst for review. REVIEW your submission carefully before clicking the icon below.
3.3. Adding Additional Budget Request

- If necessary, the agency user can upload additional forms after the budget form packet has already been submitted. To do this, the user will navigate to the Agency Budget Year Executive Summary filter and click on the Agency Forms tab. The user will then click on the Upload additional Form button.

- A window will open asking the user to select the type of form they are creating.

- The user will then fill out the form and click the Submit button.
3.4. Additional Funding Requests

3.4.1. Accessing Additional Funding Request

- To access additional funding, the user will click on the additional funding button in the ribbon.
  - This will open the additional funding window.

- The user must fill out any necessary funding information in the additional funding information tab.
### 3.4.2. Other Funds Survey

- To access the Other Funds Survey Cash or Revenues, the user will click on the Other Funds Cash tab or Other Funds Revenues tab.
- The user can click on the Generate Cash Expenditures button to implement a copy of the expenditures currently in the system. *DO NOT CLICK THIS BUTTON IF THERE IS DATA SHOWING. IT WILL DUPLICATE THE DATA.*
  - Alternatively, the user can click on the green '+' button to add new rows.
- To print the Other Funds Cash or Revenues the user will click on the Print button.

### 3.4.3. Higher Ed Expenditures

- To access the Higher Ed Expenditures, the user will click on the Higher Ed Expenditures tab. This tab is for lump sum agencies ONLY.
- The user will then click on the '+' button to open the Higher Ed data entry window.
  - Here the user can enter in the higher ed data and click save.
3.4.4. Submitting Additional Funding Requests

- To submit additional funding requests, the user will click on the Submit Funding button in the ribbon.

3.5. Agency Common Errors

- **Related Request TBD:** the system will not allow a user to submit a form that has a related request of TBD. To fix this error, the user will need to navigate back to the form and select an existing related request.

- **Form Packet Already Submitted:** the agency will only be able to submit one form packet a year. If the agency tries to submit a second form packet, they will be presented with the error message pictured below.

- **Priority Number Violation:** The priority number has already been used for the form packet. To fix this error the user will have to enter in a unique priority number.

- **Budget information does not balance:** The budget information does not balance, to fix this error the user will have to balance the line items and retry submission.
• **Commitment Item Requires a Job**: The Line item detail will not be able to be submitted unless the commitment item has a job specified. To fix this the user will need to specify a job.

![Image](image.png)

• **Bulk Import Failed**: When the user uploads an Excel file that does not match the correct format, they will be presented with a bulk import has failed error. To correct this the user must update the columns in the Excel file.

```csharp
The bulk import has failed with the exception: System.Exception: No column header row detected in the file
at 0508B0ParseBudgetLineItemDetails.0508B0ParseBudgetLineItemDetails.ReadXlsFile(Application app, WorkflowEventArgs args) in line 313
at 0508B0ParseBudgetLineItemDetails.0508B0ParseBudgetLineItemDetails.OnWorkflowScriptExecute(Application app, WorkflowEventArgs args) in line 79
```

• **Review before marking as complete**: To avoid errors in submission, please double check each form by reviewing the printable packet before marking as complete. This will help prevent analysts from having to push back items for resubmission.