# LEGISLATIVE BUDGET BOARD

# Document Submissions

**LEGISLATIVE BUDGET BOARD STAFF**

# CONTENTS

## DOCUMENT CONVENTIONS

This document uses the following symbolic conventions:

Caution: This symbol warns you of the possible loss of data.

Important: This symbol indicates information you need to know.

Tip: This symbol indicates information that may be useful.

## GETTING STARTED

The Legislative Budget Board (LBB) Document Submissions application is an electronic process for uploading documents to the LBB. State agencies, the judiciary, and higher education (all are referred to as "agency" in these instructions) are also permitted to submit older document versions (2008 through the current fiscal year) as well.
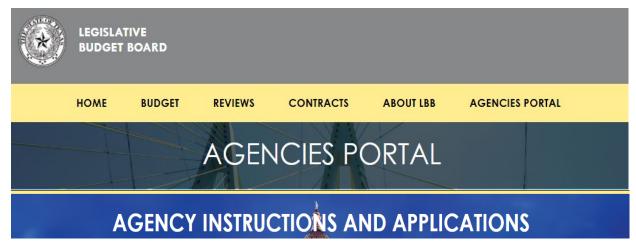
Review the important items below before you begin uploading a document for your agency:
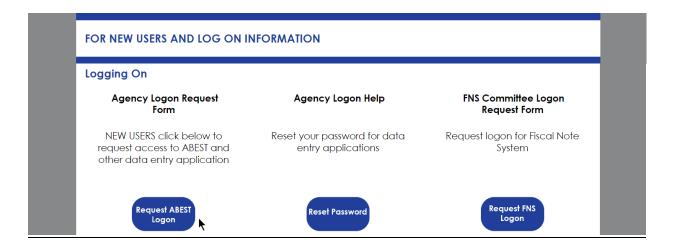
- ♦ You can submit single or multiple document(s) for each agency, year and document type (e.g., Annual Financial Report, Operating Budget, Strategic Plan, etc.).

- ♦ Submit documents in PDF format to ensure that the document is searchable. Scanned documents are not searchable.

- ♦ Once your agency's document is submitted to the LBB (**Status** is set to **Complete**), approval is needed to modify the document submission. Contact your agency's assigned LBB analyst and ask them to advise LBB Application Support to change the **Status** to **Incomplete** if needed.

- ♦ A Consolidated Annual Financial Report (AFR) and a Consolidated Annual Report of NonFinancial Data should be submitted for any Institution of Higher Education that has a System Administration Office. Refer to the Document Submissions' **News** tab/screen for additional information.
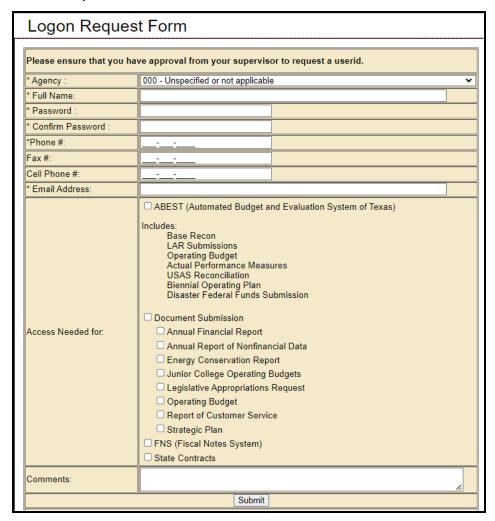
## GETTING ACCESS

To use Document Submissions, you must have a user ID and password issued by the LBB. If you have an ABEST (Automated Budget and Evaluation System of Texas) user ID and password, then you should already have access to Document Submissions. If you do not have access to Document Submissions, complete the following steps to request a user ID. If you have forgotten your user ID or password, refer to the Logging In section of these instructions.

Click **AGENCIES PORTAL** from the LBB website (www.lbb.texas.gov). Under **AGENCY INSTRUCTIONS AND APPLICATIONS**, click **FOR NEW USERS AND LOG ON INFORMATION**, then click **Request ABEST Logon** (as shown in the following).

## FOR NEW USERS AND LOG ON INFORMATION

### Logging On

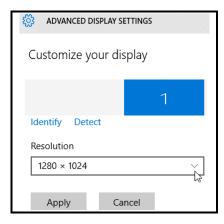| Agency Logon Request Form | Agency Logon Help | FNS Committee Logon Request Form |
|---|---|---|
| NEW USERS click below to request access to ABEST and other data entry application | Reset your password for data entry applications | Request logon for Fiscal Note System |
| **Request ABEST Logon** | **Reset Password** | **Request FNS Logon** |

Fill out the **Logon Request Form** (shown in the following graphic). When complete, scroll down and click **Submit**. You should receive an email asking you to confirm the logon request. You must respond to the email; otherwise, your request will not be processed. If you do not receive a confirmation email, send an email request to **WebAppSupport@lbb.texas.gov** or call the LBB Help Desk at 512-463-3167. The LBB will email you a user ID and password for ABEST within one business day.
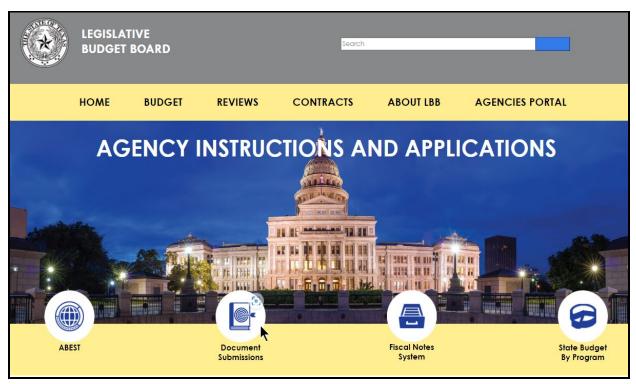
## Logon Request Form

Please ensure that you have approval from your supervisor to request a userid.

| | |
|---|---|
| * Agency : | 000 - Unspecified or not applicable |
| * Full Name: | |
| * Password : | |
| * Confirm Password : | |
| *Phone #: | ___-___-____ |
| Fax #: | ___-___-____ |
| Cell Phone #: | ___-___-____ |
| * Email Address: | |
| Access Needed for: | ☐ ABEST (Automated Budget and Evaluation System of Texas)<br><br>Includes:<br>Base Recon<br>LAR Submissions<br>Operating Budget<br>Actual Performance Measures<br>USAS Reconciliation<br>Biennial Operating Plan<br>Disaster Federal Funds Submission<br><br>☐ Document Submission<br>  ☐ Annual Financial Report<br>  ☐ Annual Report of Nonfinancial Data<br>  ☐ Energy Conservation Report<br>  ☐ Junior College Operating Budgets<br>  ☐ Legislative Appropriations Request<br>  ☐ Operating Budget<br>  ☐ Report of Customer Service<br>  ☐ Strategic Plan<br>☐ FNS (Fiscal Notes System)<br>☐ State Contracts |
| Comments: | |
| | Submit |

## *LOGGING IN*

Google Chrome is the web browser recommended for data entry. Other browsers (e.g., Firefox, Safari, Microsoft Edge, etc.) will not work consistently and can create problems in the application. The recommended screen resolution is 1280 x 1024, as shown below.



From the LBB website ([www.lbb.texas.gov](http://www.lbb.texas.gov)), click **AGENCIES PORTAL**. Under AGENCY INSTRUCTIONS AND APPLICATIONS, click Document Submissions, as shown below.
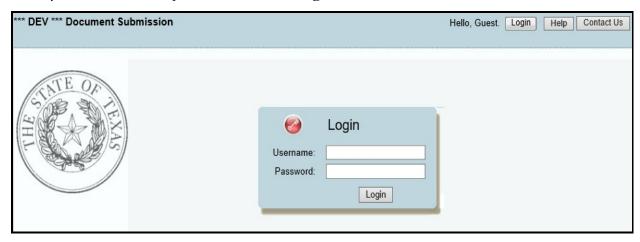


| IMPORTANT |
|---|
| If you already have a user ID and have forgotten the user ID or password, or if your user ID or password does not work, do one of the following:<br><br>• Under **AGENCY INSTRUCTIONS AND APPLICATIONS** on the LBB's website ([www.lbb.texas.gov](http://www.lbb.texas.gov)), click on **FOR NEW USERS AND LOG ON INFORMATION**, then click on **Reset Password** under **Agency Logon Help.** Enter your User ID or email address and click **Send User Info.**<br><br>• Send an email to WebAppSupport@lbb.texas.gov or call the LBB Help Desk at 512-463-3167, |

Enter your username and password and click **Login**, as shown below.

The **News** screen displays (as shown below) which provides important information.



### HELP

You can view this user instructions manual online or get help based on your screen location. Click the **Help** button to view the entire user manual, as shown below.



Click the **Help icon** (shown below) to get detailed information about the screen you are using. The user manual opens and links to the information based on your screen location. The **Help icon** is available on every screen.

## *HELP DESK CONTACT INFORMATION*

Contact the LBB Help Desk for technical application questions by clicking on **Contact Us**, as shown below.



After clicking on the **Contact Us** button, the window in the following graphic will display. Enter your message and click **Send Email**.
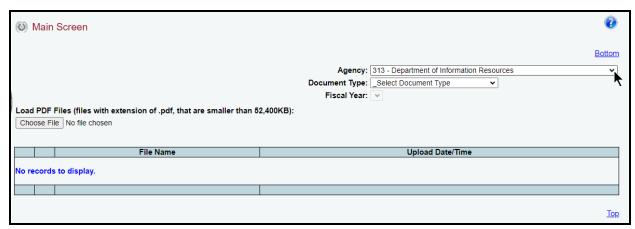


The LBB Help Desk will respond to email inquiries as soon as possible; however, it can take as long as the end of the next business day in some cases. You can also contact the LBB by sending an email to **WebAppSupport@lbb.texas.gov** or calling the Help Desk at 512-463-3167. Be prepared to leave a message when calling the Help Desk. Your call goes directly to voicemail at all times. A typical call back response from the Help Desk is within 30 minutes.
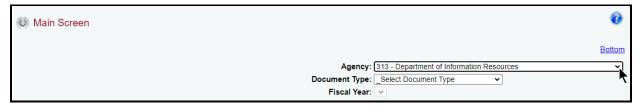
## ATTACHING DOCUMENTS
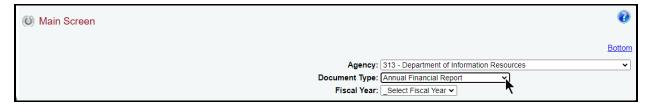
Click on the **Main Screen** menu, as shown below.

The **Main Screen** displays. Your agency will auto-populate in the **Agency** field, as shown in the below example.



If you desire a different agency, you may select another agency from the drop-down menu.
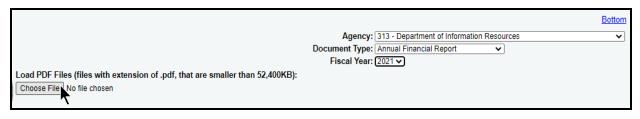


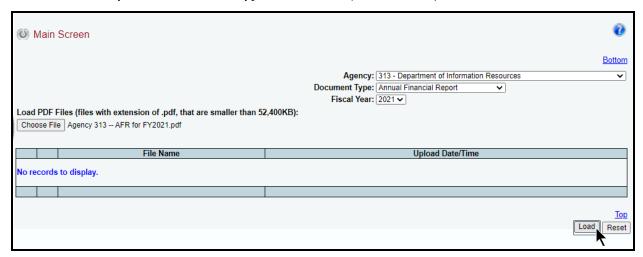Select a **Document Type** from the drop-down menu.
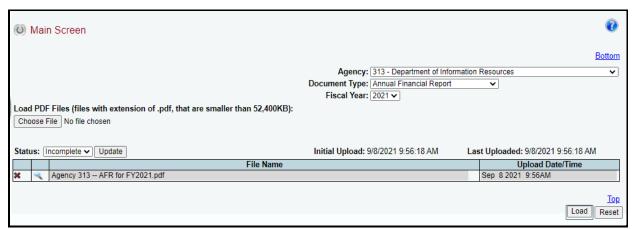


Select a **Fiscal Year** from the drop-down menu.



Select a file/document to upload by clicking on the **Choose File** button.

Select your desired file and click **Open**. Verify that the document you are uploading corresponds to the correct fiscal year and document type. Click **Load** (shown below).
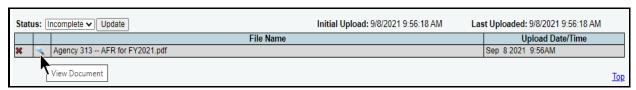


The **File Name** of the selected document that is uploaded displays on the **Main Screen** (example below). The **Status** of the **Main Screen** displays and is automatically set to **Incomplete**.
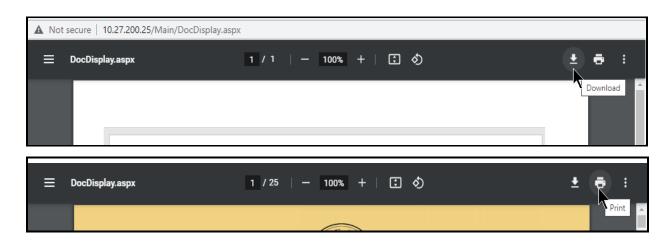


The **Initial Upload** date and time displays as to when the file(s) were initially uploaded; that is, the very first time the document was attached and submitted via Document Submissions. The **Last Uploaded** field displays the last date and time a document was attached or re-attached and re-submitted via Document Submissions.
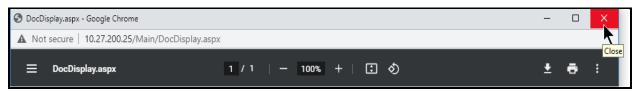
To view an uploaded document/file name, click the **magnifying glass** 🔍 to the left of the **Document/File Name** (shown below).



The uploaded document displays in a **DocDisplay.aspx** screen, and can be downloaded or printed, as shown in the following examples.
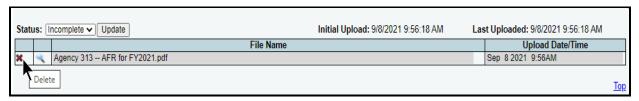
Click on the **X** in the upper right corner to exit the displayed document (shown below).



To add additional files, repeat the previous steps. Verify that the appropriate file(s) is attached and that the correct drop-down menu selections have been made.

If you selected the wrong document, you can click the red '**x**' (shown in the below example) to the left of the **Document/File Name** to delete a row of data.



Then click **OK** to confirm your request (as shown in the below example).
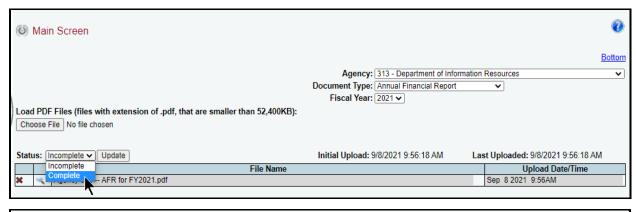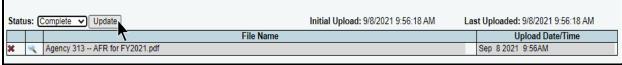


Keep in mind though, that once the **Status** field is set to **Complete**, you cannot delete a file. To delete a **Document/File Name** after the **Status** is set to **Complete**, contact your agency's assigned LBB analyst and ask them to advise LBB Application Support to change the **Status** to **Incomplete** for the applicable **Document/File Name**.
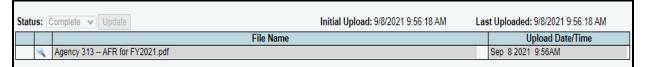
To determine which analyst is assigned to your agency, visit the LBB website at www.lbb.texas.gov. Select **ABOUT LBB**, then click on **Staff**, then select **Analyst Assignments**.

## SAVING, DOWNLOADING, AND PRINTING

To save and submit your uploaded document/file to the LBB, click on the **Status** drop-down menu, select **Complete**, and click **Update**, as shown below.
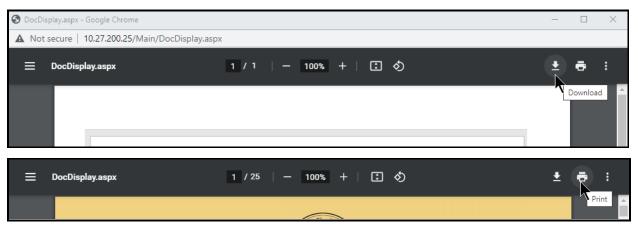






**IMPORTANT**

Once the **Status** is set to **Complete**, you cannot delete any documents from the **File Name** grid. To delete a document/file after the **Status** is set to **Complete**, contact your agency's assigned LBB analyst and ask them to advise LBB Application Support to change the **Status** to **Incomplete**.

To view a saved document/file name, click the **magnifying glass** 🔍 to the left of the **Document/File Name**. The document displays in a **DocDisplay.aspx** screen, and can be downloaded or printed.



You can review any of your agency's saved documents by selecting the appropriate **Agency**, **Document Type** and **Fiscal Year** from the **Main Screen** menu.

## TROUBLESHOOTING

### *WHAT TYPE OF DOCUMENTS CAN I ATTACH AND SUBMIT?*

- ♦ AFR- Annual Financial Report

- ♦ Annual Report of NonFinancial Data

- ♦ Energy Conservation Report

- ♦ Junior College Operating Budget

- ♦ Legislative Appropriations Request

- ♦ Operating Budget

- ♦ Report of Customer Service

- ♦ Strategic Plan

### *I SUBMITTED MY DOCUMENT TO THE LBB.  HOW DO I MAKE A MODIFICATION?*

Once the **Status** is set to **Complete,** you cannot modify or delete any documents from the **File Name** grid. To delete a document/file after the **Status** is set to **Complete**, contact your agency's assigned LBB analyst and ask them to advise LBB Application Support to change the **Status** to **Incomplete**.

To determine which analyst is assigned to your agency, visit the LBB website at www.lbb.texas.gov. Select **ABOUT LBB**, then click on **Staff,** then select **Analyst Assignments**.