ADMINISTRATORS MANUAL

e-Budget for LGUs
Powered by **LGU 360°**

Document Version Control Log

Version Control #	Description	Date	Modified By
V0.1	Draft Version	02/22/2021	JBALIAO
V1.0	Final Version	12/14/2021	IBORROMEO

Contents

Introduction

The **eBudget for LGUs**, powered by **LGU 360 Financial Suite**, takes out the complexity in matching plans and budget. As a tool built exactly to deliver results-focused budgeting to Philippine LGUs, **eBudget for LGUs** is a simple yet powerful solution that is ready-to-use and up-to-date with the latest processes and forms mandated by the **Department of Budget and Management**.

This following are the features of the eBudget for LGUs.

- **Dashboard**

- **Preparation of Programs, MFOs, and Performance Indicators**

- **Preparation of Annual Investment Program**

- **Preparation of Project Procurement Plan**
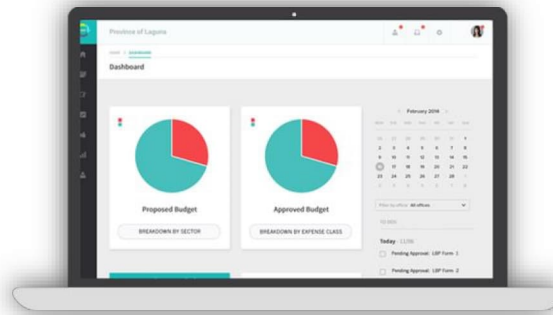
- **Preparation of LBP Forms 1-9**

- **Generation of Annual Procurement Plan**

- **Generation of Plantilla of Personnel**

- **Generation of Local Expenditure Program**

- **Encoding of Budget for eSRE Integration**

- **Archiving**

Purpose of this Document

This User Manual provides the necessary information for users to effectively use the **eBudget for LGUs**. The reader is provided with screen shots and procedure steps to be able to use the system efficiently.

Conventions

The term '**User**' is used throughout this document to refer to a person who can access and who is required to have access in the System. The following are other conventions used in this document:

Bold	Field name**,** buttons, radio button options, checkbox
Italicized	Web page name, window name, application name
<Value>	Dropdown values

Getting Started

Pre-requisites

The **eBudget for LGUs** is a web-based application. To access the system, the user must ensure the following requirements are compiled with:

1. Dedicated Machine (Server or Laptop)

Processor	64 Bit Processors, Dual Core, Four Threads, Intel i7 Processor
HDD	350 GB fast drives
Memory	8 GB of DDR 4 RAM or up to 16GB
OS	Windows
Internet	Required for email notifications to work

2. End User Workstation:

   a. Windows

Processor	CPU-Inter core i3-2120(3.30GHZ)
HDD	500 GB
Memory	4 GB of DDR 3 RAM
OS.	Windows 10
Monitor	18.5" LED Monitor (1280x600 Resolution)

   b. MAC

Processor	Core 2 Duo
HDD	250 GB
Memory	4 GB
OS	MAC OS X

2. Access to the LGU's Local Area Network (LAN)

3. Mozilla Firefox (stable version), Google Chrome (stable version), Safari v.7 or higher.

4. A registered user account

Friendly Features

The **eBudget for LGUs** powered by LGU 360 was designed and developed to help you work efficiently and to make your work life easier. Below are some of the features that the LGU 360 Team added so it is easier for you to use the system.

Full screen: Click this icon to have a full view of the forms.

Quick Save: Some of the summary pages of the forms have this icon. This allows you to save the changes made to the amounts on the summary pages after quick editing.

Export to Image: Use this icon to convert graphical report into image.

Replicate: Use this button to replicate your previous year's Annual Investment Program (AIP)

System Roles

Modules	Roles											
	LGU ADMIN	DH	BS	LFC	HRMO	LPDC	LBO	LA	LT	LCE	SCC	PO
Dashboard	View	View	View	View	View	View	View	View	View	View	View	View
Preparation	View	View	View		View	View	View	View	View	View		
AIP	Add, Edit, Delete, View, Download					Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download			View, Download		
SAIP	Add, Edit, Delete, View, Download					Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download			View, Download		
PPMP	Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download					View, Download					
APP	View, Download		View, Download							View, Download		
LBP Forms	View	View	View		View	View	View	View	View	View		
LBP Form No. 1	Add, Edit, Delete, View, Download					Add, Edit, Delete, View,	Add, Edit, Delete, View,	Add, Edit, Delete, View,	Add, Edit, Delete, View,	View, Download		

						Download	Download	Download	Download			
LBP Form No. 2	Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download				View, Download	View, Download		View, Download	View, Download		
LBP Form No. 2a	Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download				View, Download	View, Download		View, Download			
LBP Form No. 3	Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download			Add, Edit, Delete, View, Download							
LBP Form No. 3a		Add, Edit, Delete, View, Download			View, Download					View, Download		
LBP Form No. 4	Add, Edit, Delete, View, Download	Add, Edit, Delete, View, Download				View, Download	View, Download		View, Download			
LBP Form No. 5	Add, Edit, Delete, View, Download							Add, Edit, Delete, View, Download		View, Download		

LBP Form No. 6	View, Download					View, Download	View, Download		View, Download	View, Download		
LBP Form No. 7	View, Download						View, Download	View, Download		View, Download		
LBP Form No. 8	Save, View, Download							Save, View, Download	Save, View, Download			
LBP Form No. 9	Add, Edit, Delete, View, Download						Add, Edit, Delete, View, Download			View, Download		
AOB		Add, Edit, View, Delete, Save, Download										
LEP Form												
Authorization												
LEP (Executive Budget)										View, Download	Add, Edit, View, Delete, Save, Download	View, Download
OAAA										View, Download	Save, View, Download	View, Download

OASA										View, Download	Save, View, Download	View, Download
Execution	View					View			View			
ARO						Add, Edit, Delete, View, Download			View, Download			
FPPT	Add, Edit, Delete, View, Download								View, Download			
ORS						Add, Edit, Delete, View, Download						
Accountability	View		VIew		View	VIew	View	View				
QROI								View, Download	Add, Edit, Delete, View, Download			
QFRO						Add, Edit, Delete, View, Download						
QPRO	Add, Edit, Delete, View,				View, Download							

		Download											
SRE								View, Download	Add, Edit, Delete, View, Download				
PFPEF				Add, Edit, Delete, View, Download									
eSRE							View						
Budget Appropriation Expenditures							Add, Edit, Delete, View						
Budget Appropriation Debt Services							Add, Edit, Delete, View						
Supplemental Budget							Add, Edit, Delete, View						
Expenditures Tagging							Add, Edit, Delete, View						
User Management	View												
Users	Add, Edit, Delete, View												
Roles	Add, Edit, Delete, View												
Permissions	Add, Edit, Delete, View												

Maintenance	View												
Offices	Add, Edit, Delete, View												
Programs	Add, Edit, Delete, View	Add, Edit, Delete, View											
Procurement Activities	Add, Edit, Delete, View												
Salary Schedule	Add, Edit, Delete, View												
Chart of Accounts	Add, Edit, Delete, View												
Sectors/Sub Sectors	Add, Edit, Delete, View												
System Parameters	Add, Edit, Delete, View												

Accessing the System

Launch your web browser.

Enter the **eBudget for LGUs** *URL* in the web browser. Note: *Contact your System Administrator for the exact URL.*

You will be directed to the *Log In* page.
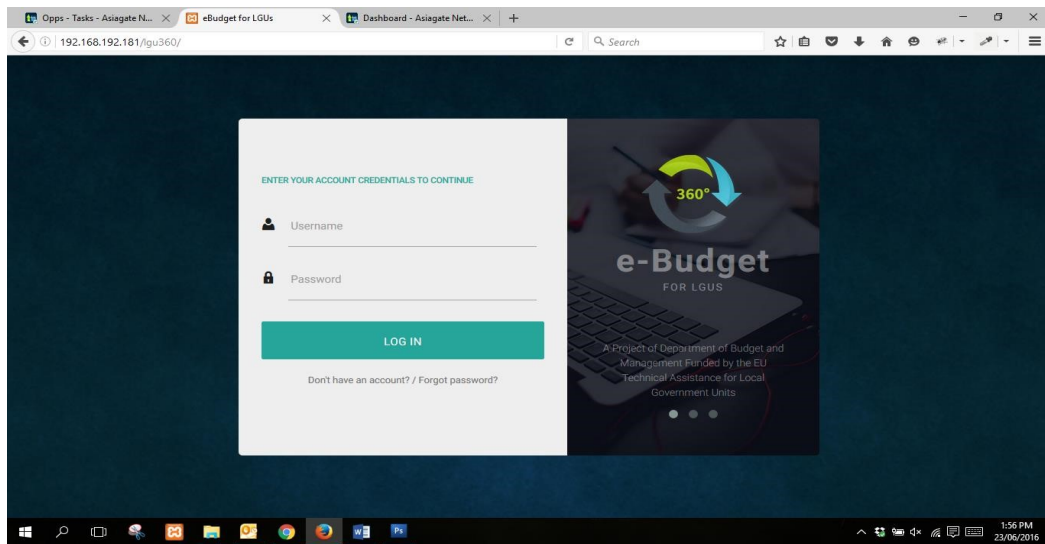
Logging In

Enter the username and password provided to you.
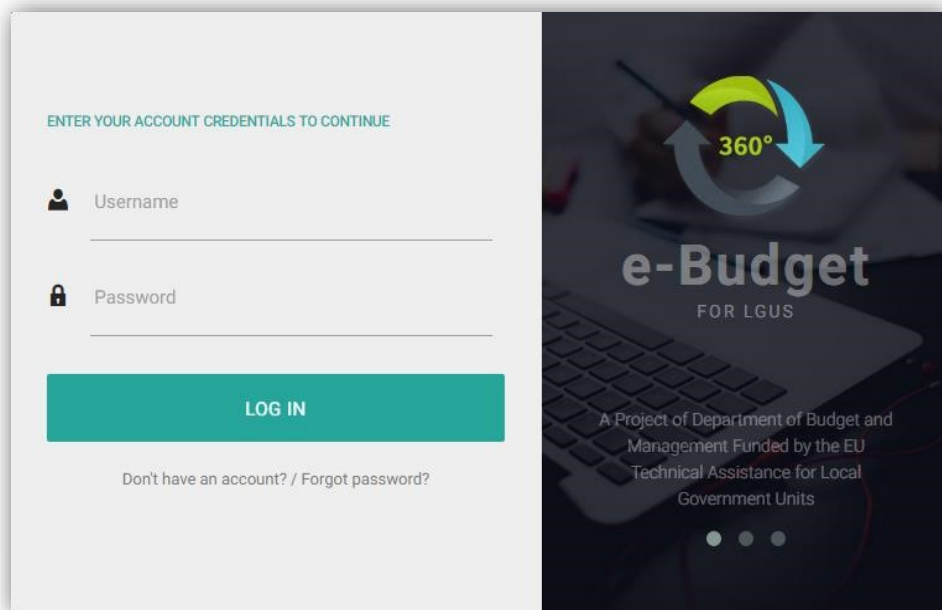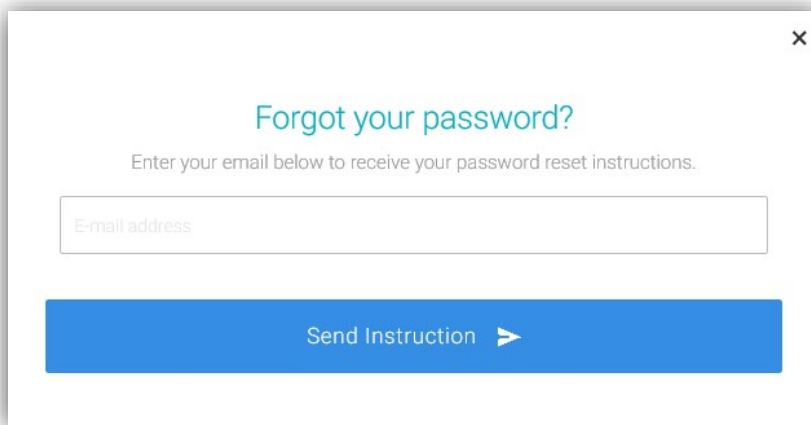
Click **LOG IN.**

> *The user must be registered in the system by the System Administrator.*
> *Contact the System Administrator to request for creation of user account.*

Forgot Password?

In case that you forgot your password, click **Forgot Password?** on the *Log In* page.

Enter the email registered with your account.

Click **Send Instructions.** A link where you can change your password will be sent to the email address registered with your account. Note: *If you can't find the email in your inbox, please check in spam or junk folder.*

Logging Out

Click your profile photo displayed on the upper right area of the page and click **LOG OUT.**
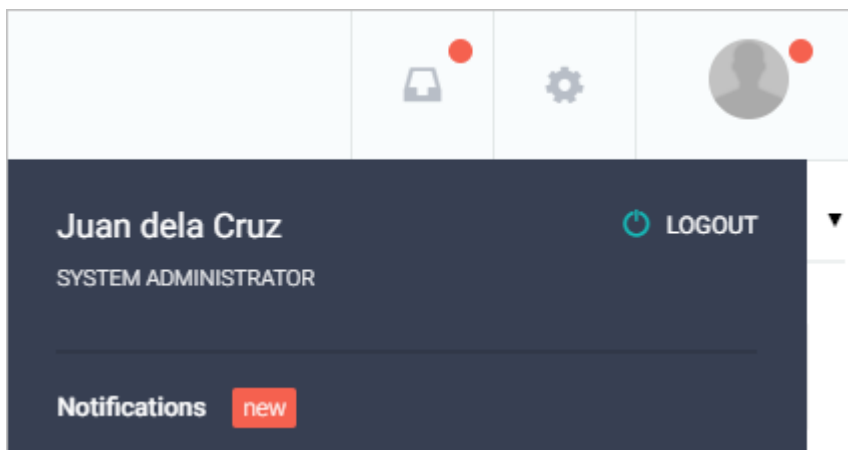
You will be logged out and redirected to the *Log In* page.

Dashboard

The Dashboard is the landing page presented once logged in.
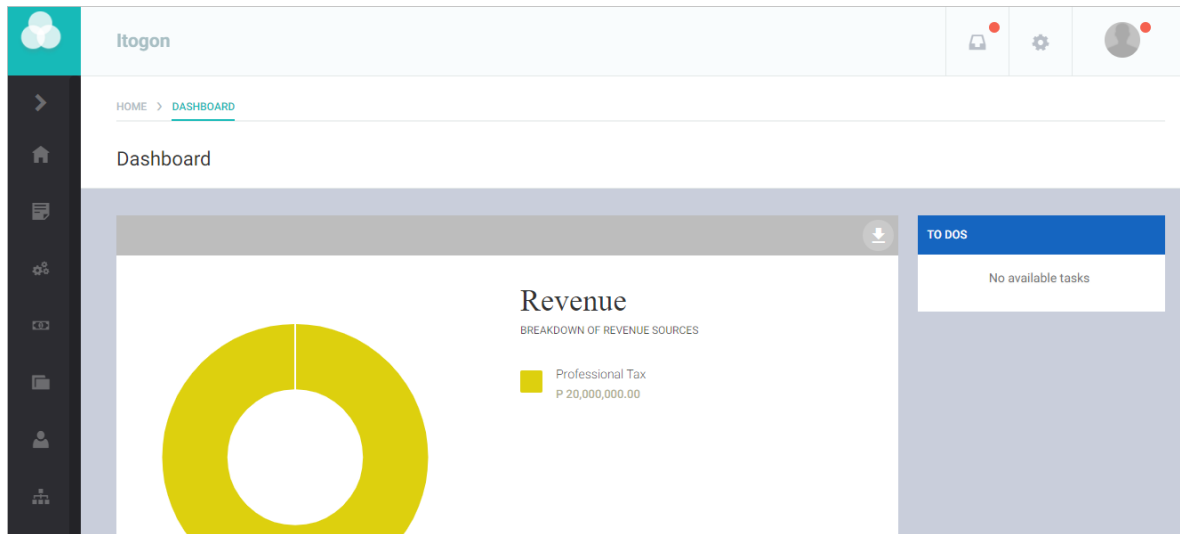
Budget Year

Check Active Budget Year

When preparing forms, you must always check the active budget year to prevent data integrity issues.
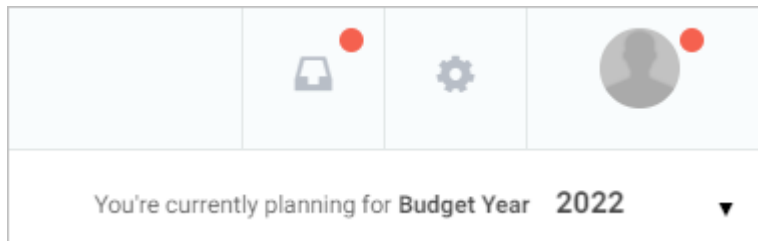
You can change the active year by clicking the ⚙ icon and selecting the year from the **Current Budget Year** dropdown list. Click **SET** button.
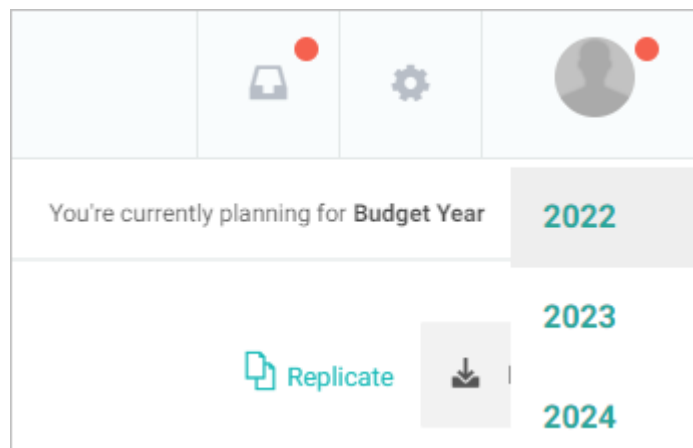
User Management

Users

Creating a User Account

On the left-sidebar of the page, click **User Management** and select **Users**.
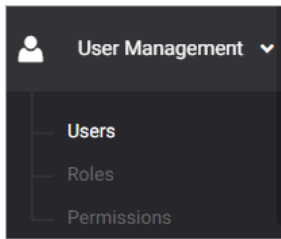
The *Users* summary page is presented.
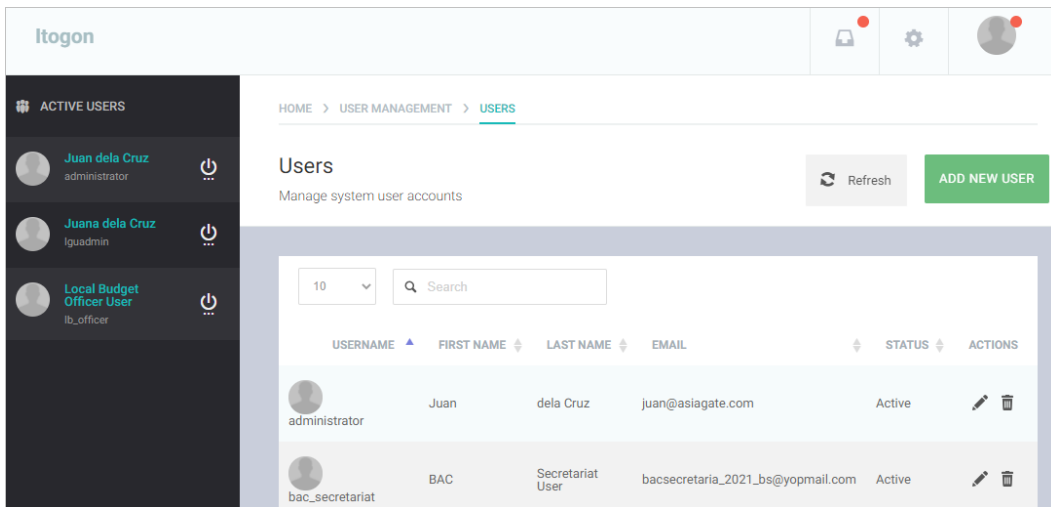
Click **ADD NEW USER** button.

The *Add New User* data entry form is displayed.
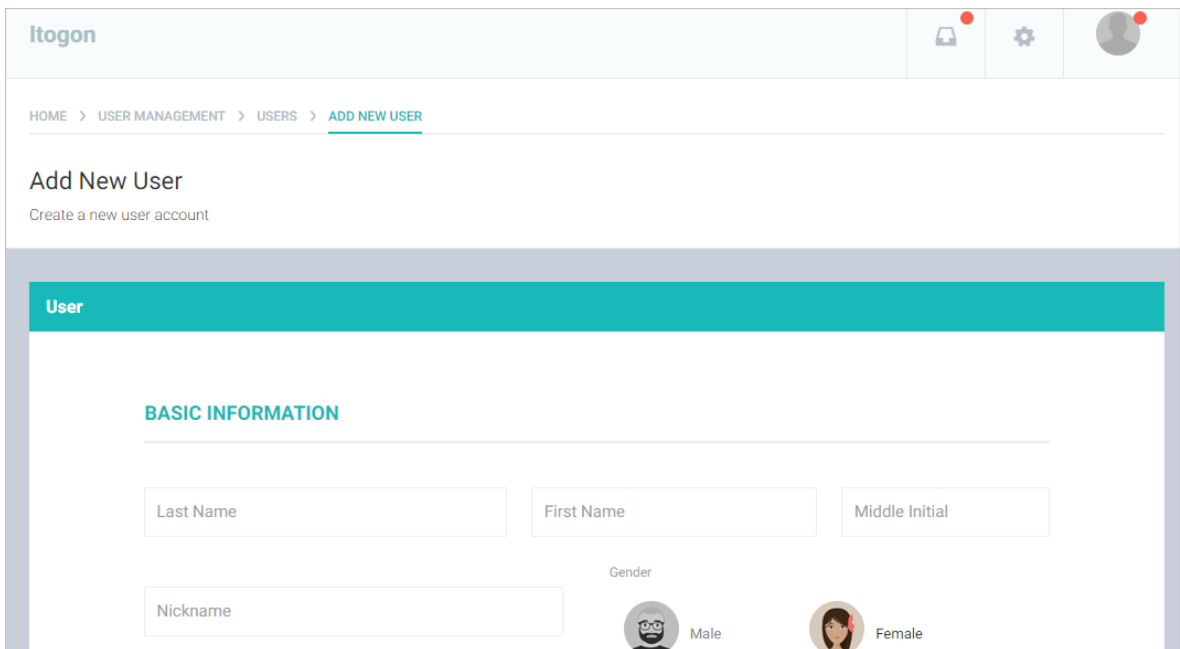
Enter the required details.

Click **SAVE** button to save details and close window. Otherwise, click **CANCEL** to discard entry.

Editing a User Account

On the left-sidebar of the page, click **User Management** and select **Users**.
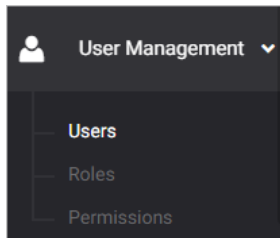
The *Users* summary page is presented.
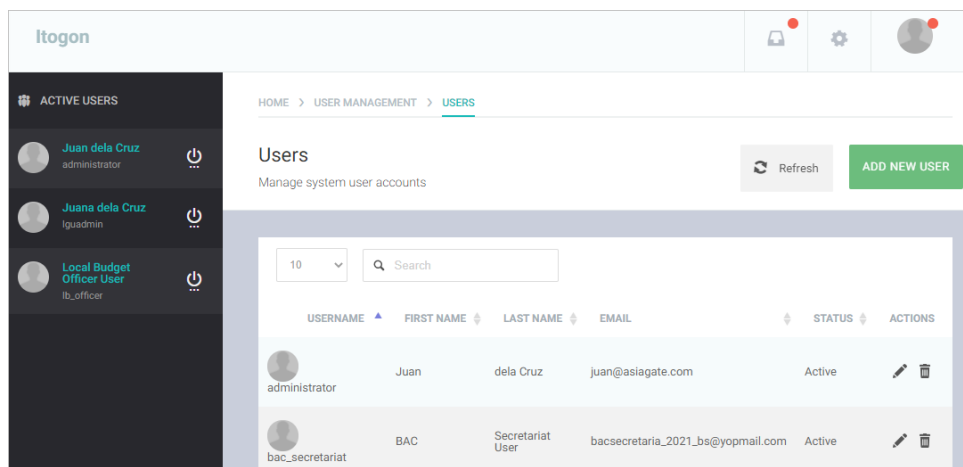
Locate the **User** that you wish to edit and click the Pencil icon.

The User with previously encoded data will be presented.

Modify details as necessary.
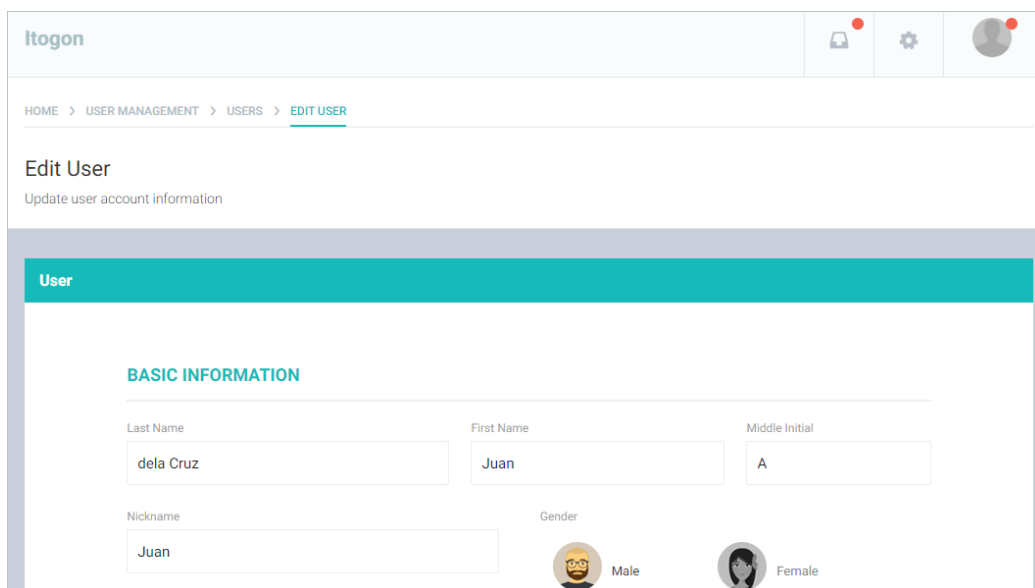
Click **Save** button.

On the left-sidebar of the page, click **User Management** and select **Users**.
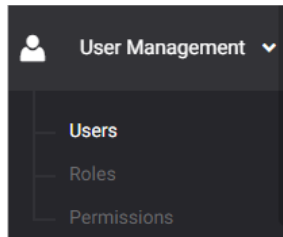
The *Users* summary page is presented.
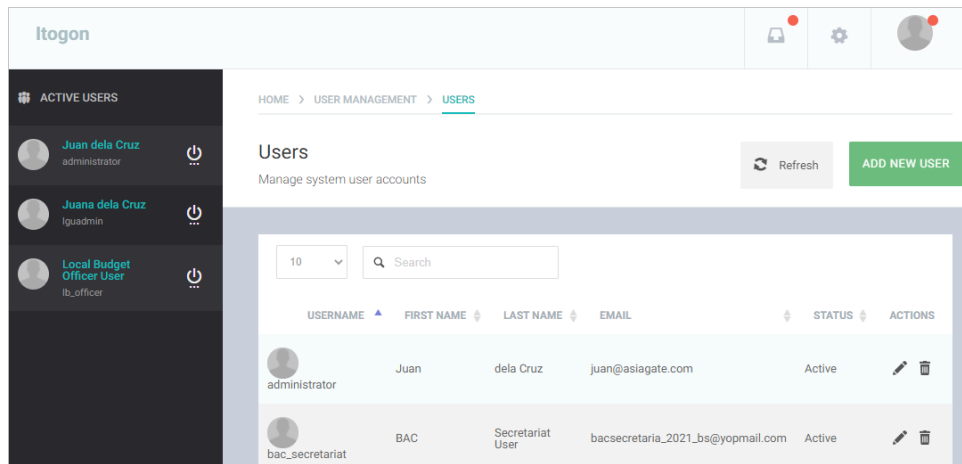
Locate the User that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.
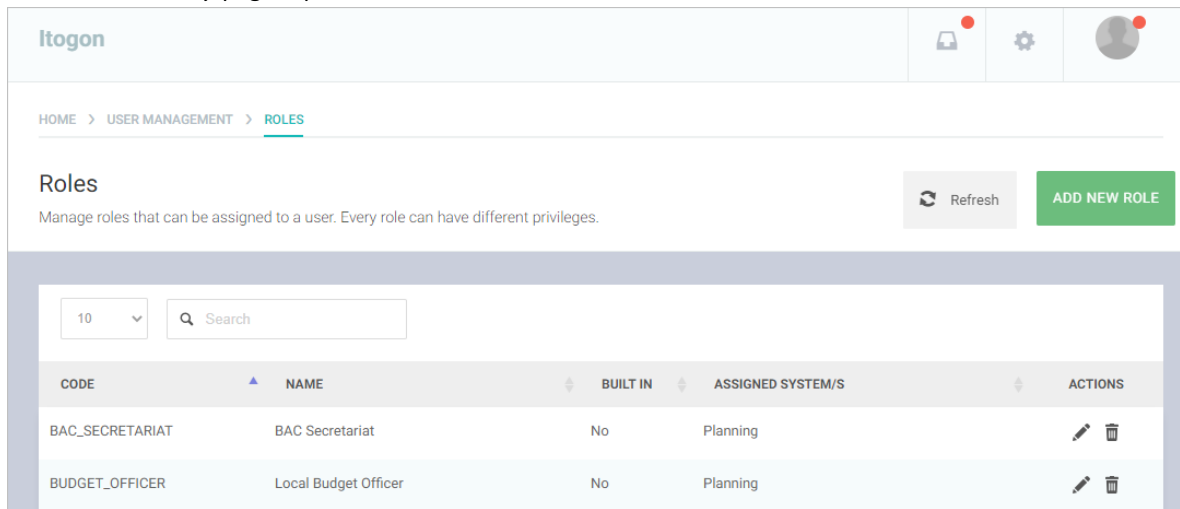
Roles

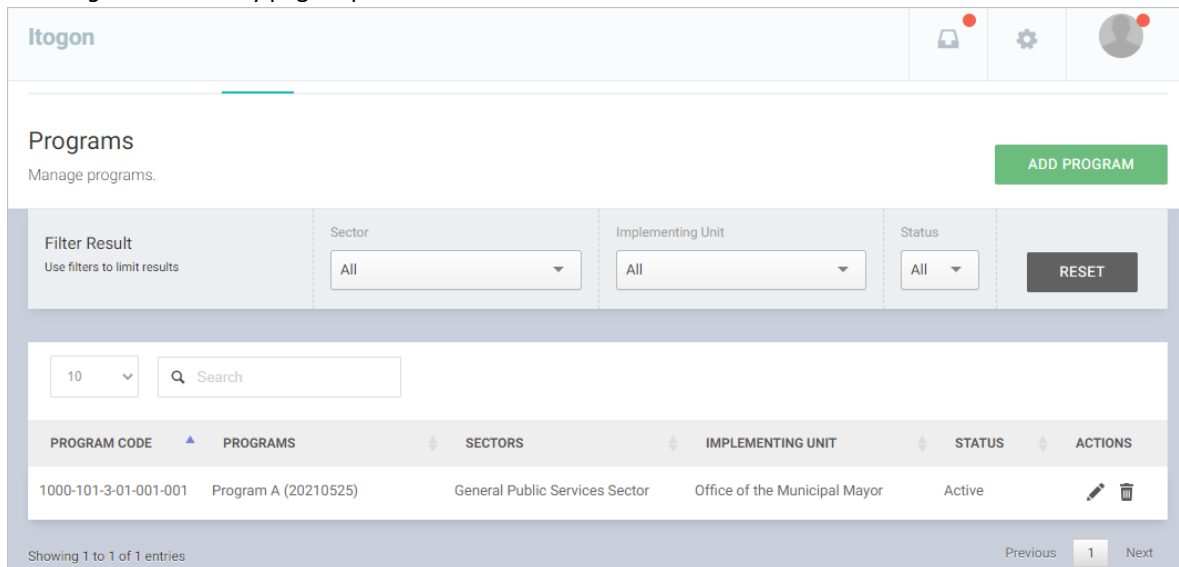### Creating a New User Role

On the left-sidebar of the page, click **User Management** and select **Roles**.

The *Roles summary* page is presented.

Click **ADD NEW ROLE** button.

The *Role* data entry form is displayed.

Enter the required details.

Click **SAVE** button to save details and close window. Otherwise, click **CANCEL** to discard entry.

Editing a User Role

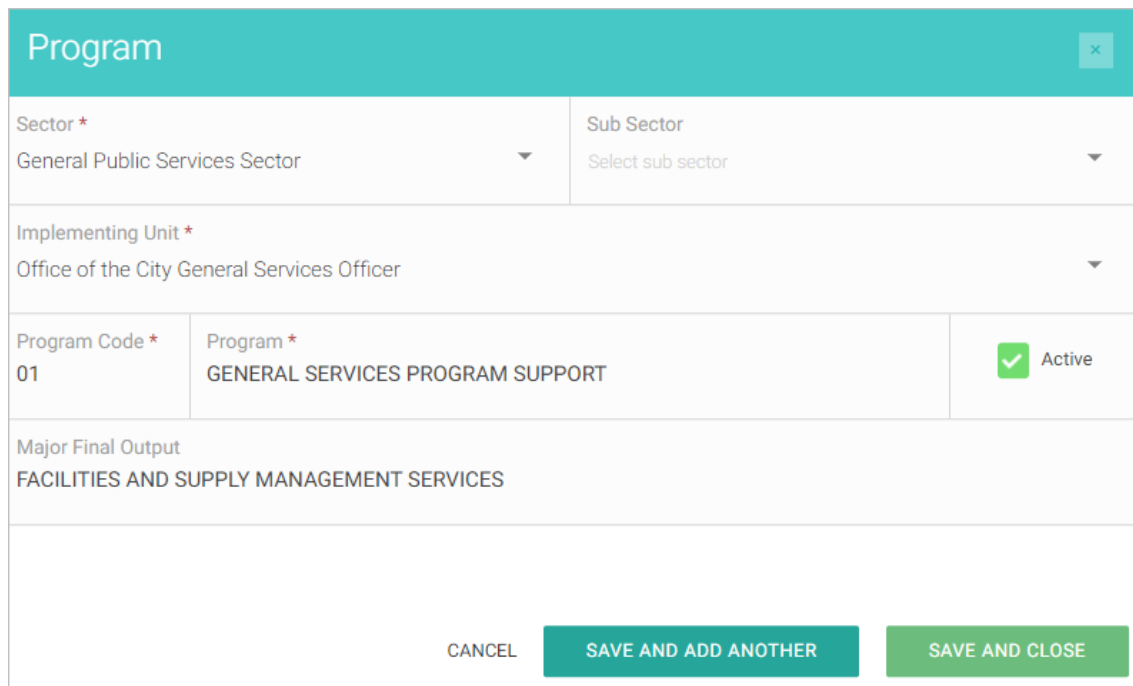On the left-sidebar of the page, click **User Management** and select **Roles**.

The *Roles* summary page is presented.

Locate the **Role** that you wish to edit and click the Pencil icon.
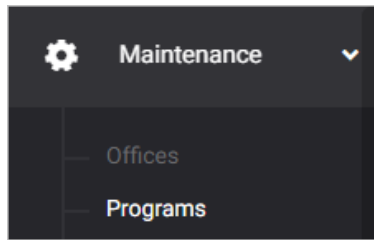
The User with previously encoded data will be presented.

Modify details as necessary.

Click **Save** button.

Deleting a User Role

On the left-sidebar of the page, click **User Management** and select **Roles**.

The *Roles* summary page is presented.

Locate the Role that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

Permissions

Granting a Permission

On the left-sidebar of the page, click **User Management** and select **Permissions**.

The *Permissions summary* page is presented.

Select **System.**

Select **Role.**

Select **Module.**

Select **Action/s.**

Select **Scope.**
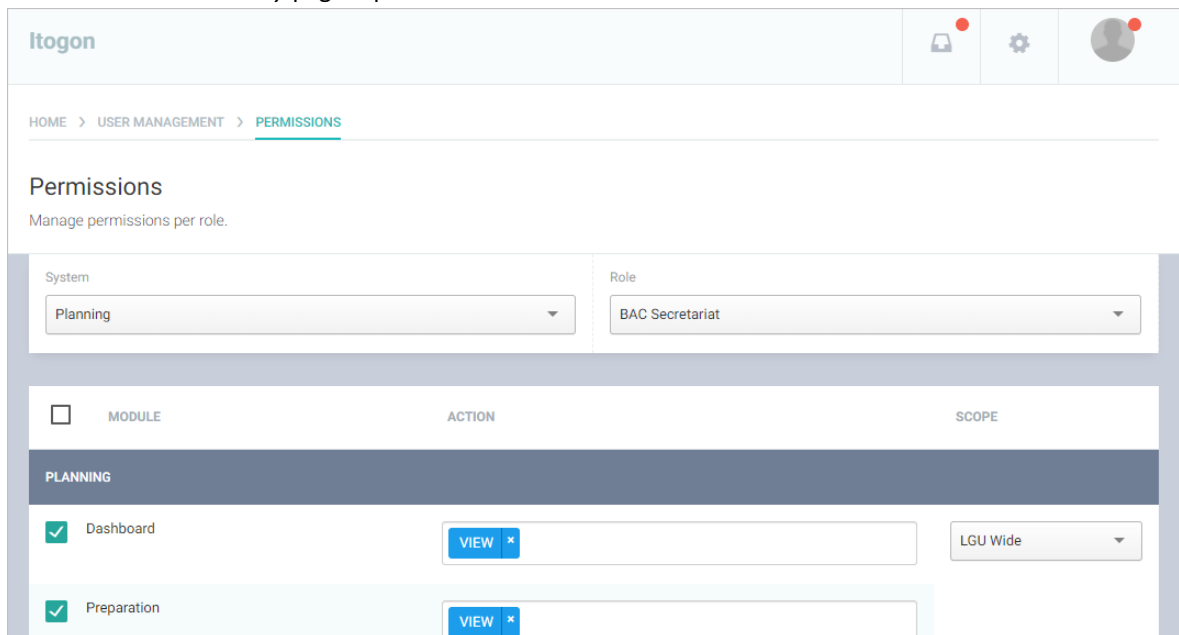
Click **SAVE** button to save permissions.

On the left-sidebar of the page, click **User Management** and select **Permissions**.

The *Permissions summary* page is presented.

Select **System.**

Select **Role.**

Uncheck specific **Module** to remove all module permissions or click **X** to delete specific action.

Click **SAVE** button to save changes.

Maintenance

Offices

Adding an Office

On the left-sidebar of the page, click **Maintenance** and select **Offices**.
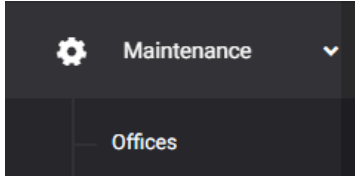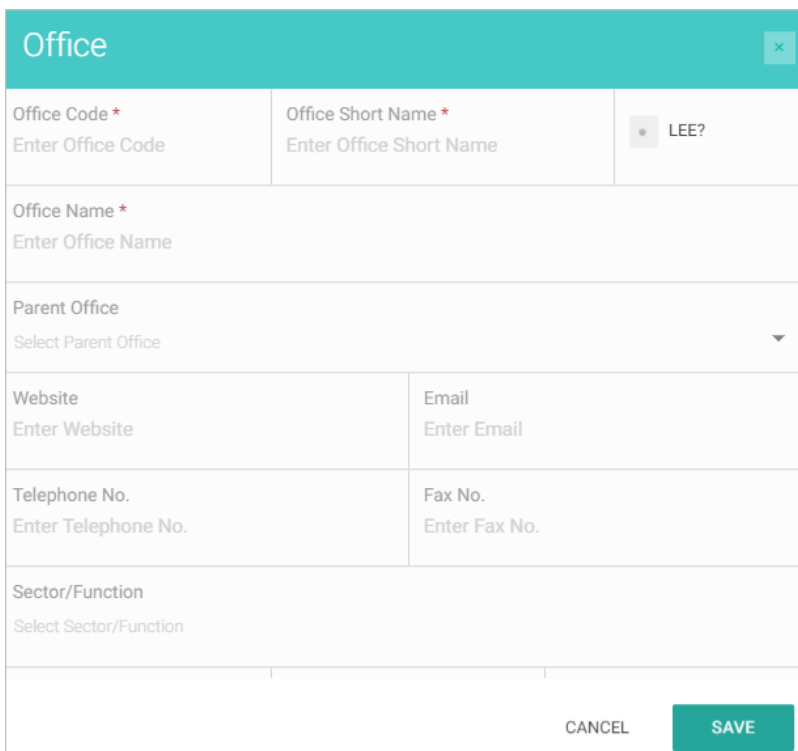
The *Offices* summary page is presented.
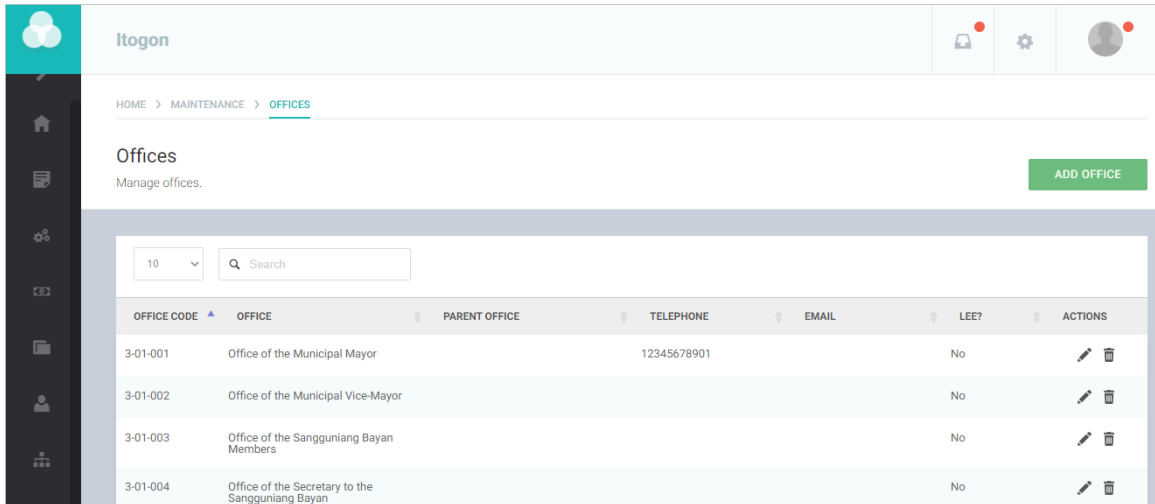
Click **ADD OFFICE** button.

The *Office* data entry form is displayed.

Enter the required details.

Click **SAVE** button to save details and close window. Otherwise, click **CANCEL** to discard entry.

Editing an Office

On the left-sidebar of the page, click **Maintenance** and select **Offices**.
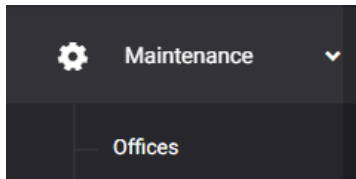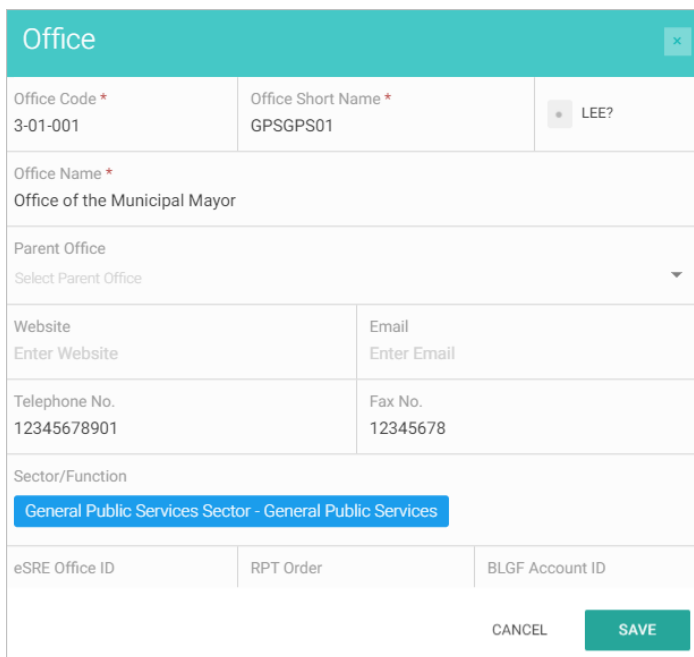
The *Offices* summary page is presented.
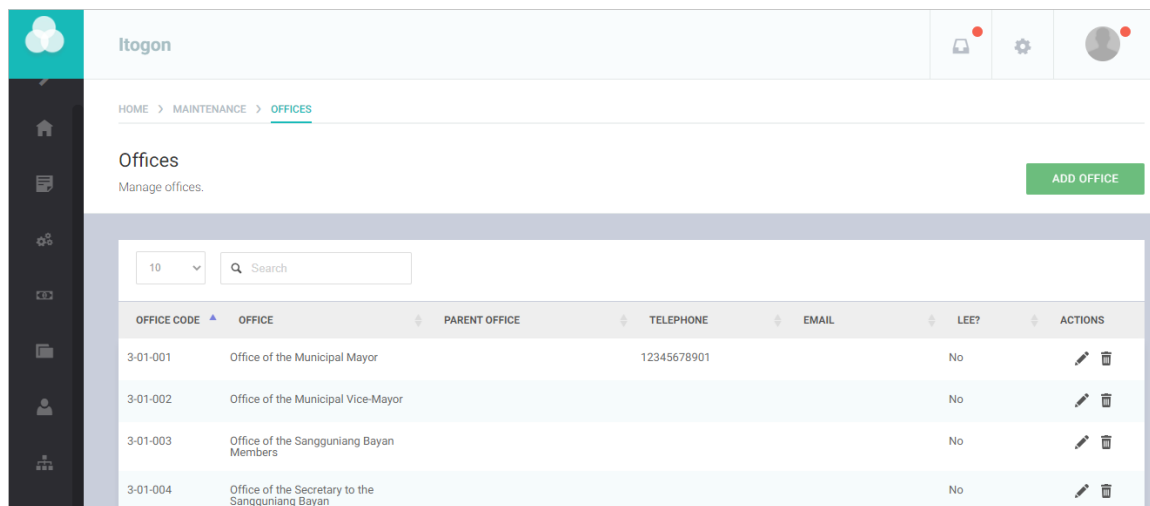
Locate the **Office** that you wish to edit and click the Pencil icon.

The Office with previously encoded data will be presented.

Modify details as necessary.

Click **Save** button.

Deleting an Office

On the left-sidebar of the page, click **Maintenance** and select **Offices**.

The *Offices* summary page is presented.

Locate the Office that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

Programs

Adding a Program

On the left-sidebar of the page, click **Maintenance** and select **Programs**.
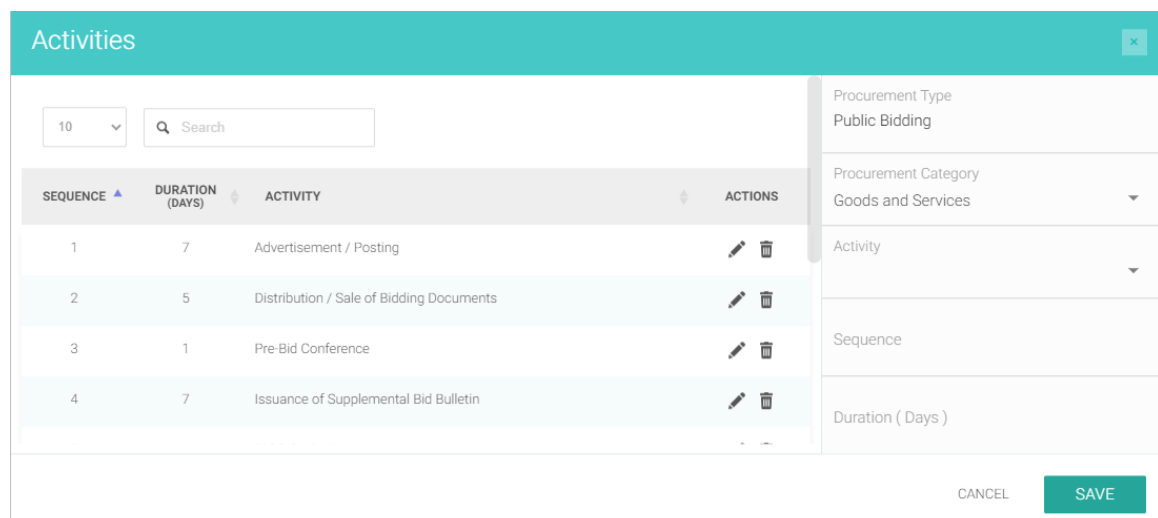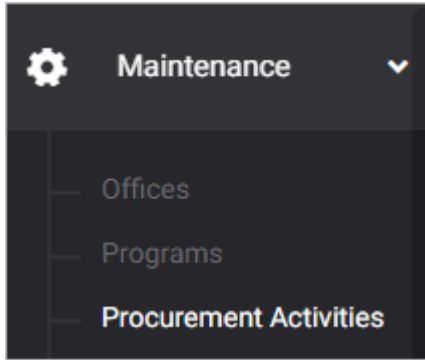

The *Programs* summary page is presented.

Click **ADD PROGRAM** button.

The *Program* data entry form is displayed.

 Select and Enter details. All fields are required.
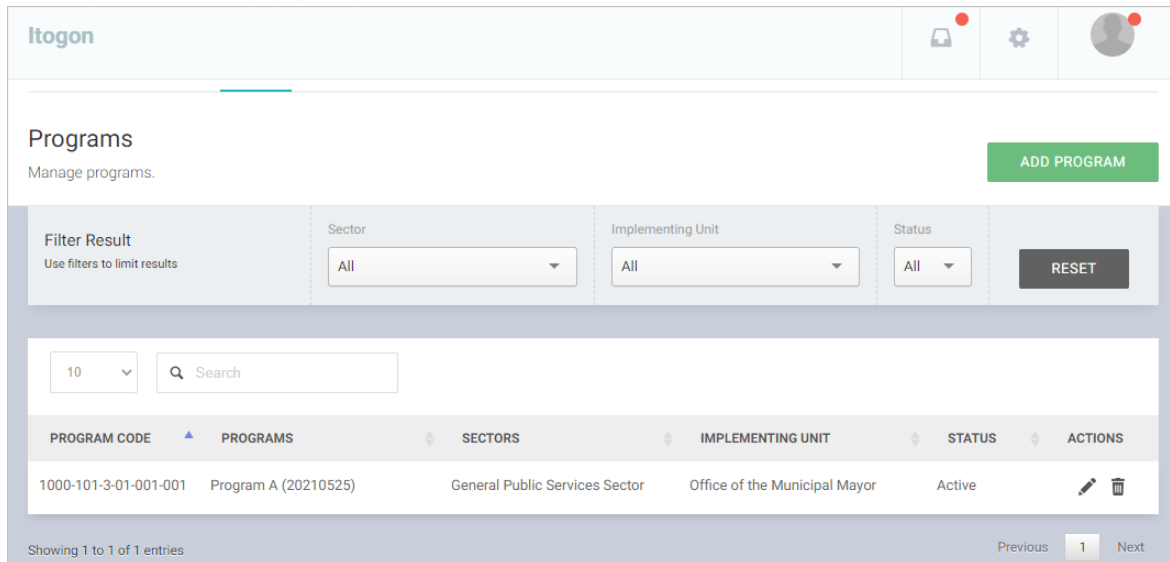
Click **SAVE AND ADD ANOTHER** if you want to save details and encode another program, or **SAVE AND CLOSE** to save details and close window. Otherwise, click **CANCEL** to discard entry.

Editing a Program

On the left-sidebar of the page, click **Maintenance** and select **Programs**.

The *Programs* summary page is presented.

Locate the Program that you wish to edit and click the Pencil icon.

The Program with previously encoded data will be presented.

Modify details as necessary.

Click **Save and Close** button.

Deleting a Program

On the left-sidebar of the page, click **Maintenance** and select **Programs**.

The *Programs* summary page is presented.

Locate the Program that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

Procurement Activities

Adding a Procurement Activity

On the left-sidebar of the page, click **Maintenance** and select **Procurement Activities**.

The *Procurement Activities* summary page is presented.

Click **VIEW ACTIVITIES** button.

The *Procurement Activity* data entry form is displayed.

Enter details.

Click **SAVE** button.

Editing a Procurement Activity

On the left-sidebar of the page, click **Maintenance** and select **Procurement Activities**.
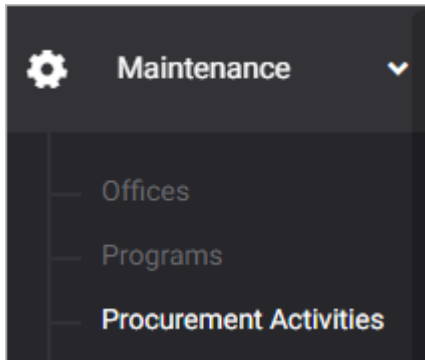
The *Procurement Activities* summary page is presented.

Click **VIEW ACTIVITIES** button.
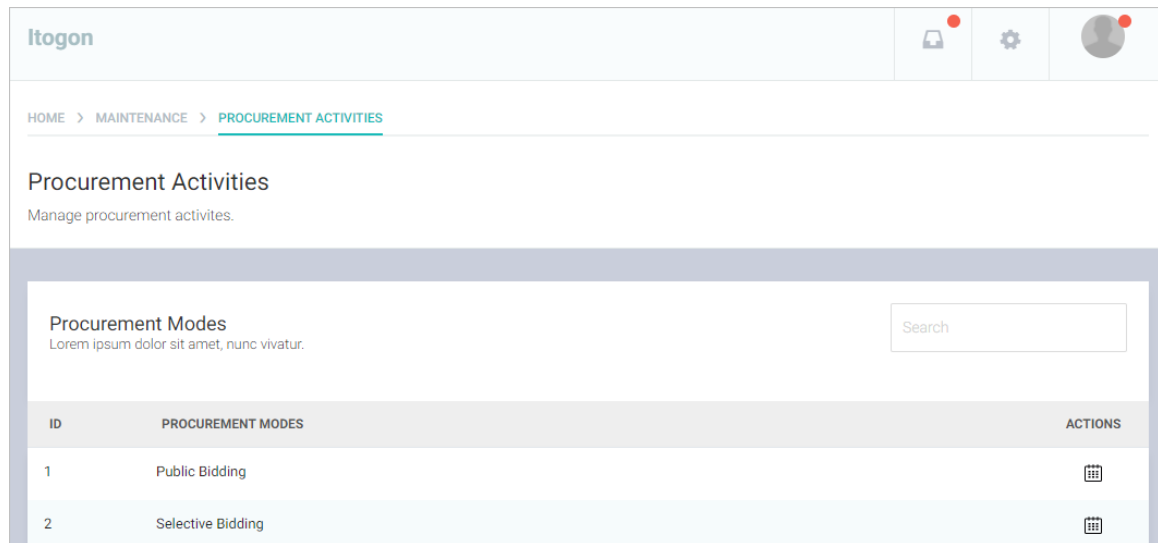
Locate the Procurement Activity that you wish to edit and click the Pencil icon.

The Procurement Activity details will be presented on the right side of the form.

Modify details as necessary.

Click **Save** button.

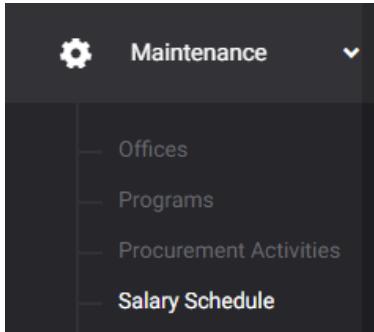On the left-sidebar of the page, click **Maintenance** and select **Procurement Activities**.

The *Procurement Activities* summary page is presented.

Click **VIEW ACTIVITIES** button.

Locate the Procurement Activity that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

Salary Schedule

Adding a Salary Schedule (Local)

On the left-sidebar of the page, click **Maintenance** and select **Salary Schedule**.

The *Salary Schedule* summary page is presented.

Click **ADD SALARY SCHEDULE** button.

The *Salary Schedule* data entry form is displayed.

Select and/or Enter details.

Click **SAVE AND ADD ANOTHER** if you want to save details and encode another salary schedule, or **SAVE AND CLOSE** to save details and close window. Otherwise, click **CANCEL** to discard entry.

Adding a Salary Schedule (National)

On the left-sidebar of the page, click **Maintenance** and select **Salary Schedule**.
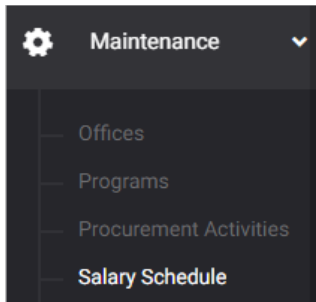
The *Salary Schedule* summary page is presented.

Click **ADD SALARY SCHEDULE** button.

The *Salary Schedule* data entry form is displayed.

Select and/or Enter details.

Click **SAVE AND ADD ANOTHER** if you want to save details and encode another salary schedule, or **SAVE AND CLOSE** to save details and close window. Otherwise, click **CANCEL** to discard entry.

On the left-sidebar of the page, click **Maintenance** and select **Salary Schedule**.

The *Salary Schedule* summary page is presented.

Locate the Salary Schedule that you wish to edit and click the Pencil icon.

The Salary Schedule with previously encoded data will be presented.

Modify details as necessary.
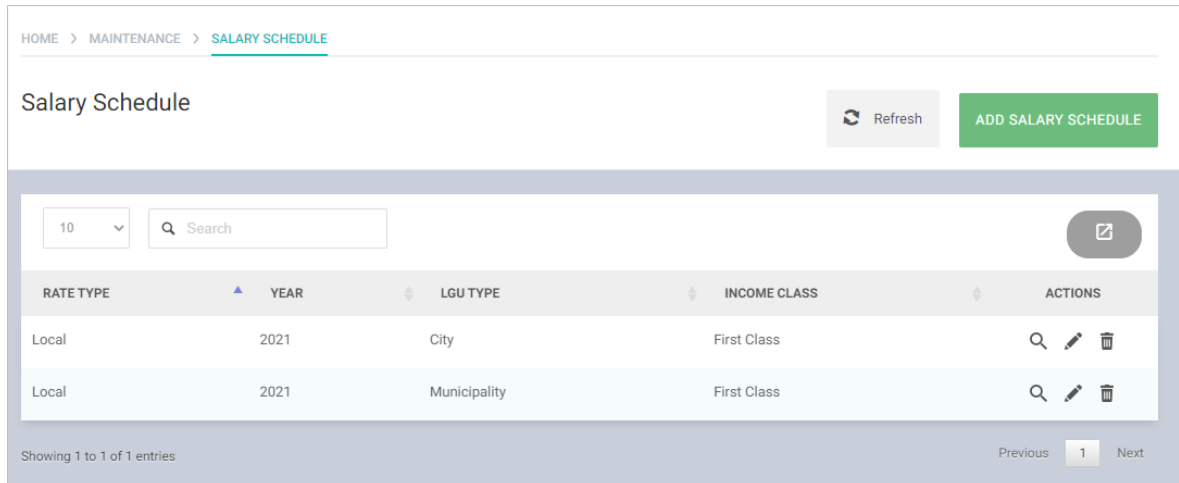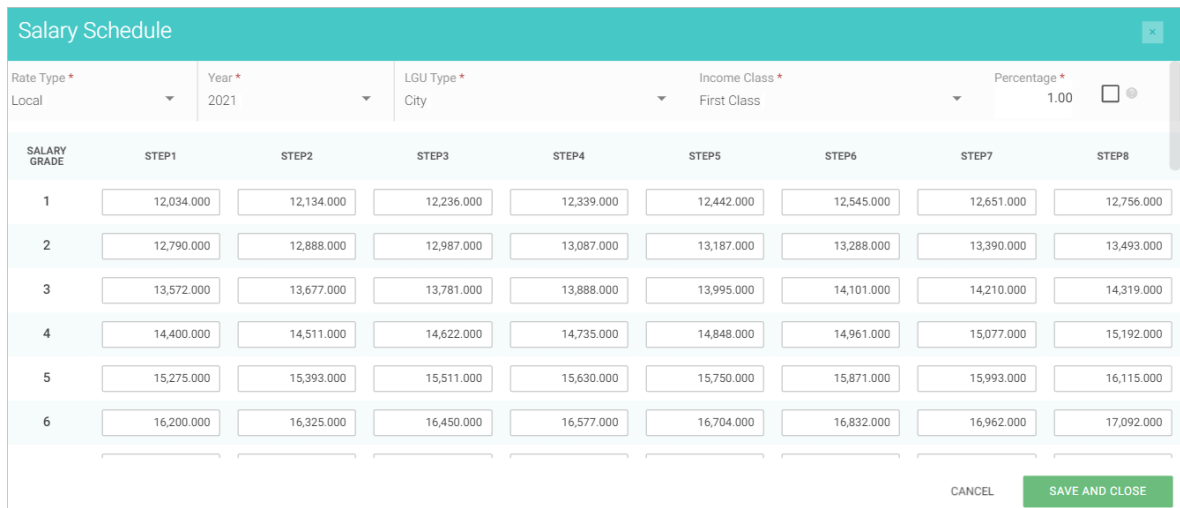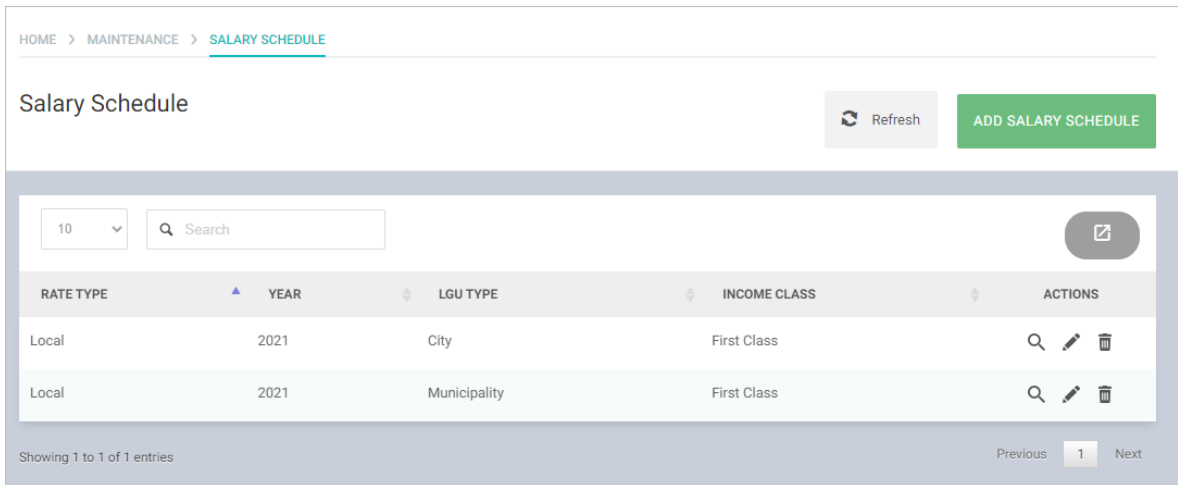
Click **Save** button.

<u>**Deleting a Salary Schedule**</u>

On the left-sidebar of the page, click **Maintenance** and select **Salary Schedule**.

The *Salary Schedule* summary page is presented.

Locate the Salary Schedule that you wish to delete and click the Trash icon.
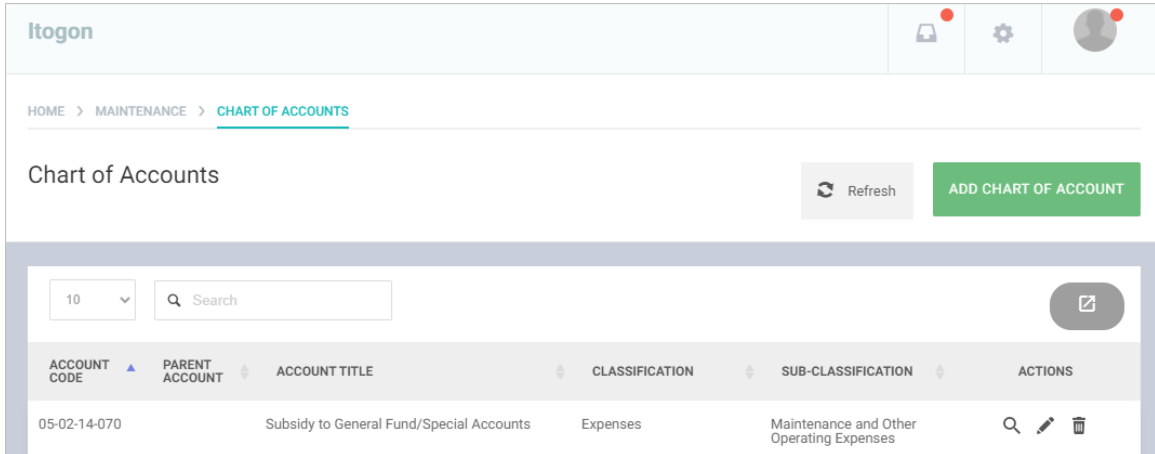
Confirmation message displays.

Click **OK** button.

Chart of Accounts

Adding a Chart of Account

On the left-sidebar of the page, click **Maintenance** and select **Chart of Accounts**.
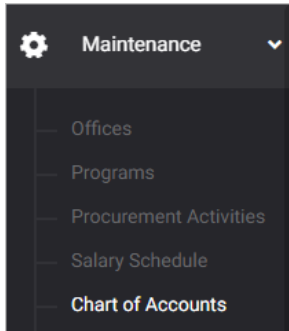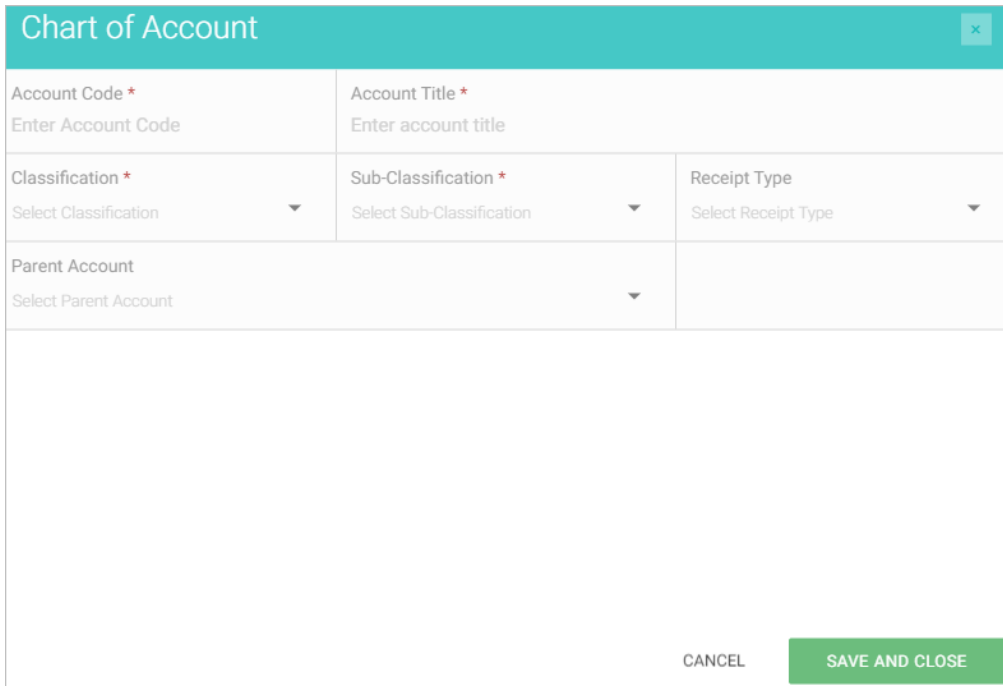
The *Chart of Accounts* summary page is presented.
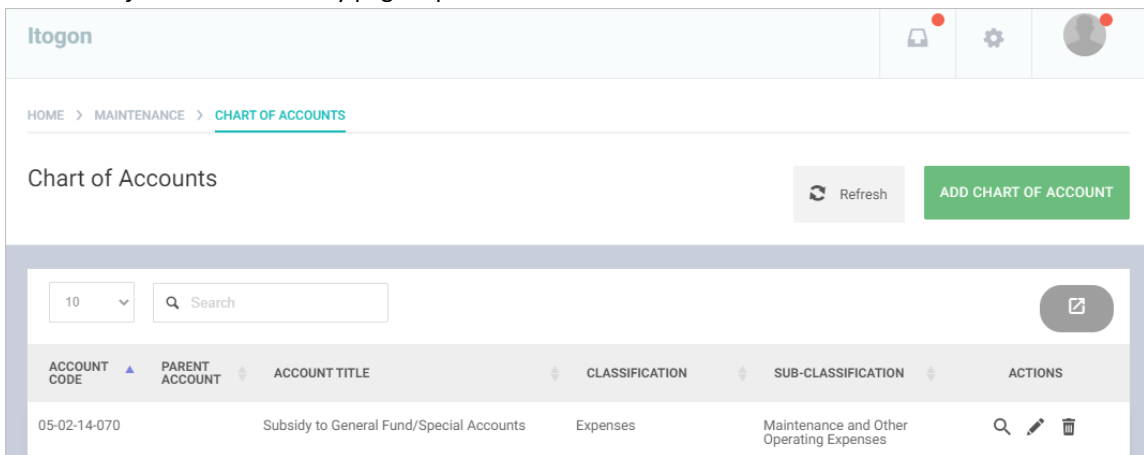
Click **ADD CHART OF ACCOUNT** button.

The *Chart of Account* data entry form is displayed.


Select and Enter details. All fields are required.

Click **SAVE** button to save details and close window. Otherwise, click **CANCEL** to discard entry.

Editing a Chart of Account

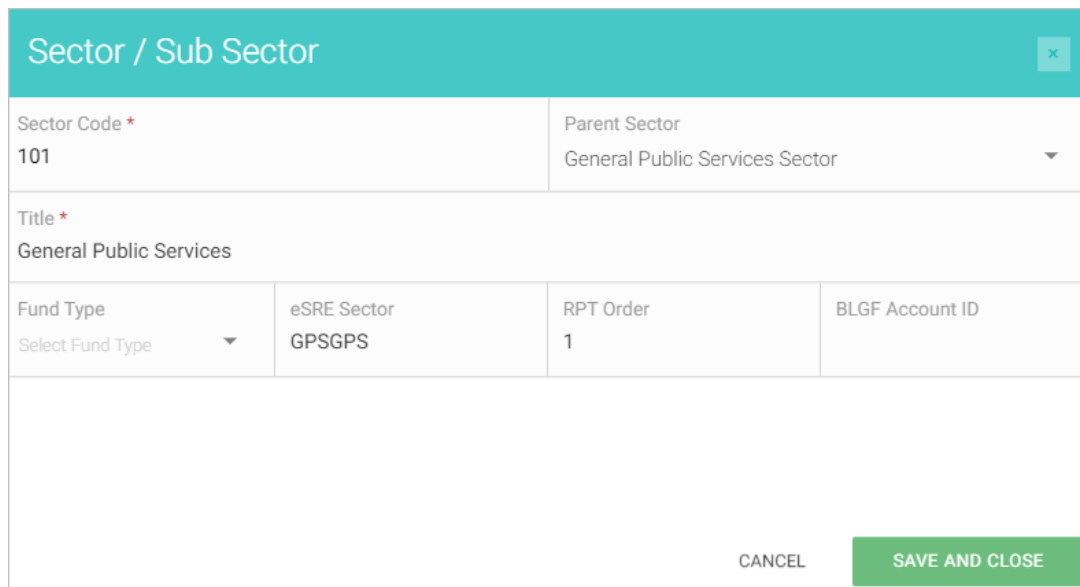On the left-sidebar of the page, click **Maintenance** and select **Chart of Accounts**.
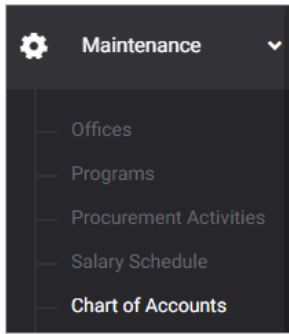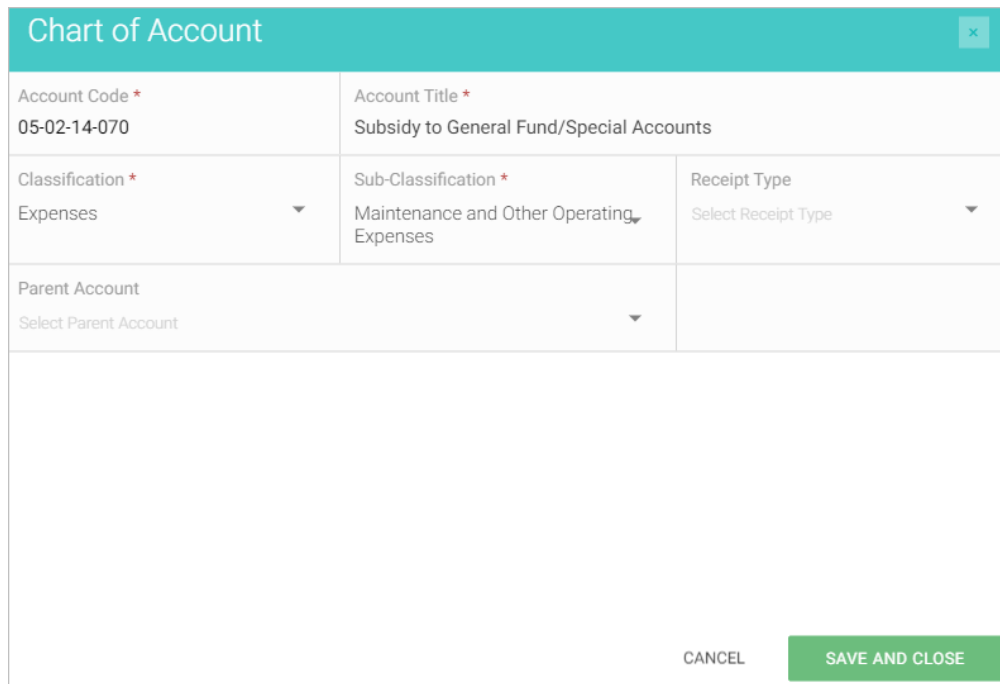
The *Chart of Accounts* summary page is presented.
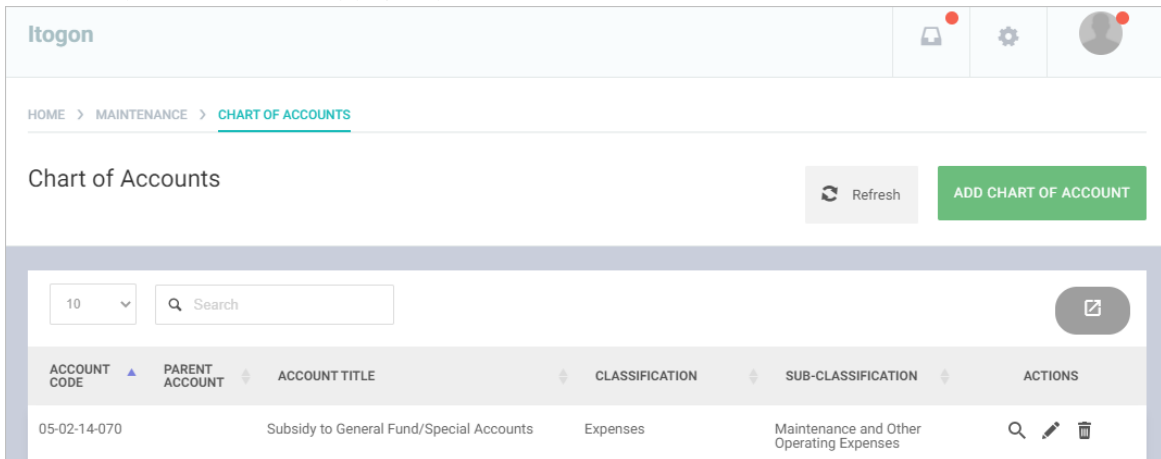
Locate the Program that you wish to edit and click the Pencil icon.

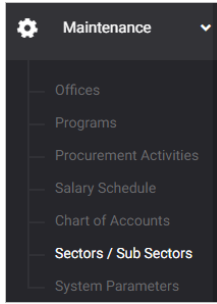The Chart of Account with previously encoded data will be presented.

Modify details as necessary.

Click **Save and Close** button.

Deleting a Chart of Account

On the left-sidebar of the page, click **Maintenance** and select **Chart of Accounts**.
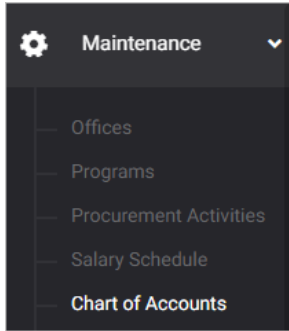
The *Chart of Accounts* summary page is presented.

Locate the Chart of Account that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

Sectors/Sub Sectors

Adding a Sector/Sub Sector

On the left-sidebar of the page, click **Maintenance** and select **Sector/Sub Sector**.
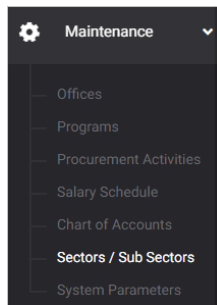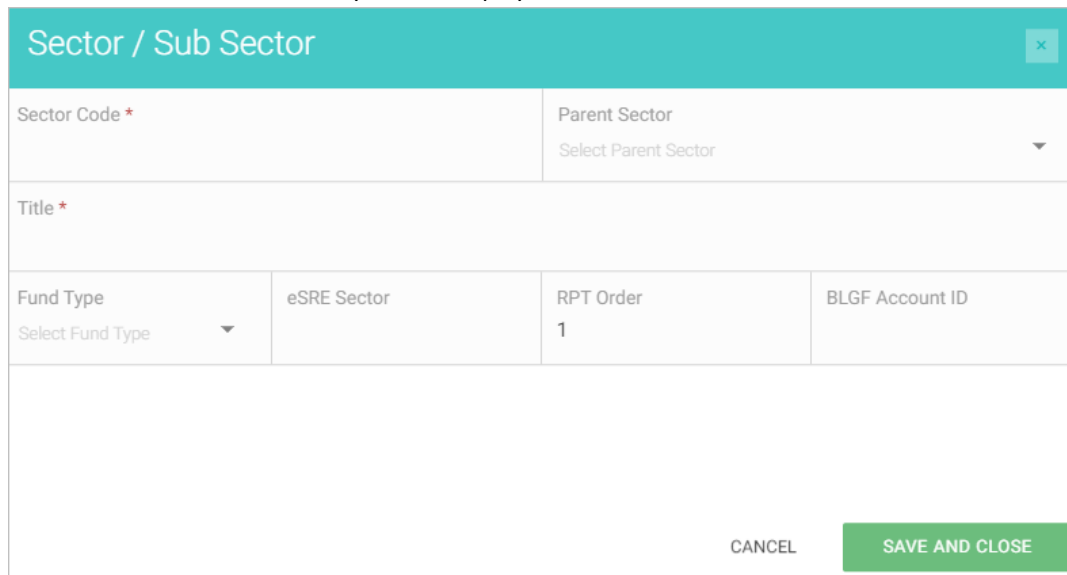
The *Sectors/Sub Sectors* summary page is presented.
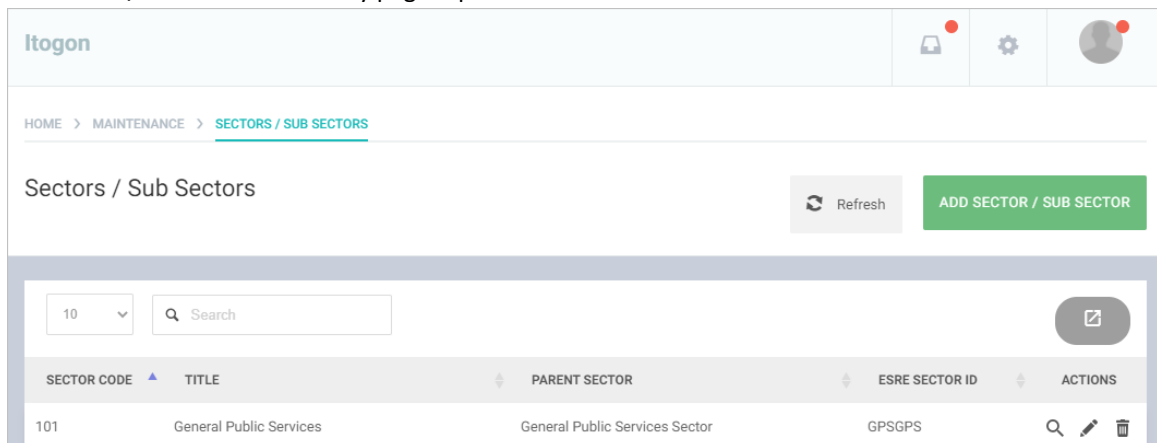
Click **ADD SECTOR/SUB SECTOR** button.

The *Sector/Sub Sector* data entry form is displayed.
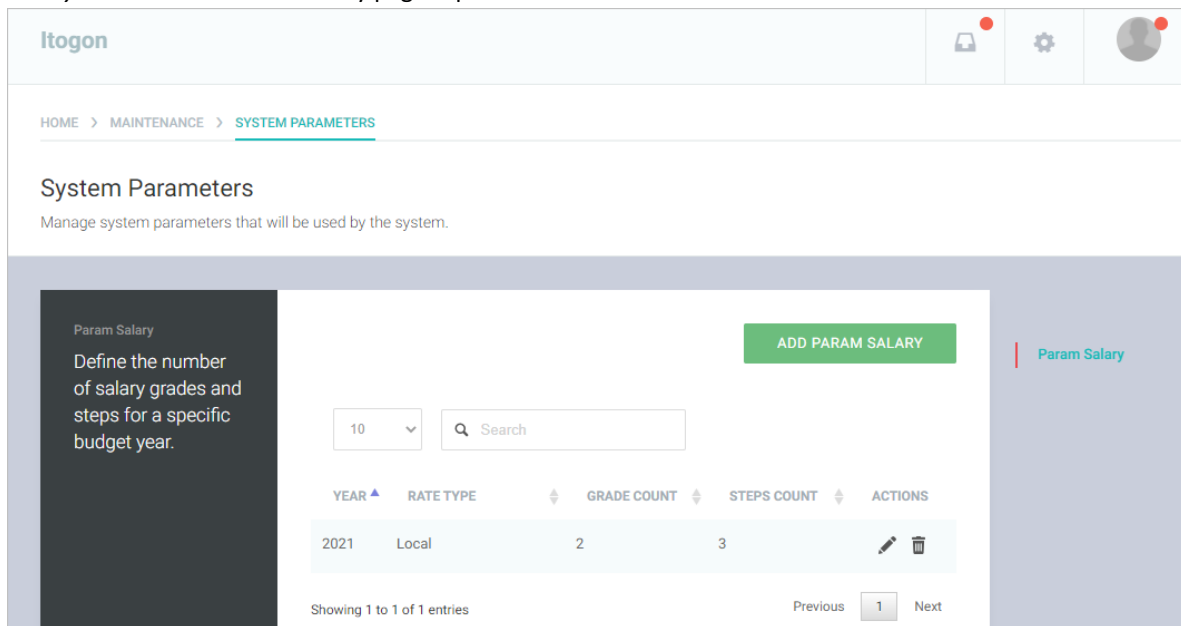
Select and Enter details. All fields are required.

Click **SAVE** button to save details and close window. Otherwise, click **CANCEL** to discard entry.

Editing a Sector/Sub Sector

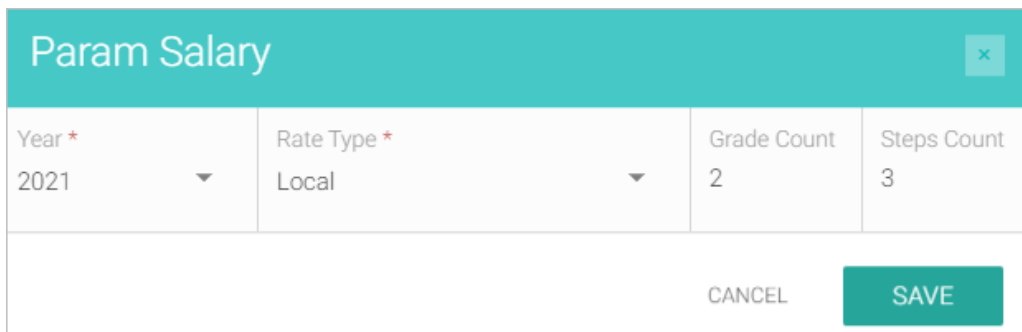On the left-sidebar of the page, click **Maintenance** and select **Sector/Sub Sector**.
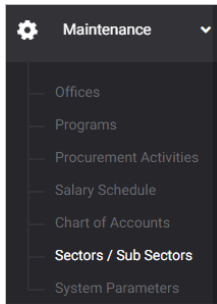
The *Chart of Accounts* summary page is presented.
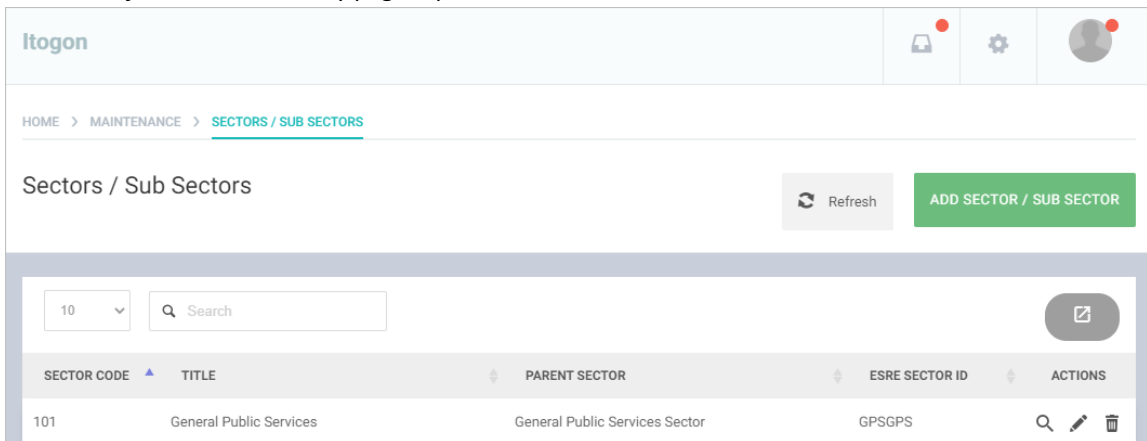
Locate the Program that you wish to edit and click the Pencil icon.

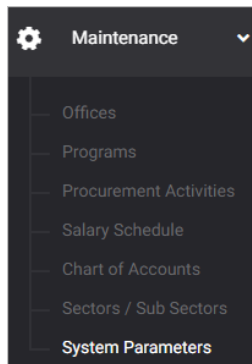The Sector/Sub Sector with previously encoded data will be presented.
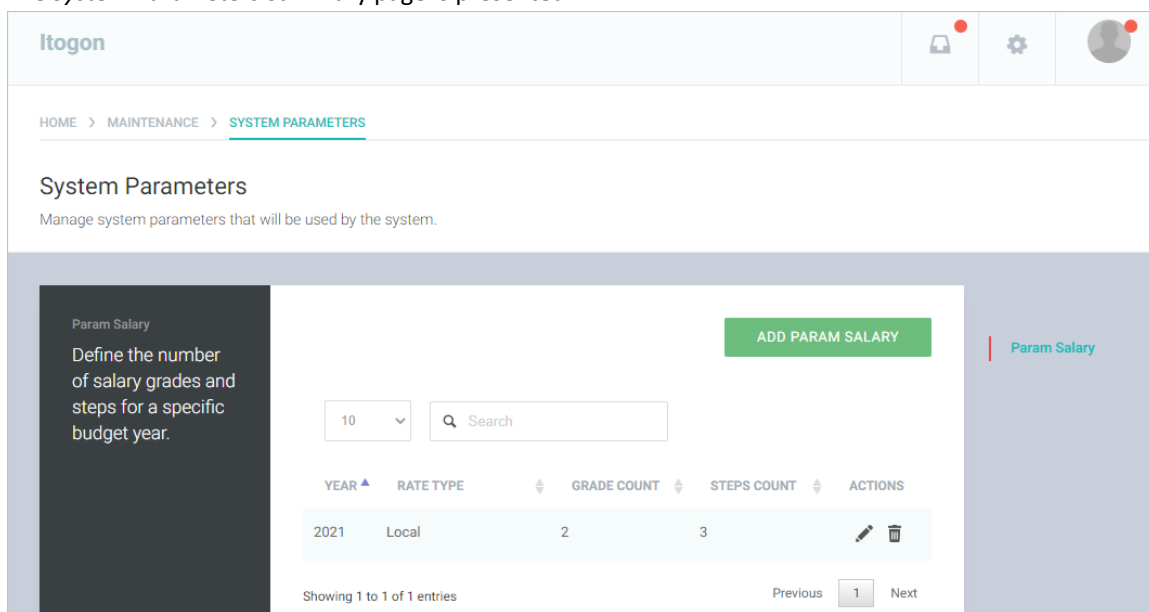
Modify details as necessary.

Click **Save and Close** button.

Deleting a Sector/Sub Sector

On the left-sidebar of the page, click **Maintenance** and select **Sector/Sub Sector**.

The *Sectors/Sub Sectors* summary page is presented.

Locate the Sector/Sub Sector that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

System Parameters

Adding a System Parameter

On the left-sidebar of the page, click **Maintenance** and select **System Parameter**.
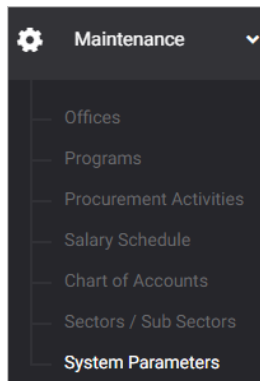
The *System Parameter* summary page is presented.
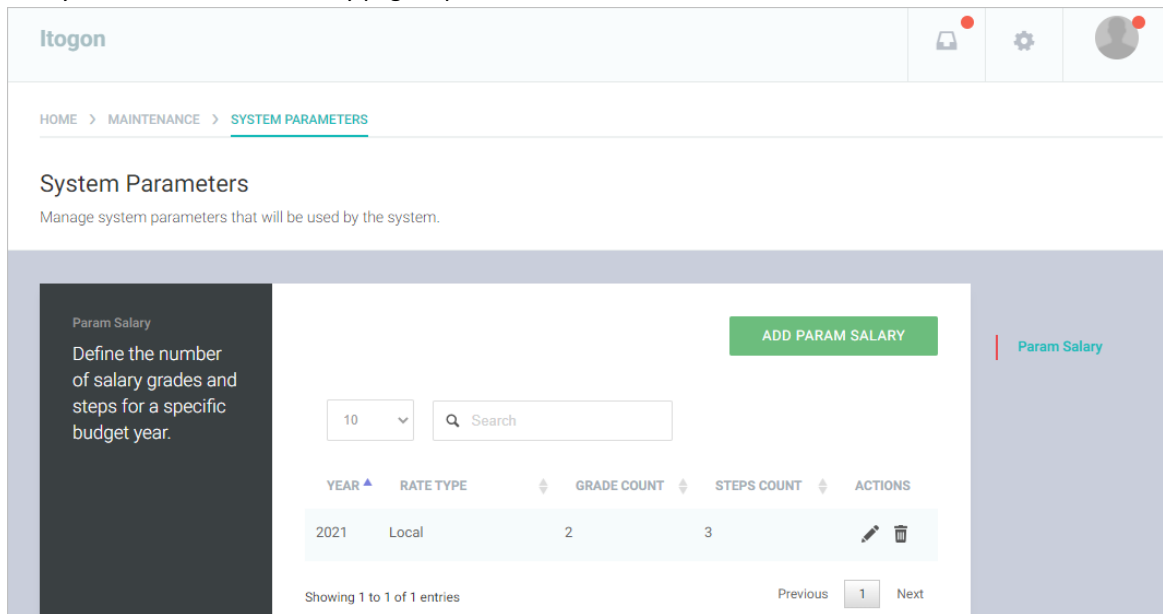
Click **ADD PARAM SALARY** button.

The *Param Salary* data entry form is displayed.

Select and Enter details. All fields are required.

Click **SAVE** button to save details and close window. Otherwise, click **CANCEL** to discard entry.

On the left-sidebar of the page, click **Maintenance** and select **System Parameters.**

The *System Parameters* summary page is presented.

Locate the Program that you wish to edit and click the Pencil icon.

The System Parameter with previously encoded data will be presented.

Modify details as necessary.

Click **Save** button.

Deleting a System Parameter

On the left-sidebar of the page, click **Maintenance** and select **System Parameters**.

The *System Parameters* summary page is presented.

Locate the System Parameter that you wish to delete and click the Trash icon.

Confirmation message displays.

Click **OK** button.

Audit Trail

View Audit Trail

On the left-sidebar of the page, click **Audit Trail**.

The *Audit Trail* summary page is presented.

Click **View** under Actions column. The *Audit Trail Details* is displayed.

Filter Audit Trail

On the left-sidebar of the page, click **Audit Trail**.

The *Audit Trail* summary page is presented.

Select **Filter by System**. The *Audit Trail* list is displayed based on the selected system.

Back-up eBudget Data

Go to C:\LGU360_v2 folder
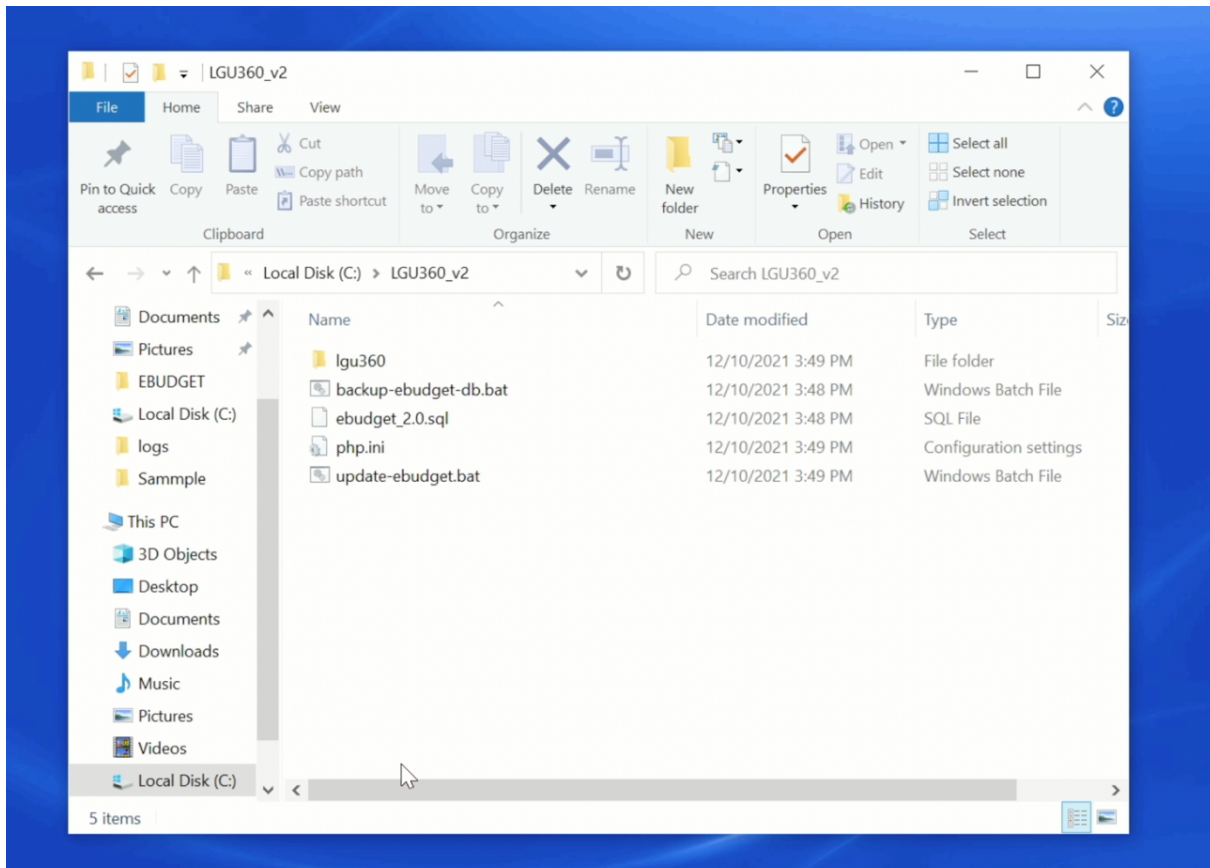
Right-click **backup-ebudget-db.bat** and select *run as administrator*

Wait for the backup to finish and exit window.

Backup file will be saved in C:\ebudget_dbbackups