ITWeb Quick Reference Guide

(Version 1.5.01)

1 - Introduction:

Steps in the ITWeb IT Budget Submission process:

- Login:
    - Register - (https://max.omb.gov/maxportal/)
    - ITWeb Login
    - Reset Expired Passwords
    - Activity Screen

- Exhibit 53:
    - Exhibit 53 Import Screen (.xls)
    - Exhibit 53 Validation Checking (Without Saving)
    - Exhibit 53 Validate and Save
    - View Exhibit 53 List
    - View Exhibit 53
    - Submit Exhibit 53 to OMB
    - Provide Explanations for any Warning messages
    - Verify Submission Status

- Exhibit 300:
    - Exhibit 300 Import Screen (.xml)
    - Exhibit 300 Validation Checking (Without Saving)
    - Exhibit 300 Validate and Save
    - View Exhibit 300 List
    - View and Edit Exhibit 300
    - Submit Exhibit 300 to OMB
    - Provide Explanations for any Warning messages
    - Verify Submission Status

- Check Agency Discrepancies
    - 300's not in 53
    - Major in 53 without 300

2 - ITWeb Login:

Welcome to ITWeb

PLEASE LOGIN

User Id ›

Password ›

OK

ATTENTION: This system contains data belonging to the U.S. Government. This computer system, including all related equipment, networks, and network devices (specifically including Internet access) are provided only for authorized U.S. Government use. U.S. Government computer systems may be monitored for all lawful purposes, including to ensure that their use is authorized, for management of the system, to facilitate protection against unauthorized access, and to verify security procedures, survivability, and operational security. Monitoring includes active attacks by authorized U.S. Government entities to test or verify the security of this system. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All information, including personal information, placed or sent over this system may be monitored.

2a –Reset Expired Passwords - Password expires every 90-days/3-failed attempts:
(https://max.omb.gov/maxportal/passwordResetForm.do)

MAX Homepage
Office of Management and Budget

Home | Training | FAQ | Contact Us | MAX Administrators | Register Here | Change Password | Login

President's Budget
o Budget Documents
o Supplementals, Budget Amendments, and Releases

Legislative Information
o Statements of Administration Policy (SAPs)
o Testimony
o Reports to Congress

Information for Agencies
o Circulars
o Memoranda
o Bulletins
o Privacy Guidance
o Grants Management
o Reports

Recover a Forgotten Password or Change Password

If you have forgotten your password or need to change your password, please enter your email address and select the *Submit* button. Once your email address is validated you will receive a confirmation email containing a link to create a new password.

Email Address: ⎯ USE THE MAX USER ID

Submit

⊞ Back to Login

3 - Activity Screen - The screen you see when you first log in:

4 – Exhibit 53 Import Screen - The page for importing an Exhibit 53:

5 – Exhibit 53 Validation Checking - ENTER an .xls file to import, then select "Validate Only", then click "OK" The resulting page shows validation warnings and errors**:**

6 – Exhibit 53 Validate and Save - Select 'Validate and save', then click "OK" to import the Exhibit 53 into ITWeb. The resulting page shows validation warnings and errors:

7 – View Exhibit 53 List - The View Exhibits page shows all the Exhibit 53s loaded into ITWeb (and allowed to be viewed):

8 – View Exhibit 53 - Click on an Exhibit 53 to show the spreadsheet data for that Exhibit 53:

9 –Submit Exhibit 53 to OMB - Click on the 'Submit' button to submit the Exhibit 53 to OMB. The resulting page shows submission warnings and errors:

9b – Provide Explanations for any "Warning" messages – Reasons why "Warning" represent valid exceptions**:**

10 –Check Exhibit 53 Submission Status – To verify submission status, please click "View Exhibits" and review the "Submitted On" column:

11 – Exhibit 300 Import Screen (.xml) - The page for importing an Exhibit 300:

12 – Exhibit 300 Validation Checking - ENTER an .xml file to import, then select 'Validate only",
then click "OK". The resulting page shows validation warnings and errors:

13 – Exhibit 300 Validate and Save - Select "Validate and save", then click "OK" to import the
Exhibit 300 into ITWeb. The resulting page shows validation warnings and errors:

14 – View Exhibit 300 List - The View Exhibits page lists all the Exhibit 300s loaded into ITWeb (and allowed to be viewed):

15 – View and Edit Exhibit 300 - Click on an Exhibit 300 to show the data for that Exhibit 300:

16 – Submit Exhibit 300 to OMB - Click on the 'Submit' button to submit the Exhibit 300 to OMB. The resulting page shows submission warnings and errors:

16b – Provide Explanations for any "Warning" messages – Reasons why "Warning" represent valid exceptions:

17 –Check Exhibit 300 Submission Status – To verify submission status, please click "View Exhibits" and review the "Submitted On" column:

18 – View List of Submitted 300s – List of Exhibit 300s submitted to OMB for Review:

19 – View Exhibit 300s identified on the Exhibit 53 – Exhibit 53 Investment lines identifying investments as Major, these are required to have Exhibit 300s submitted to OMB:

20 – Mismatched Submissions-Exhibit 300s not found on Exhibit 53 – Exhibit 300s not matched via the UPI to an Exhibit 53 line-item (All Exhibit 300s will appear until an Exhibit 53 is submitted):

21 – Mismatched Submissions-Majors on Exhibit 53 without Exhibit 300s – Majors on the Exhibit 53 not matched via the UPI to a Submitted Exhibit 300 (All Majors will appear until Exhibit 300s are submitted):

22 – Change Passwords: (https://max.omb.gov/maxportal/)

23 – Enter MAX User ID to prompt password reset email:

24 – Common Exhibit 53 Error (miscoded UPI) :

The following error pattern is typically an indication of an invalid UPI coding sequence in Mission Area "0X".

- Error: Reported DME PY sum for mission area 0X wasn't correct. It was reported as 1.150000 but should've been 0.150000
- Error: Reported DME CY sum for mission area 0X wasn't correct. It was reported as 1.150000 but should've been 0.150000
- Error: Reported DME BY sum for mission area 0X wasn't correct. It was reported as 1.150000 but should've been 0.150000
- Error: Reported SS PY sum for mission area 0X wasn't correct. It was reported as 1.100000 but should've been 0.100000
- Error: Reported SS CY sum for mission area 0X wasn't correct. It was reported as 1.100000 but should've been 0.100000
- Error: Reported SS BY sum for mission area 0X wasn't correct. It was reported as 1.100000 but should've been 0.100000

Please check all investment lines in Mission Area "0X" to resolve.

25 – ITWeb User Roles Appendix:

USER ROLES for ITWeb Agency FY09/FY10 IT Budget Requests

There are three user different roles for ITWeb. Within ITWeb there are:
1. Agency Users
2. Agency Administrators
3. Agency Submitter and Certifier for the Submission

*Please note: All ITWeb users will need a MAX Homepage account that includes ITWeb access. Even users who used ITWeb last year will need to login to the Homepage and reapply for access to this year's ITWeb exercise. Users who already have a MAX Homepage account from other MAX applications (e.g. MAX A-11, PARTWeb, Budget Community, Earmarks, CITS/WITS, etc.) can also just login and apply to have ITWeb added.

Function	Agency User Contractor or Federal Employee	Agency Admin Federal Employee ONLY	Submitter/ Certifier Federal Employee ONLY
User/account management		✓	✓
Exhibit 53 Structural/Content Validation		✓	✓
Exhibit 300 Structural/Content Validation	✓	✓	✓
Exhibit 53 Upload/Save (XLS ONLY)		✓	✓
Exhibit 300 Upload/Save (XML Only)	✓	✓	✓
Exhibit 53/300 Exporting		✓	✓
Exhibit 53/300 Submissions			✓
Exhibit 300 Create/Edit (for manually entered exhibits)	✓	✓	✓
Exhibit 53 View		✓	✓
Exhibit 300 View/Edit	✓	✓	✓

What Agencies need to do for Identification of Users:
- By no later than Friday, May 16, 2008, Agency CIOs or their Deputies should send to the following mailbox, exhibit300@omb.eop.gov, the names, contact information, and role for the agency's approved ITWeb administrators and at least one "Submitter/Certifier"
- From May 16 – June 30, 2008, Agency Administrators (Approved via the message above) should register for access to the ITWeb application by visiting the following URL: https://max.omb.gov/maxportal/register/itwebadmin. (if you are already register, you will likely need to reset your password.)
  - If the individual has a MAX Homepage account:
    - Visit the URL above
    - Enter Login Credentials
    - Click "Login" (this will automatically request access as an administrator to ITWeb)
  - If the individual does not have a MAX Homepage account:
    - Visit the URL above
    - Click on the link "Register Here"
    - Fill out all required information
    - Click "Submit" (this will request a MAX homepage account and access as an administrator to ITWeb)

- Beginning July 1, 2008, individuals requesting access to ITWeb access as a "User" or a "Submitted/Certifier" should do the following:
    - If the individual has a MAX Homepage account:
        - Visit https://max.omb.gov/
        - Click "Login"
        - Enter Login Credentials
        - Click "Login"
        - Click "Change Application"
        - Under "New Applications", click the "Add" button adjacent to "ITWeb" (this will automatically request access as a user to ITWeb)
    - If the individual does not have a MAX Homepage account:
        - Visit https://max.omb.gov/
        - Click on the link "Register Here"
        - Fill out all required information and, under "Please check the application(s) needed:", select "ITWeb Application".
        - Click "Submit" (this will request a MAX homepage account and access as a user to ITWeb)
- Beginning July 1, 2008, Registered and Approved Agency Administrators can begin managing their agency users. For more information about this, please refer to the "ITWeb Agency Administrators Instructions Appendix". Please note that for all "Submitter/Certifiers", Agency Administrators will need to grant the necessary individuals this access level using the steps outlined in the "ITWeb Agency Administrators Instructions Appendix".

Schedule:
- Agency CIOs or their Deputies, by No later than Friday, May 16, 2008, should send to the following mailbox: exhibit300@omb.eop.gov the names and contact information for their approved Agency ITWeb administrators and /or "Submitter/Certifier"
- TBD: A-11 Exhibit 53 and 300 Training
- TBD: A-11 ITWeb Technical Training.
- TBD: ITWeb Testing
- August 25, 2008: Agencies can begin submitting test files through ITWeb

For questions, please send them to exhibit300@omb.eop.gov

26 – ITWeb Agency Administrators Instructions Appendix:
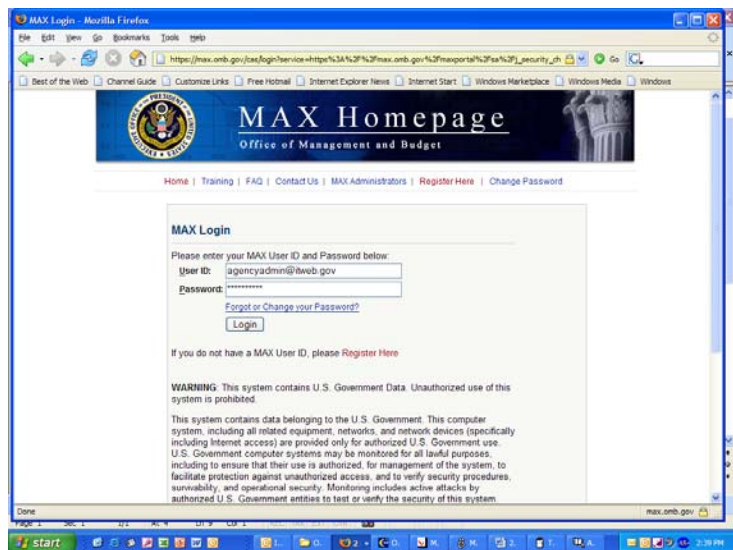(For Managing their Users)

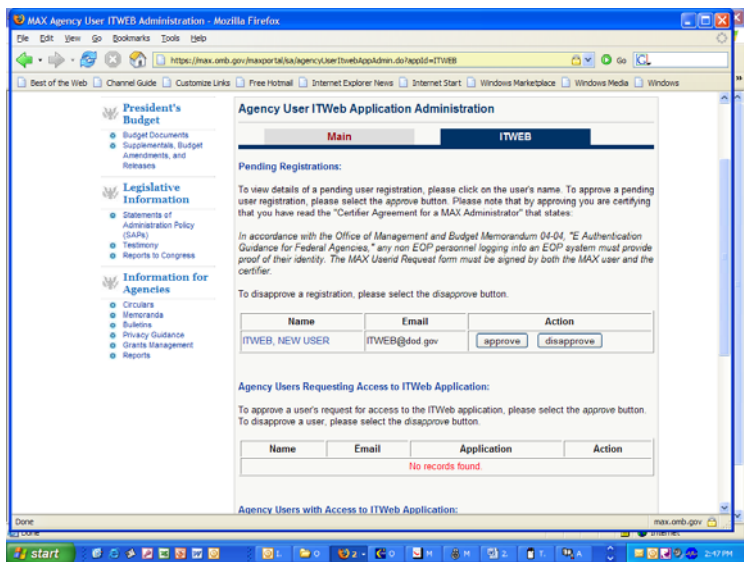|	
-- From Internet Explorer, enter https://max.omb.gov -- Click-on "Login" option	
-- Enter UserID and Password -- Click-on "Log-in" button	
-- Click-on "Manage Agency Users" button	

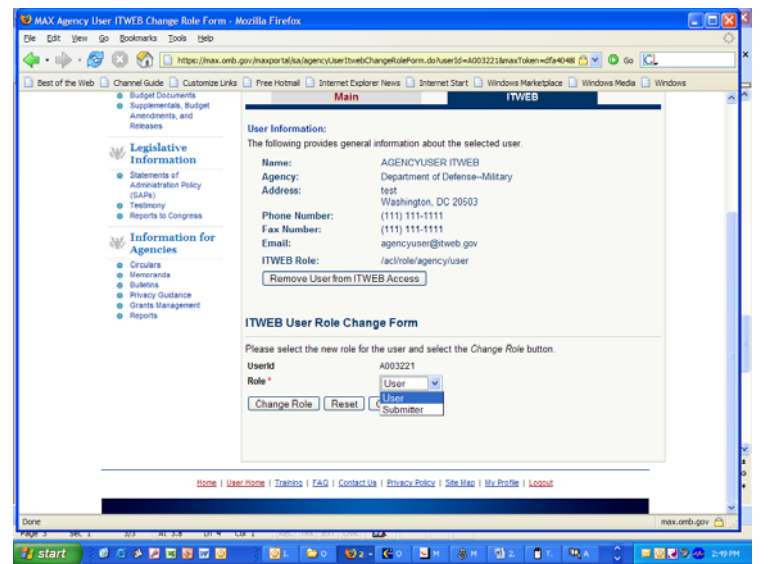|	
-- Click-on "ITWeb" tab	
On this page, you can approve users (not administrators) for MAX id and access to the ITWeb application. The user will be automatically assigned the role – "user."	
Also on this page, you can view your agency users and their roles. -- To view detailed user information or change user role, click-on the name of the user.	
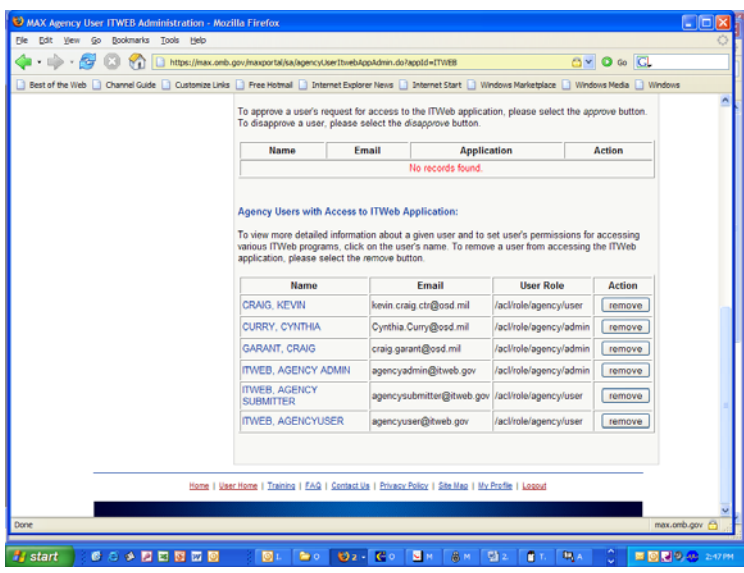
-- To change a user role, click-on "Change ITWeb User Role" button.	
-- Select "User" or "Submitter" role and click-on "Change Role" button. *You will not be able to make a user an administrator. Please contact your OMB representative if you need this change.	
To go back to your page, select "User Home" menu option.	