

## CBO Project Planning System in OnBase (CPIP) Frequently Asked Questions

### **How can I access the CBO Project Planning System?**

Go to <https://gateway.sc.gov>

### **When can I access the CBO Project Planning System?**

The system will be open each year during the dates that the Executive Budget Office provides in early April. If access is needed outside of this designated time, please reach out to the Executive Budget Office prior to logging into the system for further guidance.

### **What is my Username and Password?**

Each user should have a desktop username and password to access the CBO Project Planning System. The CBO Project Planning System cannot be accessed using a SCEIS username and password.

### **My password is not working. What do I do?**

The password may need to be reset. Go to <https://scpasswordreset.sc.gov> to reset the password.

### **Using the SCEIS Access link, I have logged in using my desktop Username and Password but am receiving the message that I am not enrolled in DUO. What do I do?**

DUO online registration instructions can be found on the Department of Administration website.

### **I am logged into OnBase, but I can't see the application. Why not?**

Review the Capital Planning System – Log On Instructions and walk through the steps. If you are still not able to see the application, contact the Executive Budget Office.

### **Can anyone at my agency access the CPIP in this system?**

No. Only two users are allowed to access the CBO Project Planning System and these users are updated annually just prior to the annual CPIP submission process.

### **How do I complete the CPIP in the CBO Project Planning System?**

There are several written and video instructions provided on the Department of Administration website that will fully explain every step of the process, here: <https://www.admin.sc.gov/services/budget/planning-capital-improvements>

### **Can I group my requests into one Project Detail Worksheet instead of creating multiple Project Detail Worksheets?**

No. Starting with the 2024 CPIP submission an individual Project Detail Worksheet should be created for each item that is intended to become a separate Permanent Improvement Project. An automated system is being developed at this time for the Permanent Improvement Project submission process that will be integrated into the CBO Project Planning System. For ease of use of the integrated systems, it is recommended to have one CPIP item for every one PIP item.

### **Do the specific fund sources matter when completing the Fund Sources table?**

Yes. The intended specific source(s) of funds should be selected for each completed Project Detail Worksheet.

### **Why can't I save my Project Detail Worksheet?**

The system is designed to initiate hard stops when data is partially or incorrectly entered. When this happens the system will prompt error messages that will explain what must be fixed prior to saving the document.

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<https://www.admin.sc.gov/services/budget/planning-capital-improvements>

## The icons in the six tables in the CBO Project Planning System; What do they mean and what do they do?

There are five icons in each table in the CPIP and Project Detail Worksheet that support the function of each table.

They are:



**Pencil** : The Pencil should be used in the Project Detail Worksheet. The Pencil puts a table in edit mode. The table must be put into edit mode to begin entry and to save data and exit edit mode.



**Disk**: The Disk can be used to save the data entered on an individual line. However, the table will remain in edit mode until the Pencil is clicked to remove the table from edit mode.



**Refresh**: The Refresh button will refresh the table and the data entered. Refreshing the data is helpful if updates are not immediately recognized by the system.



**Plus**: The Plus should be used at the CPIP level only, to create a new Project Detail Worksheet and is not designed to work in the individual Project Detail Worksheets.



**Delete**: The Delete can be used in the CPIP, as well as the individual Project Detail Worksheets to delete a fully completed line item. The table must be in edit mode, and the line must be fully completed in order to complete the delete option.

## Who do I contact in EBO?

You may contact the Capital Budgeting and Planning team for assistance.

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