OFFICE OF THE BUDGET BUSINESS PARTNER PORTAL USER GUIDE

1. INTRODUCTION

The Office of the Budget Business Partner Portal is a new application presented by the Office of the Budget to allow Business Partners to quickly and easily find important information regarding such services as Borrower Loans reports, Vendor reports, Contract information, Customer information and much more. Currently, only Borrower Loan report services are available, but check back in the future for more services that will be added periodically to the Business Partner Portal.

The Business Partner Portal also contains a Contact Us section if you need assistance. Contact Us provides contact information for Office of the Budget personnel who specialize in the services offered through the Business Partner Portal.

2. KEY ABBREVIATIONS

The following is a list of important terms and abbreviations that are used throughout this document. This section can be used as a reference if you do not understand the abbreviations used.

a. OB – Office of the Budget
b. BPP – Business Partner Portal
c. KID – Keystone ID
d. CV – Compatibility View
e. Browser – The software used to open websites
f. IE – Microsoft Internet Explorer

3. COMPATIBILITY VIEW

The Business Partner Portal (BPP) is optimized to be used with the most recent versions of the major Windows-compatible browsers (Chrome, Firefox and IE). If you are using IE, you must first make sure that IE has not been told to act as though it is a previous version. For example, you may have IE 11 installed on your workstation. However, there is an option in IE that tells it to run as though it were IE 8 or IE 9. That option is called Compatibility View (CV). In order to get the most out of the BPP, you must first make sure that your IE has its CV turned off and will therefore act as an installation of IE 11. Follow the instructions below to turn your CV off.

a. Open your IE browser
b. Open the Tools menu by either clicking Tools in the menu bar or clicking the Settings button in the top right of the browser window, as shown below in the orange rectangles.

c. Choose Compatibility View settings. The image below shows where this is if you click the Settings button. The same option is in the Tools menu.
d. In the Compatibility View Settings window, make sure both of the checkboxes are cleared. There should be no check mark in either of them. Also, make sure that the Website “pa.gov” has not been added. If it has been, highlight “pa.gov” and click the Remove button.

![Compatibility View Settings](image)

- Display intranet sites in Compatibility View
- Use Microsoft compatibility lists

Learn more by reading the Internet Explorer privacy statement

Close


e. Your browser should automatically convert to the new setting. If it doesn’t, you can close and reopen your browser. The new browser window will no longer be using CV, and will act as though it is the installed version of IE rather than a previous version.
4. KEYSSTONE ID REGISTRATION

The Keystone ID (KID) is a Commonwealth-wide initiative to allow citizens to be able to sign in to any Commonwealth application using the same username and password combination. Not all Commonwealth applications use the KID yet, but the intention is to, over time, replace existing login processes so that all applications use KID. The BPP is one of the early adopters of KID. This may be your first time using an application that is integrated with KID. If it is, you will need to register. Registration is a one-time only activity, going forward when you use the BPP you will only need to login, you will not need to register again. Follow the instructions below to register in KID.

a. Open your browser and navigate to https://www.bpp.ob.pa.gov, then click on the Borrower box or choose Borrower from the Services drop down in the top navigation bar as shown below in the orange rectangles.
b. You will be redirected to Commonwealth of Pennsylvania Identity Exchange page. Click on the Pennsylvania Keystone ID image as shown below.

Welcome to the Commonwealth of Pennsylvania Identity Exchange

Please select one of the following accounts in order to login:

More account options will be available soon…

New User? If you do not have an existing account, click one of the account options above to navigate on to the next page. You will have the opportunity to enroll by clicking “New User” on the next page.

c. On the Keystone ID page, click the New User box as shown
d. On the Keystone ID General Information page, click Next
e. Follow the instructions on the Keystone ID Profile Information screen to create your Keystone ID and click the finish button when you’re done.
f. A Congratulations message will appear if your Keystone ID was successfully created. You should receive an email at the address that you entered on the previous page. You can click the Close Window button on this screen.

g. When you receive the email, click on the link in the email called Set Permanent Password
h. Enter the KID you created in step “e”, and the temporary password from the email in the previous step and click the Login button.

![Keystone Key Login Screen](image)

i. When the Set Permanent Password screen opens up, follow the guidelines at the bottom of the screen to set your permanent password, and then click the Submit button.

![Set Permanent Password Screen](image)
j. If you have successfully set your permanent password, a Congratulations message will appear. Click Close Window, and close your browser by clicking the Red X in the upper right hand corner of the browser window.

**Congratulations!**

You have successfully set a personal password for your Keystone ID!

Please click the Close Window button and login to your application with your personal password.

This concludes the one-time Keystone ID registration process. From this point on, when you want to go to the BPP, you’ll only need to log in to the KID, you won’t need to register again.

5. **USING THE PORTAL AS A BORROWER**

As mentioned in the Introduction, OB intends on using the BPP to extend many different services to different business partner groups. For this first installment of the BPP, the only service available is the Borrower service, which allows Borrowers to run loan reports.

As services are added to the BPP, additional sections will be added to this User Guide to instruct you how to use those services. To use the BPP for Borrower services, please follow the steps below.
a. Open your browser and navigate to https://www.bpp.ob.pa.gov, then click on the Borrower box or choose Borrower from the Services drop down in the top navigation bar as shown below in the orange rectangles.

![Commonwealth of Pennsylvania Identity Exchange](image1.png)

a. You will be redirected to Commonwealth of Pennsylvania Identity Exchange page. Click on the Pennsylvania Keystone ID image as shown below.

**Welcome to the Commonwealth of Pennsylvania Identity Exchange**

![Welcome to the OB Business Partner Portal](image2.png)

New User? If you do not have an existing account, click one of the account options above to navigate on to the next page. You will have the opportunity to enroll by clicking ‘New User’ on the next page.
b. Enter your Keystone ID and password on this screen, and then click Login
c. The first time you log into the BPP, you will need to enter some additional information so that the BPP knows what information to show to you. Enter the required information (all fields with a red notice to the right are required). You don’t need to enter First Name, Last Name and Email. They will be preloaded with information sent over by the Keystone ID. After you enter your information, click Save.
d. When you’ve successfully entered your profile data, the Business Partners section will appear below the Profile section. This is where you identify, using TIN numbers and LOAN numbers in proper combinations, the Business Partner(s) that you are associated with. Enter TIN number and LOAN number, and click the Authenticate button.

![Business Partners](image)

e. If you successfully entered a TIN/LOAN combination, the exterior of the Business Partners box will turn green, a message will appear confirming you successfully added a valid Business Partner, and the name of the partner will show to the left of the screen, as shown below. If the combination you entered is not valid, the exterior of the Business Partners box will turn red, a message will appear confirming that the combination was not valid and no new Business Partner will be added to the left side of the screen, as shown below. Click the Save button to save your profile changes.

![Business Partners](image)
f. Steps c, d and e are only necessary the first time you login to the BPP. After your first login, steps c, d and e are skipped and you will immediately go to the next screen shot in this step. However, if you need to make changes to your user profile or to the Business Partners you are validated to be associated with, you can click the Edit Profile button on this screen.
g. It's a 2 step process to run a reports for a Business Partner in the BPP. First, you have to select which Business Partner, since some users can be associated with more than one Business Partner. Choose the Business Partner from the drop down box, and click Select.
h. Second, you need to choose the Report Type (left side) and Loan (right side). You can only choose one Report Type at a time, but you can choose multiple Loans if the Business Partner has more than one loan. Choose your Report Type and Loan and click the Run Reports button.
i. You can now view the loan report on screen. Scroll up and down to view more information. If you chose more than one loan, there will be Next previous buttons to allow you to navigate between loans. Click on Print Options to print. If you chose more than one loan, you can choose to print one loan or print all.