# 3 Steps to the EPM Main Menu

**Step 1.** **Assess Citrix Receiver/Workspace**

Citrix Installation Resources

- **University Help Desk (7-6000)**
- **UofU Pulse Install Citrix Guidance (Linked)**
- **Citrix Receiver Installation via UofU website (Linked)**

Does your computer have a compatible version of Citrix Receiver installed? Your computer should have a compatible version of Citrix Receiver installed for the EPM icon to launch properly.

Contact the Help Desk at 7-6000 with Citrix Receiver Client issues or installation assistance.

**FYI...Downloading "Citrix Workspace" is now encouraged**

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**Step 2.** **Log into the Citrix Portal**

Insert Citrix Portal URL into

**URL: access.med.utah.edu**

Welcome
Please log on to continue.

User name:
Password:
Log On

**= UNID & PWRD SAME AS CIS**

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**Step 3.** **Find & Click EPM Icon**

**After Clicking EPM, should see this "Starting" screen pop up...**

Chrome
Starting...
More information     Cancel
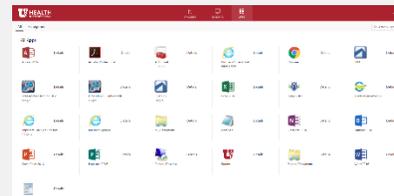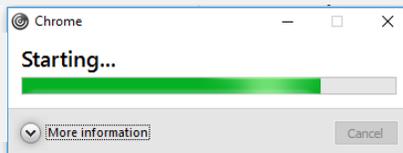
Nothing popping up after patiently waiting? Contact the Help Desk at 7-6000

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**Arrival**

Office of
**BUDGET AND INSTITUTIONAL ANALYSIS**
THE UNIVERSITY OF UTAH

Navigate   Quit EPM   Help

| Budget Input | Revenue & Expense Planning |
| | Speed Budgeting |

| Budget Reports | Analysis Reports |
| | BREC Report |

| Required Reports | Fund Summary | HCI | SA&AS |
| | SVPAA Recurring Comm | | |
| | 5-Year Comparison | HCI | SA&AS |
| | New Funding Request | | |
| | Multi-Year Budgeting | | |
| | Faculty Promotions | | |

| Actual Reports | Variance Report Workbook |
| | Actual Reports |

**INFORMATION**

**EPM Schedule**
EPM will be available daily from 6 am until midnight except Saturday which is available 8:30 am to midnight.

Activities or projects need to be added in PeopleSoft by Thursday in order for them to be added to EPM each Saturday night.

Visit the EPM website via www.obia.utah.edu for the following:
* EPM Training Information
* SVPAA Budget Guidelines & Materials
* Budget Calendar
* EPM User Guide
* EPM Security Access Form
* Training Resources

**CONTACTS**

Office of Budget & Institutional Analysis
Ethan Hacker        7-3756   ethan.hacker@utah.edu
Sharayne Farnsworth  5-7956   sharayne.farnsworth@utah.edu
Sandy Hughes        1-6455   sandy.hughes@utah.edu

*Double-click to open reports and templates

**Ignore this Screen**
**(Click "X" or "Close")**

Citrix Receiver
**Add Account**

Enter your work email or server address provided by your IT department:

Do not show this window automatically at logon.

Add     Close