

2016-2018 KBUD Budget Preparation Refresher Training



Kentucky
UNBRIDLED SPIRIT™

KBUD Budget Prep Refresher Overview

General Information

1. KBUD Training Schedule
2. OSBD Budget Prep Contact Information
3. OSBD Website Resources
4. 2016-2018 KBUD Budget Preparation Manual

KBUD Technical Issues

1. KBUD Technical Information
2. KBUD and KBUD Reporting (EBI) 4.1 Accessibility Issues



KBUD Budget Prep Refresher Overview

Operating Budget

1. 1618 Budget Prep Forms
2. New Off-Budget Fund Dimension, Form, and Report
3. Program Table Changes
4. Comma Separated Value (CSV) KBUD Upload Files
5. KBUD Search Features and Other Features
6. History Change Process
7. Personnel Runs Process/Schedule

Capital Budget

1. Capital Budget Information

Formal Budget Submission Process

1. Schedule



KBUD Training Schedule

Budget Instruction Informational Meeting:

Monday, August 24 – 1-4 pm – LRC Committee Room

KBUD Preparation Training Classes:

Refresher Classes - Transportation – Auditorium

August 17 – 1-4 pm

August 27 – 1-4 pm

New User /Other Classes – State Office Building – Rm 130

August 20 -21 – New User (Includes Capital Budget)

August 25-26 – New User (Includes Capital Budget)

September 1 – Boards (Includes Capital Budget)

September 4 – Universities (Includes Capital Budget)

September 11 – Capital ONLY Class

September 17-18 – New User (Includes Capital Budget)



KBUD Training Schedule

➤ KBUD Training Sign-Up Details

- Contact Agency's KELMS Instructor or Coordinator to Sign Up for Classes (Universities Excluded)
- Budget Instruction Informational Meeting on August 24 (No KELMS Sign up Required)
- New User Training is limited due to seating (Restricted to New KBUD Users Only)
 - New Users need to have an actual KBUD Account
 - Email request to KBUDAdministrators@ky.gov for instructions
 - Training also includes Capital Budget
- Capital Budget Class is for users who deal only with Capital Budgets



OSBD Budget Prep Contact Information

- **Budget-Related Questions should be referred to your agency's OSBD Budget Analyst**
 - Policies, procedures, developing budgets, interpreting the budget instructions, defined calculations, budget exceptions, schedules, etc.

- **KBUD Technical Questions should be referred to the KBUD Administrator**
 - Any features/functionality of the application, browser issues, KBUD and/or KBUD Reporting (EBI) errors, accessibility, security, password resets, etc.



OSBD Budget Prep Contact Information

➤ OSBD Budget Analyst

- Contact by email or phone
- Agency assignments/email available on OSBD Website

➤ KBUD Administrator

- Email – KBUDAdministrator@ky.gov
- Phone – 564-1210



OSBD Website Resources

➤ OSBD Website

- Home Page: <http://osbd.ky.gov>
- Staff Assignments/Email Address:
<http://osbd.ky.gov/StaffAssignments/Pages/GOPM.aspx>
- 1618 Budget Prep Resources:
<http://osbd.ky.gov/Pages/KBUD-Information.aspx>

➤ 1618 Budget Prep Resources

- 2016-2018 Branch Budget Request Manual (Budget Instructions)
- 2016-2018 KBUD Budget Preparation Manual
- Budget Request Templates
- Aids to Calculations
- History Change Form Instructions



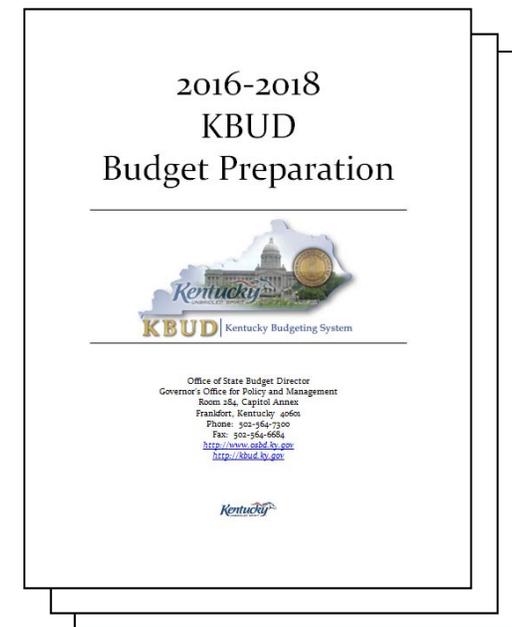
2016-2018 KBUD Budget Preparation Manual

➤ 2016-2018 KBUD Budget Preparation Manual

- Contains detailed instructions with screenshots
- Ready by August 18 (Tentative)
- OSBD Website & email link to all KBUD users

➤ Table of Contents Overview

- Introduction to KBUD
- Baseline Budget Requests
- Restricted Fund & Grant Forms
- Additional Budget Requests
- Off-Budget Forms
- Capital Budget Requests
- History Change Form Instructions
- Formatted System Queries
- KBUD Reports



KBUD Technical Information

➤ Upgrade to Version 10.1.01 Occurred in March 2015

- Additional Functionality/Browser Compatibility
- No longer a single sign in to access reports
 - ✓ Two Separate Passwords to Maintain

➤ Technical Requirements

▪ Browser Compatibility

- ✓ Microsoft Internet Explorer 8.0 (for Windows XP)
- ✓ Microsoft Internet Explorer 9.0 (for Windows 7)
- ✓ Microsoft Internet Explorer 10.0 (for Windows 7)
- ✓ Microsoft Internet Explorer 10.0 (for Windows 8 & 8.1; Desktop mode only)

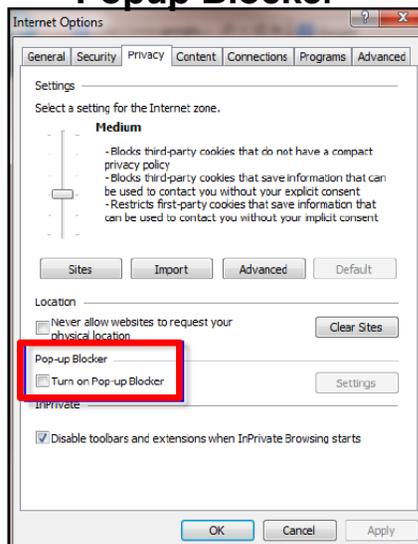
— Not Compatible with eMARS Today – Will be Compatible with eMARS Upgrade (Sep 2015) —

- ✓ Microsoft Internet Explorer 11.0 (for Windows 7)
- ✓ Microsoft Internet Explorer 11.0 (for Windows 8 & 8.1; Desktop mode only)
- ✓ Mozilla Firefox ESR 24
- ✓ Apple Safari on Apple iPad with iOS 6.1 and 7.1

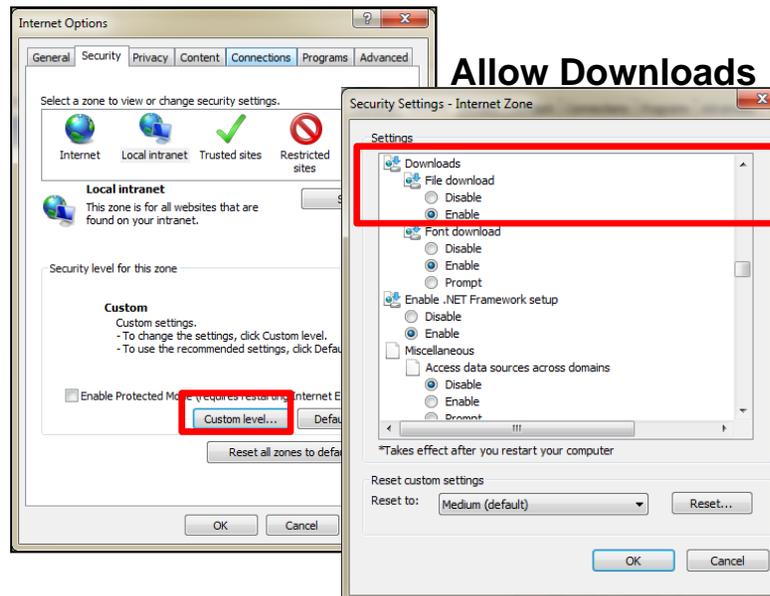
KBUD Accessibility Issues

- **Reminders for Internet Explorer Settings:**
- Turn off/Disable Pop-up Blocker
 - Set Internet Options to allow File Downloads
 - Set Internet Options to allow menus to display correctly

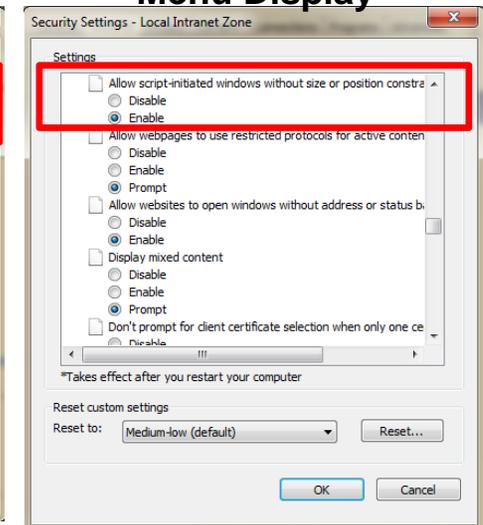
Popup Blocker



Allow Downloads

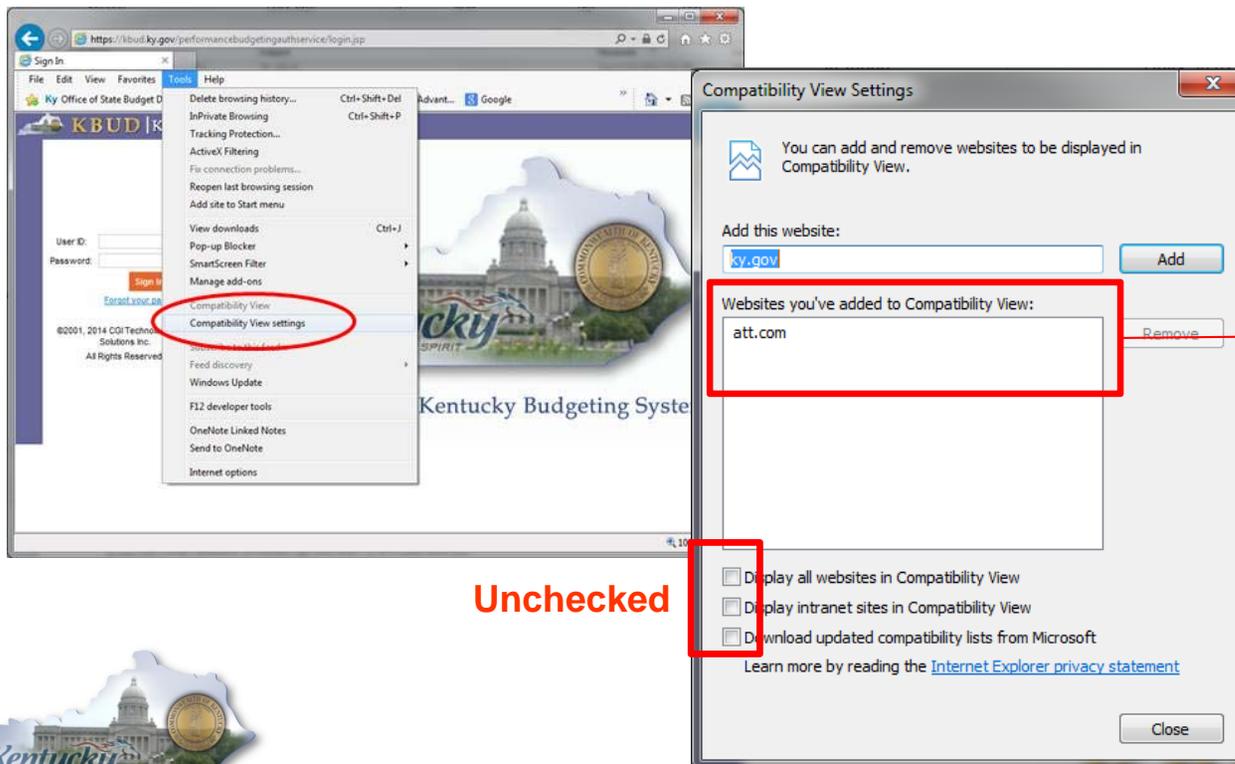


Menu Display



KBUD Accessibility Issues

- **Reminders for Internet Explorer Settings:**
 - Compatibility View Settings Turned Off (Unchecked)
 - Ensure ky.gov **IS NOT** in the Websites you've added to Compatibility View textbox



ky.gov should not be in this textbox

Unchecked

KBUD Accessibility Issues

➤ User Accounts Locked

- Users are given 3 grace logins to change the password before the User ID is inactivated
 - Self-Generated Password Reset will not work if the account is inactivated
- If your User ID is locked, you will need to contact the KBUD Administrators (KBUDAdministrator@ky.gov)

➤ Forms Locked

- Occurs periodically when two people are attempting to modify the same form at the same time
- If your form is locked, you will need to contact the KBUD Administrators (KBUDAdministrator@ky.gov)

KBUD Accessibility Issues

➤ Other Issues

- Problem: KBUD displays as a blank screen
- Solution: Use the pure (short) link as your Favorite or Shortcut instead of the longer version
 - <https://kbud.ky.gov/>
 - ~~<https://kbud.ky.gov/performancebudgeting/authservice/login.jsp>~~

KBUD Reporting (EBI) Accessibility Issues

➤ Enterprise Business Intelligence (4.1)

- Java Runtime Environment (JRE) not required for standard users
- Correct version of JRE is required if you are an eMARS/KBUD report developer
 - Link to Oracle's Website/Version 7 Update 45:
 - <http://www.oracle.com/technetwork/java/javase/downloads/java-archive-downloads-javase7-521261.html#sjre-7u45-oth-JPR>
 - Windows 32 Bit OS - jre-7u45-windows-i586.exe
 - Windows 64 Bit OS - jre-7u45-windows-x64.exe

You must accept the Oracle Binary Code License Agreement for Java SE to download this software.

Accept License Agreement Decline License Agreement

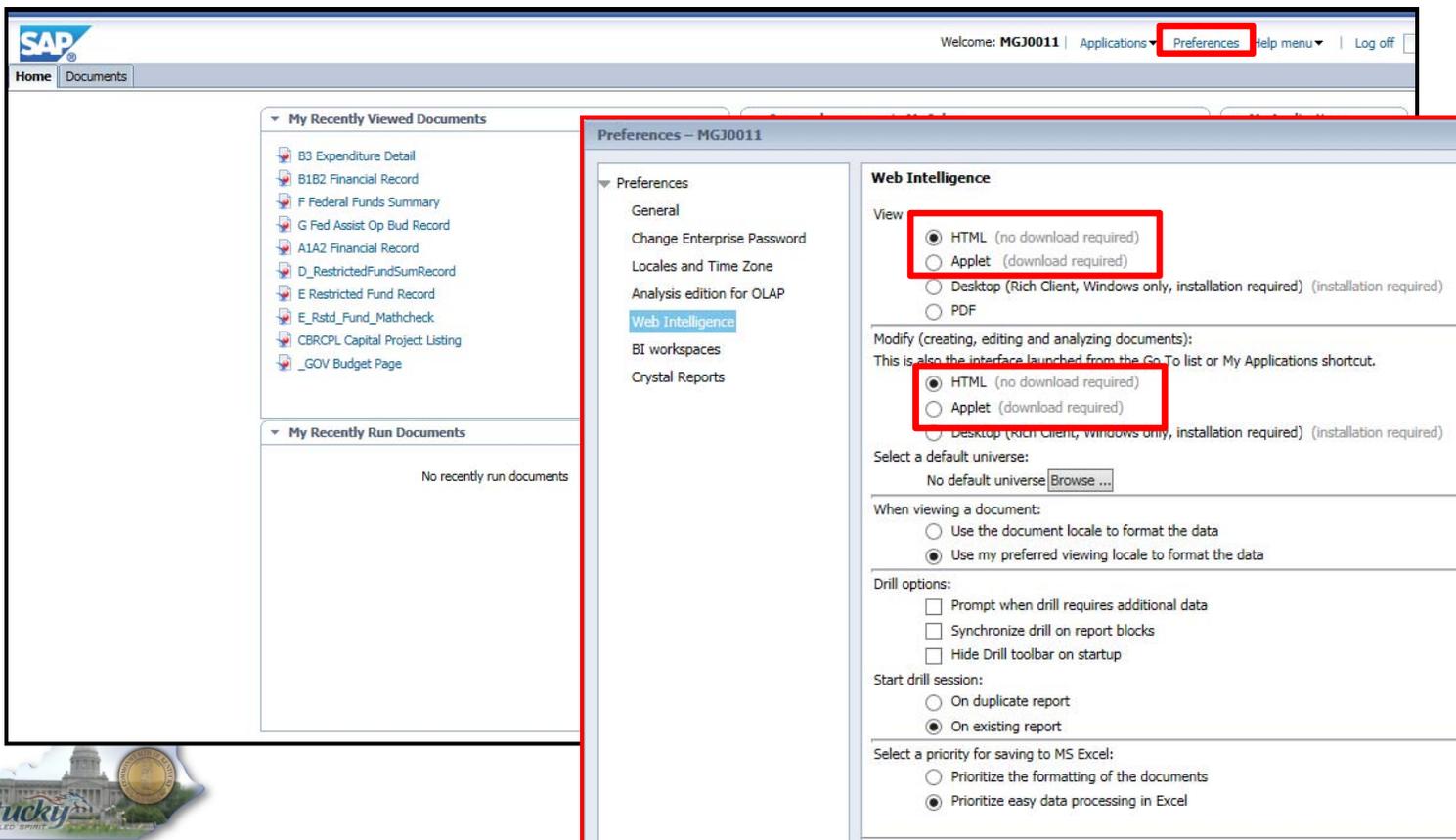
Product / File Description	File Size	Download
Linux x86	31.47 MB	jre-7u45-linux-i586.rpm
Linux x86	46.03 MB	jre-7u45-linux-i586.tar.gz
Linux x64	31.96 MB	jre-7u45-linux-x64.rpm
Linux x64	44.67 MB	jre-7u45-linux-x64.tar.gz
Mac OS X x64	50.61 MB	jre-7u45-macosx-x64.dmg
Mac OS X x64	46.63 MB	jre-7u45-macosx-x64.tar.gz
Solaris x86	51.88 MB	jre-7u45-solaris-i586.tar.gz
Solaris SPARC	54.69 MB	jre-7u45-solaris-sparc.tar.gz
Solaris SPARC 64-bit	18.01 MB	jre-7u45-solaris-sparcv9.tar.gz
Solaris x64	16.01 MB	jre-7u45-solaris-x64.tar.gz
Windows x86 Online	0.87 MB	jre-7u45-windows-i586-iftw.exe
Windows x86 Offline	27.7 MB	jre-7u45-windows-i586.exe
Windows x86	39.57 MB	jre-7u45-windows-i586.tar.gz
Windows x64	29.27 MB	jre-7u45-windows-x64.exe
Windows x64	41.38 MB	jre-7u45-windows-x64.tar.gz

[Back to top](#)

KBUD Reporting (EBI) Accessibility Issues

➤ Enterprise Business Intelligence (4.1)

- EBI Preferences/Settings
 - JRE not required for HTML settings (no download required)
 - JRE is required for Applet settings (download required)



The screenshot displays the SAP EBI Preferences dialog box for user MGJ0011. The 'Web Intelligence' section is highlighted with a red border. Within this section, the 'View' and 'Modify' options are also highlighted with red boxes. The 'View' section shows 'HTML (no download required)' selected with a radio button, while 'Applet (download required)' is unselected. The 'Modify' section also shows 'HTML (no download required)' selected. Other options include 'Desktop (Rich Client, Windows only, installation required)' and 'PDF'. The 'When viewing a document:' section has 'Use my preferred viewing locale to format the data' selected. The 'Drill options:' section has 'Prompt when drill requires additional data', 'Synchronize drill on report blocks', and 'Hide Drill toolbar on startup' all unselected. The 'Start drill session:' section has 'On existing report' selected. The 'Select a priority for saving to MS Excel:' section has 'Prioritize easy data processing in Excel' selected.

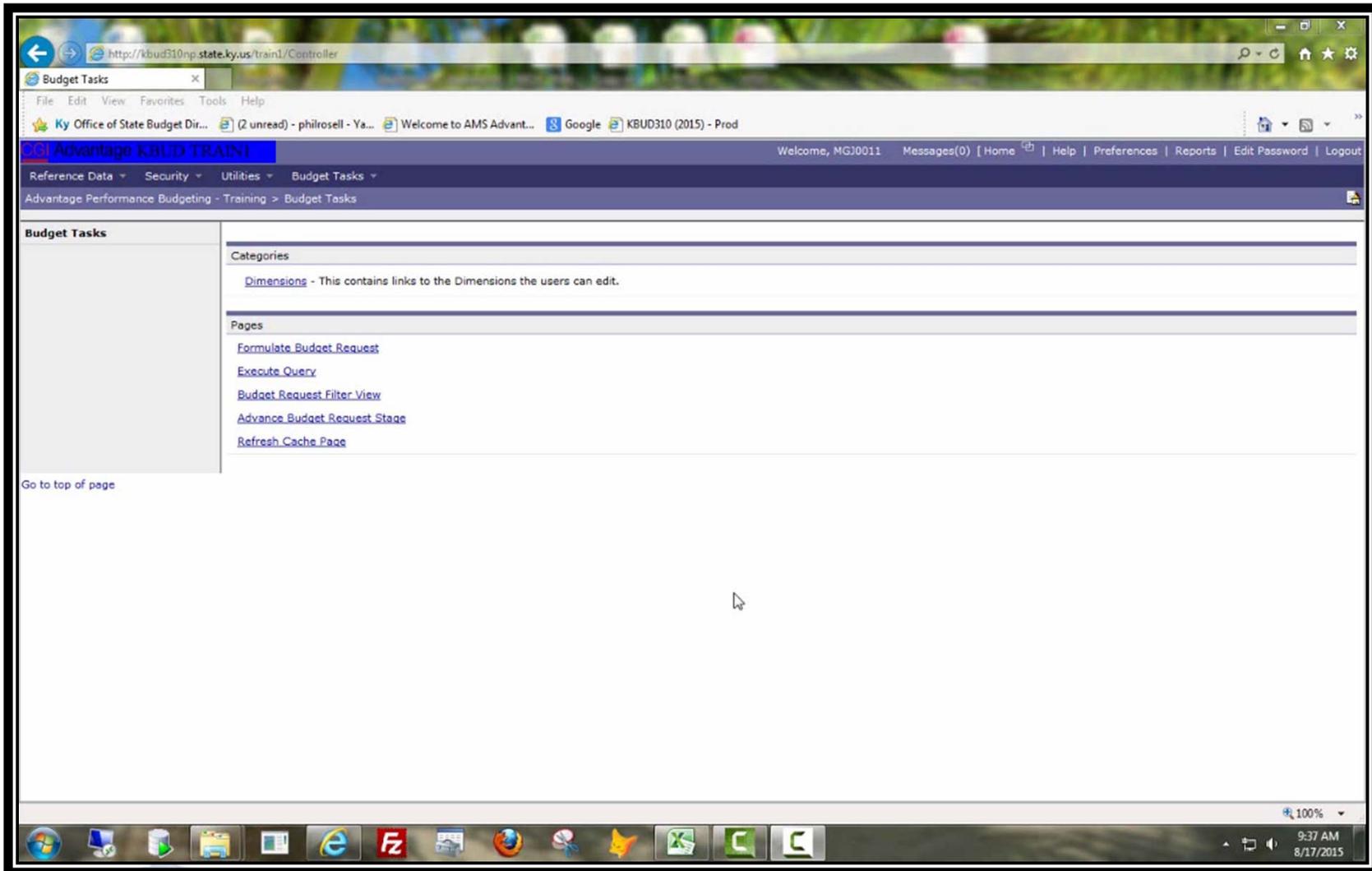
KBUD Reporting (EBI) Accessibility Issues

➤ Enterprise Business Intelligence (4.1)

- Access EBI through the KBUD Report Link or
- Access EBI directly through the Web link
 - <http://eas073vp-ws009:8080/BOE/BI>
- Navigation to KBUD's 1618 Biennium Reports Folder

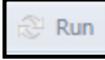
The image displays three overlapping screenshots of the SAP SAPGUI interface, illustrating the navigation path to the 1618 Biennium Reports folder. The top screenshot shows the 'Documents' tab selected in the top navigation bar. The middle screenshot shows the 'My Documents' tree view with the '16-18 Biennium' folder highlighted. The bottom screenshot shows the 'Details' view of the '16-18 Biennium' folder, listing various reports such as 'A1A2 Financial Record' and 'A3 Exp All Detail'.

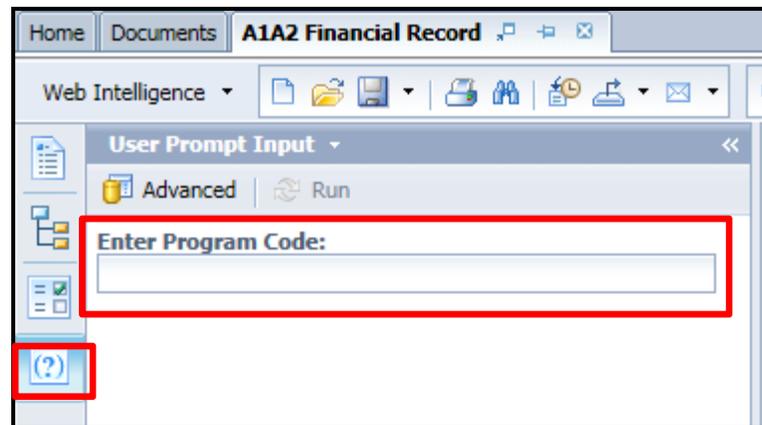
KBUD Reporting (EBI) Accessibility Issues



KBUD Reporting (EBI) Other Issues

➤ KBUD Reporting

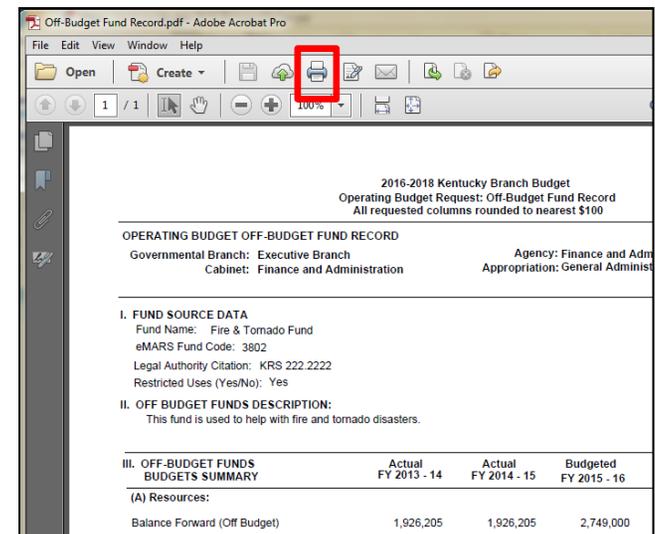
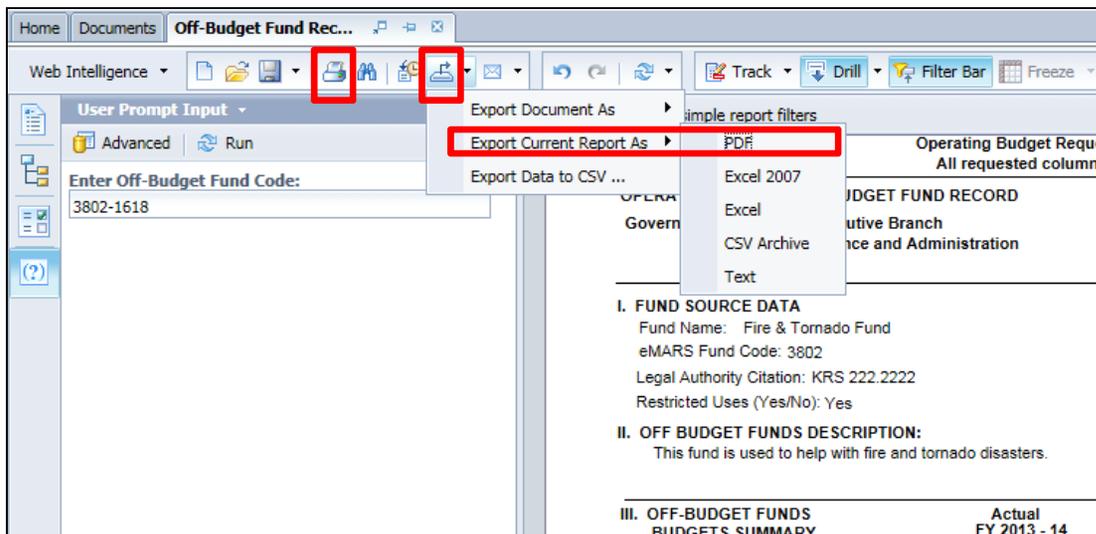
- Problem: Run Icon  is not enabled (greyed out)
- Solution: Click the User Prompt Icon and enter a Value in the text box and click out of the text box



KBUD Reporting (EBI) Other Issues

➤ KBUD Reporting

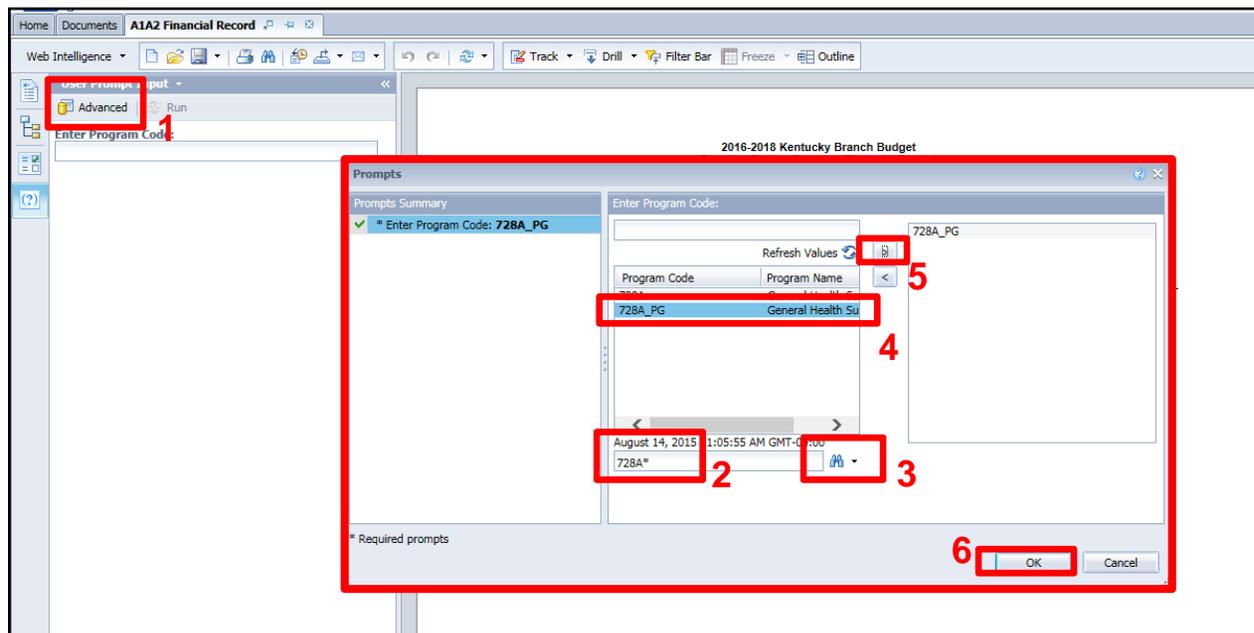
- Problem: Cannot print out a paper copy of a report
- Solution: You cannot print out a paper copy of a report directly to a network printer, instead you have to export it to a PDF document, open the PDF document in Adobe Reader and print from the Reader application to a printer



KBUD Reporting (EBI) Other Issues

➤ KBUD Reporting

- Problem: Not sure what parameter/variable to use to run the report
- Solution(s): 1) Examples in KBUD Budget Manual, 2) Ask your Budget Analyst, or 3) Use the Advanced Search



1618 Budget Prep Forms

➤ Fewer Forms in 1618

- New KBUD functionality allowed for the consolidation of forms (12 standard forms down to 7 forms) through the use of tabs

1416 BP Form Names	1618 BP Form Names
A2/A3/A4 Sources & Expenditures by Fund & Program Narrative	A2/A3/A4/A5 Baseline Budget Request
A3 Expenditure Detail	
A5 Personnel Form	
B2/B3/B4 Sources & Expenditures by Fund & Program Narrative	B2/B3/B4/B5 Additional Budget Request
B3 Expenditure Detail	
B5 Personnel Form	
E Restricted Funds Form	E Restricted Funds & Receipts Form
E Restricted Receipts Form	
G Federal Assistance Form	G Federal Assistance Form
PS-A2 Fund Source Record	Post Sec - A2/A3/A4/A5 Baseline Budget Request
PS-A3 Expenditure Detail	
PS-A3 Expenditure by Fund	
PS-A5 Personnel Form	Post Sec - B2/B3/B4/B5 Additional Budget Request
PS-B2 Fund Source Record	
PS-B3 Expenditure Detail	
PS-B3 Expenditure by Fund	Capital Request by Fund Source
PS-B5 Personnel Form	
Capital Request by Fund Source	
Capital Request Expenditures	Capital Request Expenditures
Capital Request - Impact on Operating Budget	Capital Request - Impact on Operating Budget
History: A2/A3 Sources & Expenditures by Fund	History: A2 Sources/A3 Expend by Fund & Expend Detail
History: A3 Expenditure Detail	
History: E Restricted Funds Form	History: E Restricted Funds & Receipts Form
History: E Restricted Receipts Form	
Judicial History: A3 Expenditure Detail	Jud History: A2 Sources/A3 Expend by Fund & Expend Detail
Judicial History: A2/A3 Sources & Expenditures by Fund	
Judicial History: E Restricted Funds Form	Jud History: E Restricted Funds & Receipts Form
Judicial History: E Restricted Receipts Form	
Off-Budget Form	Off-Budget Form

A2/A3/A4/A5 Baseline Budget Request

Line	Fund	Budget Object		FY 15-16	FY 16-17	FY 17-18	DC FY 16-17	DC FY 17-18
<input type="checkbox"/>	1 0100	REGAPP	R	5,247,900	5,233,900	5,233,900		
<input type="checkbox"/>	2 0100	REDGF	R	0	0	0		
<input type="checkbox"/>	3 0100	MANDEXP	R	-14,000	0	0		
<input type="checkbox"/>	4 1300	BALFOR	R	38,300	0	0		
<input type="checkbox"/>	5 1300	CURREC	R	9,600	0	0		
<input type="checkbox"/>	6 1200	BALFOR	R	173,800	0	0		
<input type="checkbox"/>	7 1200	CURREC	R	109,700	265,600	248,800		
<input type="checkbox"/>	8 0100	EXPBYFUND	E	5,233,900	5,233,900	5,233,900		
<input type="checkbox"/>	9 1300	EXPBYFUND	E	47,900	0	0		
<input type="checkbox"/>	10 1200	EXPBYFUND	E	283,500	265,600	248,800		
Totals				0	0	0	0	0

1618 Budget Prep Forms

➤ One New Form/Dimension/Report

- Off Budget Funds Form (1618_OFFBUD_FUND)
- To collect off-budget fund budget data for 1618
- Each fund will require a separate form

Off Budget Dimension Table

Off-Budget Fund Record Report

OPERATING BUDGET OFF-BUDGET FUND RECORD

Governmental Branch: Executive Branch Agency: Finance and Administration
Cabinet: Finance and Administration Appropriation: General Administration

FUND SOURCE DATA
Fund Name: Fire & Tornado Fund
eMARS Fund Code: 3002
Legal Authority Citation: KRS 222.2222
Restricted Uses (Yes/No): Yes

OFF BUDGET FUNDS DESCRIPTION:
This fund is used to help with fire and tornado disasters.

OFF-BUDGET FUNDS BUDGETS SUMMARY	Actual FY 2013 - 14	Actual FY 2014 - 15	Budgeted FY 2015 - 16	Requested FY 2016 - 17	Requested FY 2017 - 18
(A) Resources:					
Balance Forward (Off Budget)	1,926,205	1,926,205	2,749,000	3,549,000	1,349,000
Current Receipts (Off Budget)	21,755,513	14,753,957	14,800,000	14,800,000	14,800,000
Non-Revenue Receipts (Off Budget)	-2,940,470	4,467,000	4,500,000	4,500,000	4,500,000
Total Resources	20,741,248	17,127,162	22,049,000	22,849,000	20,649,000
(B) Expenditures:					
Expenditures (Off Budget)	18,006,196	18,378,631	18,500,000	21,500,000	20,000,000
Total Expenditures	18,006,196	18,378,631	18,500,000	21,500,000	20,000,000

Off Budget Funds Form

Budget Request Summary

Layout Code: 1618_OFFBUD_FUND Type: OFFBUD Fund: 3002-1618 Request Code: 3700 Request Name: Fire & Tornado Fund

Off Budget Fund: 3002-1618

Line	Budget Object	FY 15-16	FY 16-17	FY 17-18
1	05ALPDR	2,749,000	3,549,000	1,349,000
2	02CURRC	14,800,000	14,800,000	14,800,000
3	02NRRV	4,500,000	4,500,000	4,500,000
4	02EXPENRES	18,500,000	21,500,000	20,000,000
Totals		-3,549,000	-1,349,000	-649,000

Program Table Changes

- Any requests for updates to the Program Table should be made to the agency's budget analyst for review and approval
- **Formatting Change to Function Codes listed on the 1618 Full Program Consolidation**
 - 1416 Format: Dept No & Function Code (129BCC0)
 - 1618 Format: Function Code (BCC0)

1416 Format

[-] 129C_PG - Air Quality
129C - Air Quality
129BC00 - DAQ Division of Air Quality
129BCC0 - DAQ Air Emissions Fees
590C - Division of Air Quality
590BC00 - Division for Air Quality

1618 Format

[-] 129C_PG - Air Quality - Program -
129C - Air Quality - Type -
BC00 - DAQ Division of Air Quality - Program -
BCC0 - DAQ Air Emissions Fees - Program -
590C - Division of Air Quality - Type -
BC00 - Division for Air Quality - Program -
BCC0 - Air Emissions Fees - Program -

Comma Separated Value (CSV) KBUD Upload Files

- **The use of CSV Files is a convenient method to upload multiple lines of budget data within a form versus manually entering data line by line**
 - KBUD's import feature will not work unless the CSV is formatted with the correct headers
 1. Navigate to the desired Form/Tab
 2. Use the Export feature to create a blank CSV File with the correct headers
 3. Add the necessary budget data to the CSV File
 - Ensure leading zeros from objects like "0100" are not dropped "100"
 - Use the Number format on dollar amounts, **not Accounting or Currency (Will cause errors)**
 4. Import the CSV File with budget data into the correct Form/Tab



Comma Separated Value (CSV) KBUD Upload Files

A3 Expenditure Detail Tab

Edit Budget Request | A2/A3 Sources & Exp by Fund | **A3 Expenditure Detail** | A5 Personnel

Budget Request Summary ⓘ
 Layout Code: 1618_A2-A3-A4-A5 | Type: Generic | Request Code: 1703 | Program: 728A_PG

Refresh | Zero Out | Display Sub Total: | Select Model:

New Line | Copy Line | Delete Line | **Export** | Import | Audit Trail | Sort... | View as CSV

Line	Budget Object	FY 15-16	FY 16-17	FY 17-18
Totals				

A3 Expenditure Detail Tab

Edit Budget Request | A2/A3 Sources & Exp by Fund | **A3 Expenditure Detail** | A5 Personnel | Document Management

Budget Request Summary ⓘ
 Layout Code: 1618_A2-A3-A4-A5 | Type: Generic | Request Code: 1703 | Request Name: TEST | Program: 728A_PG

Refresh | Zero Out | Display Sub Total: | Select Model:

New Line | Copy Line | Delete Line | **Export** | Import | Audit Trail | View Graph | Sort... | View as CSV

Line	Budget Object	FY 15-16	FY 16-17	FY 17-18	DC FY 16-17	DC FY 17-18
1	E111	2,427,500	2,428,000	2,428,000	47,700	171,600
2	E121	164,800	164,800	164,800	2,700	10,200
3	E122	632,700	633,000	633,000	18,100	65,500
4	E123	371,700	371,700	371,700	15,200	48,100
5	E124	800	700	700	100	100
6	E150	3,542,600	3,542,600	3,542,600		
7	E180	25,100	25,100	25,100		
8	E232	14,200	14,200	14,200		
9	E241	1,600	1,600	1,600		
10	E251	11,700	11,700	11,700		
11	E801	13,000	13,000	13,000		
12	E802	7,000	7,000	7,000		
Totals		47,739,800	45,940,500	40,144,700	99,600	321,200

Export to create CSV File with Headers

Import budget data using CSV File with Headers

BudgetLine2ImportExport.csv

Budget Object	FY 15-16	FY 16-17	FY 17-18	DC FY 16-17	DC FY 17-18

Add budget data

1618DPH-728A-A3Detail.csv

Budget Object	FY 15-16	FY 16-17	FY 17-18	DC FY 16-17	DC FY 17-18	
1	E111	2,427,500	2,428,000	2,428,000	47,700	171,600
2	E121	164,800	164,800	164,800	2,700	10,200
3	E122	632,700	633,000	633,000	18,100	65,500
4	E123	371,700	371,700	371,700	15,200	48,100
5	E124	800	700	700	100	100
6	E150	3,542,600	3,542,600	3,542,600		
7	E180	25,100	25,100	25,100		
8	E232	14,200	14,200	14,200		
9	E241	1,600	1,600	1,600		
10	E251	11,700	11,700	11,700		
11	E801	13,000	13,000	13,000		
12	E802	7,000	7,000	7,000		
13	E321	22,000	22,000	21,500		
14	E346	43,700	43,700	36,800		
15	E361	26,600	26,600	21,600		

Comma Separated Value (CSV) KBUD Upload Files

The screenshot displays a web browser window with the URL <http://kbud310np.state.ky.us/train1/Controller>. The browser's address bar shows the page title "Budget Tasks". The browser's address bar also displays several tabs, including "Ky Office of State Budget Dir...", "(2 unread) - philrosell - Ya...", "Welcome to AMS Advant...", "Google", and "KBUD310 (2015) - Prod". The browser's address bar also displays the text "Welcome, MGJ0011 Messages(0) [Home | Help | Preferences | Reports | Edit Password | Logout".

The web application interface features a navigation menu with the following items: "Reference Data", "Security", "Utilities", and "Budget Tasks". The "Budget Tasks" menu item is currently selected. Below the navigation menu, the page title is "Advantage Performance Budgeting - Training > Budget Tasks".

The main content area is titled "Budget Tasks" and contains the following sections:

- Categories**
 - [Dimensions](#) - This contains links to the Dimensions the users can edit.
- Pages**
 - [Formulate Budget Request](#)
 - [Execute Query](#)
 - [Budget Request Filter View](#)
 - [Advance Budget Request Stage](#)
 - [Refresh Cache Page](#)

At the bottom of the page, there is a "Go to top of page" link. The browser's taskbar at the bottom shows the system tray with the date and time "9:37 AM 8/17/2015" and a zoom level of "100%".

KBUD Search Features

- **KBUD's Search Features have changed within the forms**
 - 1416 Forms used a small magnifying glass icon next to the cell to display the search page for available codes
 - 1618 Forms do not have a search icon
 1. Click directly in the cell to activate the cell and then right mouse click to view the Search link for the codes
 2. Click on the Search link to display the search page for the codes
 3. Type the entire code or use the * as a wildcard (E*) or leave the textbox blank to return all available codes and click Search

1416 Search Feature

Advantage KBUDNP

Budget Object Search

Code: E* Name:

Parent Budget Object:

Financial Rollups Information

Class: Category: Type:

Search Cancel Sort by User-Defined Order

Display 20 Items Srt...

Code	Name	Short Name
EXPBYFUND	Expenditures by Fund	Expenditures by Fund

Go to top of page

Go to top of page

Line	Budget Object
1	REGAPP

1618 Search Feature

Advantage KBUDNP

Budget Object Search

Code: E* Name:

Parent Budget Object:

Financial Rollups Information

Class: Category: Type:

Search Cancel Sort by User-Defined Order

Display 20 Items Srt...

Code	Name	Short Name
EXPBYFUND	Expenditures by Fund	Expenditures by Fund

Go to top of page

Go to top of page

Line	Fund	Budget Object	FY 10-10	FY 11-11
1	0100	REGAPP	1,000,000	2,000,000
2	0100	EXPBYFUND	1,000,000	2,000,000
Totals			0	0

Other KBUD Features

- **KBUD's Calculator Feature has changed within the forms**
 - 1416 Forms used a small calculator icon next to the cell to display the built-in calculator feature
 - 1618 Forms do not have a calculator icon
 - 1. Click directly in the cell to activate the cell and then right mouse click to display the calculator

1416 Calculator Feature

Line	Fund	Budget Object		FY 13-14
1	0100	REGAPP	R	12,903,000
2	0100	EXPBYFUND	E	12,955,400

1618 Calculator Feature

Line	Fund	Budget Object		FY 15-16
1	1200	CURREC		508,600
2	1200	EXPBYFUND	E	505,638

Other KBUD Features

➤ Refresh Cache Page

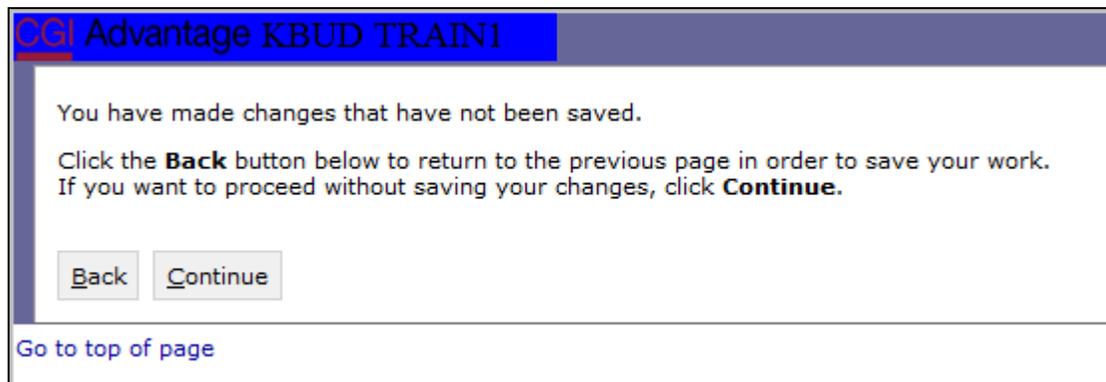
- Resets the KBUD system
- Refreshes the data link between the application and the database
- Perform this action anytime without affecting the data entered as long as you Save the information first
- Perform this action when you are not seeing the data you are expecting

The image displays two screenshots of the Advantage KBUD TRAIN1 web application interface. The left screenshot shows the 'Budget Tasks' dropdown menu, which includes options like 'Formulate Budget Request', 'Execute Query', 'Budget Request Filter View', 'Advance Budget Request Stage', and 'Refresh Cache Page'. The 'Refresh Cache Page' option is highlighted with a red box. The right screenshot shows the 'Refresh Cache Page' dialog box, which contains a 'Refresh Own Cache' button, also highlighted with a red box. Both screenshots show the application's navigation menu and the 'Budget Tasks' section.

Other KBUD Features

➤ Saving Changes: Continue or Back Buttons

- Changes were made on the previous page and were not saved
- Back button will allow you to go back to the previous page and click the Save button on the previous page, so you do not lose your changes
- Continue button will discard any of the previous changes made



History Change Process

➤ FY14 & FY15 History has been loaded to KBUD

1. History change requests need to be accomplished by the agencies through their budget analyst
2. Agencies should use the 1618 Historical Change Request Form (Excel Spreadsheet)
 - Located on OSBD's 1618 Budget Prep Resources Webpage:
 - <http://osbd.ky.gov/Pages/KBUD-Information.aspx>
3. **Highly recommend** agencies to start with history changes as they begin their 1618 budget preparation



History Change Process

- **Some reasons an agency would request a history change:**
 - The need to move General Fund (Regular Appropriation) amounts because the budget request program does not correspond to the allotment structure in eMARS (OSBD will make these history changes)
 - Appropriations changes due to reorganizations.
 - The need to spread a Balance Forward to several programs/subprograms since the amount landed in one fund/function account.
 - The need to spread Federal Fund Current Receipts to several programs/subprograms because the drawdowns were deposited into one fund/function account.
 - Payroll costs that were recorded in E154 or E169 that now need to be reflected in the payroll expenditure codes (E111 - E124) to accurately display the salary and fringe benefit expenditures by the E111-E124 object codes.



History Change Process

➤ Entries on the history change form:

- All entries need to net to zero (math checker on the form)
- Enter values down to the penny
- Example: Spreading Federal Fund Current Receipts to several programs/subprograms because the drawdowns were deposited into one fund/function account.

Math Checker

2016-2018 KBUD History Change Request Form											Net Change Amt
A2/A3 Sources & Expenditures by Fund											0.00
From						To					
Dept	Program Code	Fund	Object	FY 13-14	FY 14-15	Dept	Program Code	Fund	Object	FY 13-14	FY 14-15
095	KCAX	1200	CURREC		-2,653,008.00	095	KDDX	1200	CURREC		2,552,345.00
						095	KDDX	1200	CURREC		100,663.00

Personnel Runs Process/Schedule

➤ Personnel Run Information

- Details will be provided at Budget Instruction Informational meeting on August 24, 2015 at 1:30pm in Room 154 of the Capitol Annex



Capital Budget Information

➤ Capital Project Data from Six Year Plan

- The Capital Project information was preloaded into KBUD from the Capital Planning system (2016-2022 Capital Projects)
- KBUD used Version 3 data from the Capital Planning System which corresponds to the June 27 deadline
- If agencies made updates to projects in the Capital Planning System after June 27, agencies will need to make those same updates in KBUD
- KBUD changes from last biennium
 - Fewer fields on the dimension form
 - Impact on Budget data was preloaded for all types of projects (1416 – only IT projects had the impact data)



Formal Budget Submission/Schedule

➤ Submission Format and Quantities

- Budget Request Format and Copies
 - 1 Printed Copy to OSBD with Official Letter
 - 3 Printed Copies to LRC
 - 1 Electronic Copy to OSBD
 - 1 Electronic Copy to LRC
- A-6 Budgeted Position Record
 - 1 Electronic Copy to OSBD
 - 1 Electronic Copy to LRC
- Further instructions will be provided on submitting final version of budget request in searchable PDF format

➤ Schedule

- Budget Requests due to OSBD/LRC by November 1



Questions ?

