2020-2022
KBUD Budget Preparation
Refresher Training

Kentucky
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KBUD Budget Prep Refresher Overview

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3. OSBD Website Resources
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13. Formal Budget Submission/Schedule

KBUD Training Schedule

Budget Instructions Informational Meeting:
Early September

KBUD Preparation Training Classes:

Refresher Classes - Transportation – Auditorium

July 31 (Wed) – 1-2:30 pm
August 9 (Fri) – 9-10:30 am

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

July 29-30 (Mon & Tue) – New User (Includes Capital Budget)
August 1 (Thu) – Universities (Includes Capital Budget)
August 2 (Fri) – Boards (Includes Capital Budget)
August 5-6 (Mon & Tue) – New User (Includes Capital Budget)
August 19-20 (Mon & Tue) – New User (Includes Capital Budget)
August 21 (Wed) – Capital ONLY Class

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OSBD Budget Prep Contact Information

- **<u>Budget-Related</u> Questions should be referred to your agency's OSBD Policy & Budget Analyst**
  - Policies, procedures, developing budgets, interpreting the budget instructions, defined calculations, budget exceptions, schedules, etc.
  - Agency assignments/email available on OSBD Website http://osbd.ky.gov/StaffAssignments/Pages/GOPM.aspx

- **KBUD <u>Technical Questions</u> 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.
  - Email – KBUDAdministrator@ky.gov
  - Phone – 564-1210

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OSBD Website Resources

- **OSBD Website**
  - Home Page: http://osbd.ky.gov

- **2022 Budget Prep Resources**

  http://osbd.ky.gov/Pages/KBUD-Information.aspx
  - 2020-2022 Branch Budget Request Manual (Budget Instructions)
  - 2020-2022 KBUD Budget Preparation Manual
  - Budget Request Templates
  - Aids to Calculations (Posted as they become available)
  - History Change Form Instructions
  - Things to do before Personnel Runs Arrive

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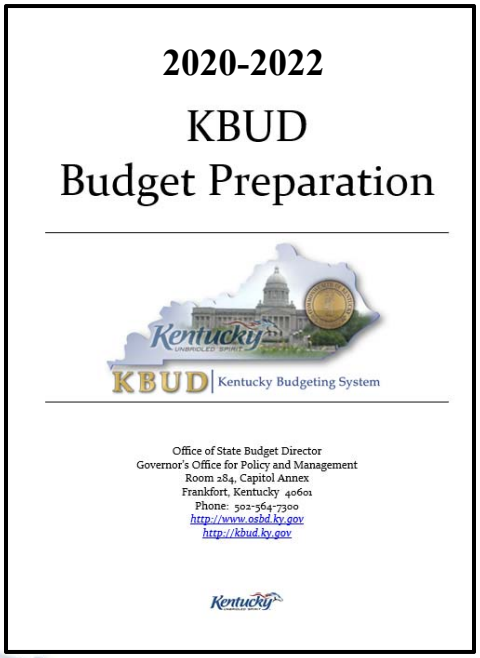
2020-2022 KBUD Budget Preparation Manual

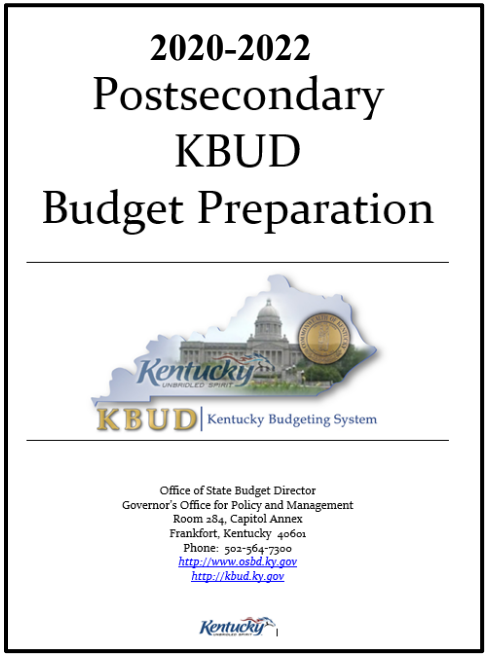
➢ 2020-2022 KBUD Budget Preparation Manual

- Contains detailed instructions with screenshots
- OSBD Website & email link to all KBUD users
  http://osbd.ky.gov/Pages/KBUD-Information.aspx

State Agencies



Universities Only



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KBUD Technical Information

- **Technical Requirements**
  - Browser Compatibility
    - ✓ 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)
    - ✓ Microsoft Internet Explorer 11.0 (for Windows 7)
    - ✓ Microsoft Internet Explorer 11.0 (for Windows 8 & 8.1; Desktop mode only)
    - ✓ Google Chrome Version 68
    - ✓ Mozilla Firefox ESR 38
    - ✓ Apple Safari on Apple iPad or iPhone with iOS 8.x
    - ✓ Android phone device with Android 5.0

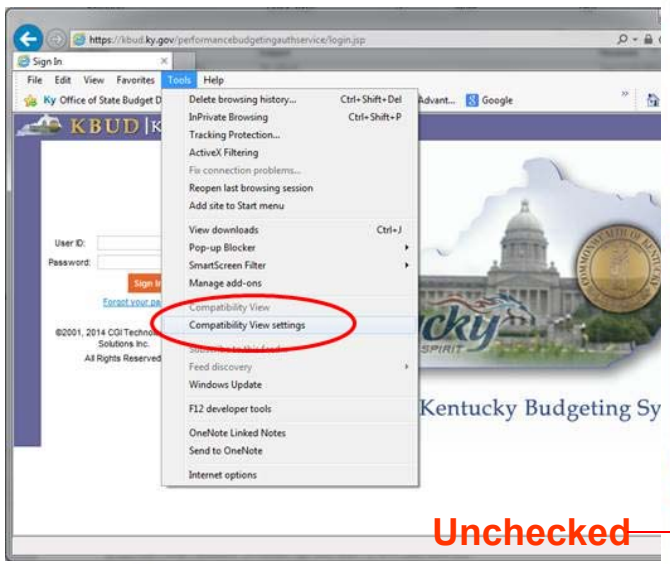
KBUD Issues

➢ Agency Accessibility Issues

- CHFS having compatibility issues with IE 11
  - Using Google Chrome as alternative
- Postsecondary Education cannot access KBUD because of the state's firewall
  - Need to establish a VM account through CPE Technical Support
- Other agencies outside the state's firewall
  - Need to establish VPN accounts through COT

KBUD Issues

- **Blank page appears after user logs in:**
  - Compatibility View Settings need to be turned off (Unchecked)
    - Ensure ky.gov **IS NOT** in the Websites you've added to Compatibility View textbox
  - Users start with the long link as Favorite or shortcut instead of the short link. Always start with the short link: https://kbud.ky.gov



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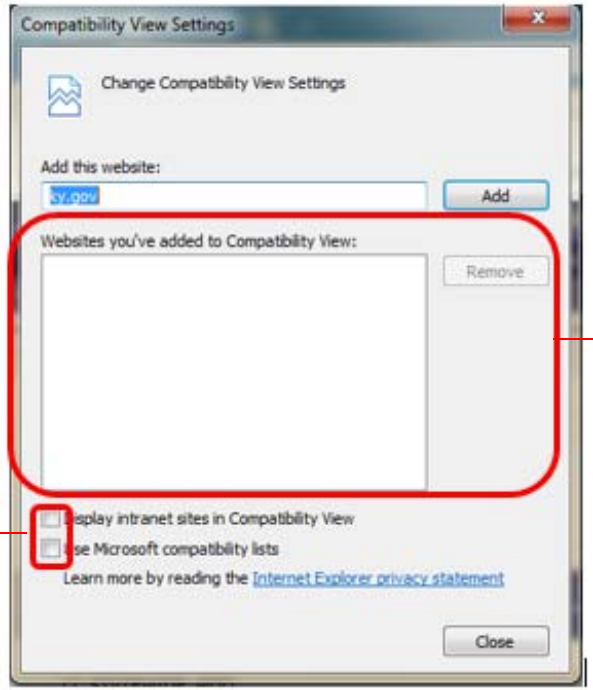

ky.gov should not be in this textbox

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KBUD Issues

➢User Accounts Locked

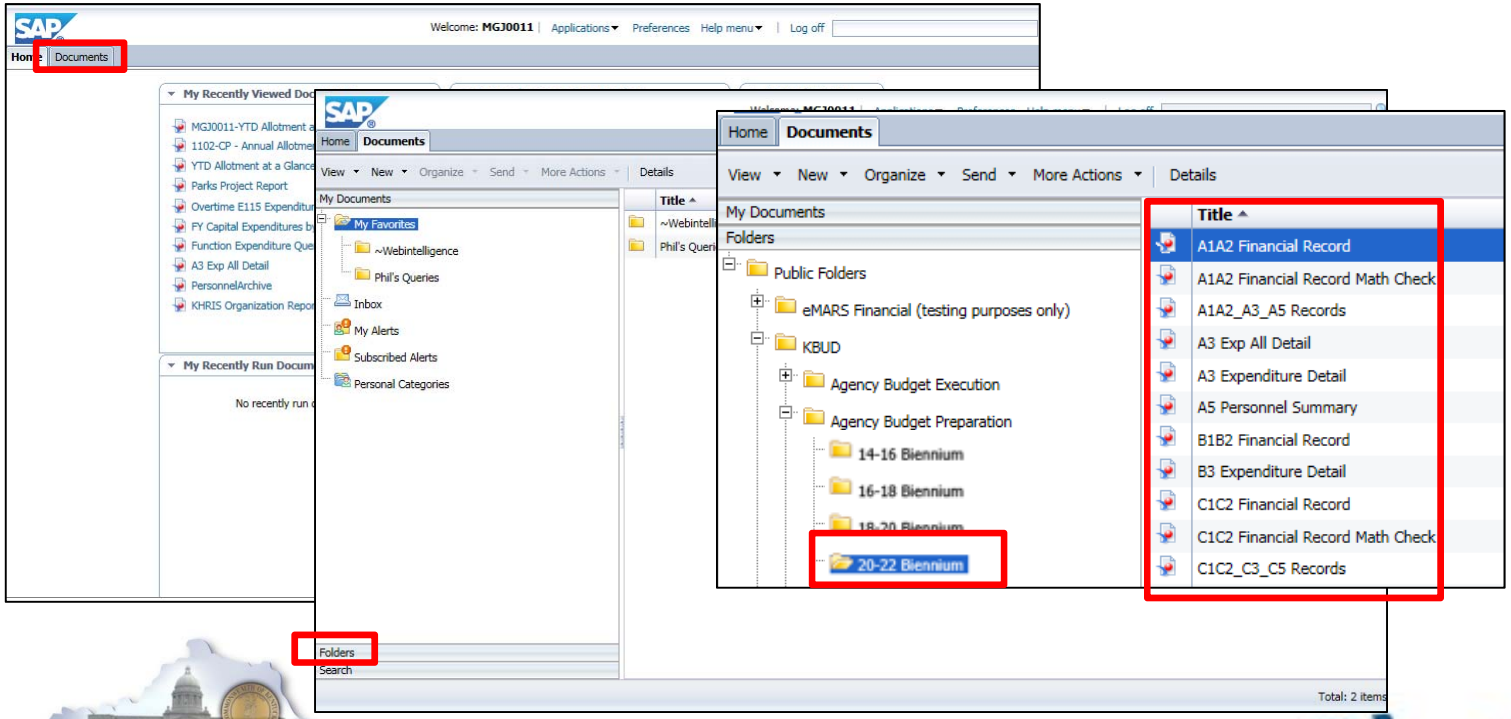
- Users are given 3 grace logins to change the password before the User ID is inactivated
  - Self-Generated Password Reset will not work if the account is inactivated
- If your User ID is inactivated, you will need to contact the KBUD Administrators (KBUDAdministrator@ky.gov) to have the account reactivated

➢Forms Locked

- Occurs periodically when two people are attempting to modify the same form at the same time (2nd user will get the message)
- User accidentally closes out of KBUD by closing the browser instead of correctly logging out of KBUD
- If your form is locked, you will need to contact the KBUD Administrator (KBUDAdministrator@ky.gov) and provide the form #

KBUD Reporting (EBI) Issues

- **Enterprise Business Intelligence (4.1)**
  - Access EBI through the KBUD Report Link or
  - Access EBI directly through the Web link https://ebi.ky.gov/BOE/BI
  - Navigation to KBUD's 2022 Biennium Reports Folder



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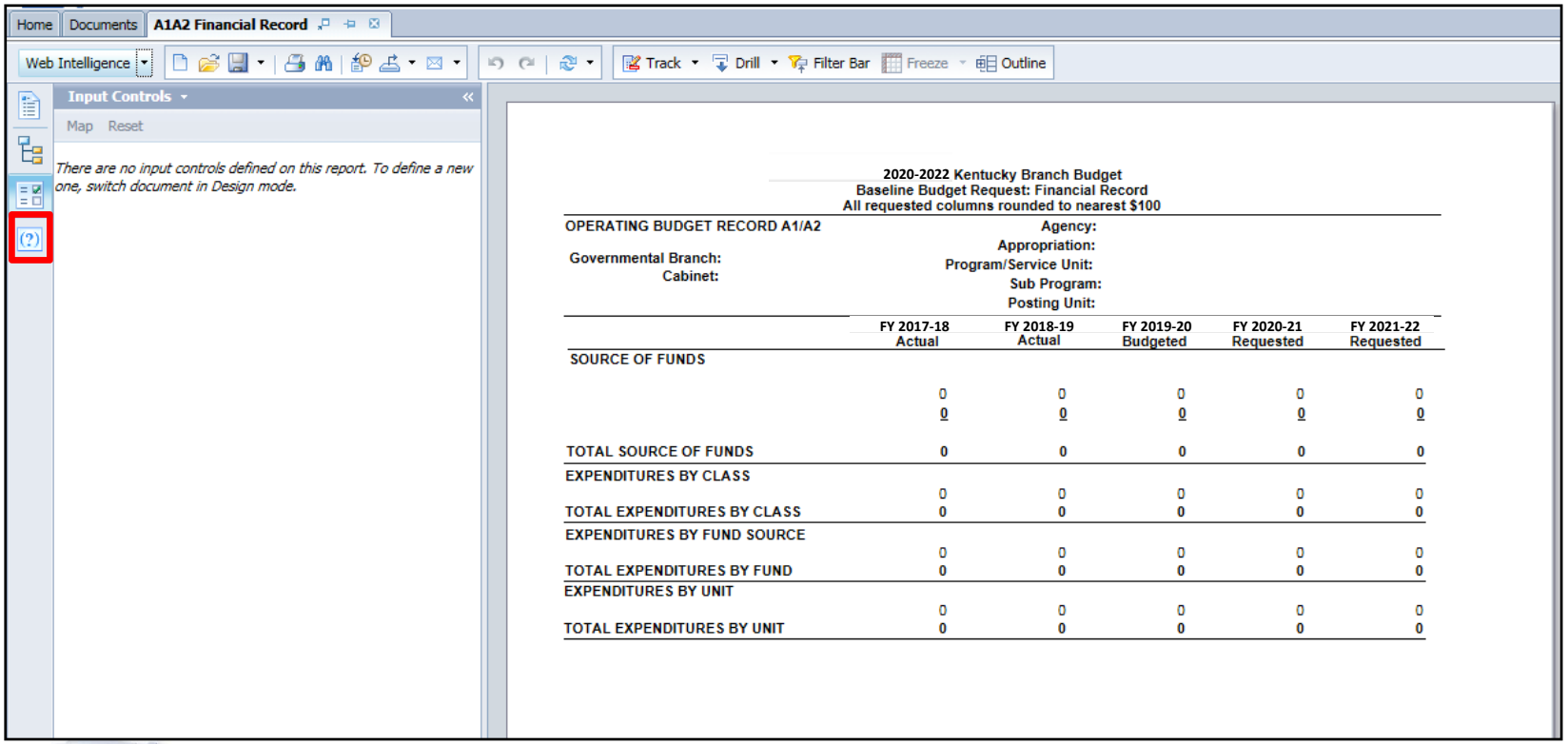
KBUD Reporting (EBI) Issues

➢ KBUD Reporting

- **Problem:** Parameter/Variable Input Textbox is not visible
- **Solution:** Click the User Prompt Icon



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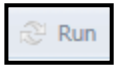
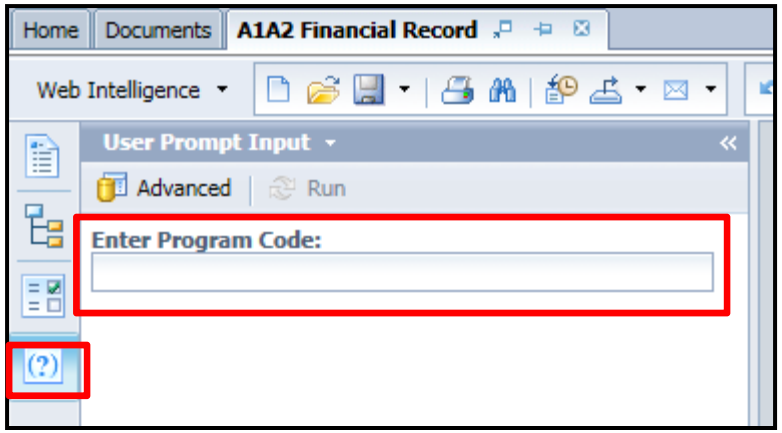
KBUD Reporting (EBI) Issues

➢ KBUD Reporting

- **Problem:** Run Icon 

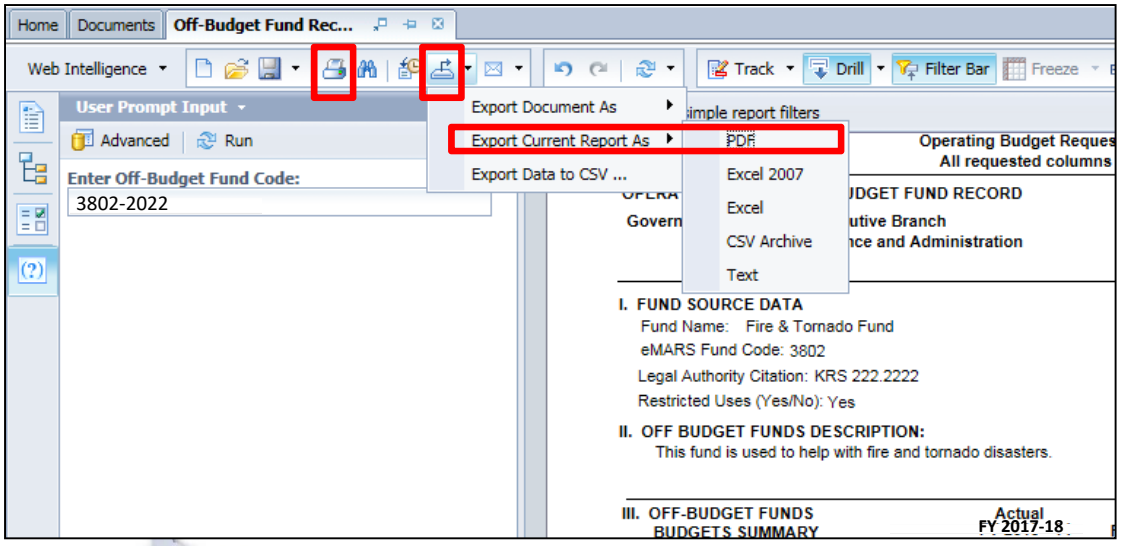
is not enabled (greyed out)
- **Solution:** Click the User Prompt Icon and enter a Value in the text box and click out of the text box

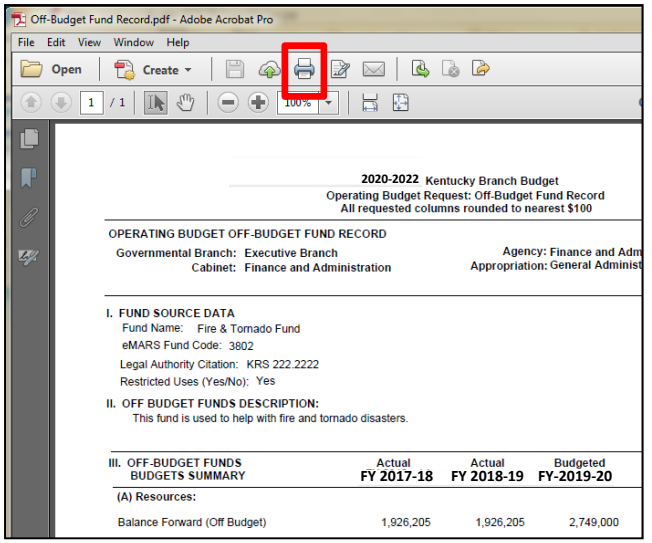


KBUD Reporting (EBI) Issues

➢ 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





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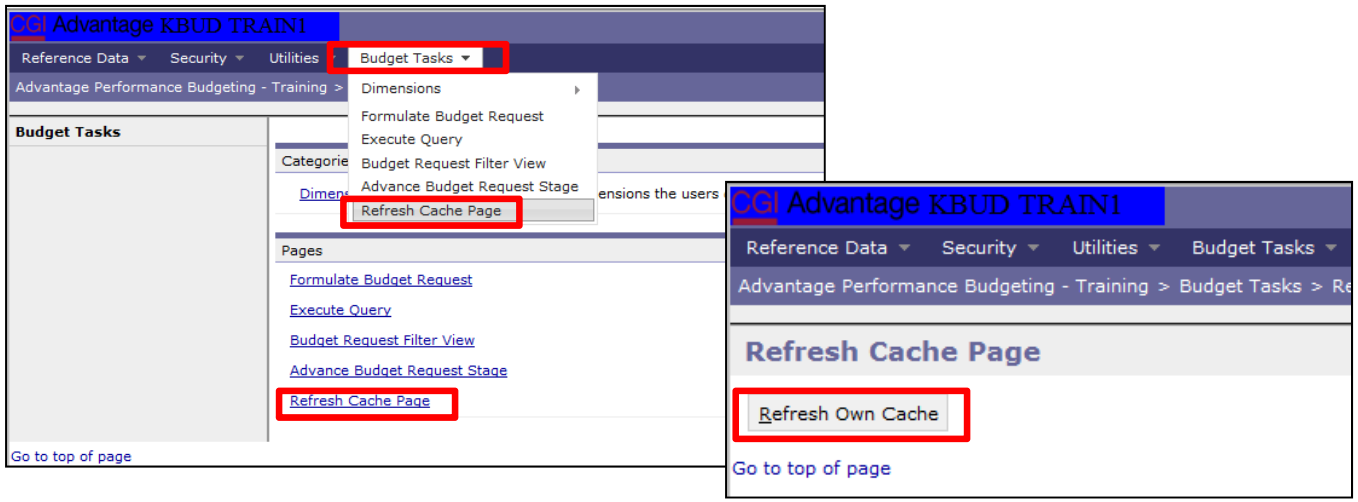
KBUD Features

- **Using Excel 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 Excel file is formatted with the correct headers
    - Navigate to the desired Form/Tab
    - Use the Export feature to create a blank Excel File with the correct headers
    - Add the necessary budget data to the Excel File
      - Ensure leading zeros from objects like "0100" are not dropped "100" (format as text or use the '0100)
      - Use the Text or Number format on dollar amounts, **not Accounting or Currency (Will cause errors)**
    - KBUD Budget Prep Manual pages 13-17 describe the process in detail

KBUD Features

➢ Refresh Cache Page

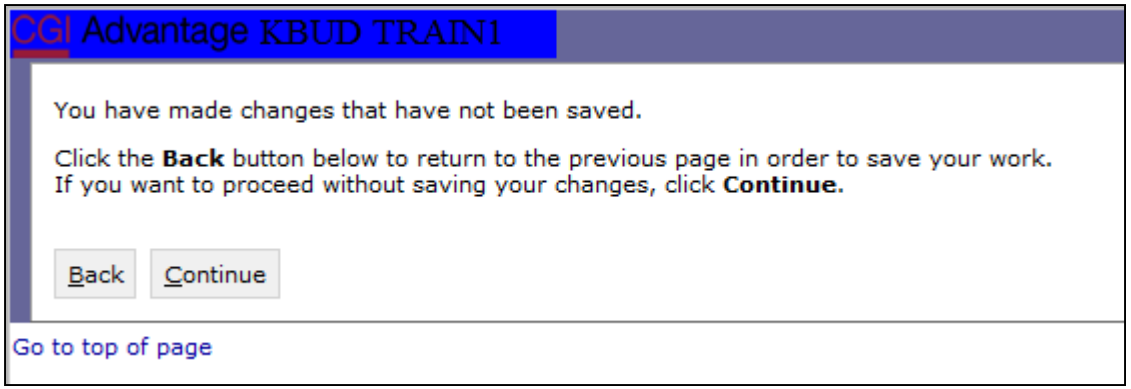
- Refreshes the data link between the application and the database
- Perform this action anytime without affecting the data entered as long as you Save your last action first
- Perform this when you are not seeing the data you are expecting, such as new ABR, Project, or Grant codes added to their dimension tables



KBUD Features

➢ Saving Changes: Continue or Back Buttons

- Changes were made on the previous page but 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



Program Table Changes

- Any additional requests for updates to the Program Table should be made as soon as possible to your OSBD Policy & Budget analyst for review and approval
- Function Codes are listed on the 2022 Full Program Consolidation for the purpose of displaying History on the on the A1A2 Financial Record and C1C2 Financial Record report
- Changes to the program table can effect the History, so ensure the program table is correct prior to making History changes

2022 Example

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History Change Process

- **FY18 & FY19 History has been loaded to KBUD**
  1. History change requests need to be accomplished by the agencies through their OSBD Policy & Budget analyst
  2. Agencies should use the 2022 Historical Change Request Form (Excel Spreadsheet) http://osbd.ky.gov/Pages/KBUD-Information.aspx
  3. **Highly recommend** agencies to start with history changes as they begin their 2022 budget preparation
  4. Process is described in the 2022 KBUD Budget Preparation Manual – Section 8 History Changes

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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 specific program/subprogram
  - The need to spread Federal Fund Current Receipts to several programs/subprograms because the drawdowns were deposited into a single 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.

Capital Budget Information

➢ Capital Project Data from Six Year Plan

- The Capital Project information was preloaded into KBUD from the Capital Planning system (2020-2026 Capital Projects)
- KBUD used Version data from the Capital Planning System which corresponds to June 26, 2019
- If agencies made updates (change amounts or added new projects) to projects in the Capital Planning System after June 26, agencies will need to make those same updates in KBUD
- Agencies will need to add leases where costs are $200K or higher/annually to KBUD (lease amounts are entered as $.01 so the project titles appear on the Capital Reports in EBI)

Schedule

- **Personnel Run Information**
  - Baseline Personnel Runs and Retirement Exhibits should be available early September

- **KBUD 2022 Budget Prep Forms will be available in late August**
  - Dimension Tables are currently available
    - Grant, Restricted Fund, Off Budget Fund, Capital Projects, ABRs can be updated
    - Requests for additional Grant, ABR, or Project codes can be sent to KBUDAdministrator@ky.gov
  - Capital data is preloaded so 2022 Capital Reports are available
  - FY18 and FY19 History changes can be completed now

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 Searchable Electronic Copy to OSBD
  - 1 Searchable Electronic Copy to LRC
- A-6 Budgeted Position Record
  - 1 Searchable Electronic Copy to OSBD
  - 1 Searchable 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

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Questions ?

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