Office of State Budget Director

Commonwealth of Kentucky

KBUD 2022-2024 Postsecondary Budget Preparation

Version 1.0

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Section 1 Introduction to KBUD

The Kentucky Budgeting (KBUD) system will be used to develop the 2022-2024 biennial budget. This manual will provide information on the KBUD system and how to use it to enter, change, report and submit the majority of their biennial budget request. This process will enable the Commonwealth to meet the statutory requirements of KRS Chapter 48 for preparing and submitting agency biennial budget requests to the Office of the State Budget Director/Governor’s Office for Policy and Management (OSBD/GOPM) and the Legislative Research Commission (LRC). It will enable the Commonwealth to provide the information required for submission contained in the 2022-2024 Branch Budget Request Manual (Budget Instructions). It is essential that agencies read and understand the 2022-2024 Budget Instructions in order to complete and submit their biennial budget request accurately, on-time, and in the correct format. The 2022-2024 Branch Budget Request Manual along with other budget resources can be found on OSBD’s Website at the following location: http://osbd.ky.gov/Pages/KBUD-Information.aspx

Section 1.1 Benefits of KBUD

Publish Budget Documents
The KBUD Reporting tool (Enterprise Business Intelligence or also known as EBI) will provide the budget reports necessary to produce or support the production of the various biennial budget documents. This will enable the Commonwealth to meet the statutory requirements for biennial budget documents and support the display and presentation of the Commonwealth’s budget decisions to the public.

Data Consolidation
KBUD will provide automatic data consolidations or “roll-ups” of budget information. This function will enable the Commonwealth to consolidate budget information from the lowest level to the many and varied higher levels. The Commonwealth will be able to produce budget reports and information that consolidate Programs, Funds, Projects, Expenditures, Revenues and other budgetary information within KBUD.

Record the Trail of Changes
KBUD will provide an audit trail of all changes made to a budget request prior to its submission. This function will enable the Commonwealth to track and record the many changes that occur to a biennial budget request during its development process. This will provide a valuable troubleshooting aid in a process that is large and complicated.
Section 1.2  KBUD Setup Summary

The section is a summarized version of the technical setup requirements necessary for an user to create an agency budget submission. For technical help with KBUD, you can contact the KBUD Administrator at KBUDAdministrator@KY.GOV.

The Commonwealth uses two separate applications to complete the full development of an agency’s budget:

1) KBUD application has built-in forms and tables for users to enter the budget data information necessary to create the KBUD reports. The link to the application is https://kbud.ky.gov/. Each user requires a separate KBUD account to utilize the application. Contact the KBUD Administrator at KBUDAdministrator@KY.GOV to request access instructions.

2) KBUD Reporting is hosted on SAP’s Enterprise Business Intelligence (EBI) platform and allows user to run and print pre-built budget reports designed for the budget preparation process. The link to this application is https://ebi42.ky.gov/BOE/BI/logonNoSso.jsp. Each user requires a separate EBI account to utilize the application. Contact the KBUD Administrator at KBUDAdministrator@KY.GOV to request access instructions.

NOTE: Users can access both applications through compatible Web browsers (Microsoft’s Edge, Google Chrome, or Mozilla Firefox). Only certain versions of these browsers will work with KBUD or EBI.
Section 2       Baseline Budget Request

Section 2.1       Budget Form Overview
Budget forms and maintenance tables are the primary tools within KBUD used to produce the agency budget request reports. The budget request reports are the final output used by agencies to submit their formal budget request to GOPM. The numerical budget data entered on the agency’s forms is translated into budget totals on the budget request reports. In addition to the budget request forms, the information entered into the maintenance tables is also used to produce the budget request reports.
The 2224_PS_A2-A3-A4-A5, Post Sec - A2/A3/A4/A5 Baseline Budget Request form is the primary form used to produce your agency’s 2224 baseline budget request.

2224 Post Secondary Baseline Budget Request Form

The 2224_PS_A2-A3-A4-A5, Post Sec - A2/A3/A4/A5 Baseline Budget Request form has been consolidated and contains multiple tabs to perform different functions:

- A2 Sources
- A3 Exp by Fund
- A3 Expenditure Detail
- A5 Personnel

2224_PS_A2-A3-A4-A5 Form with Multiple Tabs
Section 2.2   Creating a Baseline Budget Request

This section includes an overview of the baseline creation process along with the detailed instructions to create a baseline budget request required by the 2022-2024 Budget Instructions.

Section 2.2.1   Assumptions, Conditions, and Directions

The following is a list of helpful assumptions, conditions, and directions that should be followed and understood prior to creating a 2022-2024 baseline budget in KBUD:

- The user should review and understand the LRC’s 2022-2024 Budget Instructions located on OSBD’s Website (Link to Webpage - http://osbd.ky.gov/Pages/KBUD-Information.aspx).
- All budget requests outside of the baseline budget requests needs to be separately requested as an Additional Budget Request.
- There are several aids (tools) to assist in the budget request calculations located on OSBD’s Website (Link to Webpage - http://osbd.ky.gov/Pages/KBUD-Information.aspx).
- The user has an active KBUD and EBI (KBUD Reports) accounts with the correct agency security to perform the actions required. If not, contact the KBUD administrator at KBUDAAdministrator@ky.gov to obtain a copy of the KBUD Security form and instructions.
- For postsecondary agencies, users will also need a Citrix account from CPE Technical Support to access the KBUD and EBI (KBUD Reports) applications behind the state’s firewall.
- Any specific budget preparation-related questions should be addressed to the agency’s assigned GOPM policy and budget analyst, not to the KBUD Administrator.
- Any KBUD technical questions should be addressed to the KBUD administrator at KBUDAAdministrator@ky.gov.
- The use of every function and/or feature within KBUD or EBI (KBUD Reports) will not be demonstrated in this section of the manual, only the ones necessary to produce a baseline budget request. Any other questions concerning additional functions or features within KBUD can be addressed to the KBUD administrator at KBUDAAdministrator@ky.gov.
Section 2.2.2 Process Overview

The following is a summarized description of the steps involved in the process to create a baseline budget request in order to help users understand the flow of the detailed instructions:

1) Login to KBUD and navigate to the Budget Layout Selection Page to choose the 2224_PS_A2-A3-A4-A5 Baseline Budget Request form
2) Create an instance of the 2224_PS_A2-A3-A4-A5 Baseline Budget Request form for the institution. The program information for the postsecondary agencies will be entered at the bill level (Example: 430U_BILL)
3) Manually enter or import the appropriate budget lines (data) into each of the form’s tabs for each appropriate budget object combination
   o 2224_PS_A2-A3-A4-A5 Baseline Budget Request Form Tabs
      ▪ A2 Sources
      ▪ A3 Exp by Fund
      ▪ A3 Expenditure Detail
      ▪ A5 Personnel
4) Login to KBUD Reports (EBI) and navigate to the 22-24 Biennium folder to run and/or print the necessary budget request reports
   o Run the baseline budget math check report (A1A2 Financial Record Math Check) necessary for performing a math check on the budget data that was entered into KBUD. If math check errors are indicated on the report, log into KBUD and correct the errors by making the necessary changes in the form and rerun the math check report to ensure the errors have been corrected
   o Run the baseline budget request reports for each program code necessary for the official budget submission to GOPM and save a PDF version of each report for the electronic submission to GOPM
      ▪ A1A2 Financial Record
      ▪ A3 Expenditure Detail
      ▪ A5 Personnel Summary
Section 2.2.3 Login to KBUD and Navigate to the 2224_PS_A2-A3-A4-A5 Baseline Form

- Open your browser and enter the URL for the KBUD application into the browser’s address bar: https://kbud.ky.gov/.

- Enter your KBUD user ID and password.

- From the Home page, you can navigate to the KBUD forms in two ways:
  
  1. From the Home page, you can navigate to the KBUD forms by clicking the Formulate Budget Request tile on the home page. The Budget Layout Selection page will appear.
• From the Budget Layout Selection page, you will see all the KBUD forms that are available for your use. In this case, you want to choose the 2224_PS_A2-A3-A4-A5 form by clicking on the corresponding link. The Select Budget Request page will appear.

**Budget Layout Selection Page**

- Please keep in mind, the Select Budget Request page will show all the instances of this specific form (2224_PS_A2-A3-A4-A5) you have created.

**Select Budget Request Page (2224_PS_A2-A3-A4-A5 Form)**
From the Select Budget Request page, you can do all of the following functions:
1. Use the Create button to create a new instance of this specific budget form
2. Use the Search button to search for previous created forms
3. Use the View feature to only view (no editing) an existing instance of this specific form
4. Use the Edit feature to edit an existing instance of this specific form
5. Use the Delete feature to delete an existing instance of this specific form
   - (NOTE: You cannot delete a form if there are active budget lines within the form. You will receive an error message. You have to first edit the form and delete all budget lines within all tabs and then perform the deletion procedure)
6. Use the Copy feature to copy an existing instance of this specific form
Section 2.2.4 Creating the Baseline Budget Request Form

In this section, we will continue from the previous section to create an example of a baseline form for Murray State University, Program 445U_BILL.

- From the Select Budget Request page, click the Create button. The Create Budget Request page will appear and allow you to create a new instance of the 2224_PS_A2-A3-A4-A5 form.

Select Budget Request Page (2224_PS_A2-A3-A4-A5 Form)
From the Create Budget Request page, you will need to complete these three steps:

1. Fill in the Name textbox (Suggestion: make it meaningful, so you will know by its name what program is contained in the form)
2. Fill in the Program code textbox, example: 445U_BILL (NOTE: You can only create a single instance of this form with this specific program). There are two ways to fill in the textbox: 1) Type in the correct program code, or 2) click on the blue Search icon to pull up a Program Search page, and complete the following three steps to select it from a pick list:
   - 2-1) Type in the first few digits of the program code and * in the Code textbox
   - 2-2) Click the Search button
   - 2-3) Click the record for the appropriate program
   - 2-4) Click the OK button
3. Click the Save button, and the new form with all its appropriate tabs will be created
Section 2.2.5  Entering Budget Data in the 2224_PS_A2-A3-A4-A5 Form

- Once the new form is created, you will be able to access all the necessary tabs within the form. You can follow these steps to manually add line-by-line information to each tab.
  1. Click on the A2 Sources tab (NOTE: You can now add your baseline Sources of Funds)
  2. Click the Plus sign + to add a new blank line NOTE: Continue to add new blank lines for each line of budget data you need to enter for this program. Enter a separate budget line for each fund/budget object combination required by the 2022-2024 Budget Instructions for the two historical years (FY20 and FY21 Actuals), the current fiscal year (FY22 Budgeted), and the two budget request years (FY23 and FY24 Requested)
  3. Enter the appropriate budget data on the line. Every line will require a fund, program, and a budget object. To use the search feature for these items, follow these steps:
     - 3-1) Click on the Search icon for the Budget Object
     - 3-2) From the Budget Object Search page, either use the search fields to refine your search results or leave all the fields blank to see all the available codes
     - 3-3) Click the Search button to execute the search
     - 3-4) Click on and highlight the desired code, and click the OK button
  4. Once you have finished entering all your budget lines for this tab, click the Save button
  5. Click one of the next tabs to add more budget lines or click the Save & Close button to exit the form
KBUD also has the ability to import an Excel spreadsheet (XLS) to load all the budget lines automatically instead of manually adding each budget line one at a time. In these next steps, we will delete the single budget line entered in the previous steps and import all of the necessary budget lines using KBUD’s import feature. To delete the single budget line, follow these steps:

1. Click on the checkbox next to the budget line needing to be deleted
2. Click the Delete icon, and KBUD will confirm the deletion.
3. Click the Yes button and KBUD will confirm the Action was successful and permanently delete the line

![Image showing the deletion process]

**Line has been permanently deleted**
Now that the single budget line has been deleted, we will import all the budget lines using the KBUD import feature and Excel to create the import file (spreadsheet) as an Excel file. You will need to open the Excel file and add your budget lines into a worksheet and edit the cells by following the formatting rules (IMPORTANT NOTES: For the import process to be successful, you will need to ensure your Excel import file complies with all of the following formatting rules):

The first row of the Excel file needs to exactly match the column headers on the form tab in terms of name, case, and order from left to right (see the comparison below). It is recommended to use the Export feature in KBUD to download the tab’s column headings in an Excel file to be used as a template for your import file. Once you have downloaded the headers, then you can add your budget lines to the Excel file and use the file to import the budget lines into KBUD.

**Excel file (all lines and columns formatted as text)**

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fund</td>
<td>Program</td>
<td>Budget Object</td>
<td>FY 19-20</td>
<td>FY 20-21</td>
<td>FY 21-22</td>
<td>FY 22-23</td>
</tr>
<tr>
<td>2</td>
<td>0100</td>
<td>445U_BILL</td>
<td>REGAPP</td>
<td>43,570,800</td>
<td>45,014,500</td>
<td>44,581,400</td>
<td>44,581,400</td>
</tr>
<tr>
<td>3</td>
<td>0100</td>
<td>445U_BILL</td>
<td>REGAPP</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-827,600</td>
</tr>
<tr>
<td>4</td>
<td>0100</td>
<td>445U_BILL</td>
<td>PSPERF</td>
<td>2,231,300</td>
<td>557,800</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>0100</td>
<td>445U_BILL</td>
<td>REDGF</td>
<td>-458,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>1300</td>
<td>445U_BILL</td>
<td>CURREC</td>
<td>123,132,400</td>
<td>103,792,600</td>
<td>119,324,800</td>
<td>120,152,400</td>
</tr>
<tr>
<td>7</td>
<td>1200</td>
<td>445U_BILL</td>
<td>CURREC</td>
<td>18,137,600</td>
<td>19,582,900</td>
<td>22,709,000</td>
<td>22,709,000</td>
</tr>
</tbody>
</table>

**2224_PS_A2-A3-A4-A5 Form Tab Headers**

1. To use the Export feature, navigate to the desired tab and add a single blank line. Click on the Export icon. Choose Export All and Spreadsheet. A link to the Export file will appear at the bottom left of the screen. Click on it to open the file and add your budget lines to it. You will need to repeat this process for each of the form’s tabs because the headers can change for each tab.
2. Any fund cells with fund types that begin with a leading zero must include this zero. Excel will drop the leading zero if the cell is formatted as a currency or accounting format. To resolve this issue, highlight the affected column or cell, change the format to Text format, and add the “0” back to the fund “100”, so that it appears as “0100”. You will need to fix all fund cells.

3. Utilize numerical data for the five budget data columns and ensure those cells are formatted in Excel text, general, or number format and not in the currency or accounting format. Do not include the $ sign in the cell or do not use any formulas or total rows. (NOTE: All dollar values for the requested fiscal years should be rounded to the nearest $100. KBUD does not prevent the user from entering non-rounded values, but the 2022-2024 Budget Instructions request the values be rounded).

4. Utilize only valid KBUD fund types and budget objects codes combinations for this specific tab. For example, you would not use Fund Type code 1200 (Federal Funds) and Budget Object code REGAPP (Regular Appropriations) as a combination because federal funds are not included in regular appropriations. Also ensure the budget object names are all in upper case format, REGAPP. Refer to the 2022-2024 Budget Instructions for the appropriate budget objects that would apply to each Fund Type (NOTE: You can go to OSBD’s Website, http://osbd.ky.gov/Pages/KBUD-Information.aspx, to view a copy of the Budget Instructions, 2022-2024 Branch Budget Request Manual). Below are some of the more common budget objects that may be included in your budget request:

**General Fund ONLY**
- Regular Appropriation
- Postsecondary Ed Performance Fund

**Restricted and Federal Funds ONLY**
- Balance Forward
- Current Receipts
Once you have populated your Excel worksheet with all budget lines and formatted it correctly, save the file as an Excel (XLS) file with a meaningful name and in a location where you will remember to find it.

Once you have saved the Excel import file, return to A2 Sources tab in the 2224_PS_A2-A3-A4-A5 form. To import the budget lines, follow these steps:

1. Click the Import icon

2. Click the Browse button

3. Navigate to the Excel file location, and click on the file name

4. Click the Open button

5. Click the Upload button
If there are problems with the import file, you will receive an error message like the one below. You will need to review and edit your Excel worksheet to ensure all the formatting issues have been met.

- If the import is successful, the budget lines will be visible. Click the Save button to finalize the changes to the tab and complete the import process.

To complete the 2224_PS_A2-A3-A4-A5 form, you will need to repeat the procedures previously described in this section for the A3 Exp by Fund, A3 Expenditure Detail, and A5 Personnel tabs (NOTE: Each tab may have different number of columns and different names, so if you are using Excel import files to upload the budget lines, please be aware of these differences. You will need to modify the Excel file headers and budget line columns to compensate for these differences).
The A3 Exp by Fund tab needs to include budget data for each Fund/Program (as determined by your Budget Request Structure) for the two historical years (FY 19-20 and FY 20-21 Actuals), the current fiscal year (FY 21-22 Budgeted), and the two budget request years (FY 22-23 and FY 23-24 Requested). The total expenditures by each fund (EXPBYFUND) must agree with the total sources by each fund on the A2 Sources tab and the program narrative. Click on the A3 Exp by Fund tab and enter the necessary budget lines for your request. Click the Save button when you have finished entering your budget lines.

**A3 Exp by Fund tab**

- The total expenditures on the A3 – Expenditure Detail tab must agree with the total expenditures by fund (EXPBYFUND) on the A3 Exp by Fund tab and the program narrative.

- The specific expenditure budget objects each agency will be required to use are reflected in the 2022-2024 Budget Instructions or will be determined through discussions with GOPM and LRC.

- For the remaining expenditures in your request that are not required or specified by your GOPM Analyst, you can choose any detailed budget object codes or summary expenditure codes, such as EOSWM (Other Salaries and Wages – use these for Part-Time Board Member pay), EOPSCM (Other Professional Services Contracts), EOPRSM (Other Personnel Costs), or budget object group codes such as E210M, E250M, and E340M from the Budget Object Search list.

- For *Debt Service* lines, you will choose EDSGEN (General Fund), EDSRES (Restricted Fund), EDSFED (Federal Fund), EDSTOB (Tobacco) or EDROAD
Operating Transfer lines are also available for each of the major object classes: T113, T60C, etc.

- The following is a list of typical Budget Object codes you will use for expenditures:
  - E111 – Regular Salaries and Wages
  - E121 – Employer Social Security Rates
  - E122 – Employer Retirement Contribution Rate
  - E123 – Health Insurance Premiums
  - E124 – Life Insurance Costs
  - E131 – Worker Compensation Premiums
  - E222 – Facilities & Support Services charges for state-owned space (includes utilities)
  - E254 – Insurance Premium (Fire & Tornado)
  - E133 – Governmental Services Center

- Click on the A3 Expenditure Detail tab and enter the necessary budget lines for your request. Click the Save button when you have finished entering your budget lines.

A3 Expenditure Detail tab

The A5 Personnel tab is used to identify the number of Full-Time, Part-Time and Other Positions (including Federally Funded Time Limited (FFTL) and Interim positions). For fiscal years 22-23 and 23-24, the number of personnel positions that may be requested in the Baseline Budget Request A-5 Personnel tab is limited to the personnel targeted positions (Funded Personnel Cap) for FY 2022.
- In addition, the A5 Personnel tab includes the amount of funding by fund source for the total personnel positions in each program or sub-program for Baseline Budget Requests.

- When Budget Objects FULLTIME, PARTTIME and OTHERPOS are selected, the Status column must be completed. The available values for the Status column are FILLED and VACANT. If any other Budget Objects are used, the Status column will be 0 (NOTE: The Total row should be ignored since its value has no meaning in this budget form).

- Click on the A5 Personnel tab and enter the necessary budget lines for your request. Click the Save button when you have finished entering your budget lines.

A5 Personnel tab
The final step to complete the 2224_PS_A2-A3-A4-A5 form is to use the Budget Request tab to upload a comprehensive program narrative created in Microsoft Word. The template for the program narrative is named 2022-2024 Baseline Budget Record A4, and it is located on OSBD’s Website (Link to Webpage - http://osbd.ky.gov/Pages/KBUD-Information.aspx).

2022-2024 Baseline Budget Record A4 (Program Narrative)

1. To upload your program narrative file into the Document Management tab, follow these steps:
   1. Click on the Attachments button to open up the Attachments tool
   2. Click on the Browse icon to open up the Windows File Upload screen
   3. Navigate to the file’s location and click on the File Name
   4. Click the Open button
   5. Click the Upload button to add the file as an attachment to the tab
Section 2.2.6 Login to KBUD Reports (EBI) to Access Baseline Reports

In this section, we will login to SAP’s Enterprise Business Intelligence Version 4.2 (EBI 4.2) which houses the KBUD Reports and navigate to the 22-24 Biennium folder to access the necessary budget request reports. Reports are the final output of the budget request process. It is important to understand that the data entered directly into the KBUD forms and maintenance tables are used to populate KBUD reports.

A2 Sources Tab Data

A3 Exp by Fund Tab Data

A3 Expenditure Detail Tab Data

A1A2 Financial Record Report
2. There are three baseline reports required for your baseline budget submission. The other two reports are designed as supportive reports to aid the agency in reviewing and reconciling amounts entered on the forms to ensure a level of accuracy in the submission of the required reports.

Required Baseline Reports For 430U BILL
1. A1A2 Financial Record
2. A3 Expenditure Detail
3. A5 Personnel Summary

Supportive Baseline Reports
4. A1A2 Financial Record Math Check
5. A3 Exp all Detail

- To access the login webpage to EBI 4.2 which contains KBUD reports,
  1. Click on the Report tile located on the Home Page in the KBUD application
2. Enter your KBUD User ID in the User Name textbox and your password
3. Click on the Log On button

- The Home tab is the entry point into the EBI application. Once in the application, navigate to the KBUD 2224 Agency Budget Preparation folders which contain all the reports necessary for your budget submission.
  1. Click the Documents tab
  2. Click on the Folders bar at the bottom of the page to access the Public Folders
  3. Expand all the Public Folders
  4. Open the 22-24 Biennium folder under the Agency Budget Preparation folder. The available reports will appear on the right side of the web page
When the budget data has been completely entered into the 2224_PS_A2-A3-A4-A5 form, the baseline reports can be ran and printed for this program. (NOTE: We will run the A1A2 Financial Record Math Check report first to ensure the budget amounts reconcile between the all five columns: FY 2019-20, FY 2020-21, FY 2021-22, FY 2022-23, and FY 2023-24. Once the program passes the math check, we will save and print the required baseline reports for the budget submission).

1. Double click on the A1A2 Financial Record Math Check report to open up the report
2. Click on Question Mark icon to ensure the Enter Program Code textbox is visible. This will allow you to enter the required parameter/variable
3. Enter the required parameter/variable into the text box (NOTE: The program code can also be found on the 2224_PS_A2-A3-A4-A5 form in KBUD)
4. Once the proper parameter/variable is entered, the Run icon will be enabled. Click the Run icon to run the report
The Math Check Section is located at the bottom of the report. You may have to scroll down to see the section.

1. In this example, the check ensures Restricted Fund Expenditures did not exceed its Source of Funds for each of the FY (NOTE: The same check also exists for Federal Funds)

<table>
<thead>
<tr>
<th>FY 2019-20</th>
<th>FY 2020-21</th>
<th>FY 2021-22</th>
<th>FY 2022-23</th>
<th>FY 2023-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual</td>
<td>Actual</td>
<td>Budgeted</td>
<td>Requested</td>
<td>Requested</td>
</tr>
<tr>
<td>Total Sources of Restricted Funds</td>
<td>20,206,286</td>
<td>20,378,801</td>
<td>20,802,330</td>
<td>21,218,570</td>
</tr>
<tr>
<td>Total Restricted Fund Expenditures</td>
<td>20,206,286</td>
<td>20,378,801</td>
<td>20,802,330</td>
<td>21,218,570</td>
</tr>
</tbody>
</table>

**Math Check Purpose**
These three line amounts should never be negative because expenditures cannot exceed sources of funds. In other words, you cannot spend more than what you receive in revenues.

**What to Do If Math Check Fails**
If the expenditures by fund source exceed the source of fund totals, adjust the budget data in either the 2224_PS_A2-A3-A4-A5 Form. Either Revenues need to be increased or expenditures by fund decreased.
• The Math Check Section is used to check the following for the total of all funds:
  1. In this example, the check ensures Total Expenditures did not exceed its Total Source of Funds for all funds combined in each FY.

### Math Check Purpose

These line amounts should never be negative because total expenditures cannot exceed the total sources of funds. In other words, you cannot spend more than what you receive in revenues.

### Math Check Fail

If the expenditures by fund source exceed the source of fund totals, adjust the budget data in either the 2224_PS_A2-A3-A4-A5 Form. Either Revenues need to be increased or expenditures by fund decreased.
The Math Check Section is used to check the following for the total of all combined funds:

1. In this example, the check ensures Total Expenditures by Funds equal the Total Expenditures by Class for all funds combined for each FY.

<table>
<thead>
<tr>
<th>FY 2019-20</th>
<th>FY 2020-21</th>
<th>FY 2021-22</th>
<th>FY 2022-23</th>
<th>FY 2023-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budgeted</td>
<td>Requested</td>
<td>Requested</td>
<td>Requested</td>
<td>Requested</td>
</tr>
<tr>
<td>General Fund</td>
<td>12,900,000</td>
<td>27,092,300</td>
<td>27,051,103</td>
<td>22,448,200</td>
</tr>
<tr>
<td>- State Salary and Compensation Aid</td>
<td>51,820</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>- Other</td>
<td>0</td>
<td>1,547,426</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total General Fund</strong></td>
<td><strong>12,956,826</strong></td>
<td><strong>28,639,727</strong></td>
<td><strong>28,598,529</strong></td>
<td><strong>22,448,200</strong></td>
</tr>
<tr>
<td>Federal Fund</td>
<td>16,300,216</td>
<td>16,926,199</td>
<td>22,829,900</td>
<td>22,829,900</td>
</tr>
<tr>
<td>- Balance Forward</td>
<td>13,874</td>
<td>11,815</td>
<td>2,038</td>
<td>0</td>
</tr>
<tr>
<td>- General Revenue</td>
<td>6,295,919</td>
<td>476,736</td>
<td>590,000</td>
<td>409,700</td>
</tr>
<tr>
<td><strong>Total Federal Fund</strong></td>
<td><strong>6,420,815</strong></td>
<td><strong>5,087,015</strong></td>
<td><strong>6,400,736</strong></td>
<td><strong>4,549,700</strong></td>
</tr>
<tr>
<td>Restricted Funds</td>
<td>662,313</td>
<td>940</td>
<td>270,000</td>
<td>270,000</td>
</tr>
<tr>
<td>- Balance Forward</td>
<td>662,313</td>
<td>940</td>
<td>270,000</td>
<td>270,000</td>
</tr>
<tr>
<td>- Non-Revenue Receipts</td>
<td>-4,189,836</td>
<td>-8,124,769</td>
<td>-10,550,300</td>
<td>-10,550,300</td>
</tr>
<tr>
<td><strong>Total Restricted Funds</strong></td>
<td><strong>11,701,893</strong></td>
<td><strong>9,383,436</strong></td>
<td><strong>22,266,660</strong></td>
<td><strong>22,266,660</strong></td>
</tr>
<tr>
<td><strong>TOTAL SOURCE OF FUNDS</strong></td>
<td><strong>26,566,286</strong></td>
<td><strong>36,378,881</strong></td>
<td><strong>60,825,556</strong></td>
<td><strong>44,213,506</strong></td>
</tr>
<tr>
<td><strong>EXPENDITURES BY CLASS</strong></td>
<td><strong>6,420,815</strong></td>
<td><strong>5,087,015</strong></td>
<td><strong>6,400,736</strong></td>
<td><strong>4,549,700</strong></td>
</tr>
<tr>
<td>Personal Costs</td>
<td>6,477,917</td>
<td>8,747,841</td>
<td>7,222,400</td>
<td>7,222,400</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>272,013</td>
<td>57,307</td>
<td>230,000</td>
<td>401,100</td>
</tr>
<tr>
<td>Grants and Subsidies</td>
<td>95,592,900</td>
<td>77,956,126</td>
<td>45,106,530</td>
<td>57,277,300</td>
</tr>
<tr>
<td>Capital Outlay</td>
<td>0</td>
<td>258,030</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL EXPENDITURES BY CLASS</strong></td>
<td><strong>26,660,523</strong></td>
<td><strong>34,466,833</strong></td>
<td><strong>50,562,126</strong></td>
<td><strong>45,949,906</strong></td>
</tr>
<tr>
<td><strong>EXPENDITURES BY FUND SOURCE</strong></td>
<td><strong>26,660,523</strong></td>
<td><strong>34,466,833</strong></td>
<td><strong>50,562,126</strong></td>
<td><strong>45,949,906</strong></td>
</tr>
<tr>
<td>General Fund</td>
<td>12,267,492</td>
<td>24,774,072</td>
<td>27,051,103</td>
<td>22,448,200</td>
</tr>
<tr>
<td>Federal Fund</td>
<td>697,179</td>
<td>409,513</td>
<td>409,513</td>
<td>409,513</td>
</tr>
<tr>
<td>Restricted Funds</td>
<td>11,701,893</td>
<td>9,383,436</td>
<td>22,829,900</td>
<td>22,829,900</td>
</tr>
<tr>
<td><strong>TOTAL EXPENDITURES BY FUND</strong></td>
<td><strong>24,666,532</strong></td>
<td><strong>34,848,023</strong></td>
<td><strong>50,562,126</strong></td>
<td><strong>45,949,906</strong></td>
</tr>
</tbody>
</table>

**Math Check Purpose**
This line ensures the Total Expenditures by Class equals the Total Expenditures by Fund.

**What to Do If Math Check Fails**
If these two totals do not match, either adjust the EXPFYFUND budget data in the 2224_PS_A2-A3-A4-A5 Form/A3 Exp by Fund or adjust the expenditure detail budget data in the A3 Expenditure Detail tab.
In the previous Math Check Section, we were checking to ensure Total Expenditures by Funds equaled the Total Expenditures by Class for all funds combined for each FY. If the two amounts do not equal, you may need to adjust the expenditures in the A3 Expenditure Detail tab. The A3 Exp All Detail Report may be a very helpful to determine exactly what expenditures need to be adjusted. This report shows each expenditure amount for each expenditure category along with their total amounts, so it may help you quickly determine where to make the necessary adjustments.

1. Double click on the A3 Exp All Detail report to open up the report
2. Click on Question Mark icon to ensure the Enter Program Code textbox is visible. This will allow you to enter the required parameter/variable
3. Enter the required parameter/variable into the text box (NOTE: The program code can also be found on the 2224_PS_A2-A3-A4-A5 form in KBUD)
4. Once the proper parameter/variable is entered, the Run icon will be enabled. Click the Run icon to run the report
While using the match check reports, you may need to make adjustments to the budget data within the forms. KBUD has a built-in calculator feature to help you make those adjustments and automatically store the new calculated amounts.

1. Click the calculator icon in the KBUD form cell to activate it
2. Use the calculator to make adjustments and click the OK button to store the new calculated amount in the cell.
Once you have completed your match checks and are ready to run the final version of three baseline reports, complete the following steps:

1. Open each of the baseline reports as per the instructions in the previous paragraphs and use the same Program Code to run each of the reports
   - A1A2 Financial Record
   - A3 Expenditure Detail
   - A5 Personnel Summary
2. To save the reports as a PDF document, click the Export Icon and choose Export Document as PDF
3. Click the Save button’s down arrow and choose the Save As command and save the reports to a location where you will remember to find them. Open the documents with Adobe Reader and use the print feature to print paper copies of the reports.

You should now have the understanding on how to use KBUD and EBI (KBUD Reports) to create the necessary electronic and paper copies of the baseline reports required for your budget submission.
Section 3  Additional Budget Requests

Section 3.1  Budget Form Overview

The two tools within KBUD used to create your Additional Budget Requests (ABRs) are the ABR Maintenance table and the 2224_B2-B3-B4-B5, B2/B3/B4/B5 Additional Budget Request form. These tools are the components necessary to produce the B1B2 Financial Record Report and B3 Expenditure Detail Report in EBI. The narrative data entered in the ABR Maintenance dimension table along with the numerical budget data entered on the agency’s 2224_B2-B3-B4-B5 forms are translated into informative budget request reports. These reports are the final output used by agencies to submit their formal budget request to GOPM.
The 2022-2024 Budget Instructions requires agencies to complete Additional Budget Request Records when requesting budget authority from any budgetary fund source in excess of the calculations guidelines provided in the Baseline Budget Request and the Defined Calculations Budget Request. Requests for additional funding must be submitted on Additional Budget Request Records. Requests for current year appropriations for FY 2021-22 must be submitted as an Additional Budget Request. For Executive branch agencies, prior approval by the State Budget Director is required for current year appropriation requests. Additional funding requests fall into these categories:

1. **Growth** - Requests for additional funding to support the current scope of programs/activities, beyond the Baseline Budget Request and the Defined Calculations Budget Request.

2. **Expansion** - Funds required to finance proposed expanded agency activities, services, or programs.

3. **New** - Funds required to finance new operations, programs, and activities; and increases in new services delivered.

4. **Fund Source Replacement** - Funds required to replace the loss of or reduction in Federal and Restricted Funds.

The Additional Budget Request forms (B Forms) display and function much like the Baseline Budget Request forms (A Forms).

For each agency, there are at least ten blank Additional Budget Request codes in the ABR Maintenance tables that can be used for each B2/B3/B4/B5 Additional Budget Request form. These 10 codes are available, but if additional ABR codes are needed, agencies will need to contact the KBUD Administrators (KBUDAdministrator@ky.gov) to request additional blank codes.

In KBUD, the 2224_B2-B3-B4-B5 form will be used to produce your agency’s Additional Budget Request.

**B2/B3/B4/B5 Additional Budget Request**
The 2224_PS_B2-B3-B4-B5 Additional Budget Request form contains multiple tabs to perform different functions to record the various components of your ABR data:

- Budget Request
- B2 Sources
- B3 Exp by Funds
- B3 Expenditure Detail
- B5 Personnel

*2224_PS_B2-B3-B4-B5 Form with MultipleTabs*
Section 3.2  Creating an Additional Budget Request (ABR)

This section includes an overview of the Additional Budget Request (ABR) creation process along with the detailed instructions to create an Additional Budget Request required by the 2022-2024 Budget Instructions when a request meets the conditions of an ABR.

Section 3.2.1  Process Overview

The following is a summarized description of the steps involved in the process to create an Additional Budget Request in order to help users understand the flow of the detailed instructions:

1) Login to KBUD and navigate to the ABR Maintenance table to update the information for the blank ABR codes that will be used with the 2224_B2-B3-B4-B5 Budget Request forms
2) Navigate to the Budget Layout Selection Page to choose the 2224_PS_B2-B3-B4-B5 Budget Request form
3) Create an instance of the 2224_PS_B2-B3-B4-B5 Budget Request form for an ABR
4) Manually enter the appropriate budget lines (data) into the budget line tab
   - 2224_PS_B2-B3-B4-B5 Budget Request Form Tabs
     - B2 Sources
     - B3 Exp by Funds
     - B3 Expenditure Detail
     - B5 Personnel
   - Login to KBUD Reports (EBI) and navigate to the 22-24 Biennium folder to run and/or print the necessary ABR budget request reports necessary for official budget submission to GOPM
     - B1B2 Financial Record Report (Run this report for each individual ABR)
     - B3 Expenditure Detail Report (Run this report for each individual ABR)
Section 3.2.2 Login to KBUD and Navigate to the ABR Maintenance Table

- Open your browser and enter the URL for the KBUD application into the browser’s address bar: https://kbud.ky.gov/.
- Enter your KBUD user ID and password.
- From the Home page, follow these steps:
  - Click on the ABR Maintenance tile, and the ABR Maintenance page will appear.
From the ABR Maintenance page, you can search and view all the ABR codes by leaving the Code and Name textboxes empty and clicking the Search button. This will bring back all the ABRs available based on your security. You can also narrow your search for a specific ABR by following these steps:

1. Enter the ABR code assigned to this request in the Code textbox
2. Click the Search button to search for the fund (If no records are returned, you need to redefine your search. You may want to try using a wildcard search: Example - 527A22*)
3. Check the 3 dot menu and select the Edit function
4. The Edit ABR screen will appear
5. Update any of the ABR information not greyed out
6. Click either the Save or the Save & Close button
Here is some additional guidance to assist in filling out the ABR Maintenance page. The following information should be completed for each ABR.

<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the Additional Budget Request Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Type</td>
<td>Select the correct Additional Budget Request type from the drop down menu</td>
</tr>
<tr>
<td>ABR Agency Rank</td>
<td>Enter the agency priority ranking. This field is an integer field and will only accept whole numbers.</td>
</tr>
<tr>
<td>ABR Cabinet Rank</td>
<td>Enter the cabinet-wide priority ranking. This field is an integer field and will only accept whole numbers.</td>
</tr>
</tbody>
</table>
Section 3.2.3 Navigate to the 2224_PS_B2-B3-B4-B5 Form

- From the Home page, you can navigate to the KBUD forms by clicking the Formulate Budget Request tile. The Budget Layout Selection page will appear.

Home Page

![Home Page Screenshot]

Budget Layout Selection Page

![Budget Layout Selection Page Screenshot]
From the Budget Layout Selection page, you will see all the KBUD forms that available for your use. In this case, you want to choose the 2224_PS_B2-B3-B4-B5 form by clicking on the corresponding blue Select button. The Select Budget Request page will appear.

**Budget Layout Selection Page**

- Please keep in mind, the Select Budget Request page will display all the instances of this specific form (2224_PS_B2-B3-B4-B5) you have created.

**Select Budget Request Page (2224_PS_B2-B3-B4-B5 Form)**
From the Select Budget Request page, you can do all of the following functions:

1. Use the Create button to create a new instance of this specific budget form
2. Use the Search button to search for previous created forms
3. Use the View feature to only view (no editing) an existing instance of this specific form
4. Use the Edit feature to edit an existing instance of this specific form
5. Use the Delete feature to delete an existing instance of this specific form
   a. (NOTE: You cannot delete a form if there are active budget lines within the form. You will receive an error message. You have to first edit the form and delete all budget lines within all the tabs and then exit the form and perform the deletion procedure)
6. Use the Copy feature to copy an existing instance of this specific form
Section 3.2.4    Creating the Additional Budget Request Form

In this section, we will create a 2224_PS_B2-B3-B4-B5 form for ABR code 445U22X001 and Program 445U_BILL_2224.

- From the Select Budget Request page, click the Create button. The Create Budget Request page will appear and allow you to create a new instance of the 2224_PS_B2-B3-B4-B5 form.

Select Budget Request Page (2224_PS_B2-B3-B4-B5 Form)

Create Budget Request Page
From the Create Budget Request page, you will need to complete these steps:
1. Fill in the Name textbox
2. Fill in the ABR textbox with the ABR code (Example – 445U22X001)
3. Fill in the Program textbox with the Program code associated with this ABR (Example – 445U_BILL_2224)
4. Click the Save button, and the Edit Budget Request Page (new form) with all its appropriate tabs will be created

**Create Budget Request Page**

**Edit Budget Request Page**

Stage should always be set to 1 by the agencies. GOPM will move the forms to Stage 2 when needed.
Section 3.2.5  Entering Budget Data in the 2224_PS_B2-B3-B4-B5 Form

1. Click on the B2 Sources (NOTE: You can now add your Sources of Funds information)
2. Click on the Plus sign + to add a new blank line (NOTE: Continue to add new blank lines for each line of budget data you need to enter for this fund. Enter a separate budget line for each budget object required by the 2022-2024 Budget Instructions)
3. Once you have finished entering all your budget lines for this tab, click the Save button (NOTE: When entering numerical budget data, enter the data to the nearest $100).
4. Click the other tabs to add more budget lines
5. Click the Save & Close button to exit the form when done adding the budget lines

New 2224_PS_B2-B3-B4-B5 Form for 445U22X001 and 445U_BILL_2224
• Continue this same process with the remaining form’s tabs until you have completed the form.

• Ensure the necessary form’s tabs include budget data for each budget object. You can reference the budget object types by going to OSBD’s Website, http://osbd.ky.gov/Pages/KBUD-Information.aspx, and viewing a list of all applicable budget objects.

• To complete the 2224_PS_B2-B3-B4-B5 form, you will need to enter the budget lines for the B3 Exp by Fund, B3 Expenditure Detail and B5 Personnel tabs.

• The total expenditures on the B3 – Expenditure Detail tab must agree with the total expenditures by fund (EXPBYFUND) on the B3 Exp by Fund tab and the program narrative.

• The following is a list of typical Budget Object codes you will use for expenditures:
  ▪ E111 – Regular Salaries and Wages
  ▪ E121 – Employer Social Security Rates
  ▪ E122 – Employer Retirement Contribution Rate
  ▪ E123 – Health Insurance Premiums
  ▪ E124 – Life Insurance Costs
  ▪ E131 – Worker Compensation Premiums
  ▪ E184 – Personnel Board Assessments
  ▪ E222 – Facilities & Support Services charges for state-owned space (includes utilities)
  ▪ E802 – COT Rated Services
  ▪ E226 – Motor Pool Rental Charges
  ▪ E162 – Facilities Security Charges
  ▪ E254 – Insurance Premium (Fire & Tornado)
- E133 – Governmental Services Center

- Click on the B3 Exp by Fund tab and enter the necessary budget lines for your request. Then click on the B3 Expenditure Detail tab and enter the necessary budget lines for your request ensuring the total dollars reconcile. Click the Save button when you have finished entering your budget lines.

**B3 Exp by Fund tab**

These amounts should reconcile

**B3 Expenditure Detail tab**

These amounts should reconcile
- The B5 Personnel tab is used to identify the additional number of Full-Time, Part-Time and Other Positions (including Federally Funded Time Limited (FFTL) and Interim positions).

- The B5 Personnel tab includes the additional amount of funding by fund source for the total personnel positions in each program or sub-program.

- When Budget Objects FULLTIME, PARTTIME and OTHERPOS are selected, the Status column must be completed. The available values for the Status column are FILLED and VACANT. If any other Budget Objects are used, the Status column will be 0. (NOTE: The Total row should be ignored since its value has no meaning in this budget form).

- Click on the B5 Personnel tab and enter the necessary budget lines for your request. Click the Save button when you have finished entering your budget lines.

**B5 Personnel tab**
The final step to complete the 2224_PS_B2-B3-B4-B5 form is to use the Attachment button to load the program narrative created in Microsoft Word. The template for the program narrative is named 2022-2024 Additional Budget Record B4, and it is located on OSBD’s Website (Link to Webpage - http://osbd.ky.gov/Pages/KBUD-Information.aspx).

2022-2024 Additional Budget Record B4 (Program Narrative Template)
To upload your B4 program narrative Word document, follow these steps:
1. Click Attachments button to open up the KBUD Upload tool
2. Click the Browse icon to open up the Windows File Upload screen
3. Navigate to the file’s location and click on the File Name
4. Click the Open button
5. Click the Upload button to add the file as an attachment to the tab
6. Click the Save button to finalize the attachment
Section 3.2.6 Login to KBUD Reports (EBI) to Access Additional Budget Request Reports

In this section, we will login to SAP’s Enterprise Business Intelligence Version 4.2 (EBI 4.2) which houses the KBUD Reports and navigate to the 22-24 Biennium folder to access the necessary budget request reports. Reference Section 5, KBUD Reports, for more in depth explanation of reports.

- Reports are the final output of the budget request process. It is important to understand that the data entered directly into the KBUD forms and ABR Maintenance tables are used to populate KBUD reports. You can directly trace the ABR Maintenance data to the data heading on the report. You can also trace the form’s budget data amounts to the budget totals on the report.
• We will run the two ABR reports for Program 445U_BILL, Murray State University and ABR 445U22X001 that are required for your budget submission (NOTE: There are no supportive math check reports for ABRs).

**Required ABR Reports**
1. B1B2 Financial Record Report (Run this report for each individual ABR)
2. B3 Expenditure Detail Report (Run this report for each individual ABR)

**Supportive ABR Report**
(NONE)

• To access the login webpage to EBI 4.2 which contains KBUD reports:
  1. Click on the EBI 4.2 tile located on the KBUD Home page to access the application
2. Enter your eMARS User ID in the User Name textbox and your password
3. Click on the Log On button

- The Home tab is the entry point into the EBI application. Once in the application, navigate to the KBUD 2224 Agency Budget Preparation folders which contain all the reports necessary for your budget submission.
  1. Click the Documents tab
  2. Click on the Folders bar at the bottom of the page to access the Public Folders
  3. Expand all the Public Folders
  4. Open the 22-24 Biennium folder under the Agency Budget Preparation folder. The available reports will appear on the right side of the web page
In this scenario, we will run and print the B1B2 Financial Record Report for the Program 445U_BILL, Murray State University and ABR 445U22X001. You will need to repeat this process for each ABR.

1. Double click on the B1B2 Financial Record Report to open up the report.
2. Click on Question Mark icon  to ensure the parameters/variables’ text boxes are visible. This will allow you to enter the required parameters/variables.
3. Enter the required parameters/variables into the Program Code and ABR text boxes. In this scenario, we will enter the Program code 445U_BILL and ABR 445U22X001.
4. Once the proper parameters/variables are entered, the Run icon  will be enabled. Click the Run icon to run the report.
5. If you want to print a paper copy, click the Printer icon  and follow the prompts to export the report to a PDF format. Open the PDF report in Adobe Reader and use the print feature in Adobe Reader to print a paper copy.
In this second scenario, we will run and print the B3 Expenditure Detail Report for the Program 445U_BILL, Murray State University and ABR 445U22X001. You will need to repeat this process for each ABR.

1. Double click on the B3 Expenditure Detail Report to open up the report
2. Click on Question Mark icon to ensure the parameters/variables' text boxes are visible. This will allow you to enter the required parameters/variables
3. Enter the required parameters/variables into the Program Code and ABR text boxes. In this scenario, we will enter the Program code 445U_BILL and ABR 445U22X001
4. Once the proper parameters/variables are entered, the Run icon will be enabled. Click the Run icon to run the report
5. If you want to print a paper copy, click the Printer icon and follow the prompts to export the report to a PDF format. Open the PDF report in Adobe Reader and use the print feature in Adobe Reader to print a paper copy

You should now have the understanding on how to use KBUD and EBI (KBUD Reports) to create the necessary electronic and paper copies of the Additional Budget Requests reports required for your budget submission.
Section 4  Capital Budget Request

Section 4.1 Budget Form Overview

The tools within KBUD used to create your Capital Budget Requests are the Project Maintenance table and the three Capital Budget Request forms:

- 2224_CAPITAL_FUND, Capital Request by Fund Source
- 2224_CAPITAL_EXPEND, Capital Request Expenditures
- 2224_CAP_IMPONOPBUD, Capital Request - Impact on Operating Budget

These tools along with a Capital Data Load to KBUD from the Capital Planning System are all the components necessary to produce the Capital Budget Reports required by the budget instructions. The narrative and numerical data are preloaded into the Project Maintenance table from the Six Year Capital Planning System. The budget data also preloads into the three KBUD forms. All these components are needed to create the informative budget request reports. These reports are the final output used by agencies to submit their formal Capital budget request to GOPM.
In KBUD, there is preloaded project (Capital) budget data that automatically loads into the KBUD Capital Forms and project data prepopulated in the Project Maintenance tables which originates from the Six-Year Capital Planning system. This transfer of data avoids the re-entry of all of the information for each project into KBUD after having entered it into the Six-Year Capital Planning system. KBUD will be loaded with Six-Year Capital Planning System’s data (Version 3 data as of June 29, 2021), so if any changes were made to the project’s budget amounts or it’s descriptive data in the Six-Year Capital Planning System after this date, the Project Maintenance table and/or the budget amounts will need to be manually updated by the agencies with these same changes. IMPORTANT NOTE: If an agency wants to prepare a capital budget request for a project that is not in the Six-Year Capital Planning system, the agency will need to utilize one of the “blank” project codes assigned to their agency. It is possible that an agency may need multiple project codes. If that occurs, contact the KBUD Administrators (KBUDAdministrator@ky.gov) and request that additional Project codes be added.
Here is some guidance concerning the data from the Six-Year Capital Planning system:

- Only information on projects identified in the 2022-24 biennium with the Capital Plan will be transferred to KBUD.
- Real Property Lease projects and Maintenance Pools were not included in the Capital Plan, so these projects will have to be entered directly into KBUD.
- Real Property Lease projects and Reauthorized projects with no request for additional Funds must have a $0.01 entered into the FY 2021-22 column in the Capital Request by Fund Source form.

There are three KBUD Capital Budget Request forms:

- Capital Request by Fund Source form
- Capital Request Expenditures form
  - Completed only for Construction and Information Technology System projects (not for Capital Equipment or Capital Lease projects)
- Capital Request – Impact on Operating Budget form
  - Completed only on Capital Projects that have an impact on the Operating Budget

### Capital Budget Request Forms

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2224_CAPITAL_FUND</td>
<td>Capital Request by Fund Source</td>
</tr>
<tr>
<td>2224_CAPITAL_EXPEND</td>
<td>Capital Request Expenditures</td>
</tr>
<tr>
<td>2224_CAP_IMPONOPBUD</td>
<td>Capital Request - Impact on Operating Budget</td>
</tr>
</tbody>
</table>

The Capital Budget Request forms will include the amounts, fiscal years, fund sources and expenditure codes or cost elements required by the 2022-2024 Budget Instructions. These three forms will be completed at the appropriation unit level and include all the individual projects associated with the appropriation unit.

Typically, the most common changes agencies will need to make in these forms include the following:

- Capital Projects transferred from the Six-Year Capital Plan that should not be included as part of the budget request. For those projects, all of the financial data in all three forms must be changed to $0 (zero).
- Changing the amount for a Capital Project.
- Changing the Fund source for a Capital Project.
- Changing the fiscal year requested for a Capital Project.
- Adding a Capital Project or Lease.
Section 4.2 Creating a Capital Budget Request

This section includes an overview of the Capital Budget Request creation process along with the detailed instructions to create a Capital Budget Request required by the 2022-2024 Budget Instructions.

Section 4.2.1 Process Overview

The following is a summarized description of the steps involved in the process to create a Capital Budget Request in order to help users understand the flow of the detailed instructions:

1) Login to KBUD and navigate to the Project Maintenance table to update the information for one of the projects
2) Navigate to the Budget Layout Selection Page to choose the 2224_CAPITAL_FUND, Capital Request by Fund Source form
3) Create an instance of the 2224_CAPITAL_FUND form
4) Manually enter the appropriate budget lines (data) into the budget lines tab
5) Repeat this process for the 2224_CAPITAL_EXPEND and 2224_CAPITAL_IMPONOBUD forms if they apply to the project
6) Login to KBUD Reports (EBI) and navigate to the 22-24 Biennium folder to run and/or print the Capital budget request reports necessary for official budget submission to GOPM
   - CBR01 Project Summary Report
   - CBR-02, Capital Project Record
   - CBR-03, Capital Equipment Record
   - CBR-04, Capital Information Technology System Record
   - CBR-05, Real Property Lease Record
Section 4.2.2 Login to KBUD and Navigate to the Project Maintenance Table

- Open your browser and enter the URL for the KBUD application into the browser’s address bar: https://kbud.ky.gov/.

- Enter your KBUD user ID and password.

- From the Home page, follow these steps:
  - Click the on the Project Maintenance tile. The Project Maintenance page will appear.
From the Project Maintenance page, you can search and view all the Project codes by leaving the Code and Name textboxes empty and clicking the Search button. This will bring back all the Projects available based on your security. You can also narrow your search for a specific Project by following these steps:

1. Enter the Project’s Code in the Code textbox
2. Click the Search button to search for the Project (If no records are returned, you need to redefine your search)
3. Check the 3 dot menu and select the Edit function
4. The Edit Project screen will appear
5. Update any of the Project information not greyed out
6. Click either the Save or the Save & Close button

- Repeat the previous process to update each of the agency’s Projects.
The Project Maintenance table contains numerous fields necessary to complete the following reports:

- CBR-01, Project Summary Record
- CBR-02, Capital Project Record
- CBR-03, Capital Equipment Record
- CBR-04, Capital Information Technology System Record
- CBR-05, Real Property Lease Record

Here is some additional guidance to assist in filling out Project Maintenance page.

<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the Project Title (Populated by the 6-Year Plan data)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Type</td>
<td>Construction, Equipment, Information Technology System, or Lease - Select the CBR form type. (Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Location (County)</td>
<td>Construction, Equipment, or Lease - Select the county in which the project will be located. (Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Reauthorization – Regular Capital Project</td>
<td>Construction or Information Technology System - Identify if this is a currently authorized project that is being requested for reauthorization and/or additional funding. Any project that has been appropriated by the General Assembly for two consecutive biennial budgets shall not be requested again as a Reauthorized project. It shall be requested as a new project which shall not rely on past appropriations. (Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>eMARS Project Number</td>
<td>Construction or Information Technology System - If the project is currently authorized and additional funding is requested, enter the eMARS Fund Code. (Not Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Project Cost</td>
<td>Construction or Information Technology System - If the project is currently authorized and additional funding is requested, enter the new Total Project Cost. (New Cost Not Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Project Type</td>
<td>Construction or Lease - Identify the project/lease type based on the definitions provided in the 2022-2024 Branch Budget Request Manual. (Not Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Reviewed by Dept. for Facilities and Support Services</td>
<td>Construction - Identify if the project has been reviewed by the Department for Facilities and Support Services. (Not Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Completion or Acquisition Date</td>
<td>Completion Date</td>
</tr>
<tr>
<td>Long Project Description</td>
<td>Acquisition Date</td>
</tr>
<tr>
<td>Short Project Description</td>
<td>Construction, Equipment, Information Technology System, or Lease – Enter a detailed description comparable to the detailed description and justification as required by the 6-Year Capital Plan (Populated by the 6-Year Plan data). For Real Property Leases, enter the Lease Features: Specialized Project Requirements and Relationship to Existing Space.</td>
</tr>
<tr>
<td>Priorities-Capital Budget Request - Cabinet</td>
<td>Construction, Equipment, Information Technology System, or Lease - Enter the cabinet roll-up priority or the Council on Postsecondary Education system-wide priorities for the Capital Budget Request. (Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Priorities-Capital Budget Request - Agency</td>
<td>Construction, Equipment, Information Technology System, or Lease - Enter the agency or university priority number for the Capital Budget Request. (Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Priorities-Six Year Capital Plan - Cabinet</td>
<td>Construction, Equipment, or Information Technology System - Enter the cabinet priority from the 6-Year Capital Plan. (Populated by the 6-Year Plan data)</td>
</tr>
<tr>
<td>Priorities-Six Year Capital Plan - Agency</td>
<td>Construction, Equipment, or Information Technology System - Enter the agency priority from the 6-Year Capital Plan. (Populated by the 6-Year Plan data)</td>
</tr>
</tbody>
</table>
Section 4.2.3 Navigate to the 2224_CAPITAL_FUND Form

- From the Home page, you can navigate to the KBUD forms by clicking the Formulate Budget Request tile. The Budget Layout Selection page will appear.

Home Page

Budget Layout Selection Page
From the Budget Layout Selection page, you will see all the KBUD forms that are available for your use. In this case, you want to choose the 2224_CAPITAL_FUND form by clicking on the corresponding link. The Select Budget Request page will appear.

Budget Layout Selection Page

Please keep in mind, the Select Budget Request page will display the instance of this specific form (2224_CAPITAL_FUND) you have created. A single form will be created for each appropriation unit which contains all its capital projects within it.

Select Budget Request Page (2224_CAPITAL_FUND Form)
From the Select Budget Request page, you can do all of the following functions:

1. Use the Create button to create a new instance of this specific budget form
2. Use the Search button to search for previous created forms
3. Use the View feature to only view (no editing) an existing instance of this specific form
4. Use the Edit feature to edit an existing instance of this specific form
5. Use the Delete feature to delete an existing instance of this specific form
6. Use the Copy feature to copy an existing instance of this specific form

Select Budget Request Page (2224_CAPITAL_FUND Forms)
Section 4.2.4  Creating the Capital Request by Fund Source Form

In this section, we will create a Capital Request by Fund Source Form using Program 445U_BILL_2224, Murray State University.

- From the Select Budget Request page, click the Create button. The Create Budget Request page will appear and allow you to create a new instance of the 2224_CAPITAL_FUND form.
From the Create Budget Request page, you will need to complete these steps:

1. Fill in the Name textbox
2. Fill in the Restricted Fund textbox with the Project code (Example – 445U_BILL_2224)
3. Click the Save button, and the Edit Budget Request Page (new form) with all its appropriate tabs will be created

Create Budget Request Page

Stage should always be set to 1 by the agencies. GOPM will move the forms to Stage 2 when needed.

Edit Budget Request Page
Section 4.2.5 Entering Budget Data in the 2224_CAPITAL_FUND Form

- Once the new form is created, you will be able to access the Budget Lines tab within the form. You can follow these steps to review and manually adjust line information if necessary.
  1. Click on the Budget Lines tab (NOTE: You can now see the Preloaded information populated on your form in the 23FLREQCP and 24FLREQCP columns)
  2. Click on the FY 22-23 and FY 23-24s cell to change the data (NOTE: You cannot directly change the amounts in the 23FLREQCP and 24FLREQCP cells. Enter the adjusted amounts and click the Save button)
  3. The adjustment amounts are now reflected in the totals for the 23FLREQCP and 24FLREQCP columns. Continue this process until you have updated all of the Fund/Project combinations. Once you have finished, click the Save or the Save & Close button

New 2224_CAPITAL_FUND Form for 445U_BILL_2224
Section 4.2.6 Creating and Entering Budget Data in the 2224_CAPITAL_EXPEND Form

- Use the same process described in the previous section to create a new instance of a 2224_CAPITAL_EXPEND form for Program 445U_BILL_2224, Murray State University. Once you create the form, you will be able to view the preloaded detailed expenditure budget objects for each project (NOTE: It is important to understand, the total amount of all the detailed expenditure budget objects for a project on this form should equal the total Expenditures by Fund for that same project entered on the previous Capital Fund form). You can follow these steps to review and manually adjust the budget line information if necessary.
  1. Click on the Budget Lines tab (NOTE: You can now see the Preloaded information populated on your form in the 23FLREQCP and 24FLREQCP columns)
  2. Click on the FY 22-23 and FY 23-24 cells to change the data. You cannot directly change the amounts in the 23FLREQCP and 24FLREQCP cells. Enter the adjusted amounts and click the Save button
  3. The adjustment amounts are now reflected in the totals for the 23FLREQCP and 24FLREQCP columns. Continue this process until you have updated all of the Budget Object/Project combinations. Once you have finished, click the Save or the Save & Close button

New 2224_CAPITAL_EXPEND Form for 445U_BILL_2224
Section 4.2.7 Creating and Entering Budget Data in the 2224_CAP_IMPONOBUD Form

- Use the same process described in the previous section to create a new instance of a 2224_CAP_IMPONOBUD form for Program 455U_BILL_2224, Murray State University. Once you create the form, you will be able to view the preloaded five year projections for the Impact and Cost Elimination budget objects for each Fund/Budget Object/Project combination (NOTE: If the Capital Project did not have an impact on operating budget, it will not be preloaded to the form). You can follow these steps to review and manually adjust the budget line information if necessary.

1. Click on the Budget Lines tab (NOTE: You can now see the Preloaded information populated on your form in the IMPONOBUD1, IMPONOBUD2, IMPONOBUD3, IMPONOBUD4, and IMPONOBUD5 columns)

2. Click on the FY 1, FY 2, FY 3, FY 4, or FY 5 cells to change the data. You cannot directly change the amounts in the IMPONOBUD1, IMPONOBUD2, IMPONOBUD3, IMPONOBUD4, and IMPONOBUD5 cells. Enter the adjusted amounts and click the Save button.

3. The adjustment amounts are now reflected in the totals for IMPONOBUD1, IMPONOBUD2, IMPONOBUD3, IMPONOBUD4, and IMPONOBUD5 columns. Continue this process until you have updated all the Fund/Budget Object/Project combinations. Once you have finished, click the Save or the Save & Close button.

Once all the projects’ maintenance data have been updated and the Capital forms have been updated, the associated Project reports can be created and printed.
Section 4.2.8 Login to KBUD Reports (EBI) to Access Capital Reports

In this section, we will login to SAP’s Enterprise Business Intelligence Version 4.2 (EBI 4.2) which houses the KBUD Reports and navigate to the 22-24 Biennium folder to access the necessary budget request reports. Reference Section 5, KBUD Reports, for more in depth explanation of reports.

- Reports are the final output of the budget request process. It is important to understand that the data entered directly into the KBUD forms and Project Maintenance tables are used to populate KBUD reports.
In this scenario, we will run the CBR01 Project Summary Report for 455U_BILL_2022 to determine the Form Type (Construction, Equipment, Information Technology System, or Lease) for each project. Based on the results of this report, we can determine which other CBR reports are needed for this submission:

1. **CBR-02, Capital Project Record**
2. **CBR-03, Capital Equipment Record**
3. **CBR-04, Capital Information Technology System Record**
4. **CBR-05, Real Property Lease Record**

There are two ways to access the login webpage to EBI 4.1 which contains KBUD reports:

1. Either click on the EBI 4.2 tile located on the KBUD Home page to access the webpage, or open your web browser and enter the direct link to EBI 4.2 and paste it into the URL: [https://ebi42.ky.gov/BOE/BI/logonNoSso.jsp](https://ebi42.ky.gov/BOE/BI/logonNoSso.jsp)
2. Enter your eMARS User ID in the User Name textbox and your password
3. Click on the Log On button

- The Home tab is the entry point into the EBI application. Once in the application, navigate to the KBUD 2224 Agency Budget Preparation folders which contain all the reports necessary for your budget submission.
  1. Click the Documents tab
  2. Click on the Folders bar at the bottom of the page to access the Public Folders
  3. Expand all the Public Folders
  4. Open the 22-24 Biennium folder under the Agency Budget Preparation folder. The available reports will appear on the right side of the web page
In this scenario, we will run the CBR01 Project Summary Report for 445U_BILL_2022 to determine the Form Type (Construction, Equipment, Information Technology System, or Lease) for each project.

1. Double click on the CBR01 Report to open up the report
2. Click on Question Mark icon to ensure the parameter/variable text box is visible. This will allow you to enter the required parameter/variable
3. Enter the required parameter/variable into the Project Code text box. In this scenario, we will enter the Project code 445U_BILL_2022
4. Once the proper parameter/variable is entered, the Run icon will be enabled. Click the Run icon to run the report
5. If you want to print a paper copy, click the Printer icon and follow the prompts to export the report to a PDF format. Open the PDF report in Adobe Reader and use the print feature in Adobe Reader to print a paper copy

- After reviewing the CBR01 Project Summary Report for 445U_BILL_2224, it was determined that there were only Construction, and Equipment projects on the report. Therefore, only the following two additional reports need to be created for the Capital Budget Request.
  1. CBR-02, Capital Project Record
  2. CBR-03, Capital Equipment Record
In this scenario, we will run the CBR02 Capital Project Report for Capital Construction Project 455U22C002, Replace Residence Hall Domestic Water Piping. The CBR02 Report will need to be created for each of the Capital Construction projects.

1. Double click on the CBR02 Report to open up the report
2. Click on Question Mark icon to ensure the parameter/variable text box is visible. This will allow you to enter the required parameter/variable
3. Enter the required parameter/variable into the Project Code text box. In this scenario, we will enter the Project code 670K20C207
4. Once the proper parameter/variable is entered, the Run icon will be enabled. Click the Run icon to run the report
5. If you want to print a paper copy, click the Printer icon and follow the prompts to export the report to a PDF format. Open the PDF report in Adobe Reader and use the print feature in Adobe Reader to print a paper copy
In this scenario, we will run the CBR03 Capital Project Report for Capital Equipment Project 445U22C009, Broadcasting Education Laboratory Equipment. The CBR03 Report will need to be created for each of the Capital Equipment projects.

1. Double click on the CBR03 Report to open up the report
2. Click on Question Mark icon to ensure the parameter/variable text box is visible. This will allow you to enter the required parameter/variable
3. Enter the required parameter/variable into the Project Code text box. In this scenario, we will enter the Project code 445U22C009
4. Once the proper parameter/variable is entered, the Run icon will be enabled. Click the Run icon to run the report
5. If you want to print a paper copy, click the Printer icon and follow the prompts to export the report to a PDF format. Open the PDF report in Adobe Reader and use the print feature in Adobe Reader to print a paper copy

You should now have the understanding on how to use KBUD and EBI (KBUD Reports) to create the necessary electronic and paper copies of the Capital Budget Requests reports required for your budget submission.
Section 5 KBUD Reports

Section 5.1 Reports Overview
The budget request reports are the final output used by agencies to submit their formal budget request to GOPM. It is very important to understand the relationship between KBUD’s maintenance tables and forms to their associated reports. Knowing how to map KBUD data to reports will be extremely helpful for troubleshooting incorrect budget totals on reports. The illustration below should assist you in understanding these important relationships.
KBUD Reports are hosted in a Web-based application named Enterprise Business Intelligence (EBI) developed by the vendor SAP. KBUD uses EBI Version 4.2 as its platform. EBI is used to run pre-developed reports. To log into EBI, each user has to have a separate EBI account setup by KY’s Commonwealth Office of Technology (COT). Once an EBI account is established, users can request permission to access KBUD Reports by submitting a KBUD Security Form to the KBUDAdministrator@ky.gov.

- Link to KBUD Reports (EBI 4.2) - https://ebi42.ky.gov/BOE/BI/logonNoSso.jsp

Once logged into EBI, KBUD has several folders with hundreds of reports. Many of the folders are maintained for historical reasons, and most people will never have a need to access those older reports. KBUD reports are organized into two different folder structures: 1) Agency Budget Preparation, and 2) Agency Budget Execution.

- The Commonwealth has a formal budget preparation process that is accomplished prior to the new biennium and is referred to as Budget Preparation. Therefore, there are specific reports developed for this process. The Agency Budget Preparation folders are labeled with each specific Biennium. These folders house the reports necessary for each Agency to produce their Biennial Operating and Capital Budget Request.

- Once a biennial budget is enacted through KY’s legislative process, there is an official appropriation and allotment process required for each fiscal year. This is referred to as Budget Execution. To support Budget Execution, there are unique budget actions and reports required for each FY, so there is an associated FY folder which contains those reports. These reports are used at the beginning of the FY to submit the original allotments, and they are also used throughout the FY to perform appropriation and/or allotment modifications.
Section 5.2 Biennial Budget Preparation Reports Overview

There are many reports available for the biennial budget prep process, and it may be hard to understand their purpose if you do not understand their relationship to one another. Here are the most common operating budget reports.

- **A Reports** are referred to as the Baseline (BL) Reports and are associated with data entered on the A Forms in KBUD.
  - A1A2 Report is the summary report for baseline Source of Funds and Expenditures by Fund
  - A3 Expenditure Detail Report is the baseline expenditure report that provides detailed expenditures by object codes
  - A5 Personnel Summary Report is the baseline summary report for personnel totals and associated personnel costs by funds

- **B Reports** are referred to as the Additional Budget Request (ABR) Reports and are associated with data entered on the B Forms in KBUD.
  - B1B2 Report is the Summary Report for ABR Source of Funds and Expenditures by Fund
  - B3 Expenditure Detail Report is the ABR expenditure report that provides detailed expenditures by object codes
  - B5 Personnel Summary Report is the ABR summary report for personnel totals and associated personnel costs by funds

- **C Reports** are referred to as the Combined Reports because they include the baseline totals and the defined calculations from the A Forms and the totals for the Additional Budget Requests from the B Forms. Maybe an easy way to think of this is like a math equation (A + B = C) or (BL + ABR = C).
  - C1C2 Report is the summary rollup report for combined (Baseline & ABR) Source of Funds and Expenditures by Fund
  - C3 Expenditure Detail Report is the combined (Baseline & ABR) expenditure report that provides detailed expenditures by object codes
  - C5 Personnel Report is the combined (Baseline & ABR) summary report for personnel totals and associated personnel costs by funds
Another important consideration for budget preparation and submission is the Program Consolidation Levels, which is a hierarchical structure used to rollup up information into meaningful program levels. These contain the program codes used to build your budget.

Program Consolidation Levels

<table>
<thead>
<tr>
<th>Level Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Commonwealth of Kentucky</td>
</tr>
<tr>
<td>2</td>
<td>Branch of Government</td>
</tr>
<tr>
<td>3</td>
<td>Cabinet</td>
</tr>
<tr>
<td>4</td>
<td>Combined Appropriations</td>
</tr>
<tr>
<td>5</td>
<td>Appropriations</td>
</tr>
<tr>
<td>6</td>
<td>Allotments</td>
</tr>
<tr>
<td>7</td>
<td>Sub-Programs</td>
</tr>
<tr>
<td>8</td>
<td>Funding Units</td>
</tr>
</tbody>
</table>

Here is an example of six different levels of consolidation. Biennial budgets are required to be submitted at the Bill or Appropriation Unit Level. In this example below, the budget request would be submitted at the 552H_BILL level and would include the two programs under the bill level.

So if you were submitting a budget request for 552H_BILL, the actual report submission would involve submitting a full compliment of reports \((A + B + DC = C)\) for all three programs below, and the two lower levels should roll up to the BILL Level.
Section 5.3 Accessing EBI

- There are two ways to access the login webpage to EBI 4.2 which contains KBUD reports:
  1. Either click on the EBI 4.2 tile located on the KBUD Home page to access the webpage, or open your web browser and enter the direct link to EBI 4.2 and paste it into the URL textbox: https://ebi42.ky.gov/BOE/BI/logonNoSso.jsp
  2. Enter your eMARS User ID in the User Name textbox and your password
  3. Click on the Log On button
The Home tab is the entry point into the EBI application. Once in the application, navigate to the KBUD 2224 Agency Budget Preparation folders which contain all the reports necessary for your budget submission.

1. Click the Documents tab
2. Click on the Folders bar at the bottom of the page to access the Public Folders
3. Expand all the Public Folders
4. Open the 22-24 Biennium folder under the Agency Budget Preparation folder. The available reports will appear on the right side of the web page.
Section 5.4  Running Reports

- The easiest method to open a report is to double click on the title of the report.

- Most, if not all reports, require some type of parameter or variable to run the query. If the User Prompt Input textbox is not showing, click on the Question Mark Icon to display the User Prompt Input textbox.
If the Run icon is not enabled (greyed out), enter a value in the parameter/variable User Prompt Input textbox, and click out of the textbox. The Run icon should now be enabled.

The User Prompt Input textbox will accept any kind of parameter/variable (good or bad), so the Run icon being enabled is not an indication of whether the parameter/variable will work with the query. If you run the query and receive the error below, you have either entered a bad value and therefore no records were returned, or you entered a good value, and there were no records that matched your value. The best course of action is to redefine your query parameter by using the Advanced Search feature.
To use the Advanced Search Feature, follow these steps:

1. Click the Advanced icon
2. Enter a value in the Search box, using a wildcard may be helpful. In this case, I used 728* as the program code
3. Click the binoculars icon to perform your wildcard search
4. Select the best value from list returned
5. Click the Right arrow key to move the Record over to the selection box
6. Click the OK button to close the Search box and the selected value will be returned
7. Click the Run icon to run the report with new parameter/variable value

EBI also has a feature to allow multiple parameters/variables in a single User Prompt Input textbox. The multiple values need to be separated by semi-colons (Example: 728A_PG;728B_PG). This will run the report separately for both inputs. You can navigate to the second report by clicking on the page advance at the bottom right side of the screen.
Section 5.5 Printing Reports

- If you need to print a paper copy of the report, EBI cannot print to a local or network printer. To print a paper copy, use the Export tool and/or the Print feature to export the report to PDF. Once it is created as a PDF document, open up Adobe Reader and use the print feature within Reader to print to a local or network printer.