

2022-2024 KBUD Budget Preparation Refresher Training



Kentucky
UNBRIDLED SPIRIT™

KBUD Budget Prep Refresher Overview

1. KBUD Training Schedule
2. OSBD Budget Prep Contact Information
3. OSBD Website Resources
4. 2022-2024 KBUD Budget Preparation Manuals
5. KBUD Technical Information
6. KBUD Issues
7. KBUD Reporting (EBI) Issues
8. KBUD Features
9. Program Table Changes
10. History Change Process
11. Personnel Run Process/Schedule
12. Capital Budget Information
13. Formal Budget Submission/Schedule



KBUD Training Schedule

Budget Instructions Informational Meeting:

To be determined

KBUD Preparation Training Classes:

Refresher Classes – Virtual – Microsoft Teams

August 6 (Fri) – 1-2:30 pm

August 10 (Tue) – 10-11:30 am

New User /Other Classes – Virtual – Microsoft Teams

August 12 (Thu) – Capital ONLY Class

August 17 (Tue) – Boards

August 19 (Thu) – Universities (Includes Capital Budget)

August 23-24 (Mon & Tue) – New User (Includes Capital Budget)

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

Teams link will be sent out one day prior to the training start date



OSBD Budget Prep Contact Information

- **Budget-Related 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 or EBI technical questions should be referred to the KBUD Administrator**
 - Any features/functionality of the application, browser issues, KBUD and/or KBUD Reporting (EBI) errors, accessibility, security, password resets, etc.
 - Email – KBUDAdministrator@ky.gov
 - Phone – 502-564-1210



OSBD Website Resources

➤ OSBD Website

- Home Page: <http://osbd.ky.gov>

➤ 2224 Budget Prep Resources

<http://osbd.ky.gov/Pages/KBUD-Information.aspx>

- 2022-2024 Branch Budget Request Manual (Budget Instructions) ✓
- 2022-2024 KBUD Budget Preparation Manuals ✓
- Budget Request Templates (Post as they become available)
- Aids to Calculations (Post as they become available)
- History Change Form and Instructions ✓
- Things to do before Personnel Runs Arrive ✓



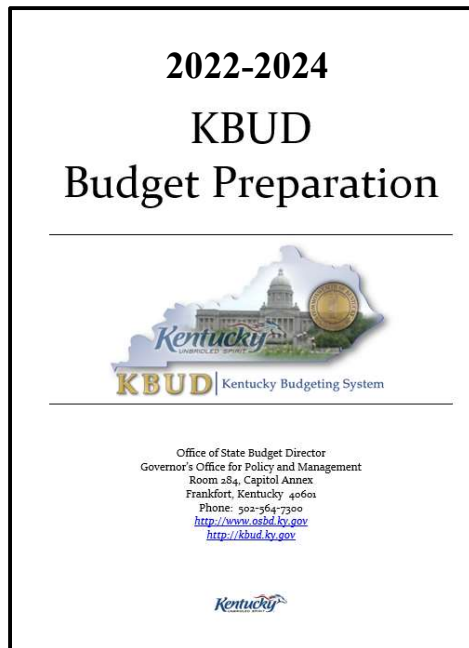
2022-2024 KBUD Budget Preparation Manuals

➤ 2022-2024 KBUD Budget Preparation Manuals

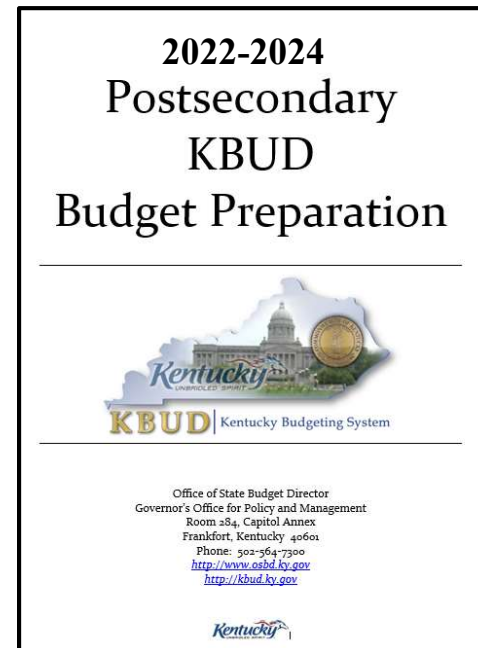
- Includes summary of all processes and detailed step-by-step instructions with screenshots from latest version of KBUD (4.2)
- OSBD Website & email link to all KBUD users

<http://osbd.ky.gov/Pages/KBUD-Information.aspx>

State Agencies



Universities Only

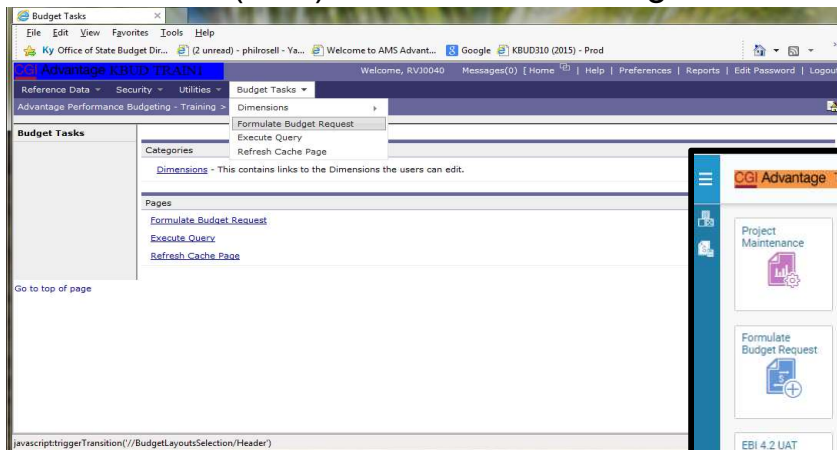


KBUD Technical Information

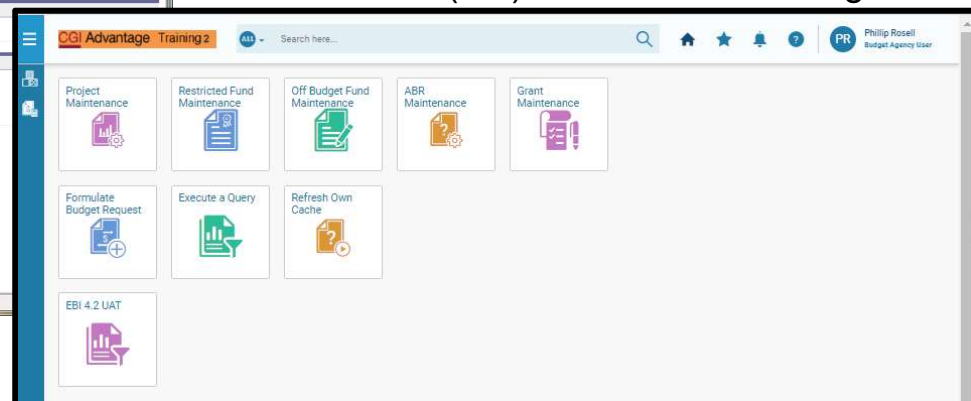
➤ Upgraded from KBUD 3.11 to KBUD 4.2

- Launch date was May 10, 2021
- Complete redesign of the user interface; role-based approach; customizable features on forms and searches
- Strategy was to upgrade KBUD prior to FY22 Budget Execution, so agencies would have hands-on experience prior to the 2224 Budget Preparation process

Older version (3.11) of KBUD Home Page



Newer Version (4.2) of KBUD Home Page

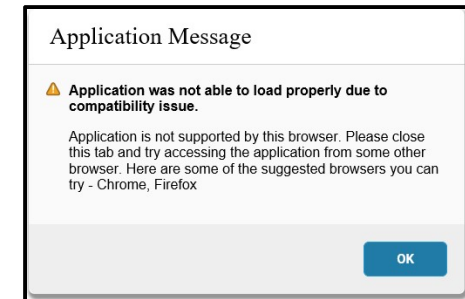


KBUD Technical Information

➤ Technical Requirements

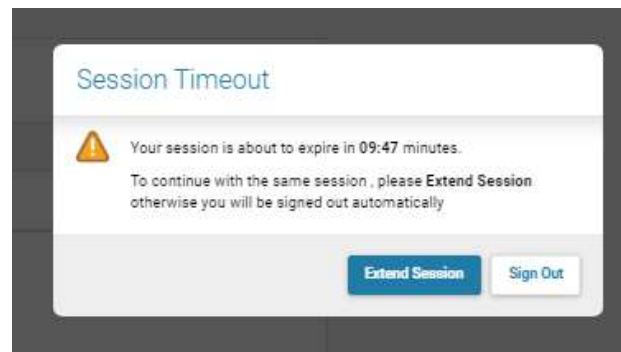
- Browser Compatibility
 - ✓ Google Chrome
 - ✓ Microsoft Edge
 - ✓ Mozilla Firefox
- No longer compatible with Internet Explorer 11

I.E. 11 Message



➤ Session Timeout Feature

- If KBUD detects no activity within a 30-minute interval, a Session Timeout warning will appear and a 10 minutes countdown will begin before it automatically logs you out.
WARNING: If the user takes no action or clicks the Sign Out button and the data entries have not been saved, the budget data will be cleared and the application will close, which means the data is lost and cannot be recovered.



KBUD Issues

➤ Agency Accessibility Issues

- Postsecondary Education cannot access KBUD or EBI directly because of the state's firewall
 - Need to establish a Citrix account through CPE Technical Support (cpetech.support@ky.gov)
- Other agencies outside the state's firewall
 - Need to establish VPN accounts through COT

➤ User Accounts Locked

- Users are given 3 grace logins to change the password before the User ID is inactivated
 - Self-Generated Password Reset will now work if the account is inactivated
- If your User ID is inactivated, you can either use the self-reset or contact the KBUD Administrator (KBUDAdministrator@ky.gov) to have the account reactivated

KBUD Issues

➤ Forms Locked

- Higher rates of locked forms since the upgrade to 4.0
 - If there is no session activity in 30 minutes, KBUD will automatically log you out even if you are in the form
 - User navigates away from the form without saving the changes
 - User closes the browser instead of closing the form properly
 - Two people are attempting to modify the same form at the same time (2nd user will get the message)
- If your form is locked, you will need to contact the KBUD Administrator (KBUDAdministrator@ky.gov) and provide the form's Request #

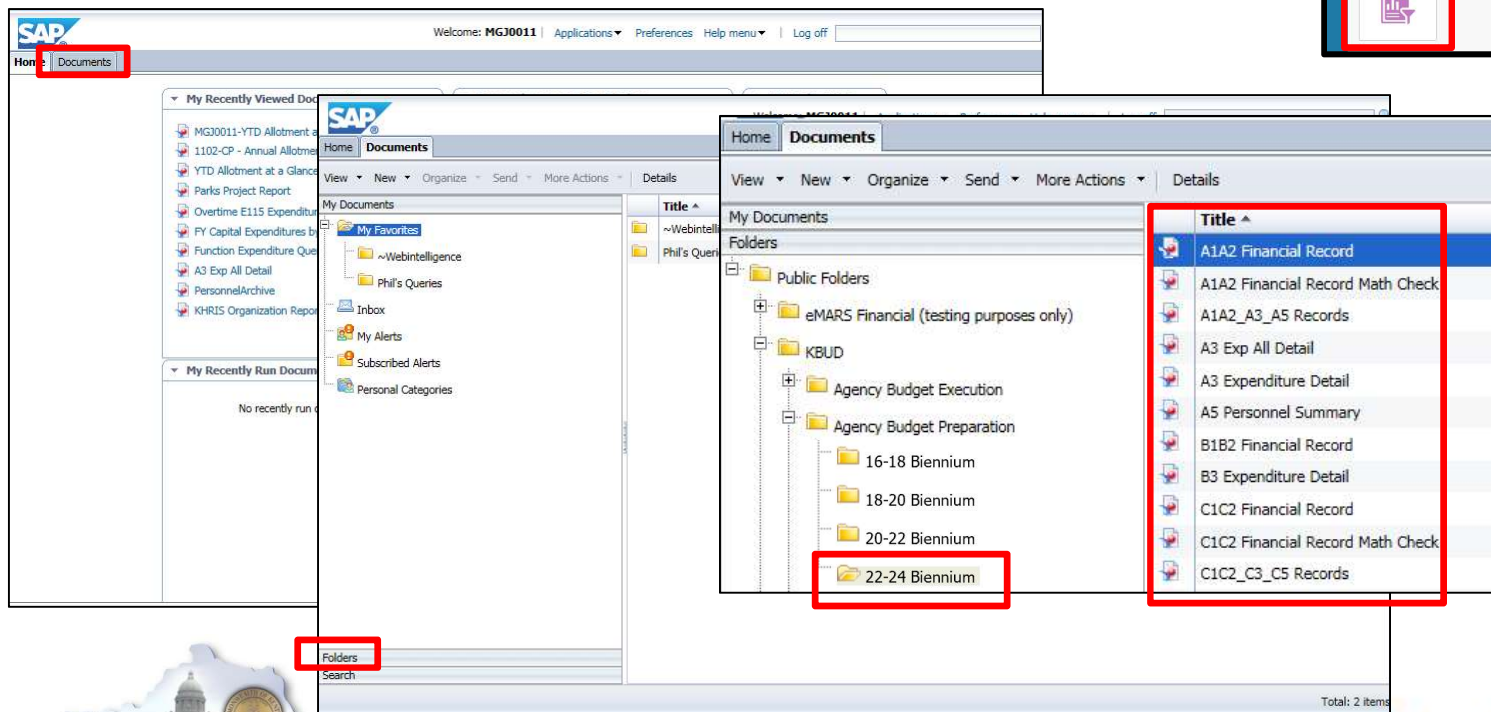
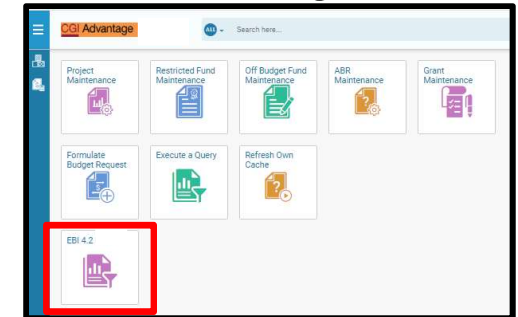
➤ Maintenance Table Issue (ABRs, Grants, Projects, Restricted Funds, Off Budget Funds)

- After modifying and saving a record (record 1), user will attempt to select and open a different record (record 2) to modify, and record 1 will reopen instead of opening record 2

KBUD Reporting (EBI) Issues

➤ Enterprise Business Intelligence (4.2)

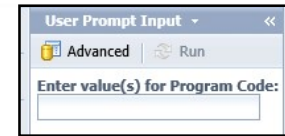
- Access EBI through the Report tile on your KBUD Home Page or
- Access EBI directly through the Web link
<https://ebi42.ky.gov/BOE/BI/logonNoSso.jsp>
- Navigate to KBUD's 22-24 Biennium Folder



KBUD Reporting (EBI) Issues

➤ KBUD Reporting

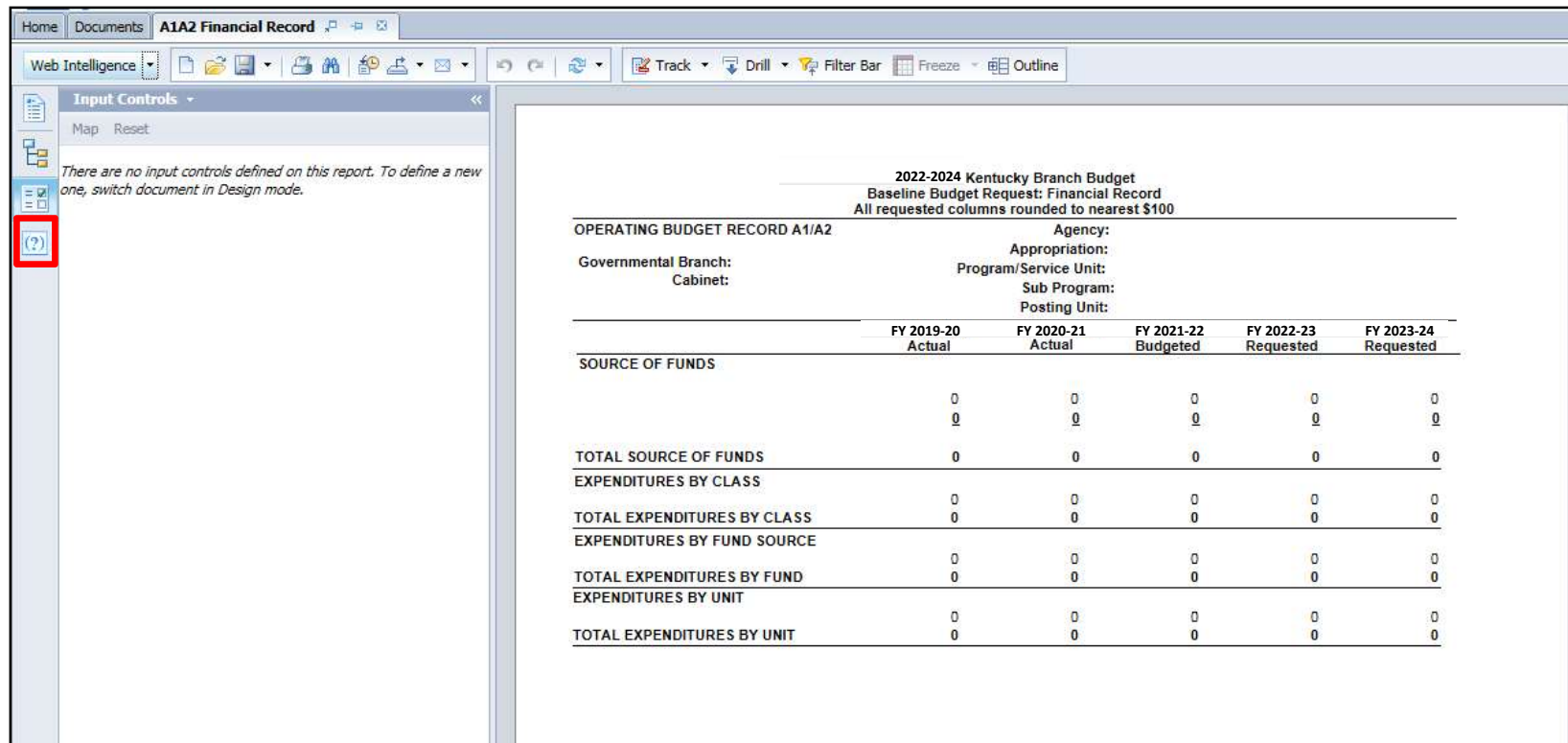
- **Problem:** Parameter/Variable Input Textbox is not visible
- **Solution:** Click the User Prompt Icon 



User Prompt Input

Advanced Run

Enter value(s) for Program Code:



The screenshot shows the KBUD Reporting (EBI) interface. On the left, the 'Input Controls' pane is visible, showing a message: 'There are no input controls defined on this report. To define a new one, switch document in Design mode.' A red box highlights the 'User Prompt Icon' (a question mark in a square) in the 'Input Controls' pane. The main area displays a financial record for the '2022-2024 Kentucky Branch Budget'.

2022-2024 Kentucky Branch Budget
Baseline Budget Request: Financial Record
All requested columns rounded to nearest \$100

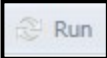

OPERATING BUDGET RECORD A1/A2

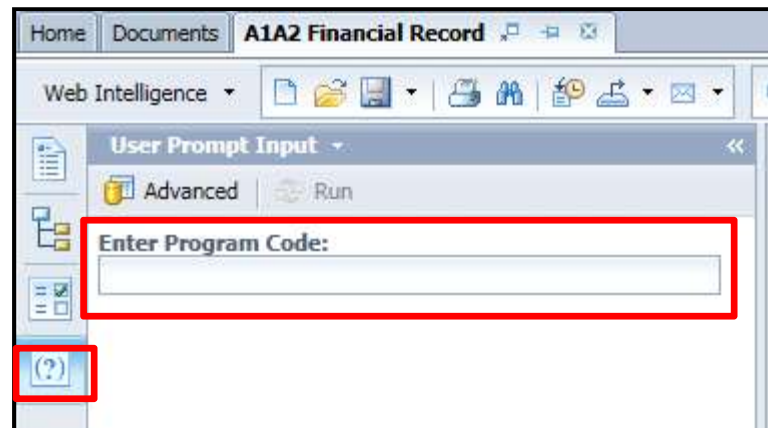
Agency:
Appropriation:
Governmental Branch: Program/Service Unit:
Cabinet: Sub Program:
Posting Unit:

	FY 2019-20 Actual	FY 2020-21 Actual	FY 2021-22 Budgeted	FY 2022-23 Requested	FY 2023-24 Requested
SOURCE OF FUNDS	0	0	0	0	0
	0	0	0	0	0
TOTAL SOURCE OF FUNDS	0	0	0	0	0
EXPENDITURES BY CLASS	0	0	0	0	0
TOTAL EXPENDITURES BY CLASS	0	0	0	0	0
EXPENDITURES BY FUND SOURCE	0	0	0	0	0
TOTAL EXPENDITURES BY FUND	0	0	0	0	0
EXPENDITURES BY UNIT	0	0	0	0	0
TOTAL EXPENDITURES BY UNIT	0	0	0	0	0

KBUD Reporting (EBI) Issues

➤ KBUD Reporting

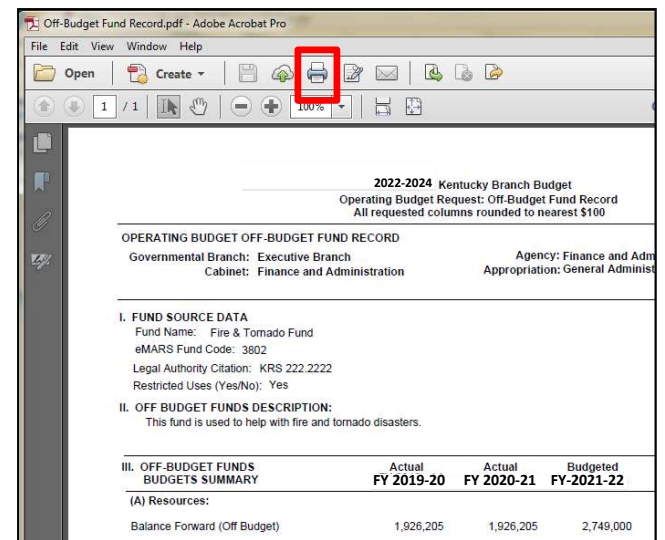
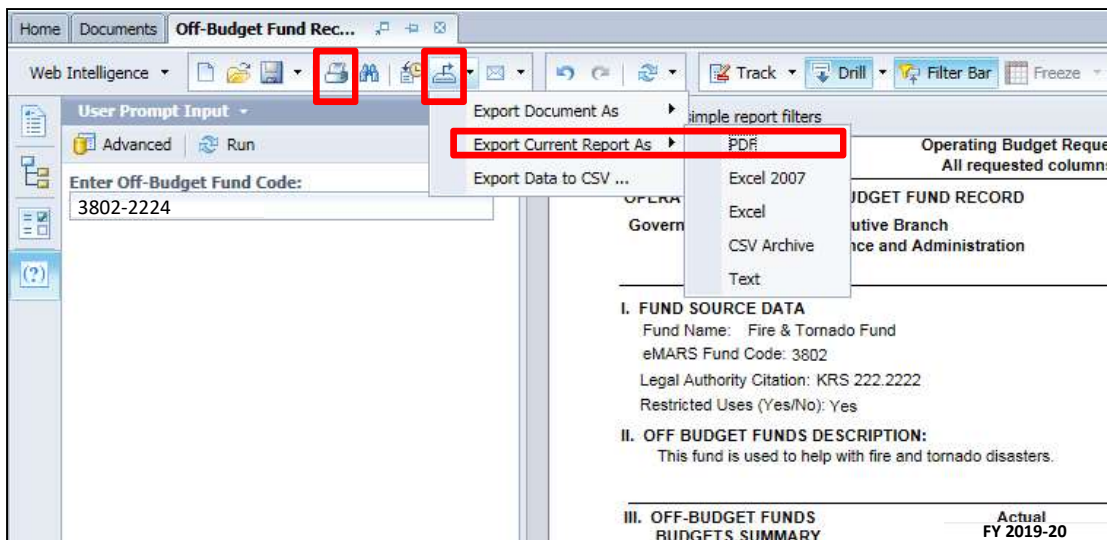
- **Problem:** Run Icon  is not enabled (greyed out)
- **Solution:** Click the User Prompt Icon  and enter a Value in the text box



KBUD Reporting (EBI) Issues

➤ KBUD Reporting

- **Problem:** Cannot print a paper copy of a report directly from EBI
- **Solution:** You cannot print 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/Acrobat and print from the Adobe application



KBUD Features

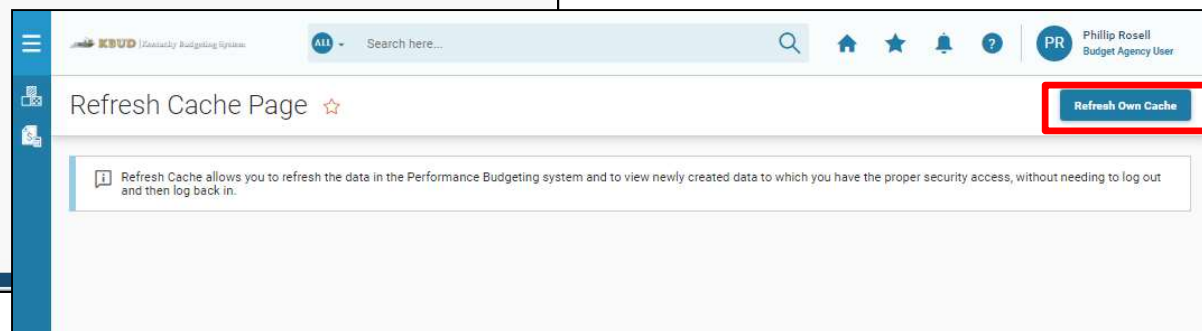
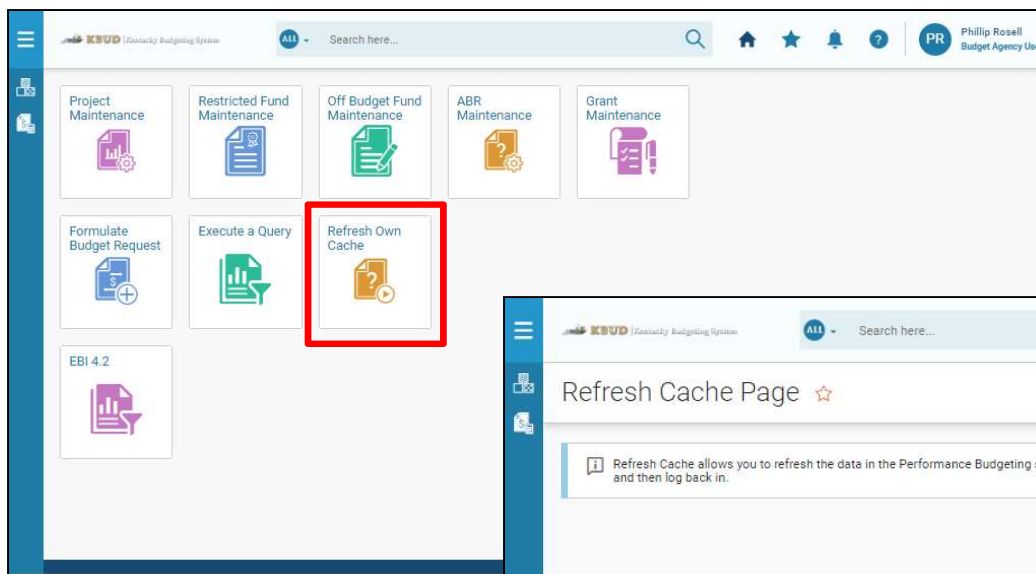
- **Using Excel Files is a convenient method to upload multiple lines of budget data within a form versus manually entering budget data line by line**
 - KBUD's import feature will not work unless the Excel file is formatted with the correct headers
 - Navigate to the desired Form/Tab and add a blank budget line
 - Use the Export feature to create an 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 a leading apostrophe, '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

1 of 1: Error [BF22005]: null - Unable to Import. Number, order, or names of columns in the file are incorrect.

KBUD Features

➤ Refresh Cache Page

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



Program Table Changes

- Any requests for updates to the Program Table should be made as soon as possible to your OSBD Policy & Budget analyst for review and approval
- _PGs/_SPs, Function, and Function Type Codes are listed on the 2224 Full Program Table for the purpose of displaying History on the on the A1A2 Financial Record and C1C2 Financial Record report
- Changes to the Full Program Table can effect History, so ensure the program table is correct prior to making History changes
- No chart of account element is ever deleted from the Full Program Table, so please do not ask to delete any old programs, function types, or functions

2224 Example

- 129C_PG - Air Quality - Program -	_PG or _SP (Balance Forwards)
129C - Air Quality - Type -	Function Type (All other Sources of Funds)
BC00 - DAQ Division of Air Quality - Program -	Functions (Expenditures)
BCC0 - DAQ Air Emissions Fees - Program -	
590C - Division of Air Quality - Type -	
BC00 - Division for Air Quality - Program -	
BCC0 - Air Emissions Fees - Program -	

History Change Process

➤ FY20 & FY21 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 2224 Historical Change Request Form (Excel Spreadsheet) and the newly revised History Change Instructions
<http://osbd.ky.gov/Pages/KBUD-Information.aspx>
3. **Highly recommend** agencies to start with history changes as they begin their 2224 budget preparation
4. Process is described in the 2224 KBUD Budget Preparation Manual – Section 8 History Changes

History Change Process

➤ Common 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
- Source of funds and expenditure changes due to reorganizations
- The need to spread a Restricted or Federal fund's Balance Forward to several programs/subprograms since the entire 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 (Personal Services Exp Reimb/Distr) or E169 (Indirect Personnel Costs) 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
- Expenditures do not match the correct source of funds and need to move to a different program

Capital Budget Information

➤ Capital Project Data from Six Year Plan

- The Capital Project information was preloaded into KBUD from the Capital Planning system (2022-2028 Capital Projects)
- KBUD used Version 3 data from the Capital Planning System which corresponds to June 29, 2021
- If agencies made updates (change amounts or added new projects) to projects in the Capital Planning System after June 29, 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 should be available early September

➤ KBUD 2224 Budget Prep Forms will be available in late August

- Maintenance 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 2224 Capital Reports with amounts are available
- Capital Forms are also currently available
- FY20 and FY21 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
- Final version of budget request submitted in a **searchable** PDF format

➤ Schedule

- Budget Requests due to OSBD/LRC by November 1

Questions ?

