

# **MBARS EPP Training Manual**

**Office of Budget and Program Planning  
February 14-15, 2008**

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## Logging on to MBARS

- ✓ MBARS is accessed by logging in SABHRS
- ✓ Click on MBARS/Citrix/Doc Dir/Mgr Rpts
- ✓ Double click on the MBARS logo
- ✓ If you are having technical difficulties or need a password reset, contact the MBARS Helpdesk at 5795.

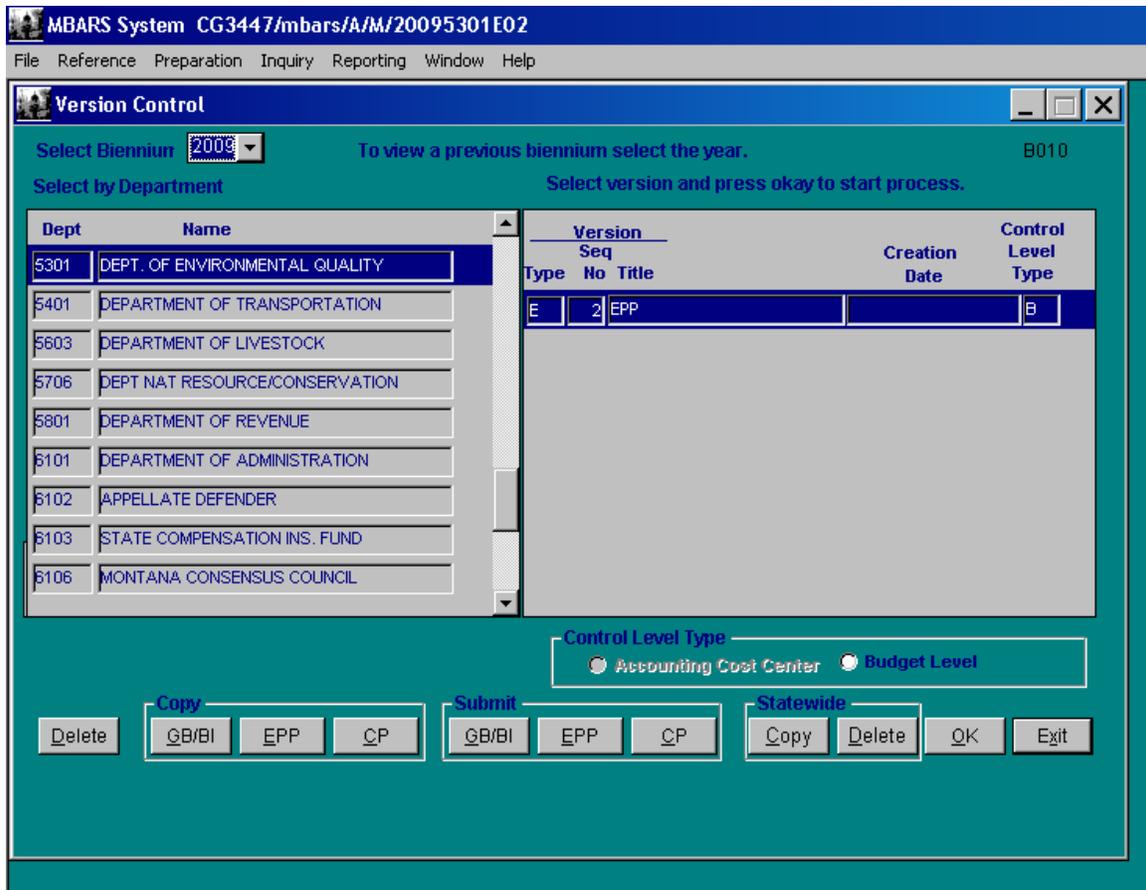
To logon to MBARS:

- Enter your User ID and Password. Click the OK button.
- To change your password, click on File/Change Password.

Select a Budget Version:

The Version Control screen allows a user to select the data they want to view or work on in all subsequent screens. MBARS automatically selects the most recent version a user worked in. To select another version:

- Select File on the Main Menu option bar.
- Click on Version Control. The Version Control screen will appear.



MBARS System CG3447/mbars/A/M/20095301E02

File Reference Preparation Inquiry Reporting Window Help

**Version Control**

Select Biennium: 2009 To view a previous biennium select the year. B010

Select by Department Select version and press okay to start process.

Dept	Name	Version Seq	Type	No	Title	Creation Date	Control Level Type
5301	DEPT. OF ENVIRONMENTAL QUALITY		E	2	EPP		B

Control Level Type:  Accounting Cost Center  Budget Level

Copy: Delete GB/BI EPP CP Submit: GB/BI EPP CP Statewide: Copy Delete OK Exit

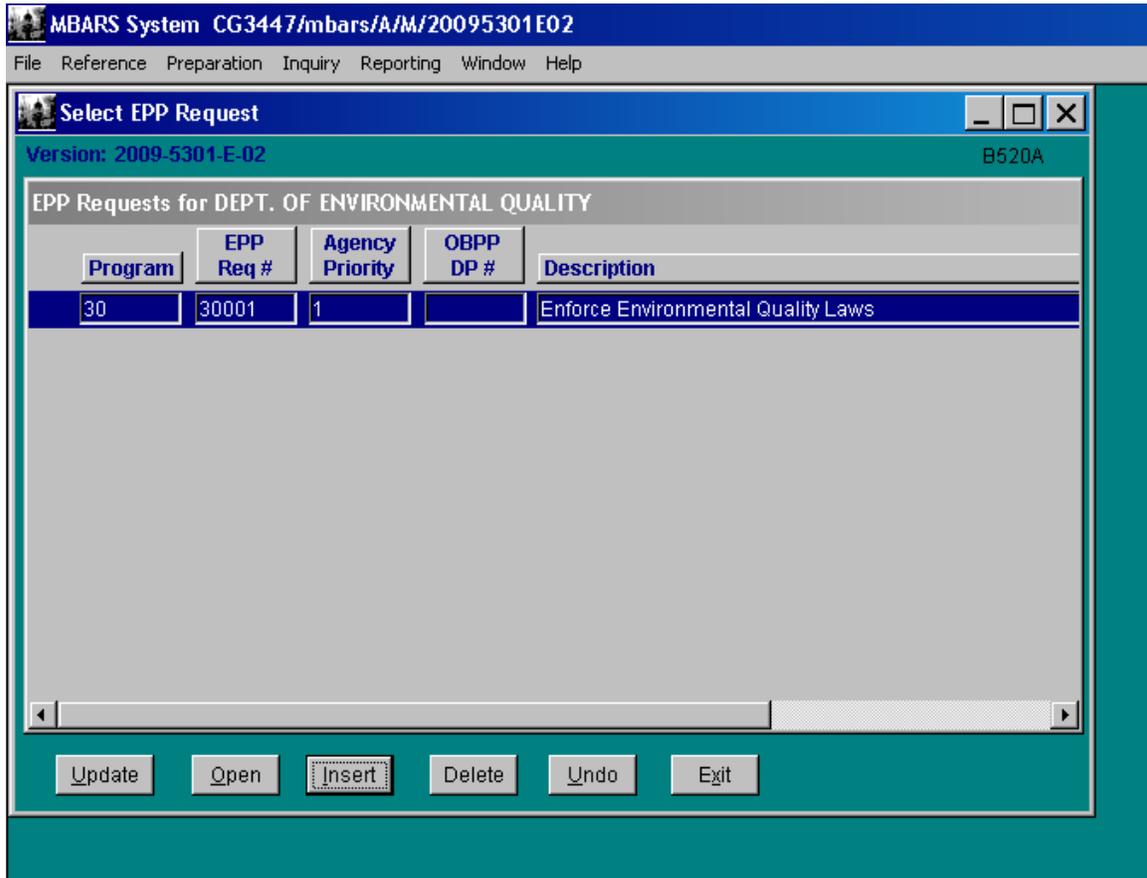
- The biennium defaults to the current biennium. If you wish to view a previous biennium, select it from the “Select Biennium” drop down list.

- Select the **E 2** version for your agency by either double clicking or clicking once on the version and clicking OK on the bottom right of the screen (E 1 for MUS).

## Go to the EPP Main Screen

- PATH: Preparation/Capital Projects and EPP/EPP

The Main EPP screen allows the user to select an EPP item or insert a new request.



- The Select EPP Request screen will appear.
  - ✓ To open an existing request, highlight the request and click the Open button at the bottom of the screen or double click on the request. Once you have established an EPP Request, the identifying information will appear at the top of each subsequent screen.
  - ✓ To create a new EPP item, click on insert. The system will automatically go to the Request Details screen.
  - ✓ By clicking on any of the column headings, you can sort the list. A single click will sort the data into ascending sequence. A double click will sort the data into descending sequence.

## EPP Request Details Screen

The EPP request screen captures descriptive information to begin the task of building an EPP request.

- Click on the Reporting Level Box to assign the EPP request to a program (RL 2).
  - ✓ Select the appropriate program reporting level from the drop down list.

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File Reference Preparation Inquiry Reporting Window Help

**EPP Request Details**

Reporting Level: 5301.30 Agency: 5301 DEPT. OF ENVIRONMENTAL QUALITY B520  
Program: 30 ENFORCEMENT DIVISION  
Version: 2009-5301-E-02

EPP Request Number 30001 Agency Priority 1 Request Date 02/13/2006  
Agency Contact Amy Sassano Phone 444-0619

**EPP Request Name**  
Enforce Environmental Quality Laws

Budget Level  Present Law  New Proposal  
Bill Number (dropdown) DP Category None (dropdown)  
Special Considerations None (dropdown)

**Other Agencies involved in this EPP Request**  
Add

Update Undo Exit Justification Resources  
Legislation OBPP

- You will notice that the agency name, agency number, program name, and program number will appear.
- **Use the TAB key or click on each field with your mouse to move between fields on the screen.** Pushing the enter key is the same as clicking the update button. Use the Shift/TAB keys to return to the previous field.
  - Enter the EPP Request number (agency choice-unique number).
  - Enter the Agency Priority number – this number should be UNIQUE FOR THE AGENCY . This number can be entered now or later.
  - Enter the Request Date. (MBARS will format)
  - Enter the Agency Contact and telephone number.
  - Enter the EPP Request Name – clearly state the purpose of the request and this name should be UNIQUE FOR THE PROGRAM. (40 character limit)
  - Indicate whether the proposal is a New Proposal (NP) or a Present Law (PL) Adjustment. (See EPP Instructions for NP and PL definitions)
  - Select the appropriate Budget Category (Bill Number).

- Select any appropriate special considerations (generally None).
- Select the DP Category (currently the only option is 'None')
- CLICK UPDATE to save your work.

## **Add Related Agency Requests**

Use this panel to identify EPP items of other agencies that are related to this EPP request. If applicable:

- Click on the ADD button in the lower right hand corner of the EPP Request Details screen if there is a related agency for the request. The Add Related Agency Request screen will appear.
- Click on the Insert button at the bottom of the screen.

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File Reference Preparation Inquiry Reporting Window Help

**Add Related Agency Requests**

Version: 2009-5301-E-02 B520B  
 Agency: DEPT. OF ENVIRONMENTAL QUALITY Request #: 30001  
 Program: ENFORCEMENT DIVISION DP #:  
 Name: Enforce Environmental Quality Laws

Agency	Name	EPP Req. No.	DP No.	Request Description
5706	DEPT NAT RESOURCE/CONSERVATIO	21023		Work with DEQ on Enforcing Envi

Update Insert Delete Undo Exit

- Select the appropriate agency from the drop down list.
- Select the appropriate agency EPP number from the drop down list.
- You may use the Insert button at the bottom of the screen to add as many agencies as needed.
- CLICK UPDATE to save your work.
- Click Exit to return to the EPP Request details screen.

## EPP Request Justification Screen

This screen captures narrative to describe and justify the EPP Request.

- Click on the Justification button at the bottom of the EPP Request Details screen. The EPP Request Justification screen will be activated.

MBARS System CG3447/mbars/A/M/20095301E02

File Reference Preparation Inquiry Reporting Window Help

**EPP Request Justification**

Version: 2009-5301-E-02 B521  
Agency: DEPT. OF ENVIRONMENTAL QUALITY Request #: 30001  
Program: ENFORCEMENT DIVISION DP #:  
Name: Enforce Environmental Quality Laws

**EPP Request Description and Justification**

This request is for \$35,000 general fund and 1.00 FTE each year of the biennium to enforce the environmental la

Exit

- Double click in the narrative box to bring up the expanded text box.
  - ✓ The EPP Request Description and Justification box will be copied forward for use in describing the Decision Package for approved and pending items.
  - ✓ Request descriptions should clearly and concisely describe and justify the request using the style sheet supplied by OBPP.
  - ✓ When you see an expanded text box, spell check, copy and paste buttons appear in the upper right hand corner of the screen. Use the spell check button on the narrative box to spell check its contents. Use the copy and paste buttons to retrieve text already prepared elsewhere or use the right mouse button. Bullet points, indentation, italic and bold are not functional in the narrative boxes.
  - ✓ If you need a blank line between paragraphs, use the Ctrl/Enter sequence twice. The first time will advance you to the line beyond the first paragraph and the second time will create a blank line.
- CLICK UPDATE to save your work.
- Click Exit to return to the EPP Request Details screen.

## EPP Request Resource Requirements Screen

The screens capture the expenditure budget and funding for a request.

- Click on the Resources button at the bottom of the EPP Request Details screen. The EPP Request Resource Requirements screen will appear.

### 1st Level Costs Panel

- Click on the Insert button at the bottom of the screen to insert a line of first level objects. Insert as many lines as needed to describe the request. Select the appropriate object line. The account values indicate the unallocated object for each first level account category.
  - ✓ Select an account and enter the appropriate dollar amounts for YR1 and YR2. The system will format your entry to indicate dollars.
  - ✓ Repeat for additional accounts if needed. Total costs will be calculated by the system.
  - ✓ If FTE are being requested, the system will automatically populate account "1099" and the Total FTE Fields from the FTE Details screen. If other personal services items such as overtime, differential pay, per diem, etc. are being requested, record these costs in account "1098".
  - ✓ When approved and pending EPP requests are copied forward into the August budget version, all accounts except "1099" will be posted into decision packages. This is because MBARS will calculate position costs into the correct accounts for FTE at that time. All other objects will be carried forward in the unallocated accounts and agencies will be required to allocate these costs to third level accounts.

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File Reference Preparation Inquiry Reporting Window Help

**EPP Request Resource Requirements**

Version: 2009-5301-E-02 B522  
Agency: DEPT. OF ENVIRONMENTAL QUALITY Request #: 30001  
Program: ENFORCEMENT DIVISION DP #:  
Name: Enforce Environmental Quality Laws

1st Level Costs Funding Funding Notes

Proposed First Level Budget

	2008	2009
Total FTE	1.00	1.00

Account	Amount	Amount
61099	\$34,771	\$34,771
<b>Total Costs</b>	\$34,771	\$34,771
<b>Total Funding</b>	\$34,771	\$34,771

Update Insert Delete Undo Exit Revenue and FTE Impacts

## Funding Panel

- Click on the Funding tab. The Funding panel will become active.
- Click on the Insert button at the bottom of the screen.

MBARS System CG3447/mbars/A/M/20095301E02

File Reference Preparation Inquiry Reporting Window Help

**EPP Request Resource Requirements**

Version: 2009-5301-E-02 B522  
Agency: DEPT. OF ENVIRONMENTAL QUALITY Request #: 30001  
Program: ENFORCEMENT DIVISION DP #:  
Name: Enforce Environmental Quality Laws

1st Level Costs **Funding** Funding Notes

Fund Number	Name	Amounts Requested		Proposed Funding Splits	
		2008	2009	2008	2009
01100	GENERAL FUND	\$34,771	\$34,771	100.00%	100.00%
<b>Total Funding</b>		\$34,771	\$34,771	100.00%	100.00%
<b>Total Costs</b>		\$34,771	\$34,771		

Update Insert Delete Undo Exit Revenue and FTE Impacts

- Select the appropriate fund from the drop down list. You will see the fund name appear.
- Enter the appropriate amount to be funded for each year as needed so that total costs equal total funding.
- CLICK UPDATE to save your work.
- The proposed funding percentages will be calculated by the system. The system will also calculate the Total Funding and Total Funding Splits. The Total Expenditure amounts are also displayed for your reference.

## Funding Notes

- Click on the Funding Notes tab. The Funding Notes panel will become active.
  - ✓ This panel is provided to capture federal maintenance of effort amounts, federal minimum matching rates and or any other funding restrictions or requirements for the applicable funds.

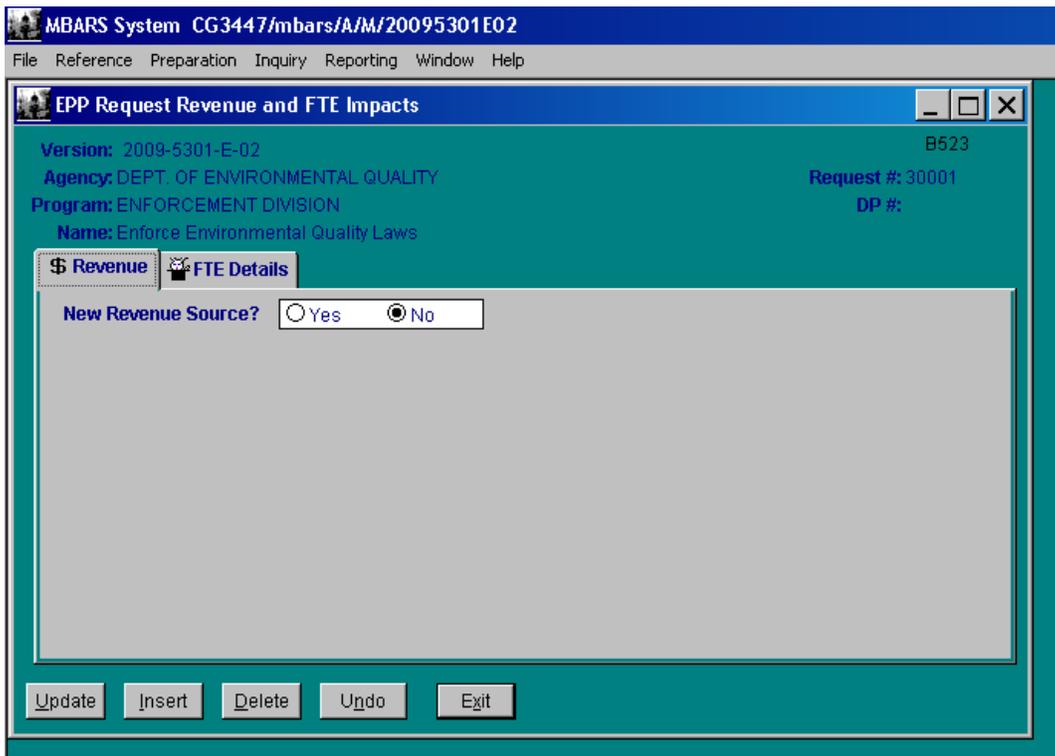
- Complete any sections of the Funding Notes panel as appropriate.
- CLICK UPDATE to save your work.

### **EPP Request Revenue and FTE Impacts Screen**

- From any tab on the EPP Request Resource Requirements screen, click on the Revenue and FTE Impacts button at the bottom of the screen. The Revenue and FTE Impacts tabs will appear.

#### **Revenue Panel**

- This panel will capture information about new sources of revenue. For new sources of revenue you will be asked to identify the collecting agency, fund, revenue account codes, and the corresponding anticipated revenue amounts for YR1 and YR2. Drop down lists will be provided for valid collecting agencies, funds, and revenue accounts.
- Total revenue amounts will be calculated for both years by the system.



### **FTE Details Panel**

- Click on the FTE Details tab. The FTE Details panel will become active.
- This screen will be used to provide the FTE summary information on the first level costs panel for any FTE requested. You are asked to provide a minimum of information, just enough to facilitate costing personal services amounts. FTE and dollar amounts will post to the 1<sup>st</sup> level costs screen.

MBARS System CG3447/mbars/A/M/20095301E02

File Reference Preparation Inquiry Reporting Window Help

**EPP Request Revenue and FTE Impacts**

Version: 2009-5301-E-02 B523  
 Agency: DEPT. OF ENVIRONMENTAL QUALITY Request #: 30001  
 Program: ENFORCEMENT DIVISION DP #:  
 Name: Enforce Environmental Quality Laws

**\$ Revenue** **FTE Details**

Position #	Pay Plan	Grade	Step	WC Cd	Job Cd	FTE Yr1	FTE Yr2	Job Code Title
53145623	20	4	6	74244	999927	1.00	1.00	Not Yet Classified-gr 04
<b>Total</b>						1.00	1.00	

	Salary		Benefits		Insurance		Total	
	2008	2009	2008	2009	2008	2009	2008	2009
53145623	\$28,087	\$28,087			\$6,684	\$6,684	\$34,771	\$34,771
<b>Total</b>	\$28,087	\$28,087	\$0	\$0	\$6,684	\$6,684	\$34,771	\$34,771

Update Insert Delete Undo Exit Calc Payroll

- ✓ Once the attribute details have been provided for all requested positions, you will need to click on the Calc Payroll button at the bottom of the screen. Cost will be computed per position and the total personal services costs will be provided.
- ✓ New positions are funded at entry with VERY few exceptions. For pay plan 20, multiple “steps” are available to simulate entry for a pay range within each pay band (grade). Documentation will be required to justify the pay selection for these positions.
- ✓ CLICK UPDATE to save your work.
- ✓ Click on the Exit button at the bottom of the screen. The EPP Request Details screen will appear.

## EPP Request Legislation Screen

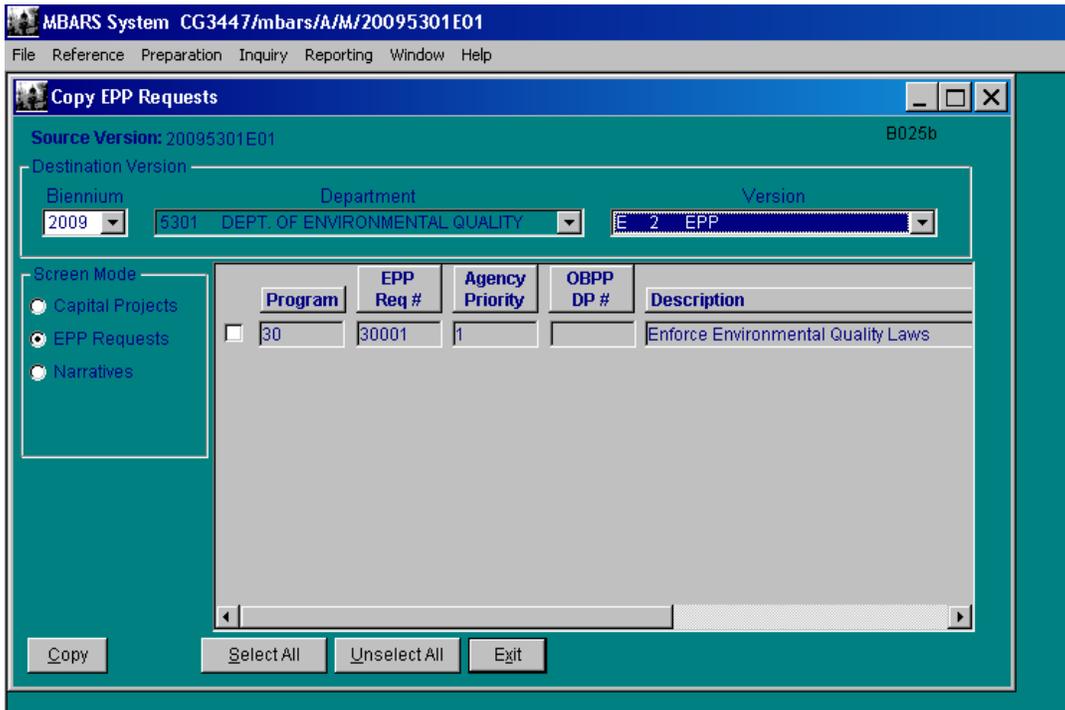
This screen is intended to “connect” EPP items with an agency’s proposed legislation.

- Click on the Legislation button at the bottom of the EPP Request Details screen. The EPP Request Legislation screen will appear.

- ✓ Select the appropriate radio buttons for the listed questions.
- ✓ Fill in the remaining fields as necessary. Obviously, an LC number or Bill Number will not be available and need not be completed.
- ✓ CLICK UPDATE to save your work.
- ✓ Click Exit to return to the EPP Request Details screen.
- ✓ Click Exit again to return to the EPP Request list to create a new EPP item or edit an existing item.
- ✓ The agency should also indicate the EPP request number on the Legislation Form submitted to OBPP for the legislation request.

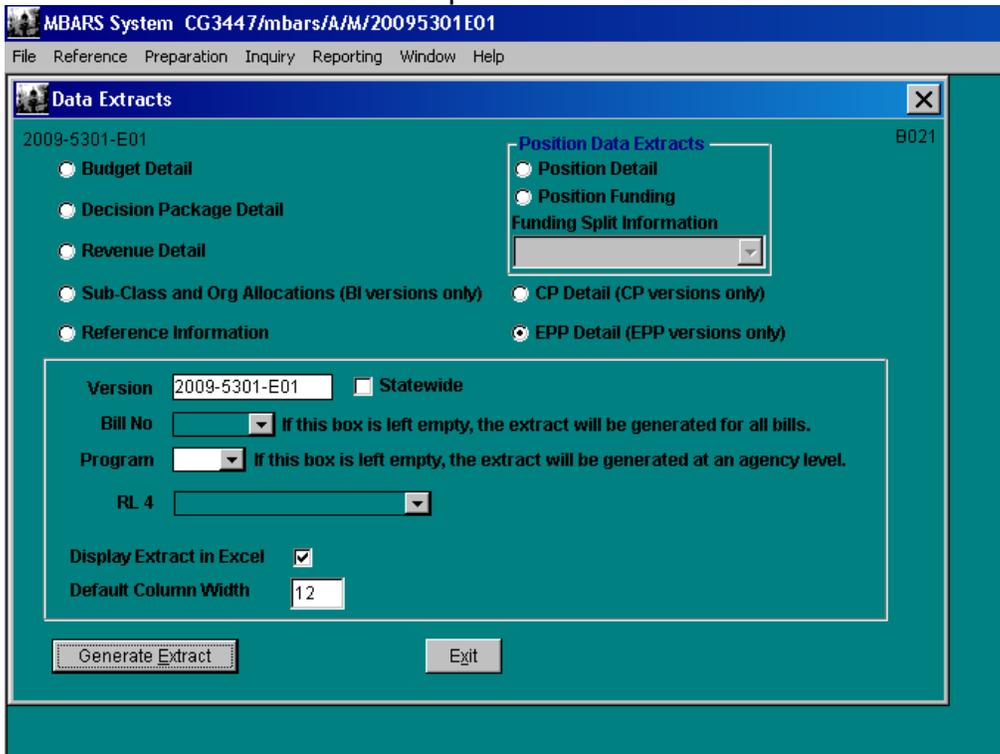
## **Copying EPP Requests from One Version to Another Version**

- MBARS allows you to copy an EPP request from another EPP version (most likely a previous biennium version) to your current version.
- You must be in the version that you want to copy FROM
- PATH: Preparation/Copy Data/Copy Data
  - ✓ Select the EPP Radio Button in the Screen Mode box on the left side of the screen
  - ✓ Select the Biennium and the Version from the drop down data boxes in the Destination box on the top of the screen.
  - ✓ Select one or more EPP requests that you would like to copy by clicking on the check box next to the request.
  - ✓ Click the Copy Button. The process will take place without using paste.



## Data Extracts

- There is now a Data Extract available for EPP Data
- PATH: Inquiry/Data Extracts
  - ✓ Select the EPP Detail radio button on the middle right of the screen
  - ✓ Leave Program Blank to query the entire agency or select program to only receive data related to that program
  - ✓ Click the Generate Extract Button
  - ✓ Enter a file name and choose a file location
  - ✓ Click Save
  - ✓ The data extract will come up in Excel



## Office of Budget and Program Planning Details Screen

- PATH: EPP Request Details/OBPP
- This screen will be used exclusively by the OBPP.

## Submitting Your EPP Requests

- Once you have completed your EPP package and are ready to submit:
  - ✓ Go to Preparation/Capital Projects and EPP/Budget Control Checklist
  - ✓ Mark the Box “complete”. The box will stay “complete” if all requests have an agency priority assigned and expenditures equal funding. If either of these conditions is not met, the box will not stay “complete”. **Note:** If the box is marked “complete” and subsequently there are any changes made to the EPP package, the box will revert to “not complete” and will have to be re-marked.
  - ✓ Go to the version control screen (File/Version Control) and click on the submit EPP button at the bottom/center of the screen.
  - ✓ Send an e-mail to your Executive Budget Analyst with a copy to Jeanne Nevins notifying OBPP that your request has been submitted.

## Resources Available

- There are several resources available, if you need help with MBARS
  - ✓ MBARS Helpdesk – 5795
  - ✓ Your Executive Budget Analyst, OBPP
  - ✓ Amy Sassano, OBPP – 0619
  - ✓ User Guides on the state MINE page.