BUD-26 Manage Grant Authorizations in Budgets

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to manage grant authorizations in Budgets in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of managing initial grant authorizations in Budgets using the Application Development Framework Desktop Integration (ADFDI) spreadsheet.

Manage Grant Authorization in Budgets

To Manage Grant Authorization in Budgets, please follow the steps below. There are 17 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

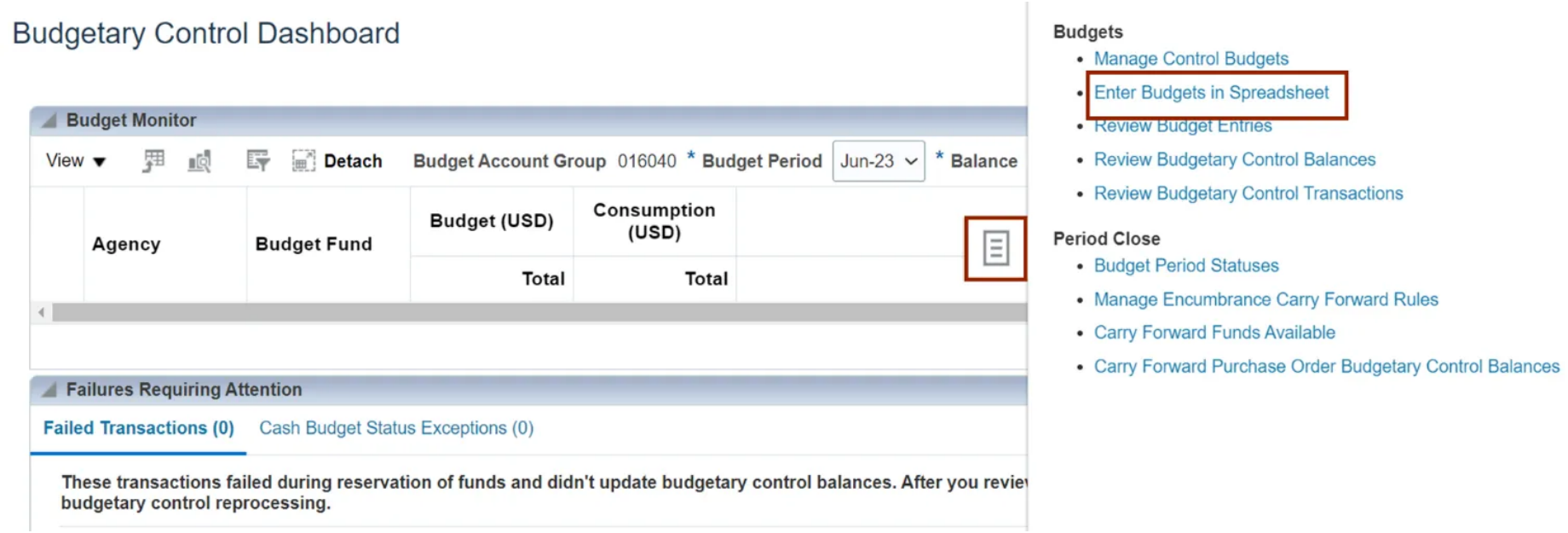
Step 2. Click the **Budgetary Control** tab. Click the **Budgetary Control** app.

Image



Step 3. The **Budgetary Control Dashboards** page opens. Click the **Tasks** icon. Under **Budgets**, select **Enter Budgets in Spreadsheet**.

Image

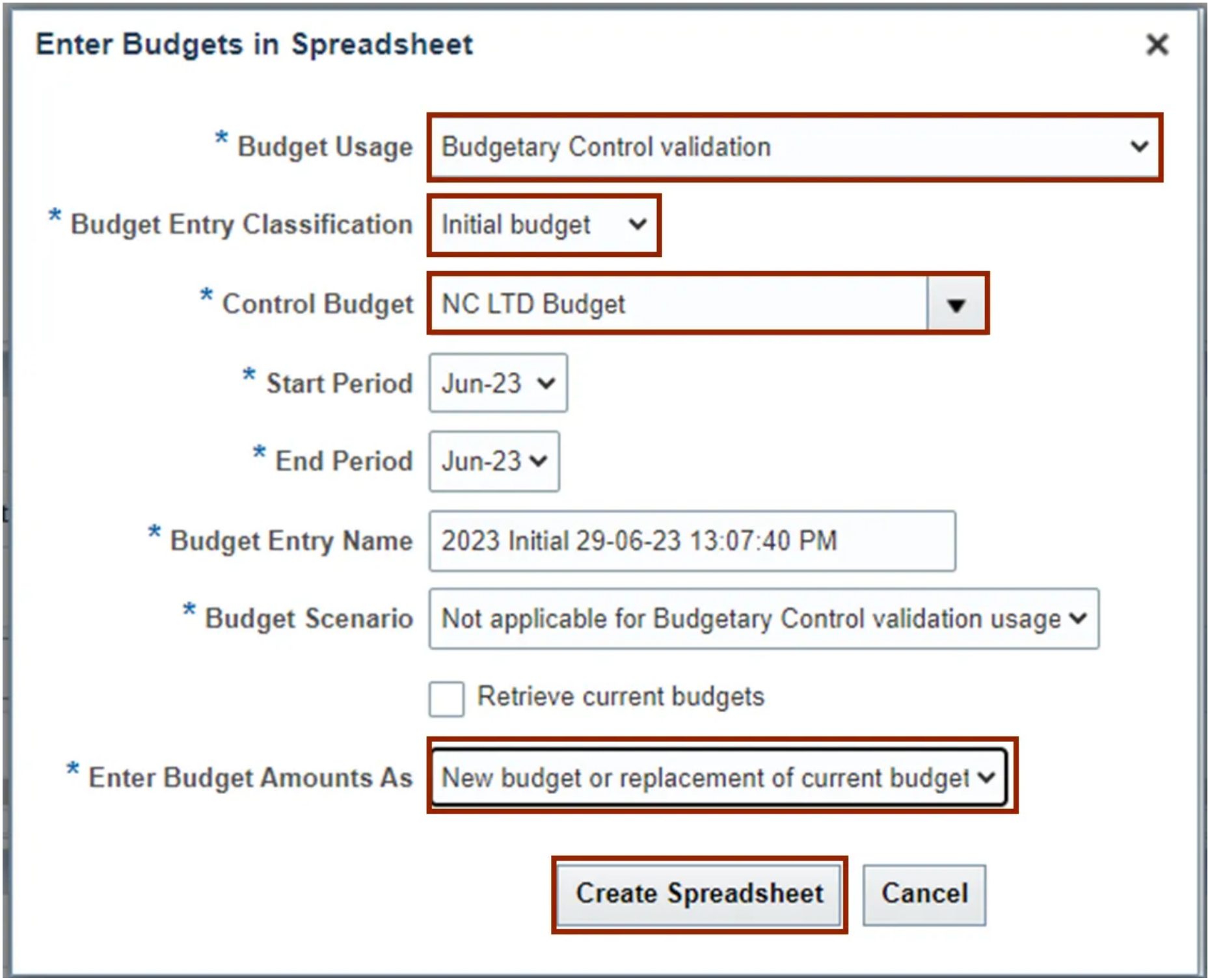


Step 4. On the **Enter Budgets in Spreadsheet** window, enter the appropriate fields.

In this example, we choose ***Budget Usage*** as **Budgetary Control validation**, ***Budget Entry Classification*** as **Initial Budget**, ***Control Budget*** as **NC LTD Budget**.

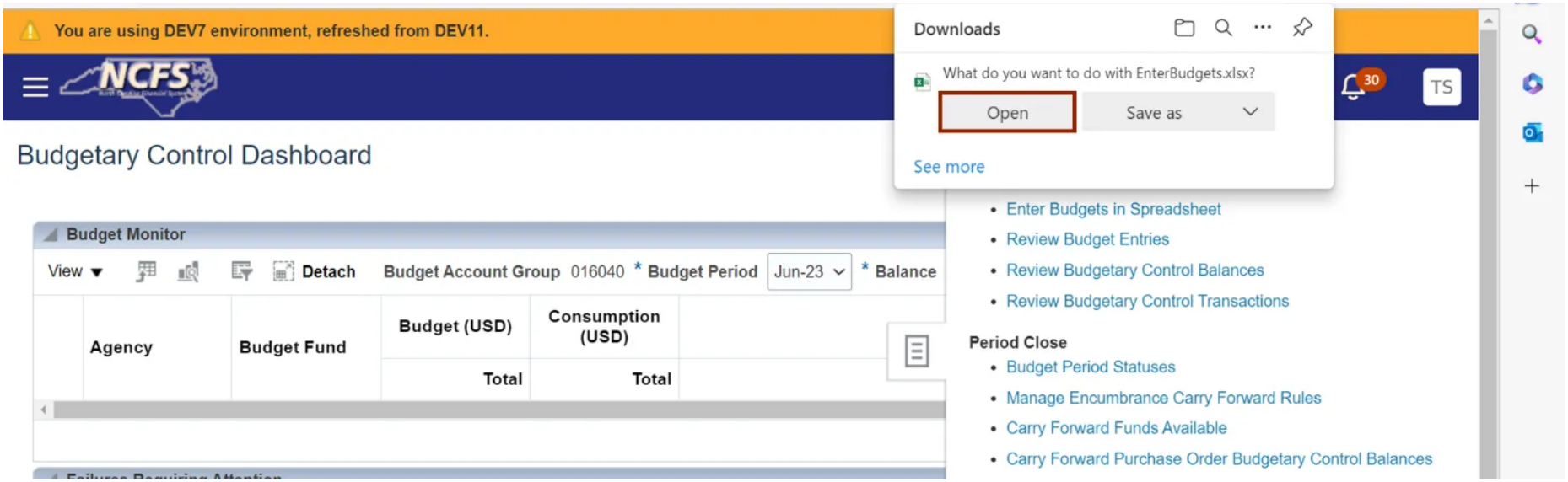
The following fields will be auto populated once the ***Control Budget*** field is selected: ***Start Period***, ***End Period***, ***Budget Entry Name***, and ***Budget Scenario***. Then, enter ***Budget Amounts*** as **New Budget or replacement of current budget**. Furthermore, click the **Create Spreadsheet** button.

Image


Enter Budgets in Spreadsheet
* Budget Usage
Budgetary Control validation
* Budget Entry Classification
Initial budget
* Control Budget
NC LTD Budget
* Start Period
Jun-23
* End Period
Jun-23
* Budget Entry Name
2023 Initial 29-06-23 13:07:40 PM
* Budget Scenario
Not applicable for Budgetary Control validation usage
Retrieve current budgets
* Enter Budget Amounts As
New budget or replacement of current budget
Create Spreadsheet
Cancel

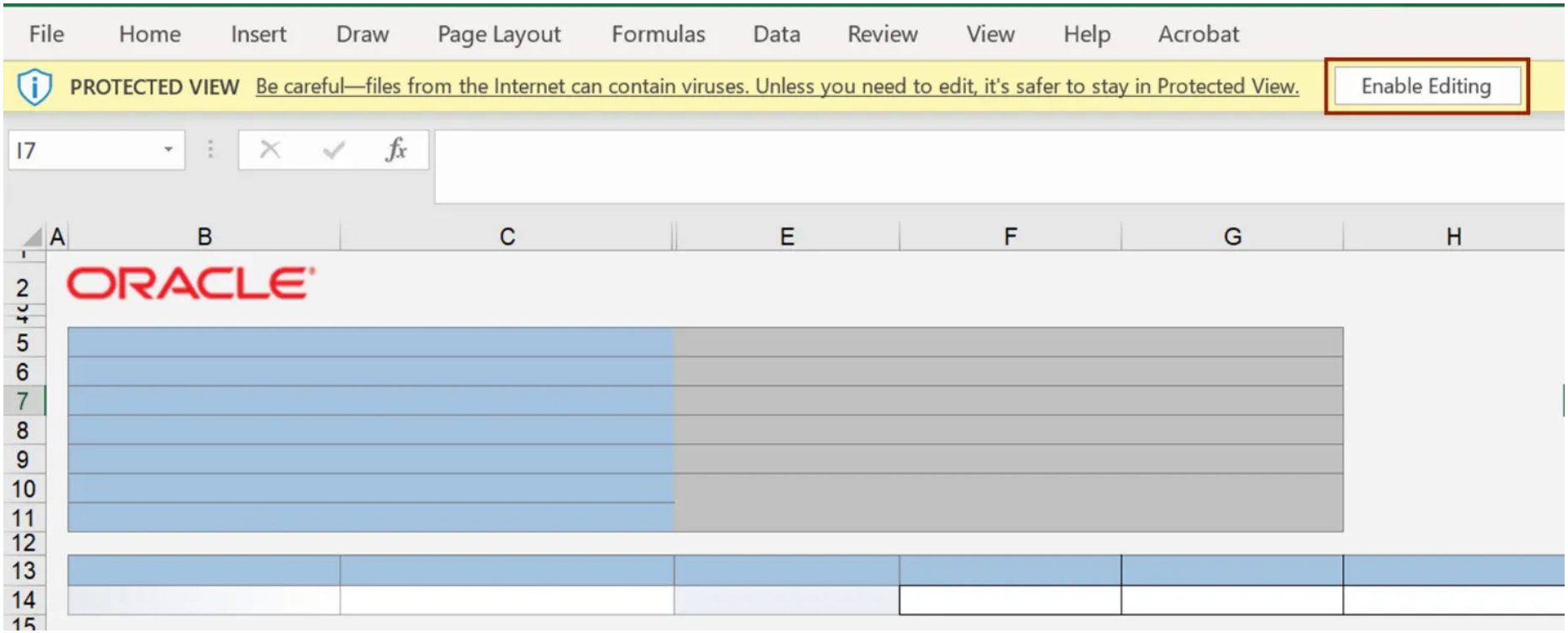
Step 5. On the **Budgetary Control Dashboard** page, the *Downloads* pop-up appears. On the **Downloads** pop-up, click the **Open** button.

Image



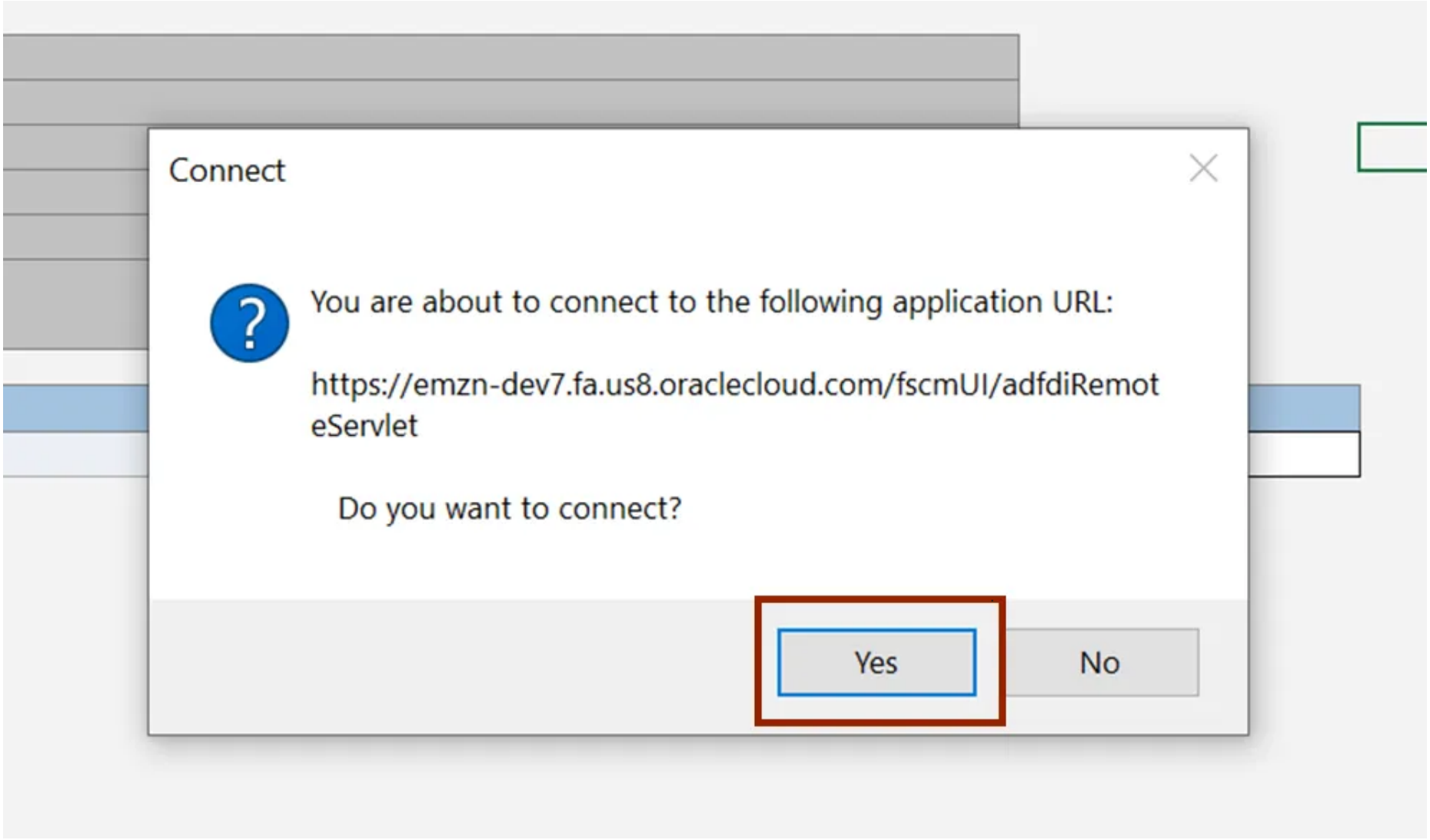
Step 6. The Excel sheet appears. Click the **Enable Editing** button.

Image



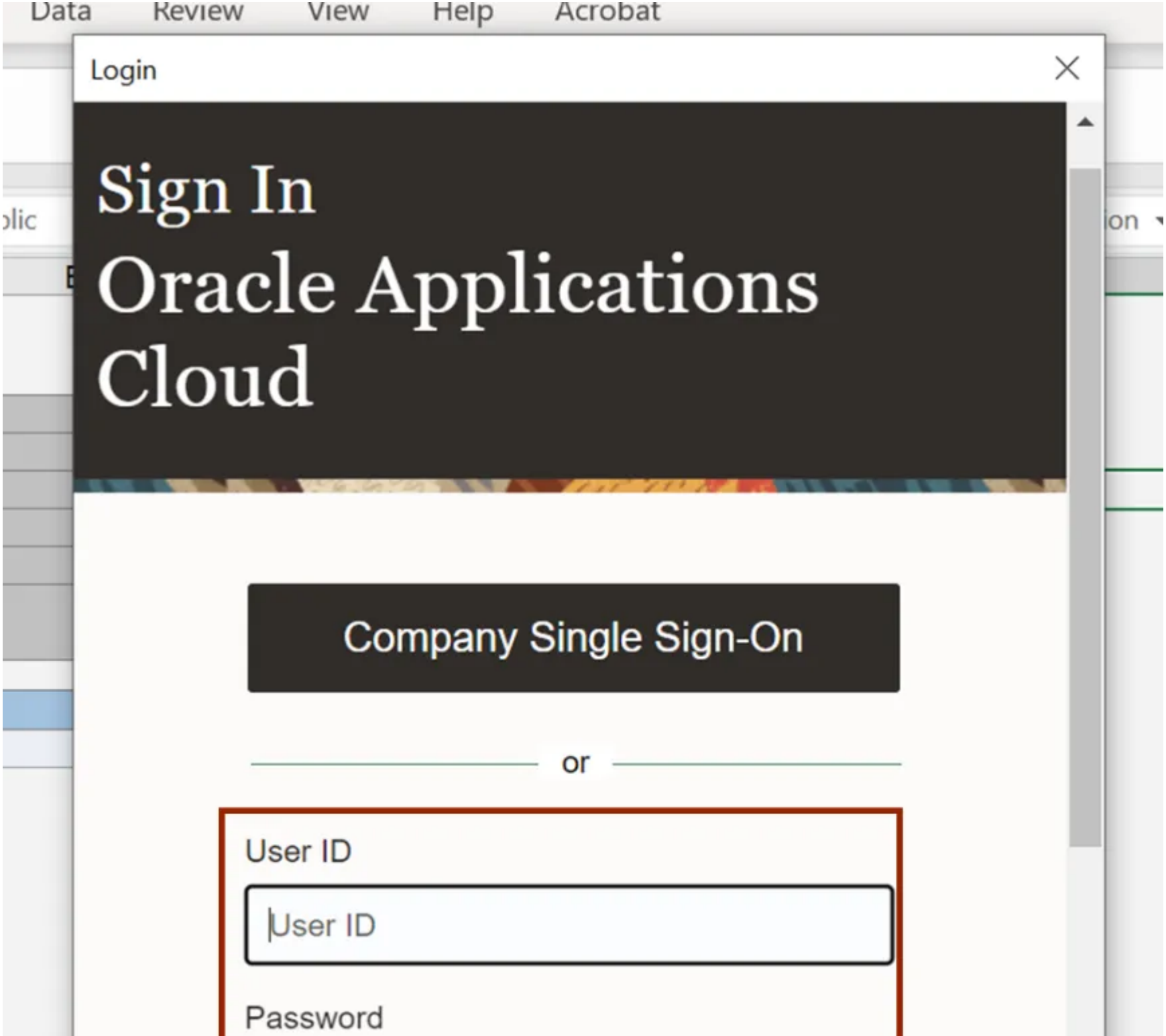
Step 7. On the *Connect* pop-up, click the **Yes** button.

Image



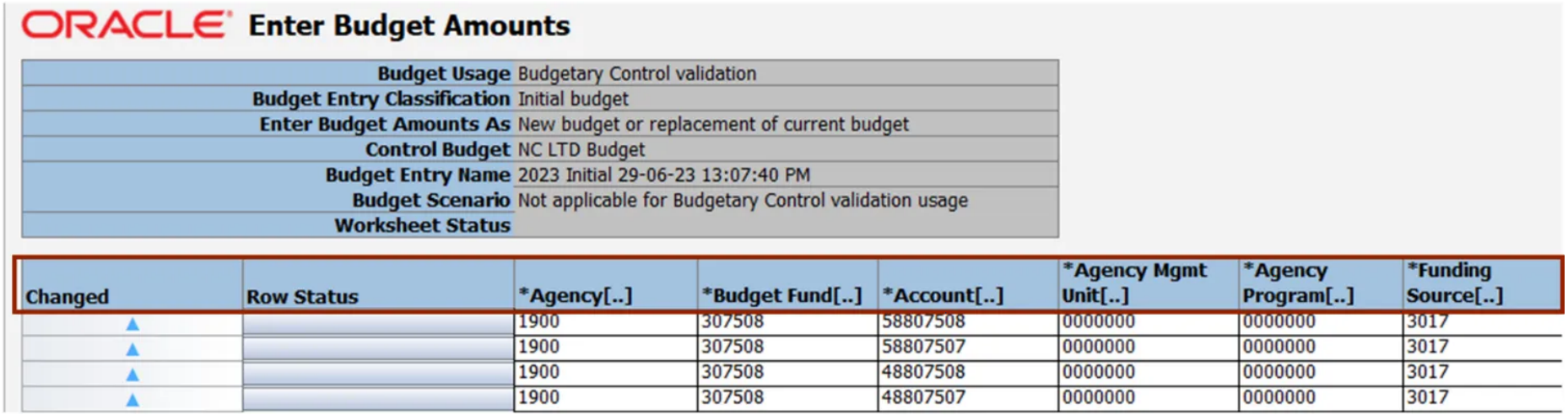
Step 8. On the **Sign in** pop-up, enter **User ID** and **Password**. Then, click the **Sign In** button.

Image


Data
Review
View
Help
Acrobat
Login
Sign In
Oracle Applications Cloud
Company Single Sign-On
or
User ID
User ID
Password

Step 9. The Spreadsheet opens. Enter the Budget values as required.

Image



Step 10. Scroll to the right and enter the budget amount. In the **Comment** column mention a comment if required.

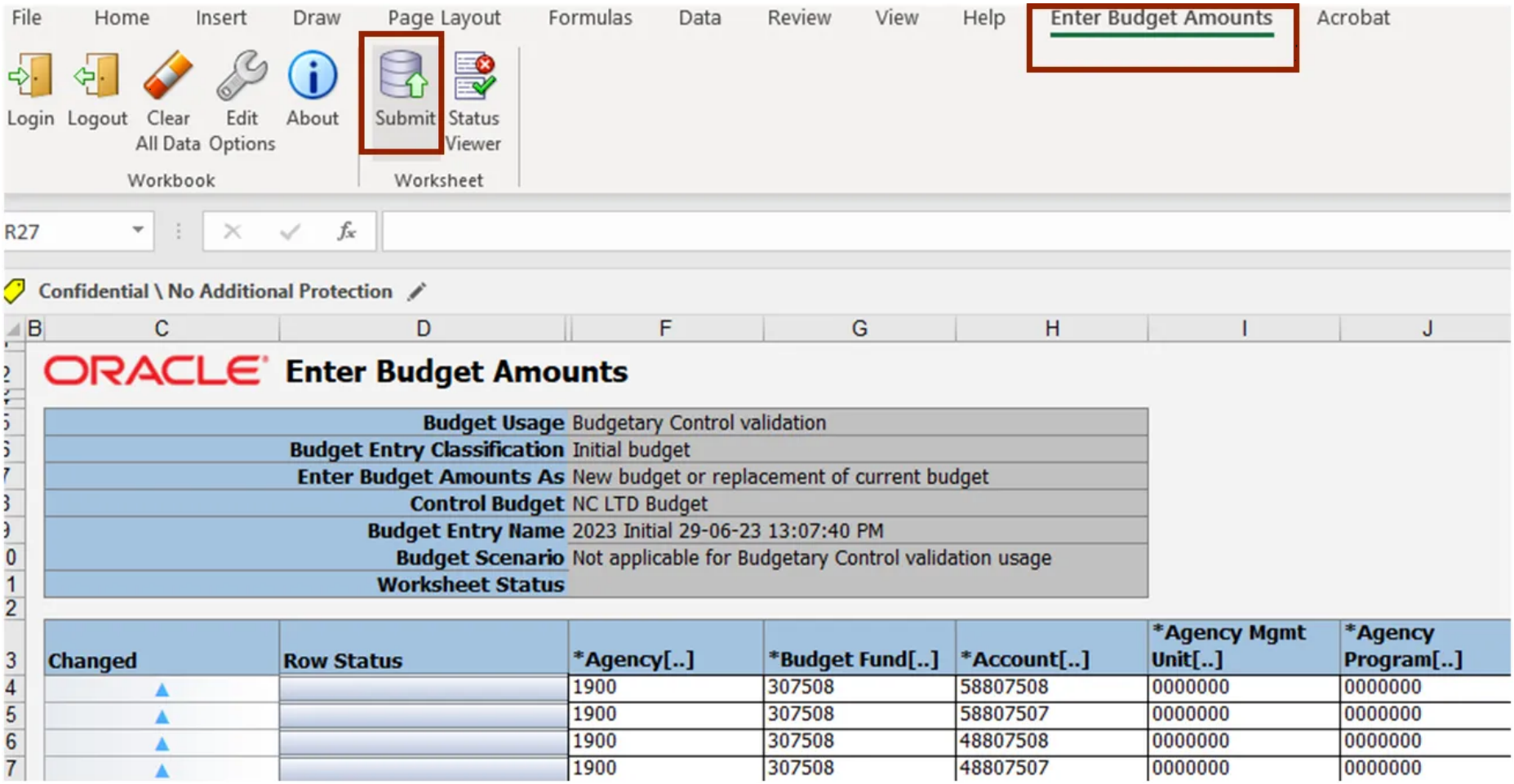
In this example, we choose to write **New Budget** in the **Comment** fields.

Image

*Project[..]	*Inter Fund[..]	*Future 1[..]	*Future 2[..]	*Future 3[..]	Jun-23	Comment
0000000000	000000	0000	000000	00000	20,000	New Budget
0000000000	000000	0000	000000	00000	30,000	New Budget
0000000000	000000	0000	000000	00000	20,000	New Budget
0000000000	000000	0000	000000	00000	30,000	New Budget

Step 11. Under the **Enter Budget Amounts** tab on top of the sheet, click the **Submit** button.

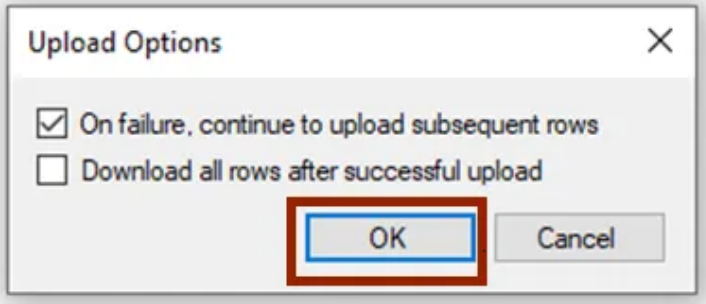
Image



Step 12. On the *Upload Options* pop-up, click the **OK** button.

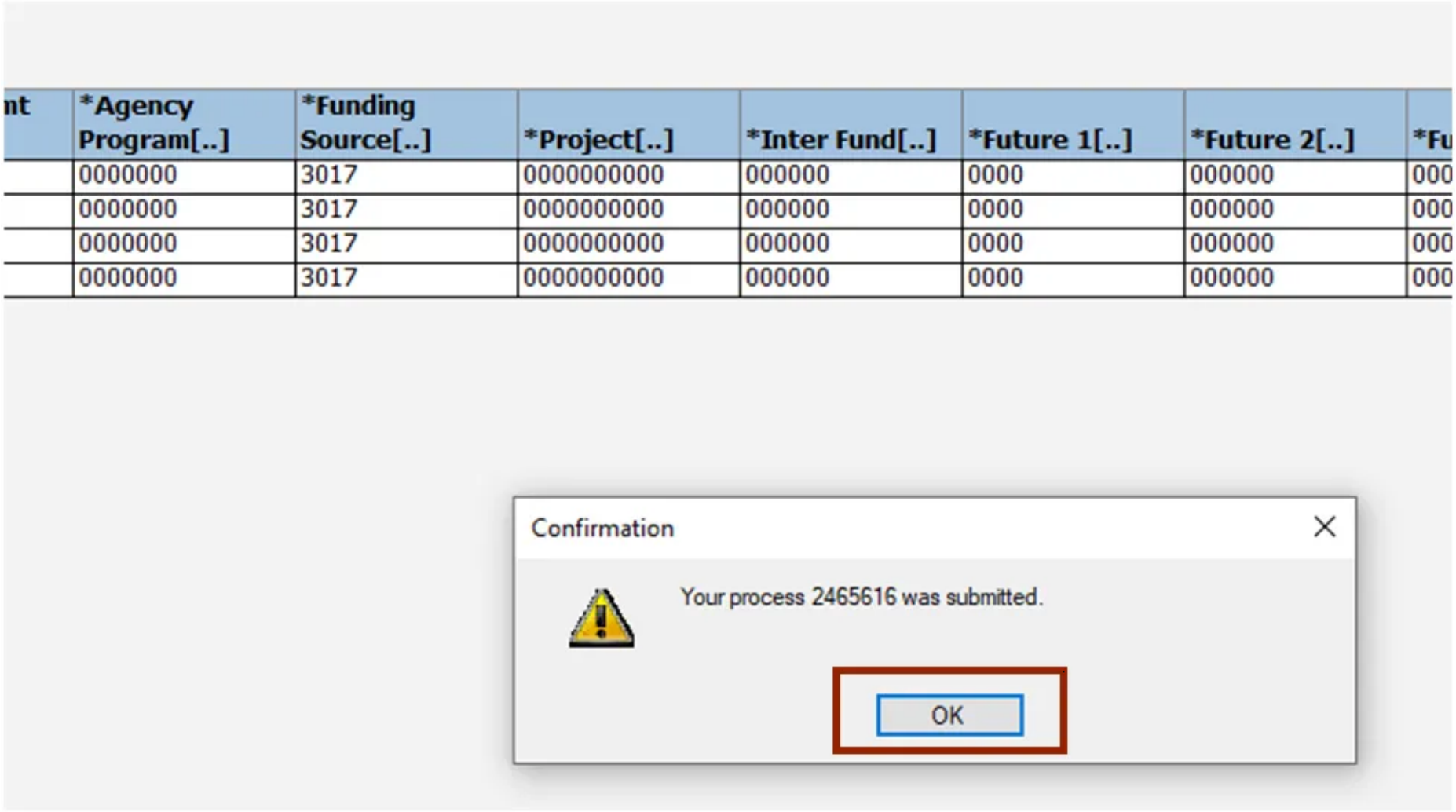
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	J	K	L	M	N	O	P
mt	*Agency Program[..]	*Funding Source[..]	*Project[..]	*Inter Fund[..]	*Future 1[..]	*Future 2[..]	*Future 3[..]
	0000000	3017	0000000000	000000	0000	000000	00000
	0000000	3017	0000000000	000000	0000	000000	00000
	0000000	3017	0000000000	000000	0000	000000	00000
	0000000	3017	0000000000	000000	0000	000000	00000



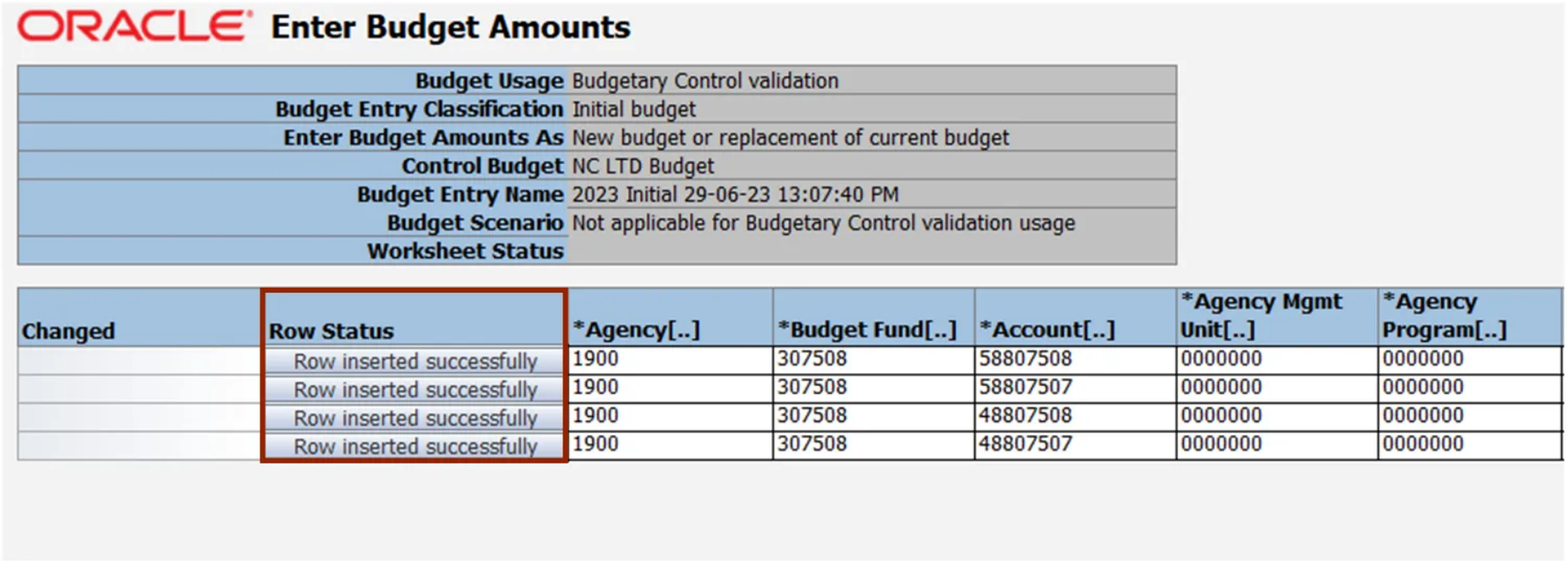
Step 13. The *Confirmation* pop-up appears, which indicates that the process was submitted. Click the **OK** button.

Image



Step 14. (a) The **Row Status** fields get updated to **Row Inserted Successfully**.

Image



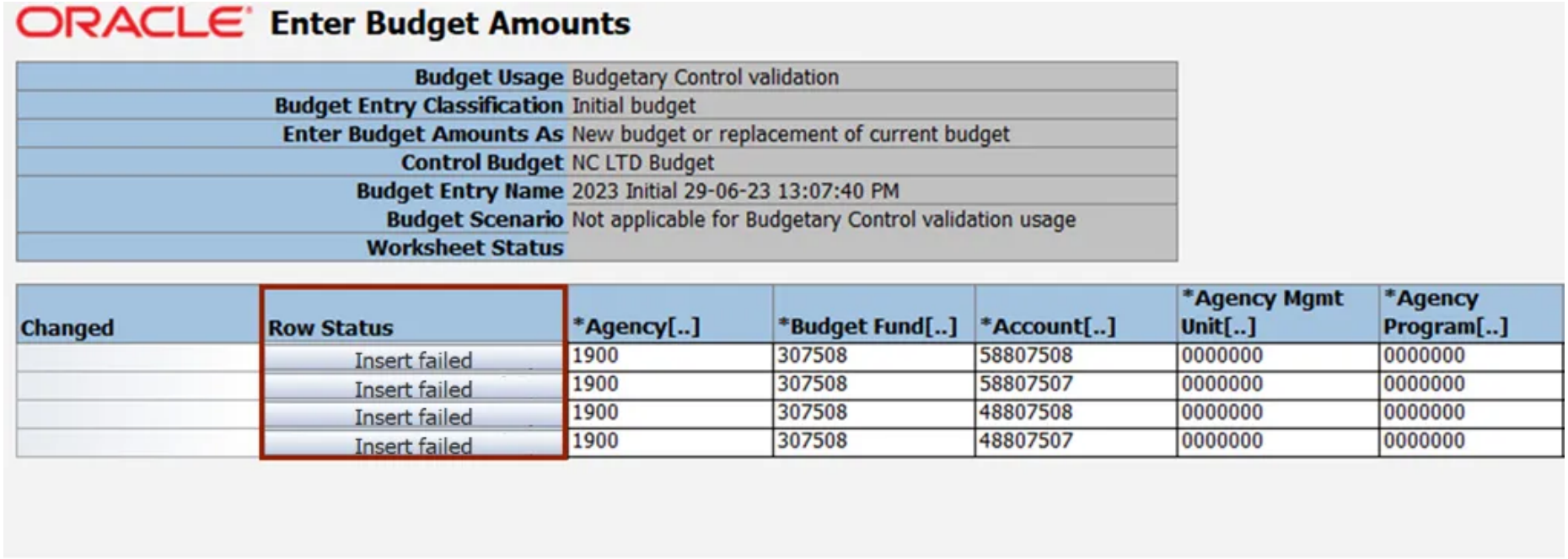
ORACLE **Enter Budget Amounts**

Budget Usage	Budgetary Control validation
Budget Entry Classification	Initial budget
Enter Budget Amounts As	New budget or replacement of current budget
Control Budget	NC LTD Budget
Budget Entry Name	2023 Initial 29-06-23 13:07:40 PM
Budget Scenario	Not applicable for Budgetary Control validation usage
Worksheet Status	

Changed	Row Status	*Agency[..]	*Budget Fund[..]	*Account[..]	*Agency Mgmt Unit[..]	*Agency Program[..]
	Row inserted successfully	1900	307508	58807508	0000000	0000000
	Row inserted successfully	1900	307508	58807507	0000000	0000000
	Row inserted successfully	1900	307508	48807508	0000000	0000000
	Row inserted successfully	1900	307508	48807507	0000000	0000000

Step 14. (b) Alternatively, if the **Row Status** fields reflect **Insert Failed**, validate all segments, and enter the correct values after validation. Then repeat the submit process. (Step 11 -13).

Image



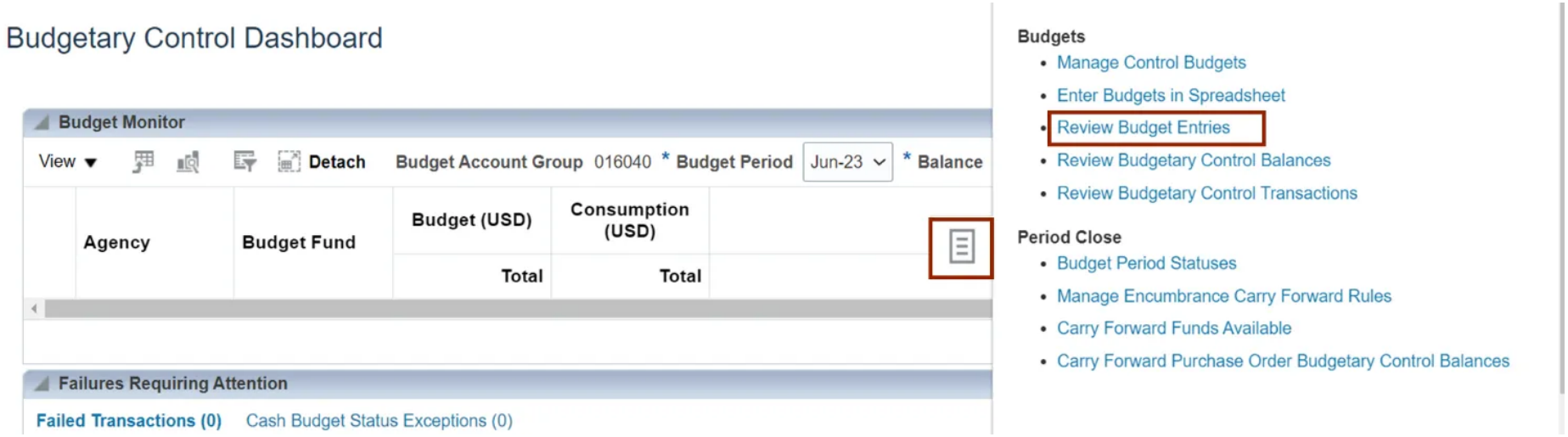
ORACLE Enter Budget Amounts

Budget Usage	Budgetary Control validation
Budget Entry Classification	Initial budget
Enter Budget Amounts As	New budget or replacement of current budget
Control Budget	NC LTD Budget
Budget Entry Name	2023 Initial 29-06-23 13:07:40 PM
Budget Scenario	Not applicable for Budgetary Control validation usage
Worksheet Status	

Changed	Row Status	*Agency[..]	*Budget Fund[..]	*Account[..]	*Agency Mgmt Unit[..]	*Agency Program[..]
	Insert failed	1900	307508	58807508	0000000	0000000
	Insert failed	1900	307508	58807507	0000000	0000000
	Insert failed	1900	307508	48807508	0000000	0000000
	Insert failed	1900	307508	48807507	0000000	0000000

Step 15. Navigate back to the **Budgetary Control Dashboard** page. Click the **Tasks** icon. Under **Budget**, click **Review Budget Entries**.

Image



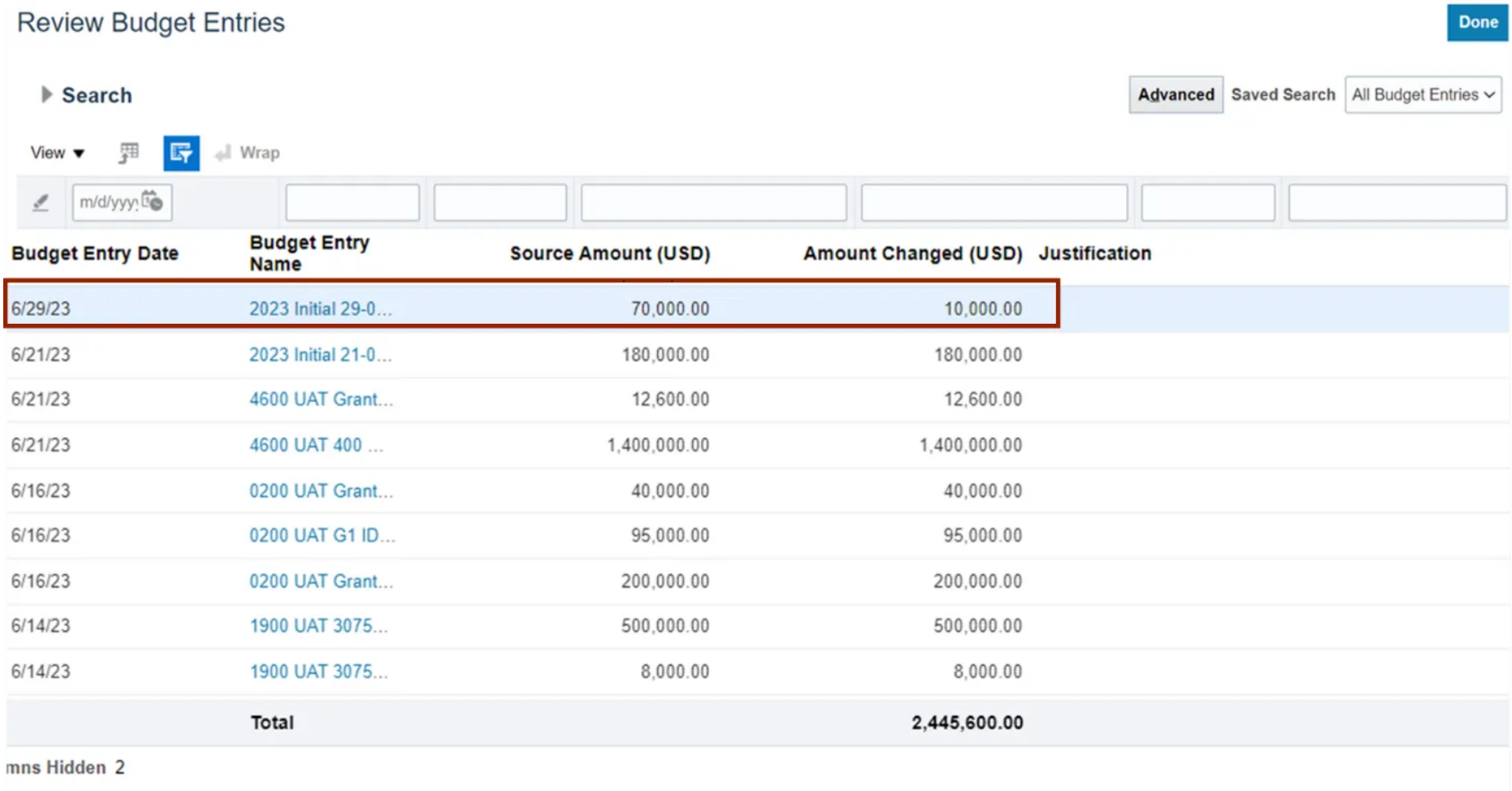
Step 16. In the **Search** section, enter the ***Control Budget*** as **NC LTD Budget**, ***From Budget Period*** as **Aug-21**, and ***To Budget Period*** as **Jun-22**. Click the **Search** button.

Image



Step 17. The newly added budget entries can be viewed here.

Image



Wrap-Up

Manage Grant Authorization in Budgets using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - GM100: Grants Management

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