

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

Budget Monitor

View

Detach

Budget Account Group

016040

*

Budget Period

Jun-23

*

Balance

Agency	Budget Fund	Budget (USD)	Consumption (USD)	
		Total	Total	

Failures Requiring Attention

Failed Transactions (0)

Cash Budget Status Exceptions (0)

These transactions failed during reservation of funds and didn't update budgetary control balances. After you review budgetary control reprocessing.

- Manage Control Budgets
- Enter Budgets in Spreadsheet
- Review Budget Entries
- Review Budgetary Control Balances
- Review Budgetary Control Transactions

- Budget Period Statuses
- Manage Encumbrance Carry Forward Rules
- Carry Forward Funds Available
- Carry Forward Purchase Order Budgetary Control Balances

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

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

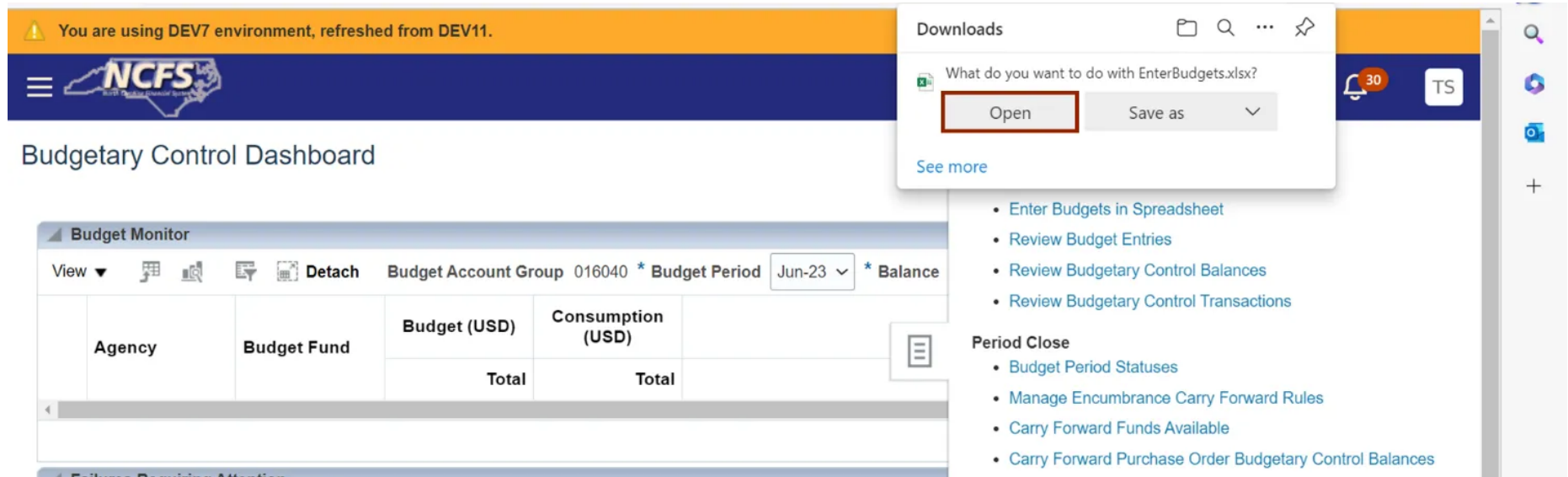
* Enter Budget Amounts As New budget or replacement of current budget ▼

Create Spreadsheet

Cancel

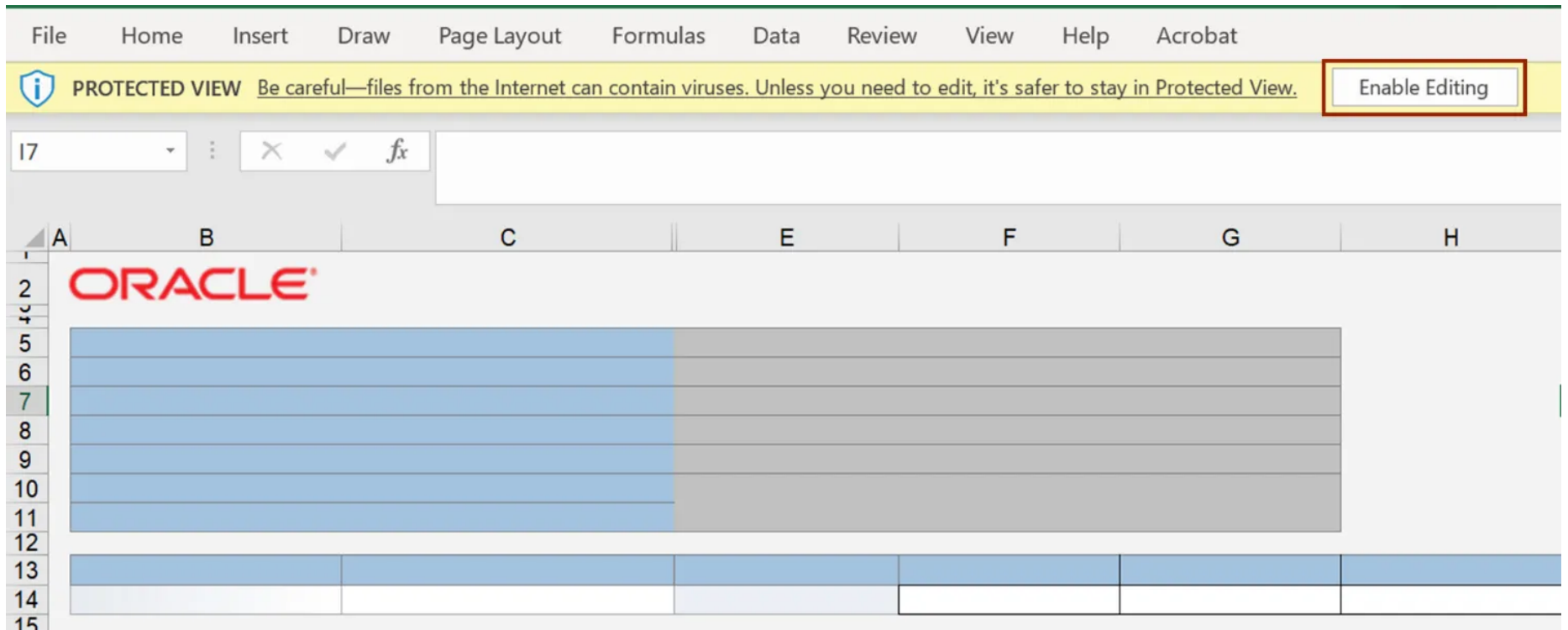
Step 5. On the **Budgetary Control Dashboard** page, the *Downloads* pop-up appears. On the **Downloads** pop-up, click the **Open** button.

Image



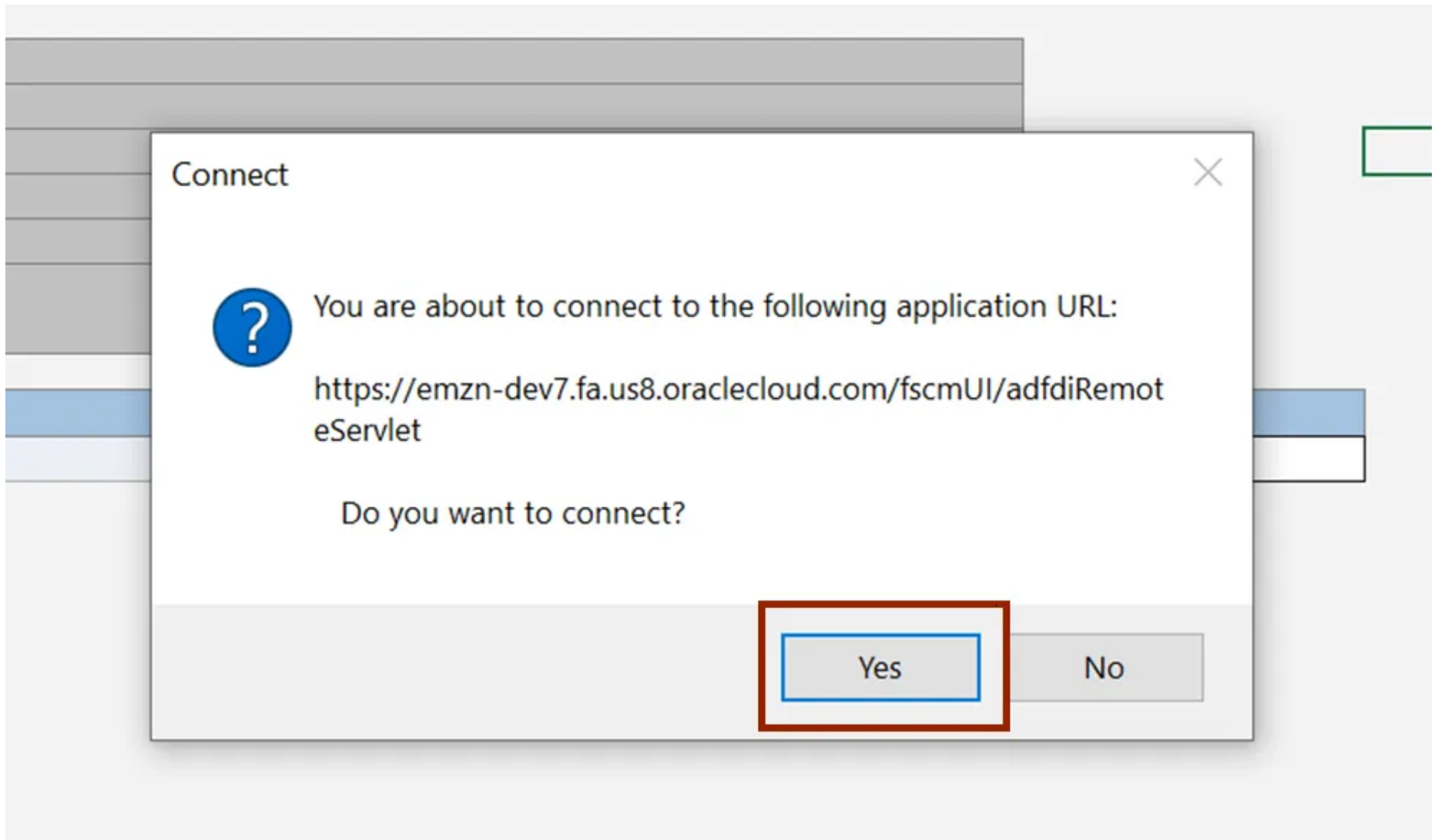
Step 6. The Excel sheet appears. Click the **Enable Editing** button.

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

Login



Sign In Oracle Applications Cloud

Company Single Sign-On

or

User ID

Password

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

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[..]	*Funding Source[..]
▲		1900	307508	58807508	0000000	0000000	3017
▲		1900	307508	58807507	0000000	0000000	3017
▲		1900	307508	48807508	0000000	0000000	3017
▲		1900	307508	48807507	0000000	0000000	3017

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

File Home Insert Draw Page Layout Formulas Data Review View Help **Enter Budget Amounts** Acrobat

Login Logout Clear Edit About Submit Status Viewer

Workbook Worksheet

R27

Confidential \ No Additional Protection

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[..]
▲		1900	307508	58807508	0000000	0000000
▲		1900	307508	58807507	0000000	0000000
▲		1900	307508	48807508	0000000	0000000
▲		1900	307508	48807507	0000000	0000000

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

Image

	J	K	L	M	N	O	P
mt	*Agency Program[..]	*Funding Source[..]	*Project[..]	*Inter Fund[..]	*Future 1[..]	*Future 2[..]	*Future 3[..]
	0000000	3017	00000000000	000000	0000	000000	00000
	0000000	3017	00000000000	000000	0000	000000	00000
	0000000	3017	00000000000	000000	0000	000000	00000
	0000000	3017	00000000000	000000	0000	000000	00000

Upload Options

☒ On failure, continue to upload subsequent rows

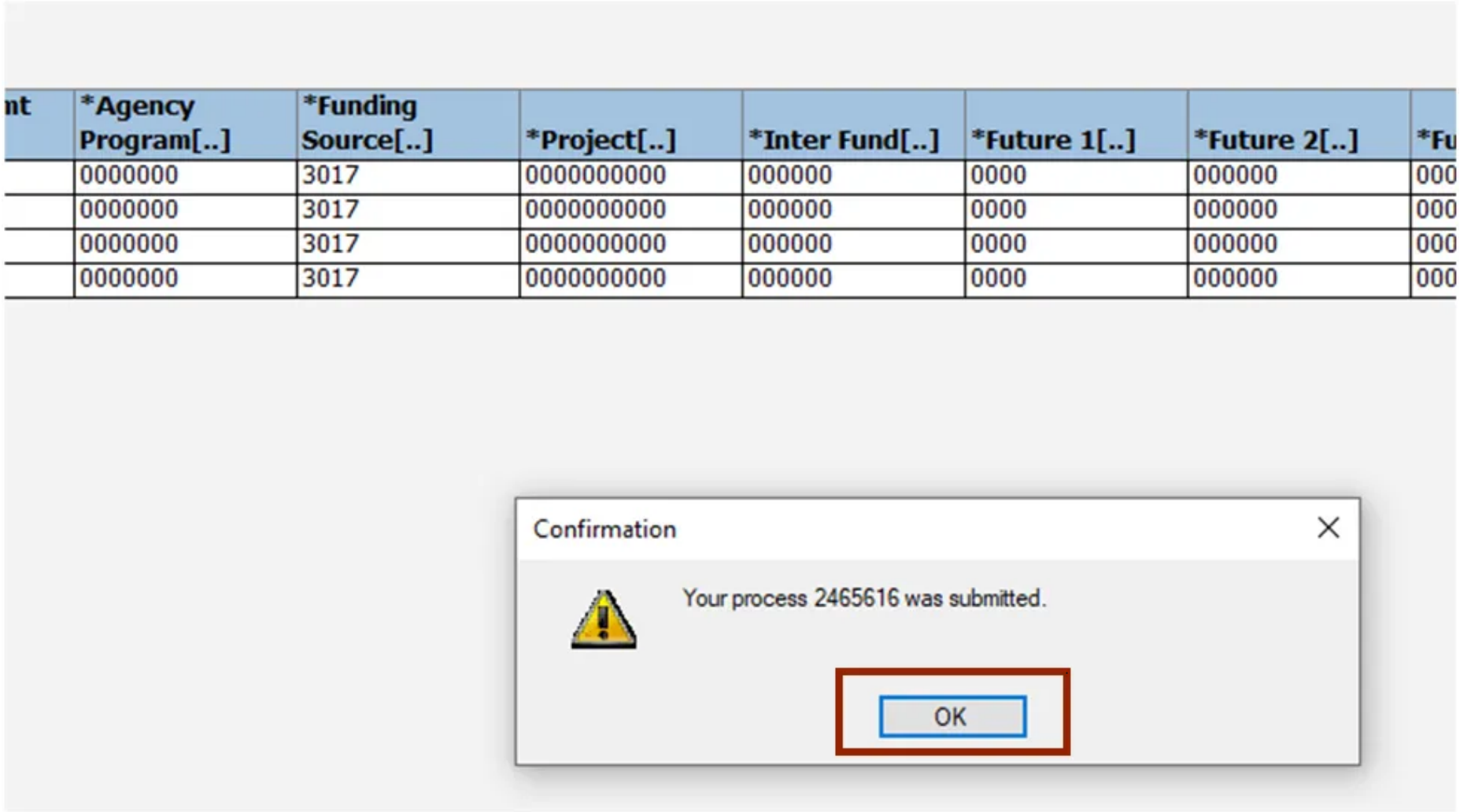
☐ Download all rows after successful upload

OK

Cancel

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

Budgetary Control Dashboard

Budget Monitor

View

Detach

Budget Account Group

016040

*

Budget Period

Jun-23

*

Balance

Agency	Budget Fund	Budget (USD)	Consumption (USD)	
		Total	Total	

Failures Requiring Attention

Failed Transactions (0)

Cash Budget Status Exceptions (0)

- ## Budgets

- Manage Control Budgets
- Enter Budgets in Spreadsheet
- Review Budget Entries
- Review Budgetary Control Balances
- Review Budgetary Control Transactions

Period Close

- Budget Period Statuses
- Manage Encumbrance Carry Forward Rules
- Carry Forward Funds Available
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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

Review Budget Entries

Search

Advanced

Saved Search

All Budget Entries

* Control Budget

NC LTD Budget

* From Budget Period

Jun-23

* To Budget Period

Jun-23

Budget Entry Name

Search

Reset

Save...

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

Image

Review Budget Entries

Done

Search

Advanced

Saved Search

All Budget Entries

View

Wrap

m/d/yyyy

Budget Entry Date	Budget Entry Name	Source Amount (USD)	Amount Changed (USD)	Justification
6/29/23	2023 Initial 29-0...	70,000.00	10,000.00	
6/21/23	2023 Initial 21-0...	180,000.00	180,000.00	
6/21/23	4600 UAT Grant...	12,600.00	12,600.00	
6/21/23	4600 UAT 400 ...	1,400,000.00	1,400,000.00	
6/16/23	0200 UAT Grant...	40,000.00	40,000.00	
6/16/23	0200 UAT G1 ID...	95,000.00	95,000.00	
6/16/23	0200 UAT Grant...	200,000.00	200,000.00	
6/14/23	1900 UAT 3075...	500,000.00	500,000.00	
6/14/23	1900 UAT 3075...	8,000.00	8,000.00	
Total			2,445,600.00	

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Wrap-Up

Manage Grant Authorization in Budgets using the steps above.

Additional Resources

- Virtual Instructor-Led Training (VILT)
 - [GM100: Grants Management](#)

First Published

Thu, 07/20/2023

Last Updated

Fri, 09/19/2025

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