BUD-22 Update or Correct Budget

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to update or correct budgets in the North Carolina Financial System (**NCFS**) for the life to date control budget. This includes grant authorizations in federal budget codes for all agencies and for the Department of Public Safety special disaster budget codes.

Introduction and Overview

This QRG covers the process of making budget revisions using the Application Development Framework Desktop Integration (ADFDI) spreadsheet for the life to date control budget only. These revisions are then uploaded to the Budgetary Control Module from the spreadsheet. The budget revision and grant authorization corrections and updates entered through the Budgetary Control Module replaces the NCAS document type 15 functionality.

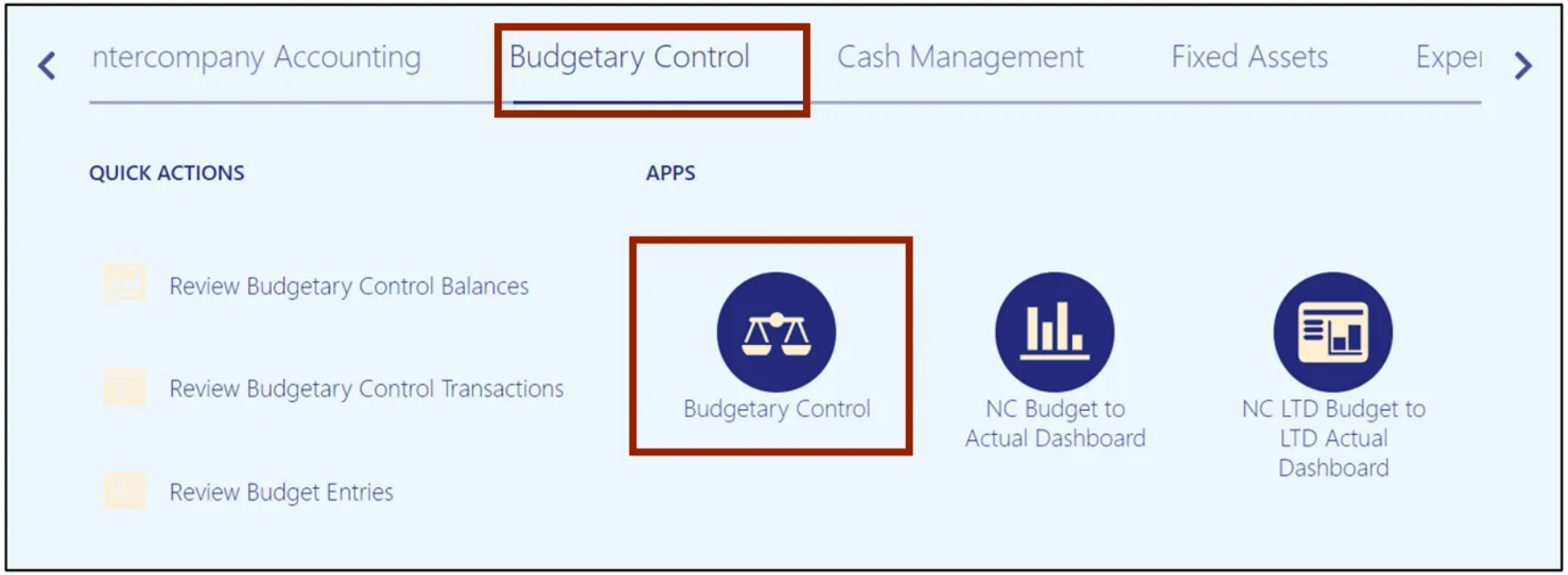
Update or Correct Budget

To update or correct the NC LTD budget, please follow the steps below. There are 23 steps to complete this process.

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

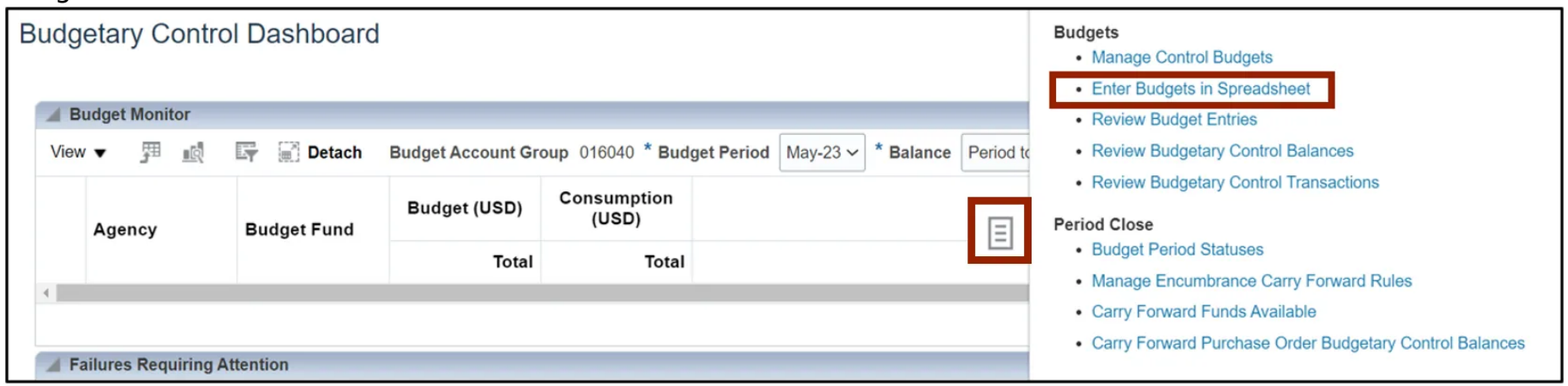
Step 2. On the **Home** page, click the **Budgetary Control** tab and click the **Budgetary Control** app.

Image



Step 3. Click the **Tasks** icon and click **Enter Budgets in Spreadsheet** from the **Tasks** pane.

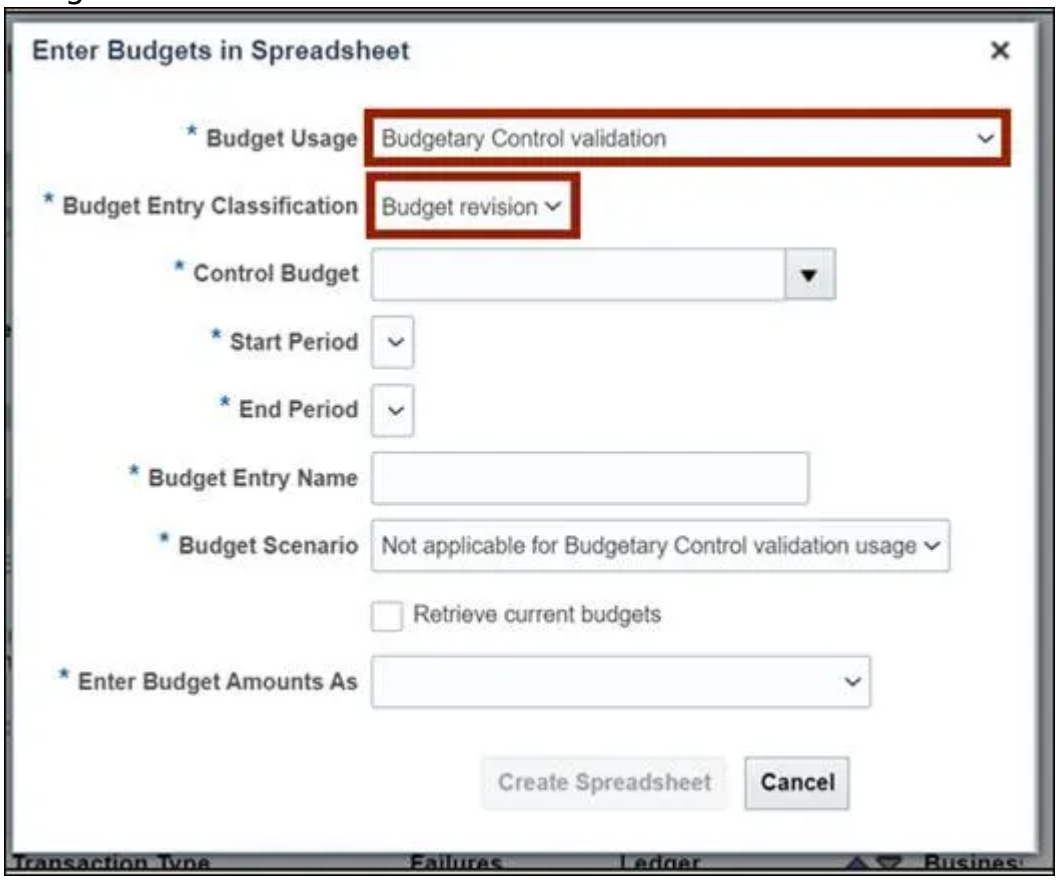
Image



Step 4. The *Enter Budgets in Spreadsheet* pop-up window appears. Select the following details from the respective drop-down choice lists:

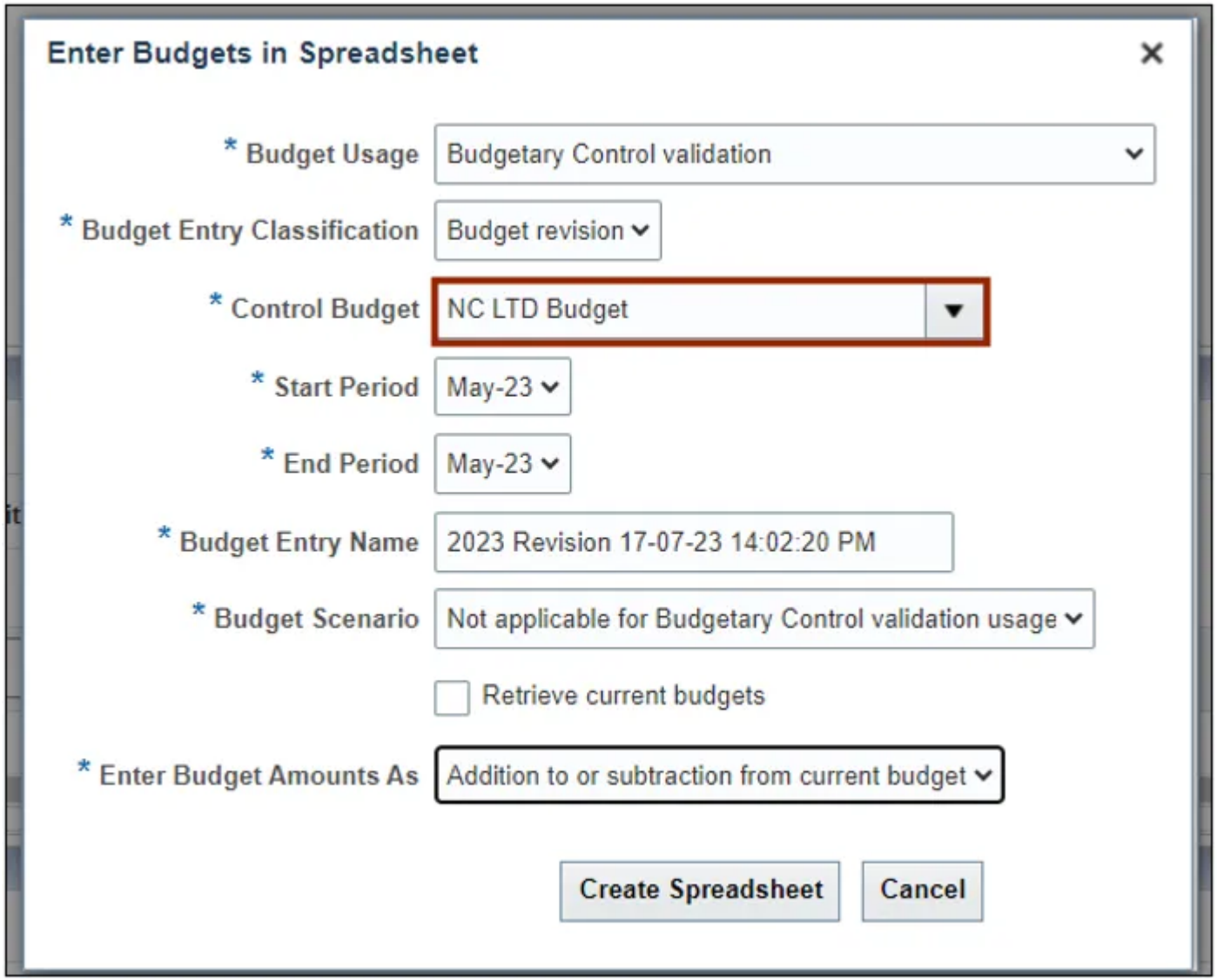
- ***Budget Usage*: Budgetary Control validation**
- ***Budget Entry Classification*: Budget Revision**

Image



Step 5. On the ***Control Budget** field, select **NC LTD Budget** from the drop-down choice list. The ***Start Period**, ***End Period**, ***Budget Entry Name**, and ***Budget Scenaio** fields are now auto filled.

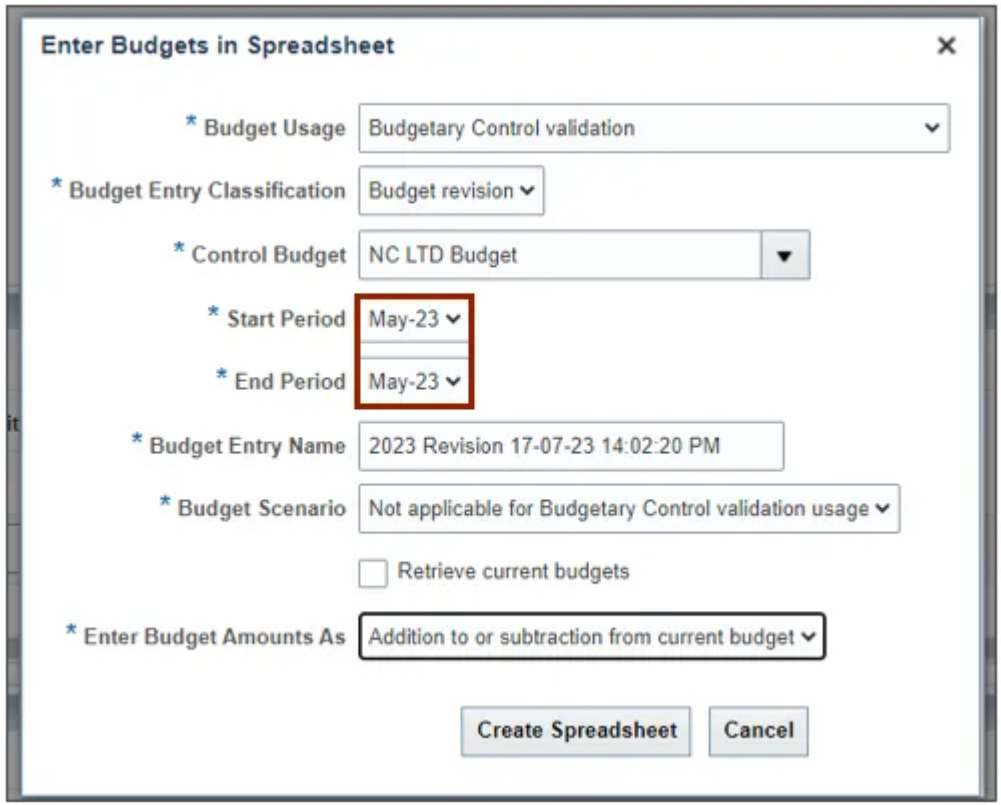
Image



Step 6. Change the ***Start Period** and ***End Period** fields, if required.

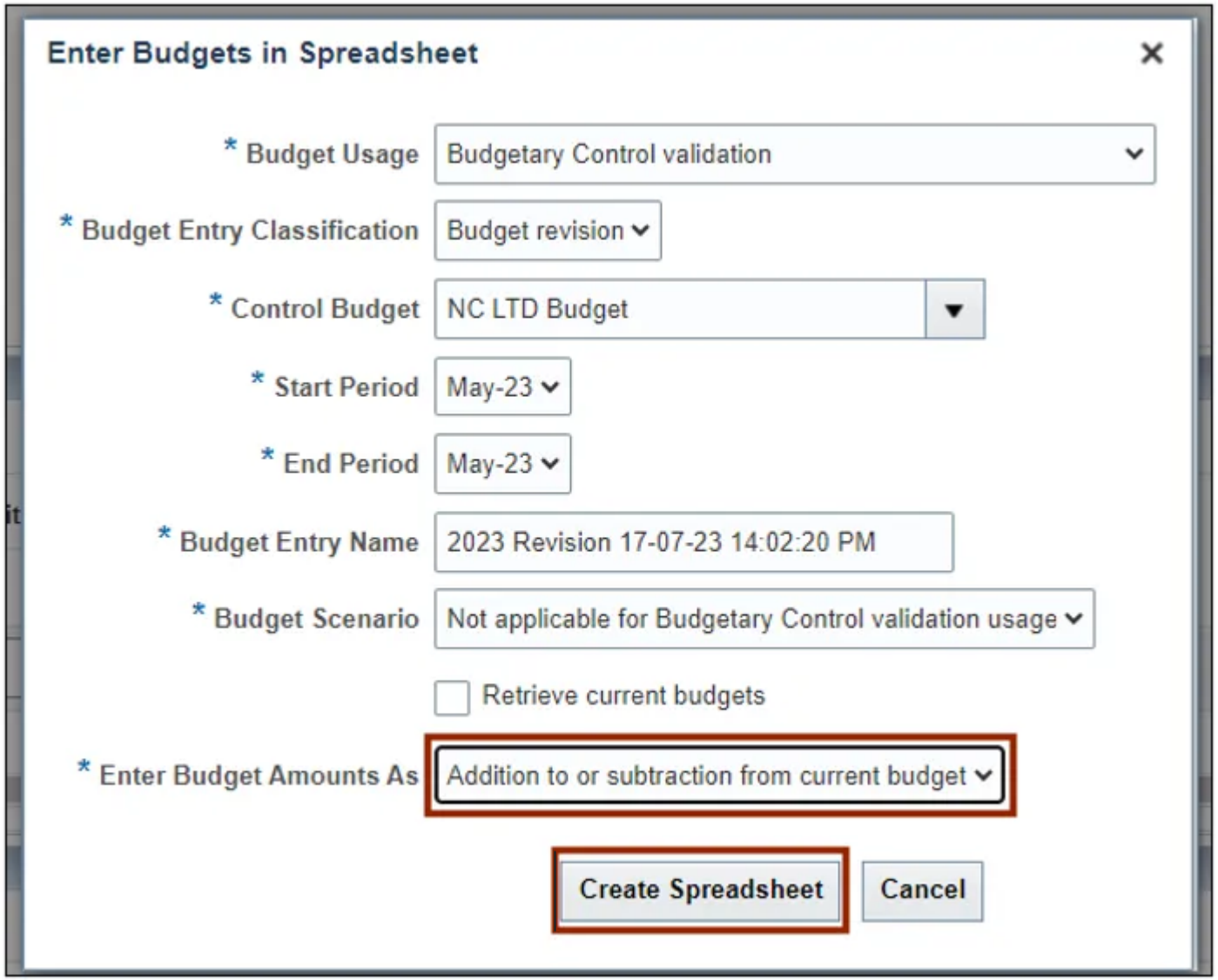
In this example, we choose **May-23** on the **Start** and **End Period** field.

Image



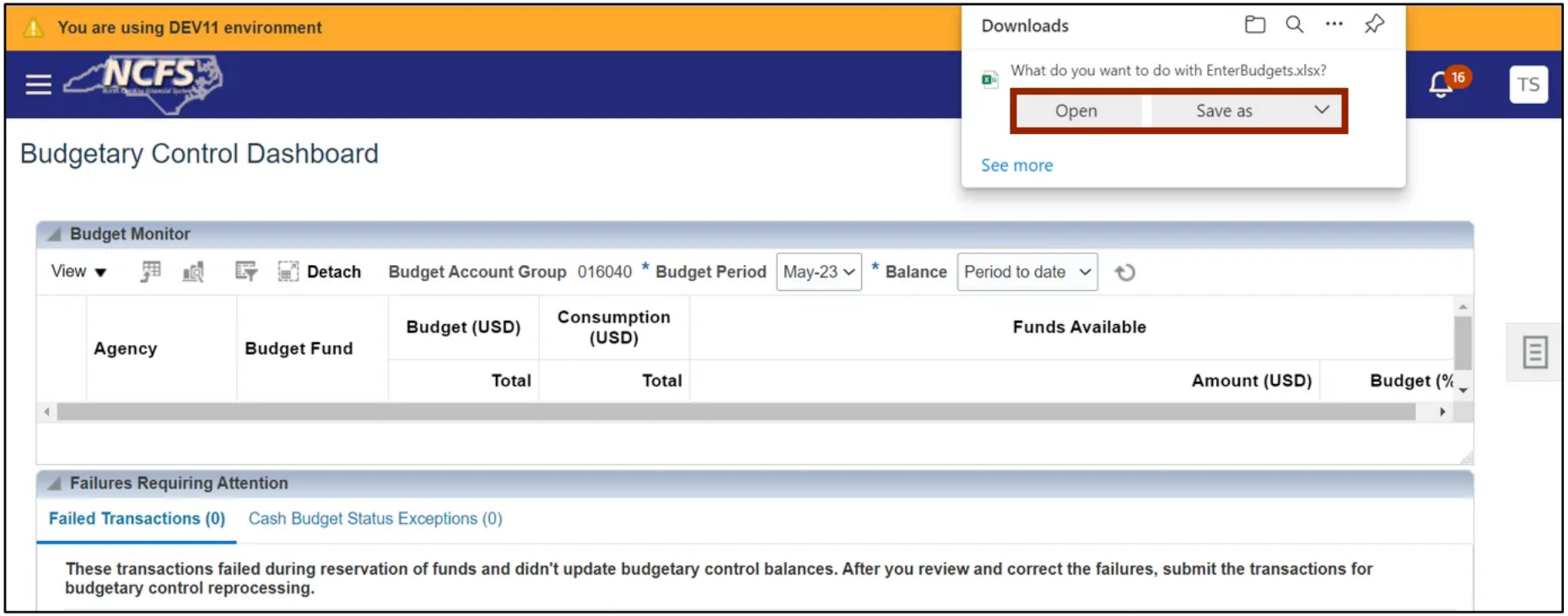
Step 7. On the ***Enter Budget Amounts As*** field, select **Addition to or subtraction from current budget**. Then, click the **Create Spreadsheet** button.

Image



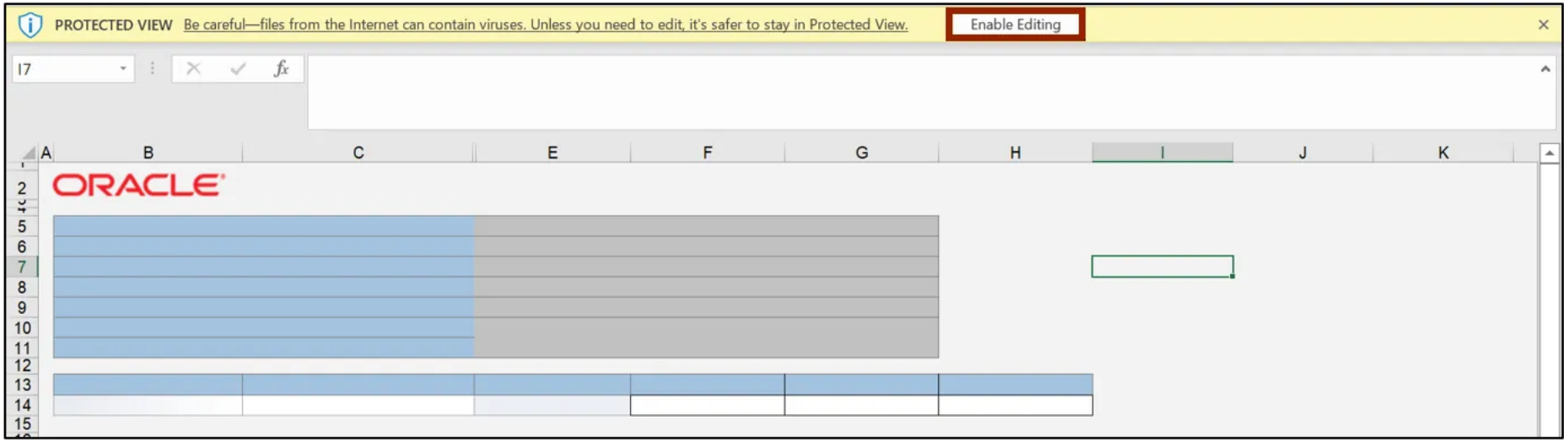
Step 8. The *Downloads* pop-up appears. Click the **Open** button to open the downloaded Excel file or click the **Save As** button to save a copy of the downloaded Excel file.

Image



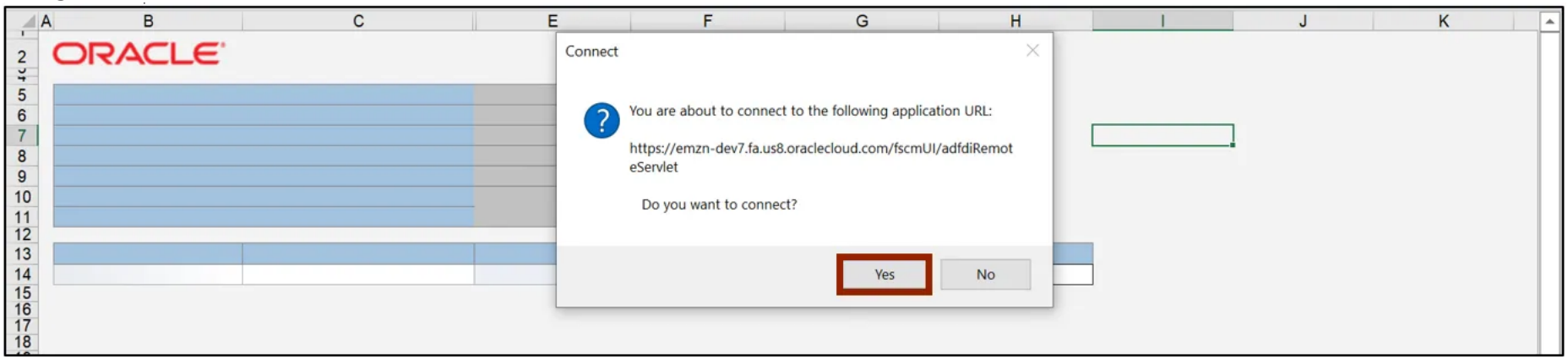
Step 9. Click the **Enable Editing** button.

Image



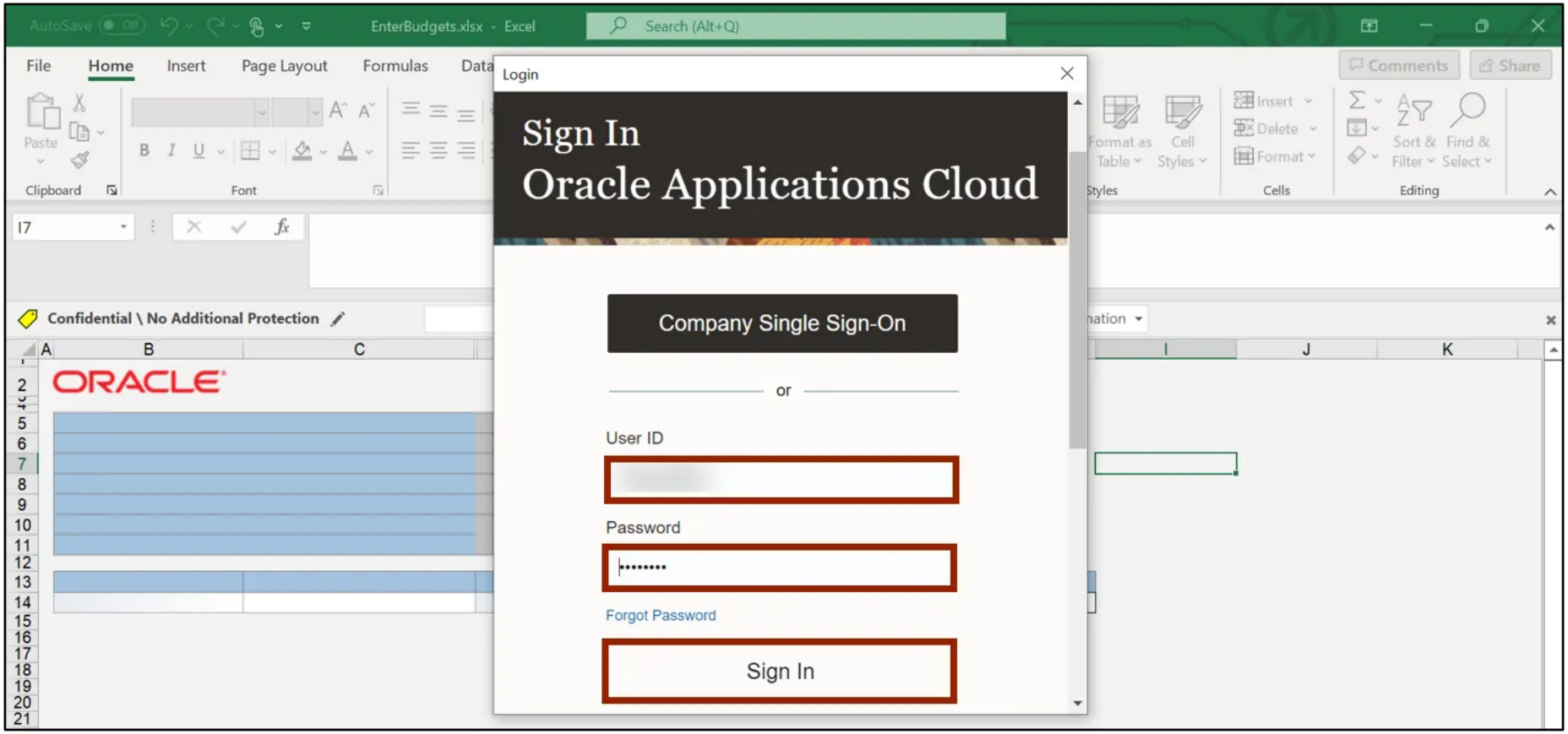
Step 10. The *Connect* pop-up appears. Click the **Yes** button to successfully connect to the server.

Image



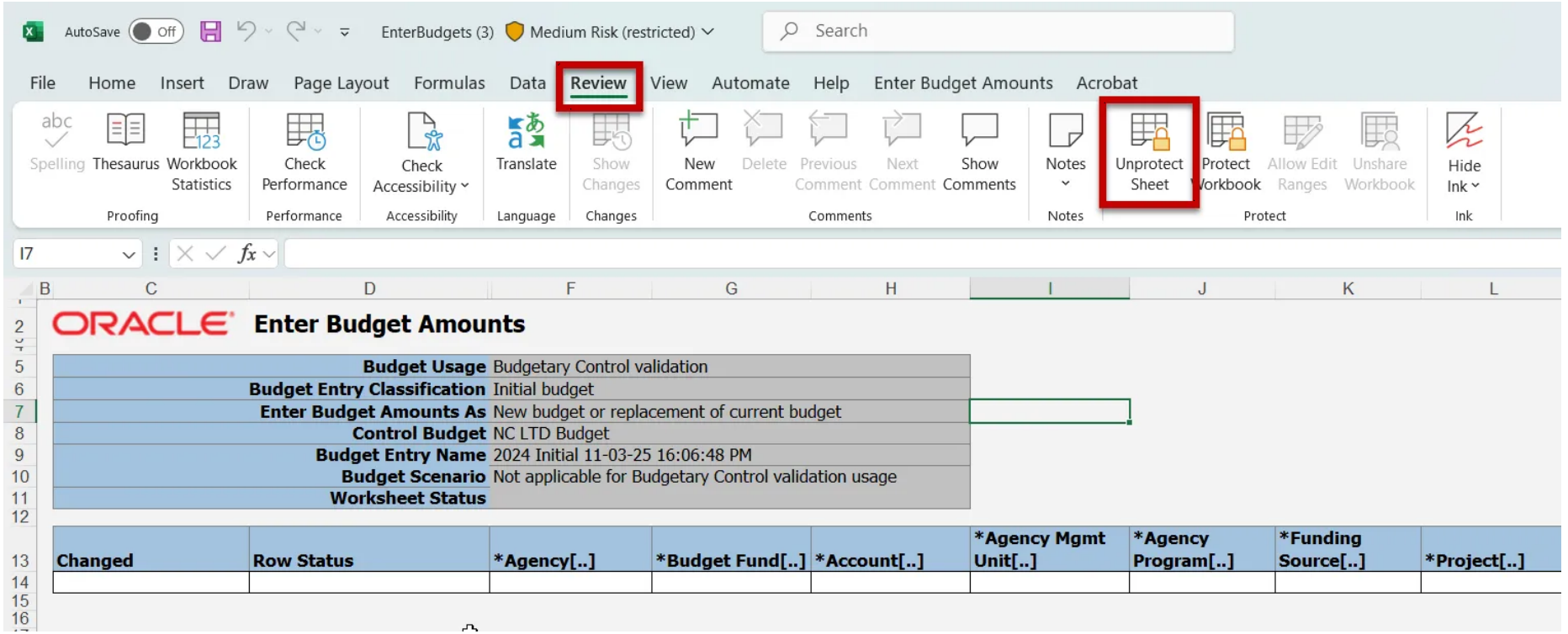
Step 11. On the NCFS portal *Login* pop-up, enter the **User ID** and **Password** credentials and click the **Sign In** button.

Image



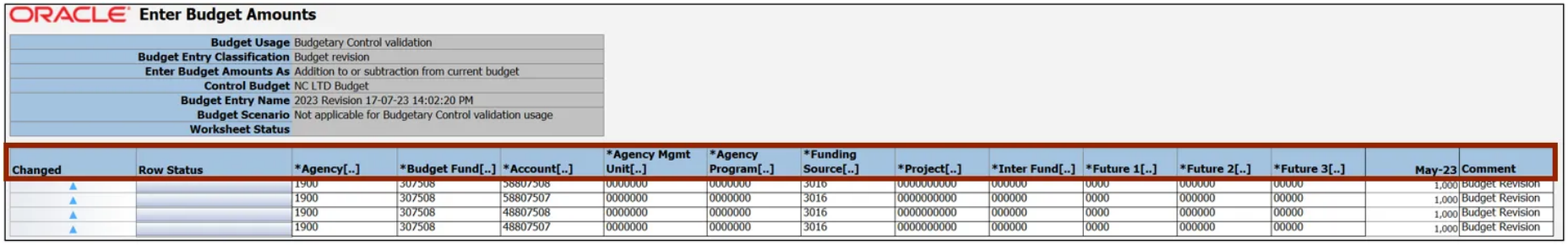
Step 12. The spreadsheet opens. On the menu bar, click on **Review** and then click **Unprotect Worksheet**. This will now unlock the spreadsheet for any modifications.

Image



Step 13. Enter the budget values as required.

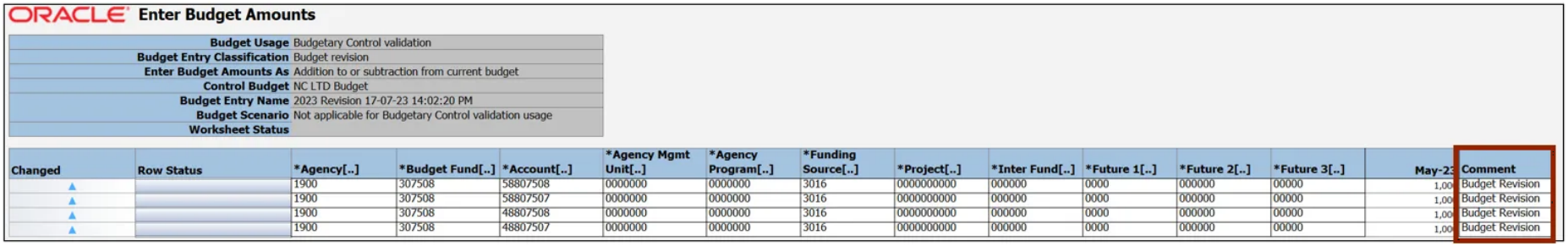
Image



Step 14. Scroll to the right and enter the budget amount information. Next, make a comment if required.

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

Image



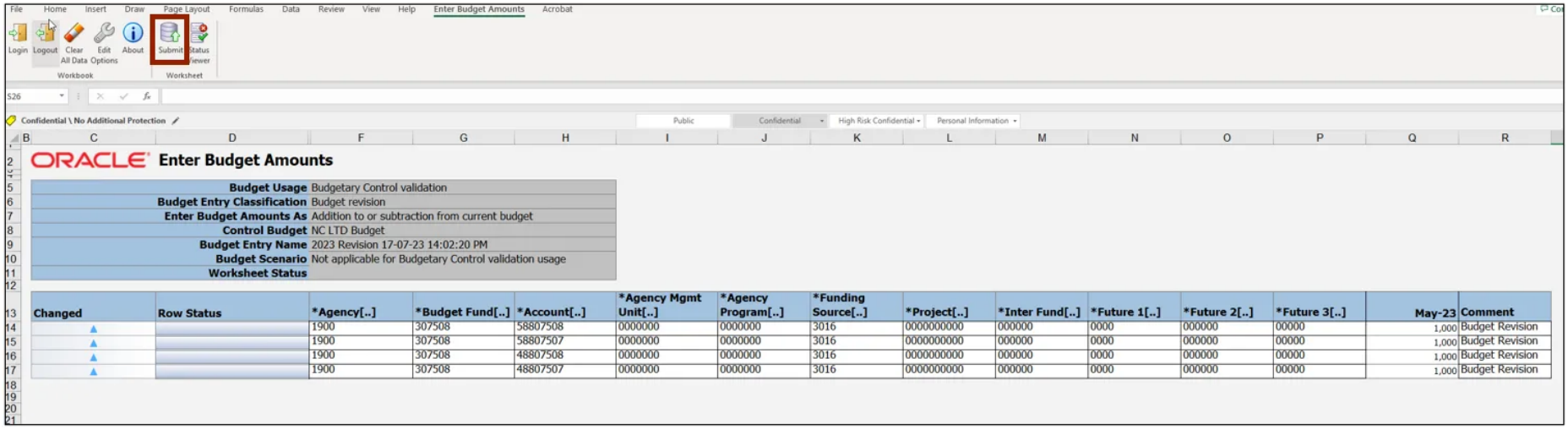
ORACLE **Enter Budget Amounts**

Budget Usage	Budgetary Control validation
Budget Entry Classification	Budget revision
Enter Budget Amounts As	Addition to or subtraction from current budget
Control Budget	NC LTD Budget
Budget Entry Name	2023 Revision 17-07-23 14:02:20 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[..]	*Project[..]	*Inter Fund[..]	*Future 1[..]	*Future 2[..]	*Future 3[..]	May-23	Comment
▲		1900	307508	58807508	0000000	0000000	3016	0000000000	000000	0000	000000	00000	1,000	Budget Revision
▲		1900	307508	58807507	0000000	0000000	3016	0000000000	000000	0000	000000	00000	1,000	Budget Revision
▲		1900	307508	48807508	0000000	0000000	3016	0000000000	000000	0000	000000	00000	1,000	Budget Revision
▲		1900	307508	48807507	0000000	0000000	3016	0000000000	000000	0000	000000	00000	1,000	Budget Revision

Step 15. Under the **Enter Budget Amounts** tab on top of the sheet, click the **Submit** button.

Image

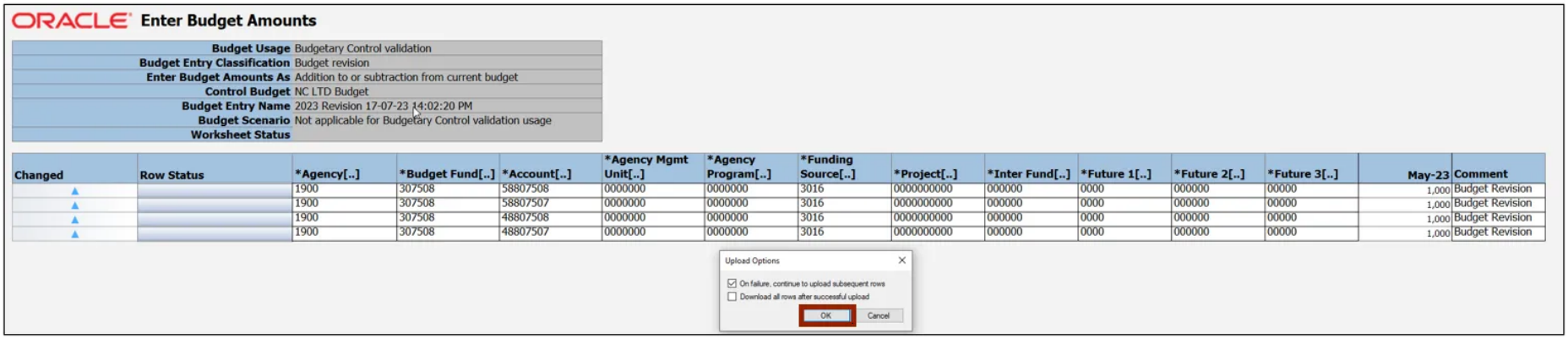


Step 16. The *Upload Options* pop-up appears. Click the **OK** button.

- The first option should be checked. If it is not checked, the process will stop as soon as it encounters an error.
- If the second option is checked, then the entire data that is successfully uploaded, can be downloaded.

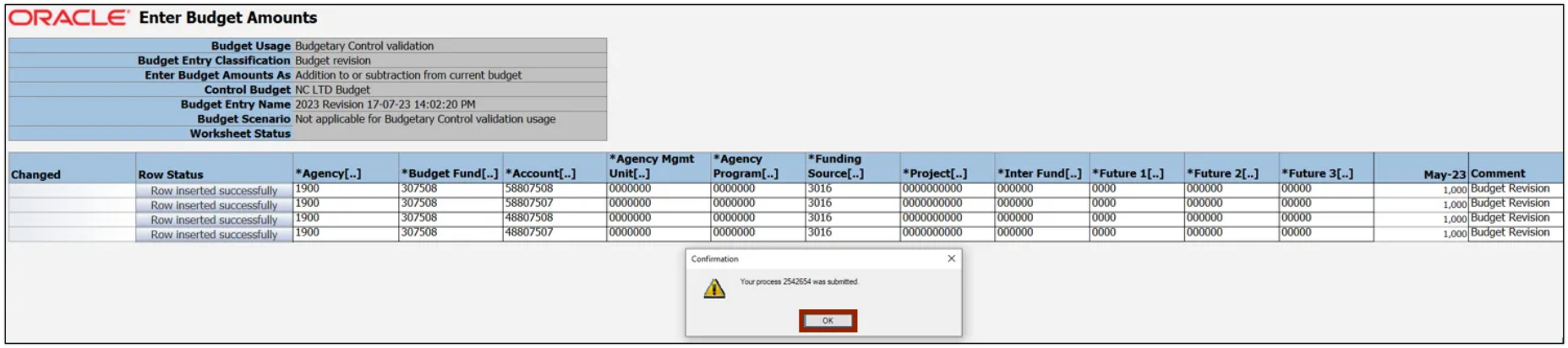
Note: This option is usually not checked because there is already a copy of the data on the sheet.

Image



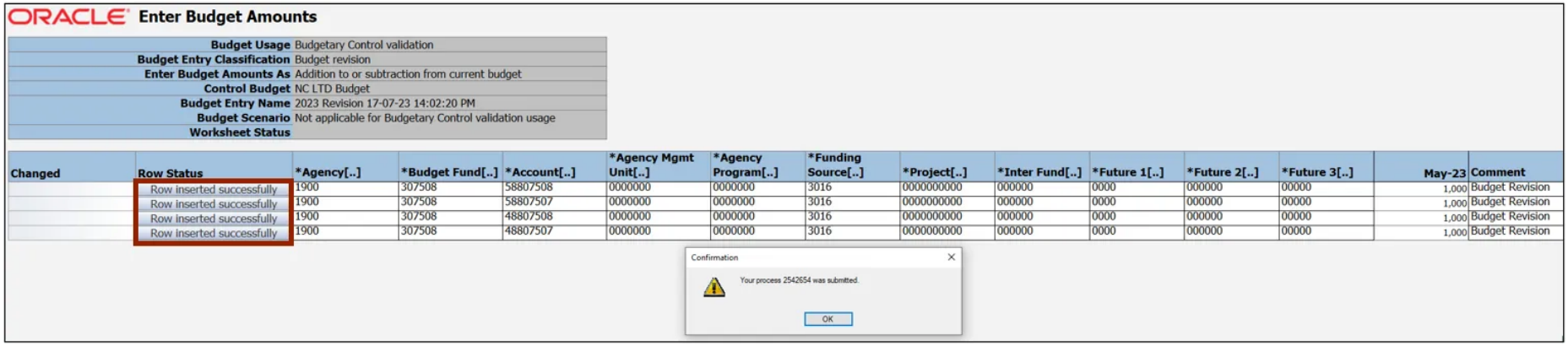
Step 17. The *Confirmation* pop-up appears, which indicates that the process was submitted.

Image



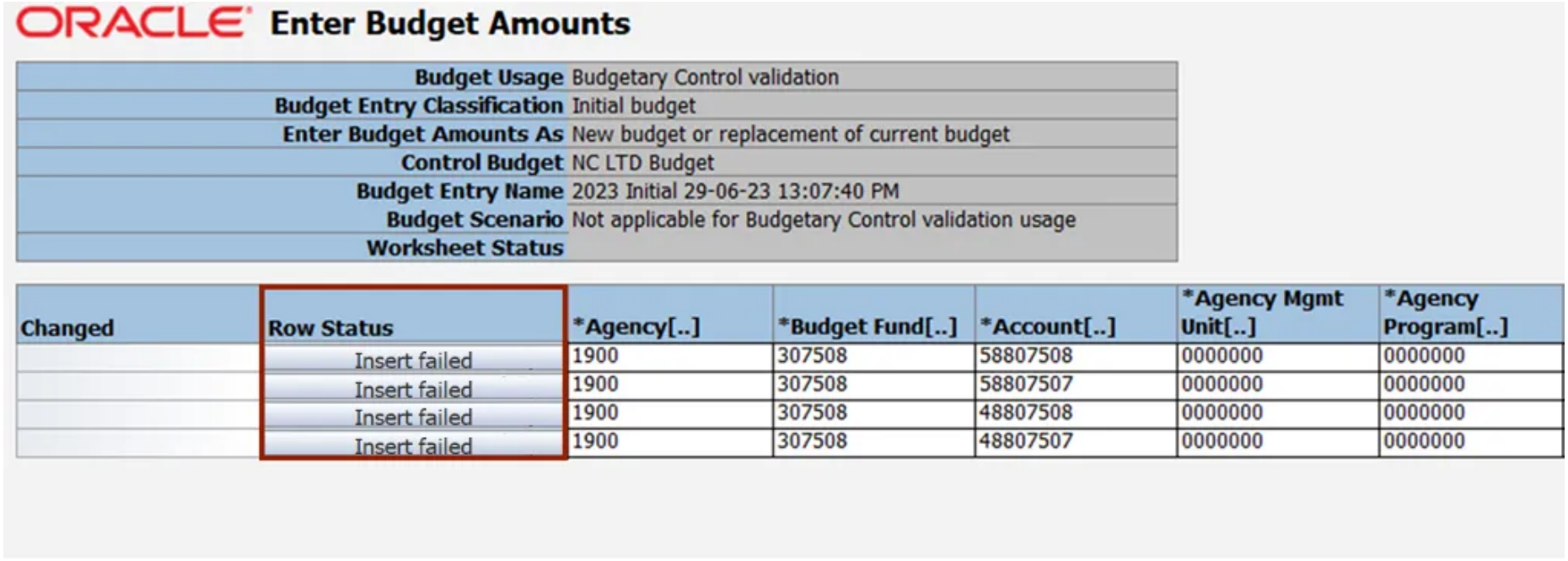
Step 18. Once submitted, the **Row Status** fields get updated with **Row Inserted Successfully**.

Image



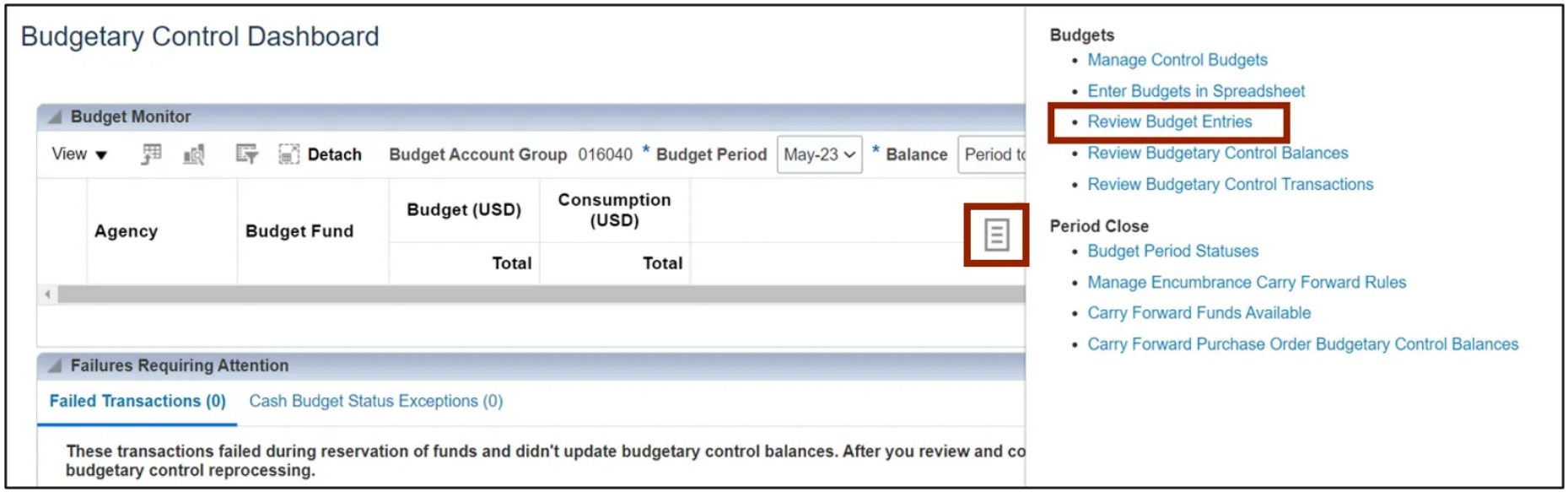
Step 19. Note: If the process fails, no confirmation will appear, and an error appears in the Row Status column. You will need to correct the field(s) that are in error and submit again.

Image



Step 20. Navigate back to the **Budgetary Control Dashboard** page on NCFS. Click the **Tasks** icon and select **Review Budget Entries** to view the budget revision.

Image



Step 21. On the **Search** section, select the **Control Budget**, **From Budget Period**, and **To Budget Period** from the respective drop-down choice lists.

In this example we choose:

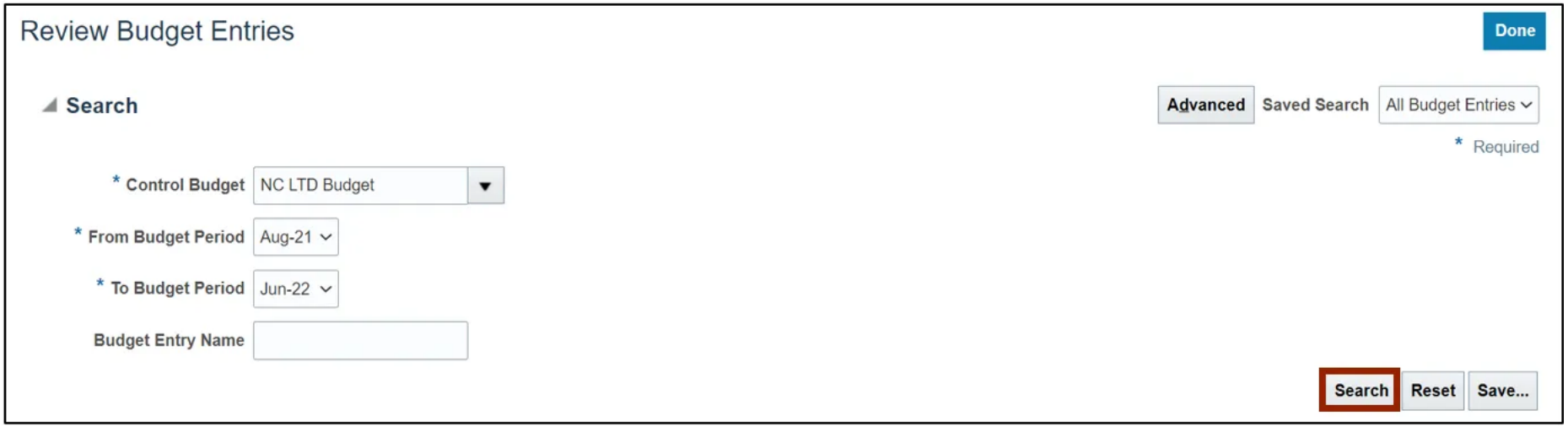
- ***Control Budget*: NC LTD Budget**
- ***From Budget Period*: May-23**
- ***To Budget Period*: May-23**

Image



Step 22. Click the **Search** button.

Image



Step 23. The newly added budget revision can be viewed here.



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Wrap-Up

Update or correct budgets by making budget revisions through the ADFDI spreadsheet using the steps above.

Additional Resources

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

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