MANAGE GRANT AUTHORIZATIONS IN BUDGETS

BUD

QUICK REFERENCE GUIDE BUD-26

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.
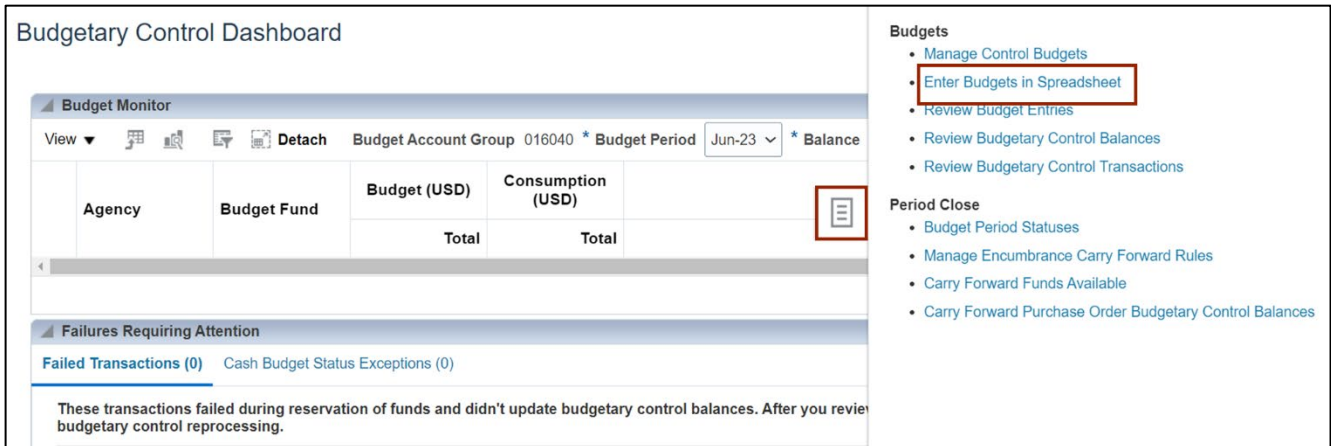
Manage Grant Authorization in Budgets

To Manage Grant Authorization in Budgets, please follow the steps below:

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

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

NCFS

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

4. On the *Enter Budgets in Spreadsheet* pop-up, 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.

5. On the **Budgetary Control Dashboard** page, the *Downloads* pop-up appears. On the *Downloads* pop-up, click the **Open** button.
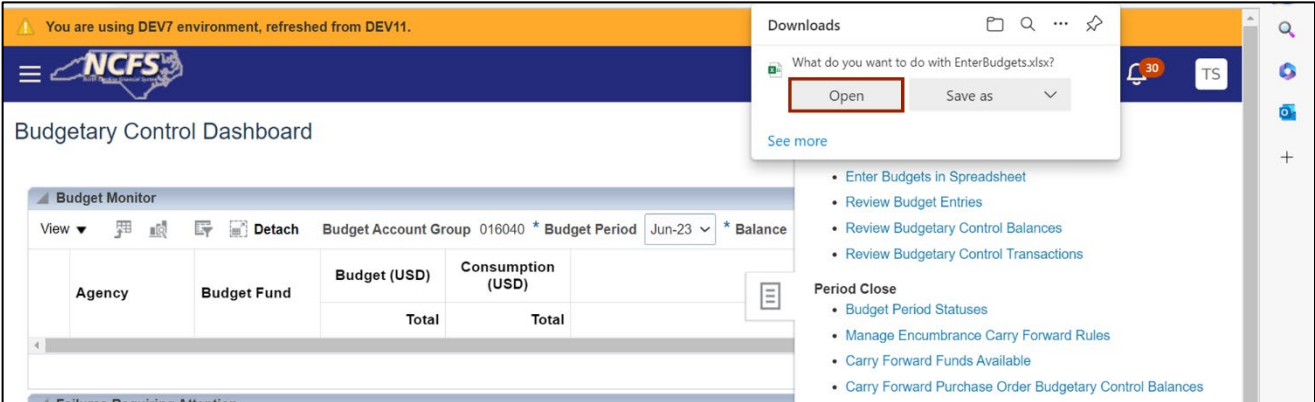
6. The Excel sheet appears. Click the **Enable Editing** button.

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

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

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

ORACLE **Enter Budget Amounts**

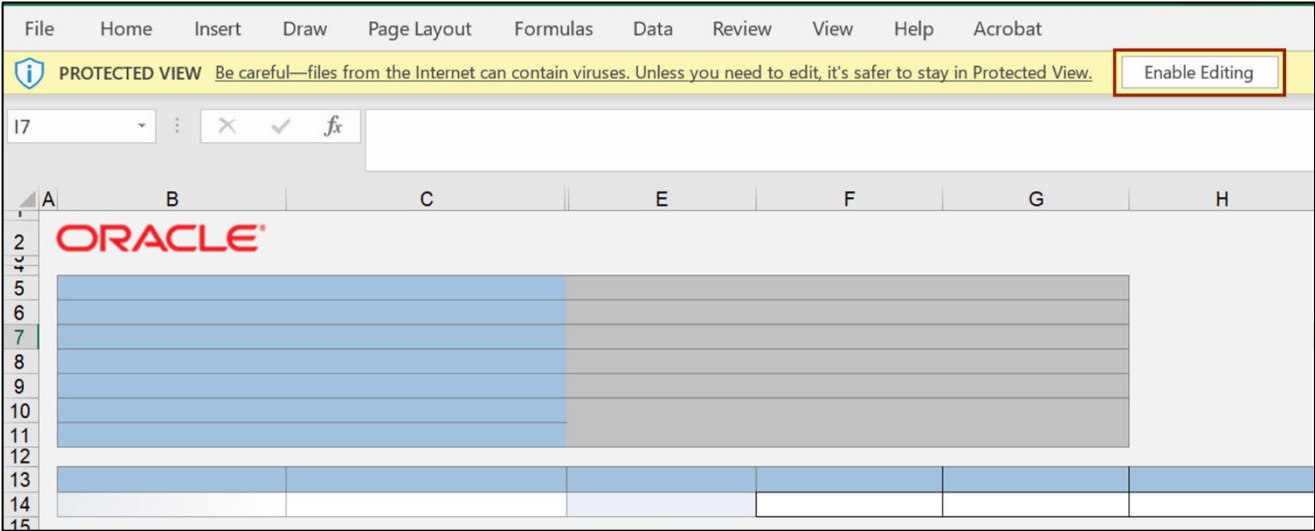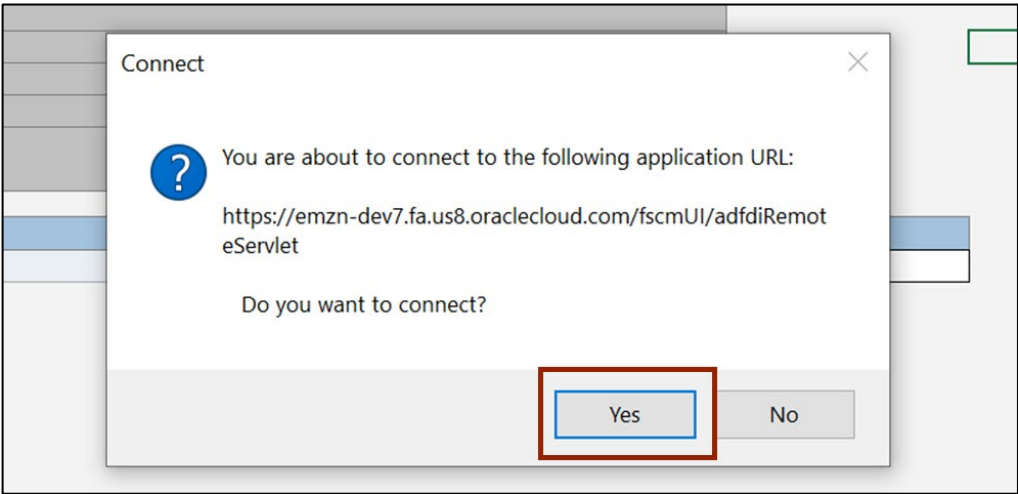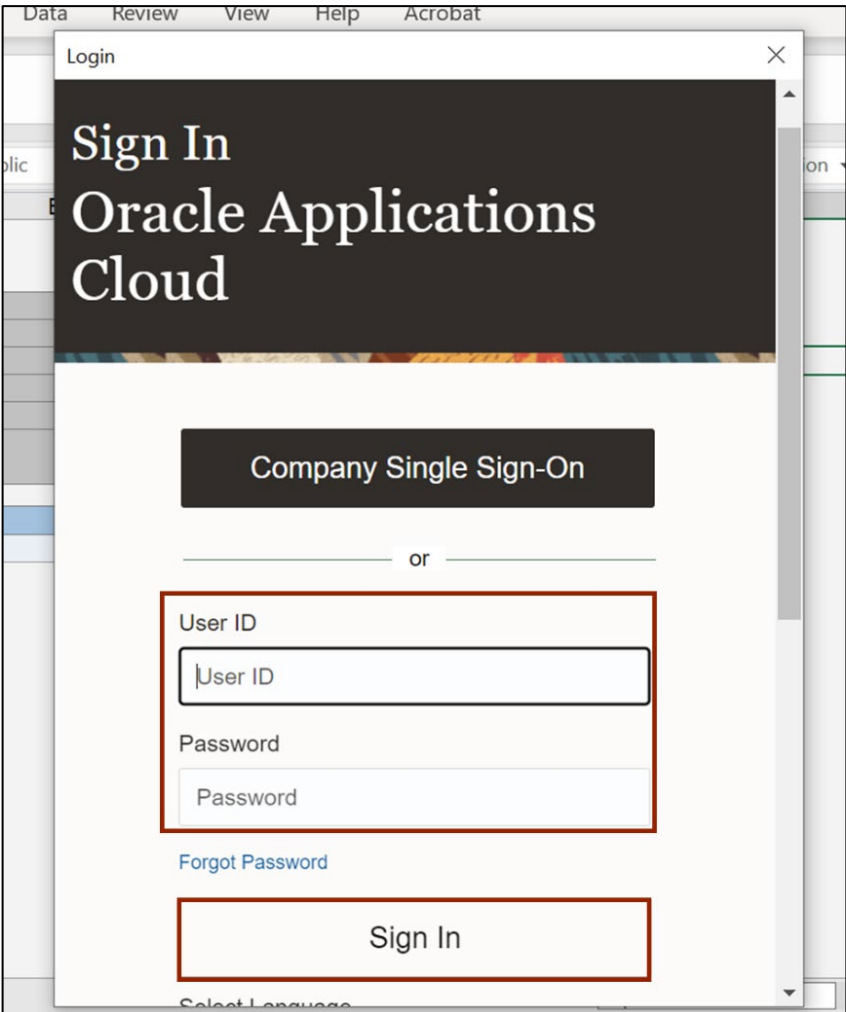|				
Budget Usage	Budgetary Control validation			
Budget Entry Classification	Initial budget			
Enter Budget Amounts As	New budget or replacement of current budget			
Control Budget	NC LTD Budget			
Budget Entry Name	2023 Initial 29-06-23 13:07:40 PM			
Budget Scenario	Not applicable for Budgetary Control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

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.

*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

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

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

Login Logout Clear Edit About Submit Status
All Data Options Viewer

Workbook — Worksheet

R27

Confidential \ No Additional Protection

B	C	D	F	G	H	I	J

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	
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▲		1900	307508	58807508	0000000	0000000
▲		1900	307508	58807507	0000000	0000000
▲		1900	307508	48807508	0000000	0000000
▲		1900	307508	48807507	0000000	0000000

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

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

Upload Options ☒

☑ On failure, continue to upload subsequent rows
☐ Download all rows after successful upload

OK   Cancel

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

nt	*Agency Program[..]	*Funding Source[..]	*Project[..]	*Inter Fund[..]	*Future 1[..]	*Future 2[..]	*Fu
	0000000	3017	0000000000	000000	0000	000000	000
	0000000	3017	0000000000	000000	0000	000000	000
	0000000	3017	0000000000	000000	0000	000000	000
	0000000	3017	0000000000	000000	0000	000000	000

Confirmation ☒

⚠ Your process 2465616 was submitted.

OK

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

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).

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

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.

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

Wrap-Up

Manage Grant Authorization in Budgets using the steps above.

Additional Resources

Virtual Instructor-Led Training (vILT)

- GM100: Grants Management