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Award Budget

In case of New Award(s), the CGA AA will review and complete the Award/Contract Setup and submit for CGA Supervisor approval. Once the CGA Supervisor will review and approve the New Award/Contract Setup, the BFS system will send Email notification to the RA (as configured). Once approved by the CGA supervisor, the Award will be available for RA(s) to distribute the Unallocated Budget as needed. RA(s) need to follow the below steps to re-allocate the Budget.

1. RA will distribute the budget using the Award Budget Entry page.

Note: Budget purpose will consist of "Budget Reallocation", "Chartfield Mapping" and "STIP Budget" only.

Navigation: RA Grants Workcenter >> Award Setup and Maintenance >> Award Budget Entry

The screenshot shows the 'Award Budget Entry' form with the following fields and values:

- Business Unit: GM100
- Budget ID: 048938new
- Award ID: 048938
- Budget Purpose: Chartfield Mapping (dropdown menu open showing options: Chartfield Mapping, Budget Reallocation, Chartfield Mapping, STIP Budget)
- Interface ID: (empty)

Buttons: Find an Existing Value, Add a New Value, Add.

Please ensure to add Business Unit, Budget ID, Award ID, Budget Purpose and Click Add Button. (Interface ID will be required for Budget Purpose "STIP budget" only)

2. A new Field – 'Source' is added for approval workflow routing. It behaves the same as that in GL Journals. Please select the appropriate Source as applicable on Header Page.

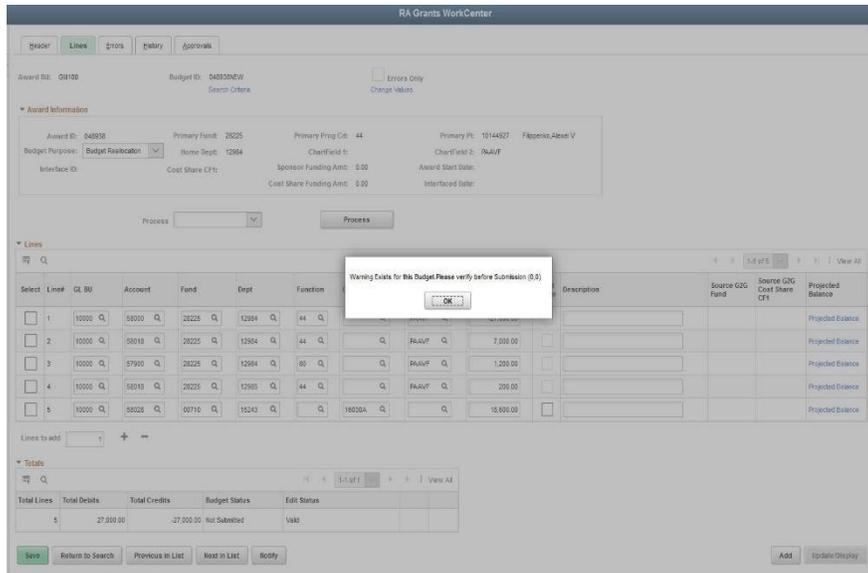
The screenshot shows the 'Award Budget Entry' form with the 'Award Information' section expanded. The 'Source' field is highlighted in yellow and contains the value 'MA'.

Award Information:

- Award ID: 048938
- Budget Purpose: Budget Reallocation
- Interface ID: (empty)
- Primary Fund: 28225
- Home Dept: 12984
- Cost Share CF1: (empty)
- Primary Prog Cd: 44
- ChartField 1: (empty)
- Sponsor Funding Amt: 0.00
- Cost Share Funding Amt: 0.00
- Primary Pl: 10144927
- ChartField 2: PAAVF
- Award Start Date: (empty)
- Interfaced Date: (empty)
- Submitted By: (empty)
- Accepted By: (empty)
- Approved By: (empty)
- Submitted On: (empty)
- Accepted On: (empty)
- Approved On: (empty)
- Entered By: (empty)
- Initiated By: (empty)
- Posted By: (empty)
- Entered On: (empty)
- Initiated On: (empty)
- Posted On: (empty)
- Last Updated By: (empty)
- Last Updated On: (empty)

Buttons: Save, Notify, Add, Update/Display.

3. RA will need to populate the budget lines in order to complete Budget Re-allocation on Line page
 - a) RA need to enter account 58000 unallocated budget row with base chart string and then redistributes the budgets accordingly. (**Note: The system will not default 58000 unallocated budget row automatically going forward.**)
 - b) RA will click “Save” button once Budget reallocation is completed.
 - c) RA will select Process “Edit” and click process Button on Line Page. It will run the “Edit” process to ensure there are no errors associated with Budget.



Note: Online edit Validations –

- a) If the PC Chartfield of a budget line is not mapped before the budget distribution, the following two error messages will be logged.
 - Failure: Invalid project Chartfields mapping
 - PC Chartfield Mapping doesn't Exist
- b) If the Chartfield Attribute of Chartfield 1 or Chartfield 2 is NON C&G ATTRIBUT, the following warning message will be logged. 'Chartfield Attribute of Chartfield1 cannot be NON C&G ATTRIBU'.

4. RA will Click on Error Page to review Errors/Warnings(if any)

Award BU: GM100 Budget ID: 048938NEW

Header Errors/Warnings

Go To Header	Message Type	Field Name	Field Long Name	Message Text
Go To Header				Line Warnings Exist for this Budget

Line Errors/Warnings

Line#	Message Type	Field Name	Field Long Name	Message Text
4	Warning	DEPTD	Department	Line has Non-Primary DeptID
5	Warning	DEPTD	Department	Line has Non-Primary DeptID
5	Warning	FUND_CODE	Fund Code	Line has Non-Primary Fund
5	Warning	CHARTFELD1	ChartField 1	Chartfield Attribute of Chartfield1 cannot be NON C&G ATTRIBU

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

Header | Lines | Errors | History | Approvals

5. RA can submit the budget with warning. RA will select “Submit” and click on Process Button. Once RA will confirm submission, the Budget reallocation will be routed to RA Supervisor for their approval.

Award BU: GM100 Budget ID: 048938NEW

Process:

Warnings found for this Budget. Do you still want to continue with submission? (0.0)

Buttons: Yes, No

Selected	Line#	CL BU	Account	Fund	Dept	Function	Description	Source G2G Fund	Source I2G Cost Share CFI	Projected Balance
<input type="checkbox"/>	1	10000 Q	58000 Q	20225 Q	12864 Q	44 Q				Projected Balance
<input type="checkbox"/>	2	10000 Q	55016 Q	20225 Q	12864 Q	44 Q	PAUJF Q		7,300.00	Projected Balance
<input type="checkbox"/>	3	10000 Q	57900 Q	20225 Q	12864 Q	80 Q	PAUJF Q		1,200.00	Projected Balance
<input type="checkbox"/>	4	10000 Q	56016 Q	20225 Q	12865 Q	44 Q	PAUJF Q		200.00	Projected Balance
<input type="checkbox"/>	5	10000 Q	55025 Q	10710 Q	15043 Q	Q	10030A Q		10,600.00	Projected Balance

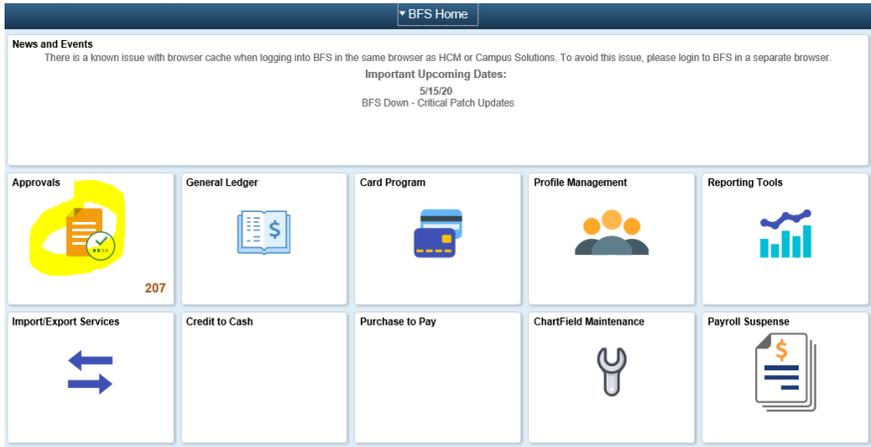
Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

Header | Lines | Errors | History | Approvals

Note: In case of any errors, RA need to get errors fixed and required to re-run the “Edit” Process again.

- RA Supervisor will login and Click on Approval Tile (New Approval workflow to RA Supervisor)

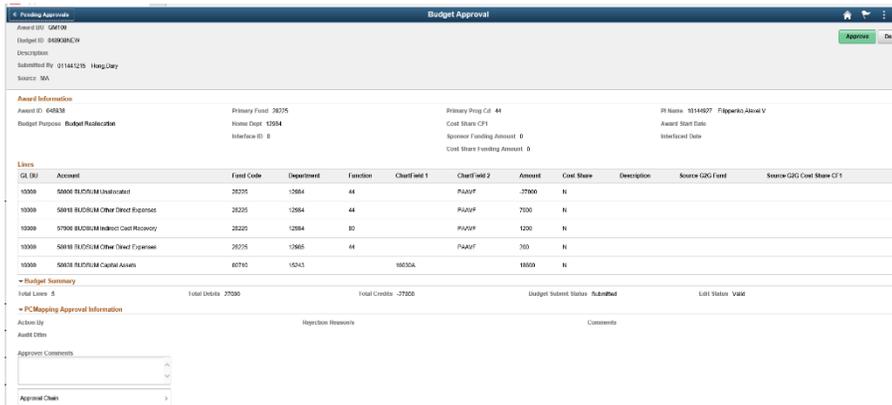
Navigation: Approvals Tile



- RA Supervisor will click on “Budget Approval” section in Approval Tile.

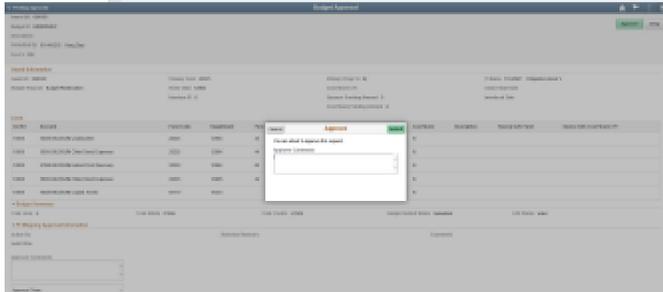


- RA Supervisor will review the content of Budget



9. RA Supervisor will review the details and approve the Budget

Note: The budget will be processed by nightly job and will be available the next day of submission.



Chartfield Mapping

Default Chartfield mapping for the Award will be created during New Award/ Award modifications. Only additional setup if required can be initiated by the CGA team. This Chartfield mapping step is optional and will be required only to establish any additional Chartfield mapping Request for the Award.

RA will initiate the Chartfield Mapping Request and get it approved by the RA supervisor. Once the RA supervisor approves, the request will be routed to CGA for their action. Once CGA approves, the Chartfield mapping will be available as needed. BFS system will send email notification to RA, confirming the Chartfield mapping is completed. RA(s) need to follow the below steps to request for new additional Chartfield Mapping Request for the Award:

1. RA will initiate a separate Chartfield Mapping request before s/he can submit the referenced budget.

Navigation: RA Grants Workcenter >> Award Setup and Maintenance >> Award Budget Entry

Award Budget Entry

Find an Existing Value | Add a New Value

Business Unit: GM100

Budget ID: 048938map

Award ID: 048938

Budget Purpose: Chartfield Mapping

Interface ID: 0

Add

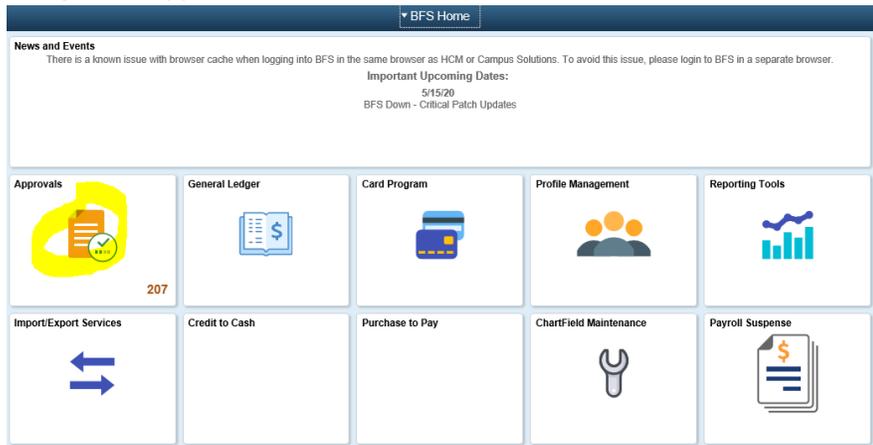
[Find an Existing Value](#) | [Add a New Value](#)

Please ensure to add Business Unit, Budget ID, Award ID, Budget Purpose (= “Chartfield Mapping”) and Click Add Button.

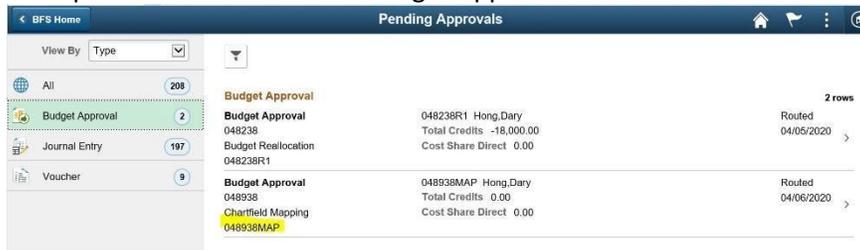
(Interface ID will be required for Budget Purpose “STIP budget” only)

- RA Supervisor will login and click on Approvals Tile. RA Supervisor will login and Click on Approval Tile (New Approval workflow to RA Supervisor)

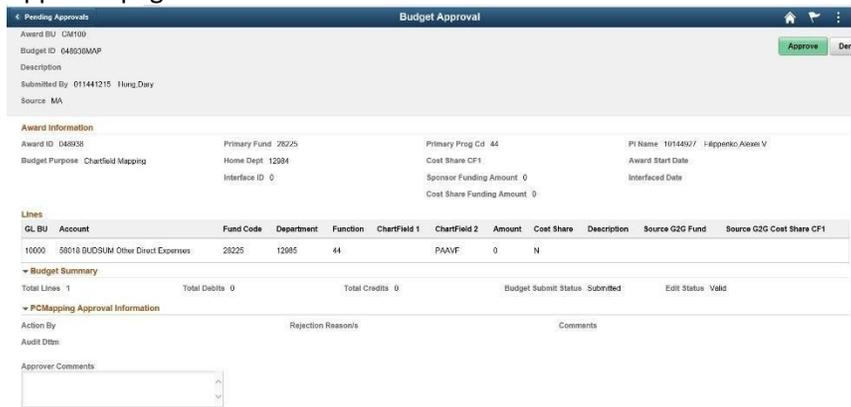
Navigation: Approvals Tile



- RA supervisor will click on the Budget Approval Section and Review the Chart Mapping request.

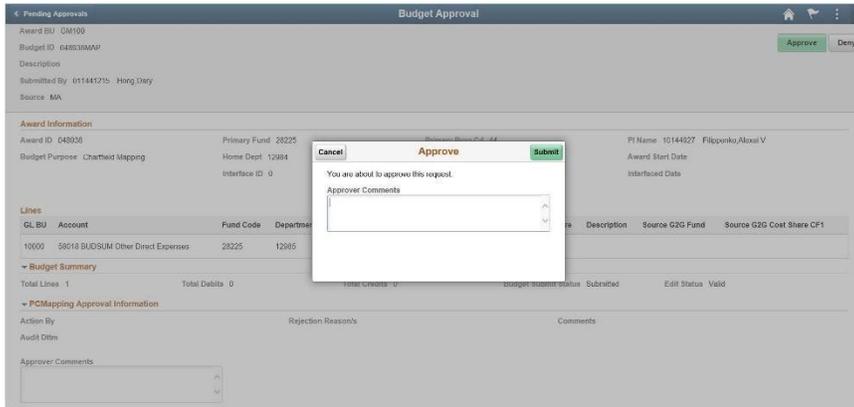


- RA Supervisor will review the content of the Chartfield Mapping by clicking '>' on Pending Approval page.



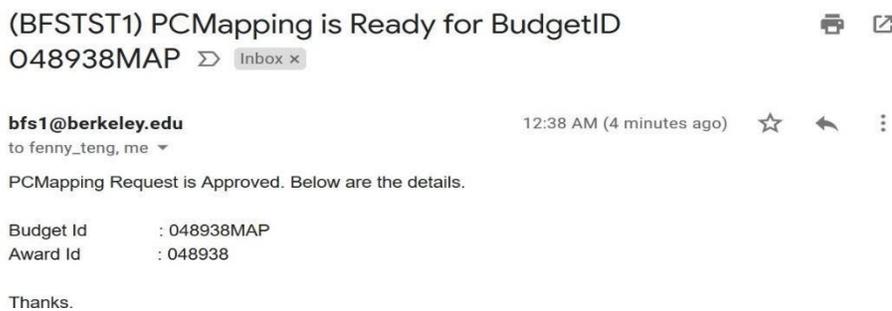
7. RA supervisor will click on “Approve” button, add the approver comments and then “Submit” button in order to approve the Chartfield mapping request.

Once RA Supervisor approves the request, the Chartfield mapping request will route it to CGA Team for further action.



8. Once CGA complete the setup and approves the Chartfield mapping request, BFS System will send the email notification to RA(s) confirming the request has been completed and available to use.

RA can proceed with Budget re-allocation on New Chartfield PC mapping and will not encounter any errors



Award Mod

In case of Award Mod, the CGA AA will review the Award Mod and submit for CGA Supervisor approval. Once the CGA Supervisor will review and approve the Award Mod, the BFS system will process the Award mod during scheduled nightly job. The Award Mod will be available for RA(s) to distribute the Unallocated Budget the next day. RA(s) need to follow the below steps to reallocate the Budget.

Note: Award mod process will insert new PC Mapping rows when changes in Department/Program Code/CF1/CF2 are approved with the beginning of the month as the effective date when the file is processed.

Also in case of any invalid/inactive chartfield(s) existing on these pages, the system will prevent the approval at both Award analyst level and if it misses there will stop the supervisor from approving until they are corrected.

1. RA will distribute the budget using the Award Budget Entry page. RA can use “Copy” feature to populate the Budget Lines from the Original Budget (if needed) or follow the same steps as “Award Budget”

In order to use the “Copy” feature, RA needs to search for earlier budget reallocation for the same Award and select “Copy” and click the Process button.

Navigation: RA Grants Workcenter >> Award Setup and Maintenance >> Award Budget Entry – Lines Tab

The screenshot displays the 'Award Budget Entry' interface. At the top, there are tabs for 'header', 'lines', 'errors', 'history', and 'approve'. Below these, the 'Award Information' section shows details for Award ID: 048712, Budget ID: 0487120012010, and various funding and start dates. A 'Process' button with a dropdown menu is visible, with 'Copy' selected. A 'Copy Budgets' dialog box is open, allowing the user to search for a source budget ID (04871201) and a budget purpose (Budget Mod only). The main table lists budget lines with columns for Select, Line#, GL BU, Account, Fund, Dept, Function, Chartfield 1, Chartfield 2, Amount, Source CGO Fund, Source CGO Cost Share CF1, and Projected Balance. The table contains 9 lines of data, including amounts like 156,548.00 and 45,714.00. A 'Totals' section at the bottom shows 'Total Lines', 'Total Debits', 'Total Credits', 'Budget Status', and 'Edit Status'.

3. RA will edit and will review Errors/Warnings(if any)

Header Errors/Warnings

Go To Header	Message Type	Field Name	Field Long Name	Message Text
Go To Header				Line Warnings Exist for this Budget

Line Errors/Warnings

Line#	Message Type	Field Name	Field Long Name	Message Text
5	Warning	DEPTD	Department	Line has Non-Primary DeptID
5	Warning	CHARTFELD2	ChartField 2	Chartfield Attribute Value of Chartfield2 does not match with Award PI
6	Warning	DEPTD	Department	Line has Non-Primary DeptID
6	Warning	CHARTFELD2	ChartField 2	Chartfield Attribute Value of Chartfield2 does not match with Award PI
7	Warning	DEPTD	Department	Line has Non-Primary DeptID
7	Warning	CHARTFELD2	ChartField 2	Chartfield Attribute Value of Chartfield2 does not match with Award PI
8	Warning	DEPTD	Department	Line has Non-Primary DeptID
8	Warning	CHARTFELD2	ChartField 2	Chartfield Attribute Value of Chartfield2 does not match with Award PI

4. RA can submit the budget with warning. RA will select "Submit" and click on Process Button. Once RA will confirm submission, the Budget reallocation will be routed to RA Supervisor for their approval.

Lines

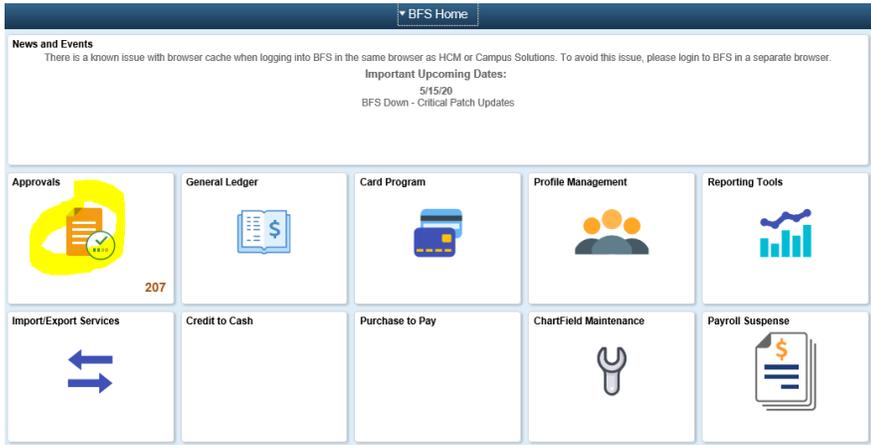
Select	Line#	CL BU	Account	Fund	Dept	Function	ChartField 1	ChartField 2	Source CGG Fund	Source CAG Cost Share CFI	Projected Balance
<input type="checkbox"/>	1	10000 CL	50000 CL	61013 CL	12300 CL	44 CL	CL	BBOP CL			Projected Balance
<input type="checkbox"/>	2	10000 CL	51000 CL	61013 CL	12300 CL	44 CL	CL	BBOP CL	9,900.00		Projected Balance
<input type="checkbox"/>	3	10000 CL	80000 CL	61013 CL	12300 CL	44 CL	CL	BBOP CL	7,500.00		Projected Balance
<input type="checkbox"/>	4	10000 CL	67800 CL	61013 CL	12300 CL	80 CL	CL	BBOP CL	18,500.76		Projected Balance
<input type="checkbox"/>	5	10000 CL	98012 CL	61013 CL	20697 CL	44 CL	CL	EULAJ CL	2,724.00		Projected Balance
<input type="checkbox"/>	6	10000 CL	13000 CL	61013 CL	20697 CL	44 CL	CL	EULAJ CL	10,400.00		Projected Balance
<input type="checkbox"/>	7	10000 CL	55000 CL	61013 CL	20697 CL	44 CL	CL	EULAJ CL	1,000.00		Projected Balance
<input type="checkbox"/>	8	10000 CL	67800 CL	61013 CL	20697 CL	80 CL	CL	EULAJ CL	12,667.68		Projected Balance

Totals

Total Lines	Total Debits	Total Credits	Budget Status	CRS Status
8	68,750.00	68,750.00	Not Submitted	Valid

- RA Supervisor will login and click on Approvals Tile.

Navigation: Approvals Tile



- RA Supervisor will click on "Budget Approval" section in Approval Tile.



- RA Supervisor will review the details and approve the Budget

Note: The budget will be processed by nightly job and will be available the next day of submission.

