

Budget Upload - CGA Supervisor Review

1. CGA Supervisors have the flexibility to approve the budget while it is still in the CGA analyst's queue, or wait until the CGA analyst sends the budget to the CGA supervisor's queue. If the CGA analyst approves budget, then the budget can only be found in the supervisor's queue.

The screenshot shows the Oracle Grants WorkCenter interface. The main title is 'New Department Budgets Awaiting Supervisor Review'. Below the title is a table with the following data:

Award ID	Customer Name	Fund	Department	Empl ID	PI Name	Fund Contact	Billing Specialist Name	Start Date	Interfac
038188	NIH - Neurological Disorders & Stroke	81976	26697	011959455	Feldman, Daniel E.	YY10	Paul Howl	06/01/2015	05/31/2

The 'New Budgets Awaiting Supervisor Review' option in the left-hand navigation menu is highlighted with a red box. An orange arrow points to the 'Award ID' column header in the table.

2. The purpose of budget is listed on the corner of the budget page since it would be redundant to have the CGA supervisors go through each additional link(s) to approve the budget.

The screenshot shows the 'Department Budget Approval' page. At the top, there are fields for 'File Name', 'Business Unit', 'Contract Number', and 'Processing Status'. The 'Purpose' field is highlighted with a red box and contains the text 'New Award Budget'.

Below the header, there are two main sections:

- Account Summary:** A table with columns for Account, Description, New Sponsor Amount, New Cost Share Amount, Reported Sponsor Amount, and Reported Cost Share Amount. The data is as follows:

Account	Description	New Sponsor Amount	New Cost Share Amount	Reported Sponsor Amount	Reported Cost Share Amount
57900	BUDSUM Indirect Cost Recovery	100,000.00	0.00	0.00	0.00
58000	BUDSUM Unallocated	-333,649.00	0.00	333,649.00	0.00
58018	BUDSUM Other Direct Expenses	233,649.00	0.00	0.00	0.00
- Project Costing Mapping:** A table with columns for Fund Contact, Contract Number, PI ID, PI Name, and Award Department. The data is as follows:

Fund Contact	Contract Number	PI ID	PI Name	Award Department
YY10	038188	011959455	Daniel Feldman	26697
YY10	038188	011959455	Daniel Feldman	26697
YY10	038188	011959455	Daniel Feldman	26697

At the bottom of the page, there are buttons for 'Approve', 'Deny', and 'Refresh', along with a link for 'Review Import/Export Logs'.

3. When the CGA supervisor reviews the budget and finds an incomplete setup, such as incorrect mapping or incorrect amount, the budget will be sent back to the CGA analyst's queue. The CGA analyst will determine if the correction(s) need to be made on the CGA side or if the budget needs to be rejected and sent back to the department for correction.

Favorites ▾ Main Menu ▾ > Grants ▾ > Grants WorkCenter ▾ > Department Budget Approval

ORACLE

Grants WorkCenter

Main | Reports/Queries

My Work

Edit Filters

Department Budget Approval

File Name CGD_031_7682_ONL_012533262 Business Unit GM100 Contract Number 038188 Processing Status Supervisor Rejected Purpose New Award

Account Summary Personalize | Find | 1-3 of 3 | Last

Account	Description	New Sponsor Amount	New Cost Share Amount	Reported Sponsor Amount	Reported Cost Share Amount
57900	BUDSUM Indirect Cost Recovery	100,000.00	0.00	0.00	0.00
58000	BUDSUM Unallocated	-333,649.00	0.00	333,649.00	0.00
58018	BUDSUM Other Direct Expenses	233,649.00	0.00	0.00	0.00

Project Costing Mapping Personalize | Find | 1-3 of 3 | Last

Award Data | Budget Data | PC Mapping | (FFTF)

Fund Contact	Contract Number	PI ID	PI Name	Award Department
YY10	038188	011959455	Daniel Feldman	26697
YY10	038188	011959455	Daniel Feldman	26697
YY10	038188	011959455	Daniel Feldman	26697

Approve Deny Refresh Review Import/Export Logs

Rejection Reasons/Comments

Rejection Reasons Find | View All | 1 of 1 | Last

Rejection Reason
1 Invalid Program Code

Denial Comments incorrect pc mapping

- Once CGA supervisors approve the budget by clicking on the 'Approve' button, the system will load the budget to the budget page immediately. However, the budget row inserted from the budget upload program will be greyed out, so that no data can be changed on the CGA side once the budget is uploaded. This feature is designed to preserve the data integrity between the budget sent from the department and budget uploaded and approved on the CGA side. It should be noted that CGA can still add and edit any manually inserted rows for their carry forward, program income, or close out process.

Related Content | New Window | Help |

Department Budget Approval

File Name: CGD_031_7882_ONL_012533262 Business Unit: GM100 Contract Number: 038188 Processing Status: Supervisor Rejected Purpose: New Award Budget

Account Summary

Account	Description	New Sponsor Amount	New Cost Share Amount	Reported Sponsor Amount	Reported Cost Share Amount
57800	BUDSUM Indirect Cost Recovery	100,000.00	0.00	0.00	0.00
58000	BUDSUM Unallocated	-333,649.00	0.00	333,649.00	0.00
58018	BUDSUM Other Direct Expenses	233,649.00	0.00	0.00	0.00

Project Costing Mapping

Fund Contact	Contract Number	PI ID	PI Name	Award Department
YY10	038188	011959455	Daniel Feldman	26697
YY10	038188	011959455	Daniel Feldman	26697
YY10	038188	011959455	Daniel Feldman	26697

Rejection Reasons/Comments

Related Content: Contract Terms | Award Fund Inquiry | Import | Review Import/Export Logs | Project Chartfields CrossWalk

Budget Detail

Project: 1009260 Microscale Organization and Se

Budget Period: 1 Begin Date: 06/01/2015 End Date: 05/31/2019 Finalize Process Monitor

Project Budget Summary

Cost Share Direct: \$0.00 Currency: USD Total Budget: \$333,649.00

Sponsor Budget: \$333,649.00 Security Status: None

Budget Amounts for Period

Account	Fund Code	Department	Program Code	Chartfield 1	Chartfield 2	Activity	Analysis Type	Source Type	Budget Item	Amount	Currency
58018	81976	26697	43			01	BUD		OTHEXP	233,649.00	USD
58000	81976	26697	43			01	BUD		UNALLOCATED	333,649.00	USD
58000	81976	26697	43			01	BUD		UNALLOCATED	-333,649.00	USD
57900	81976	26697	80			01	BUD		FACADM	100,000.00	USD

Return to Award Profile

Full Save | Return to Search | Notify

5. Finalize budget

- For New Awards: The Supervisor Approval Process finalizes the budget.
- For Award Modification: The Award Modification Program finalizes the budget.
- For Budget Reallocation: The Supervisor finalizes the budget.
- For PC Mapping: The system DOES NOT LOAD the budget to the budget page.

6. Notifying Departments that budgets have been posted

- To notify the departments if the budget they submitted has been posted, a report is sent out via Query Output Distribution Mod which is scheduled in the nightly batch for only budgets that are posted that day.

Query Output Distribution

Navigation: Favorites ▾ Main Menu ▾ > CAL Components ▾ > GM ▾ > Query Output Distribution

ORACLE

Query Output Distribution

Run Control ID CH Report Manager Process Monitor

Note: Sender Email ID defaults to cgaawards@berkeley.edu as defined in UC_CONSTANTS Table if left Blank

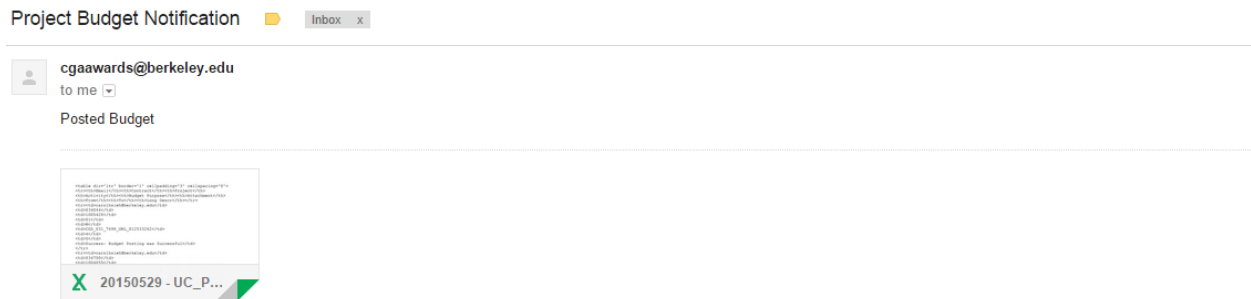
Sender Email ?

Query Name 🔍

Date Reported 📅

Message Text

Email Notification Screenshot



An example of the report

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Email	Contract	Project	Activity	Budget Purpose	Attachment	From	To	Long Descr				
2	carolhsieh@berkeley.edu	34044	1005428	1	M	CGD_031_7698_ONL_012533262	4	5	Success: Budget Posting was Successful				
3	carolhsieh@berkeley.edu	34700	1004855	1	M	CGD_031_7701_ONL_012533262	13	15	Success: Budget Posting was Successful				
4	carolhsieh@berkeley.edu	34865	1004893	1	M	CGD_031_7703_ONL_012533262	12	13	Success: Budget Posting was Successful				
5	carolhsieh@berkeley.edu	36974	1008047	1	M	CGD_031_7699_ONL_012533262	14	16	Success: Budget Posting was Successful				
6	carolhsieh@berkeley.edu	37169	1008243	1	M	CGD_031_7700_ONL_012533262	4	5	Success: Budget Posting was Successful				
7	carolhsieh@berkeley.edu	37443	1008512	1	M	CGD_031_7695_ONL_012533262	11	12	Success: Budget Posting was Successful				
8	carolhsieh@berkeley.edu	38187	1009278	1	N	CGD_031_7652_ONL_012533262	2	4	Success: Budget Posting was Successful				
9							0	0					

NOTES:

- For Award Mods, CGA will no longer need to add a line on the budget page in order to load budget.
- For Training Grants or Multi funds awards, CGA will no longer need to change fund codes on the award attribute page.
- CGA analysts cannot change the budget. CGA can send the budget back to the department to add and edit, but cannot change the budget amount or any chartfield values.
- The department RAs have the option to use an excel spreadsheet to load the budget, but CGA will not have the access to load budget via excel.
- For Award Mods, CGA analysts will still need to approve the award mod on the WorkCenter. This portion is to approve and load budgets only.