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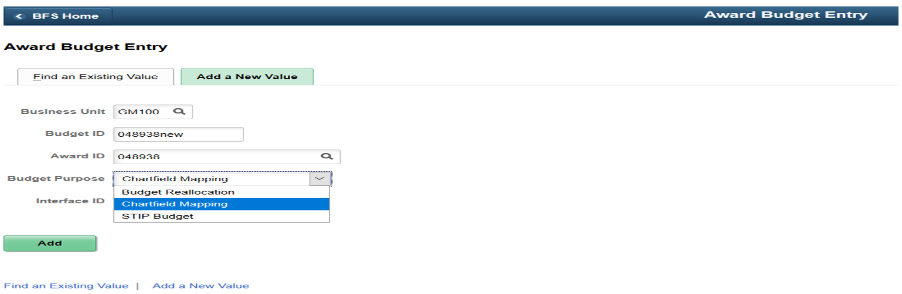
Award Budget

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.

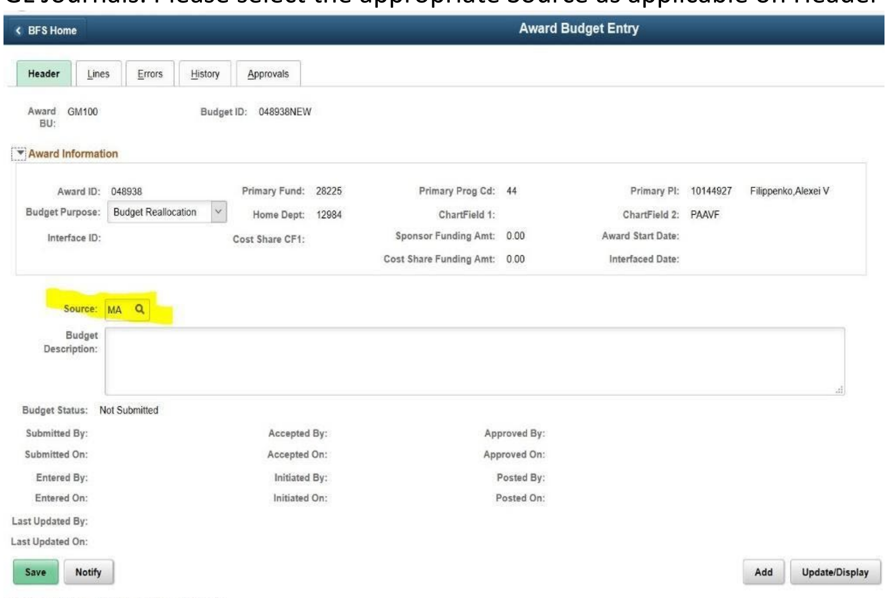
1. RA will distribute the budget using the Award Budget Entry page.
   Note: Budget purpose will consist of "Budget Reallocation", "Chartfield Mapping" and "STIP Budget" only.

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

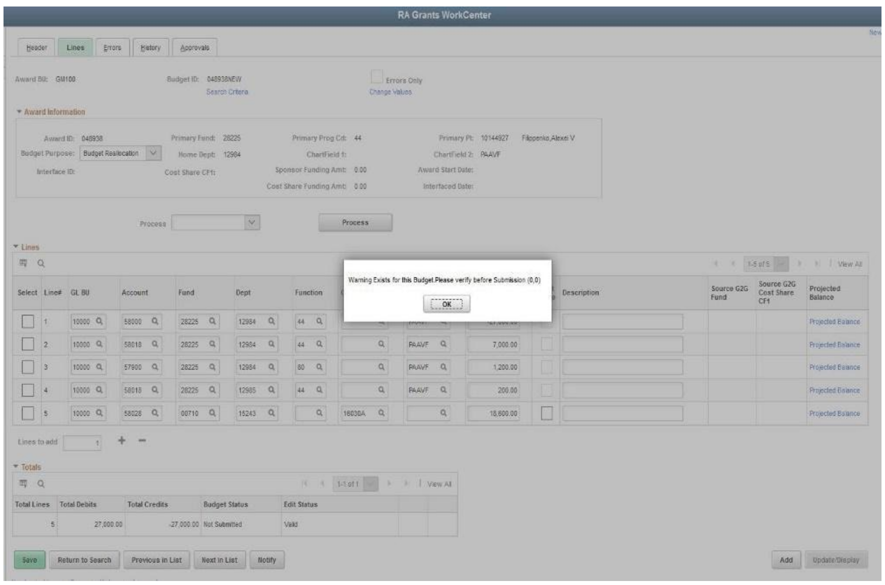
   

   Please ensure to add Business Unit, Budget ID, Award ID, Budget Purpose and Click Add Button. (Interface ID will be required for Budget Purpose "STIP budget" only)

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.

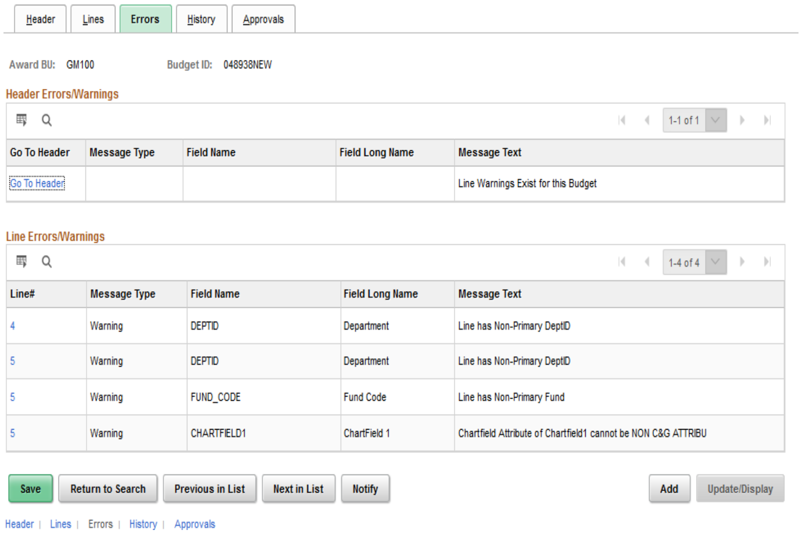
3. RA will need to populate the budget lines in order to complete Budget Re-allocation on Line page
    a) RA need to enter account 58000 unallocated budget row with base chart string and then redistributes the budgets accordingly. (***Note:*** *The system will not default 58000 unallocated budget row 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.



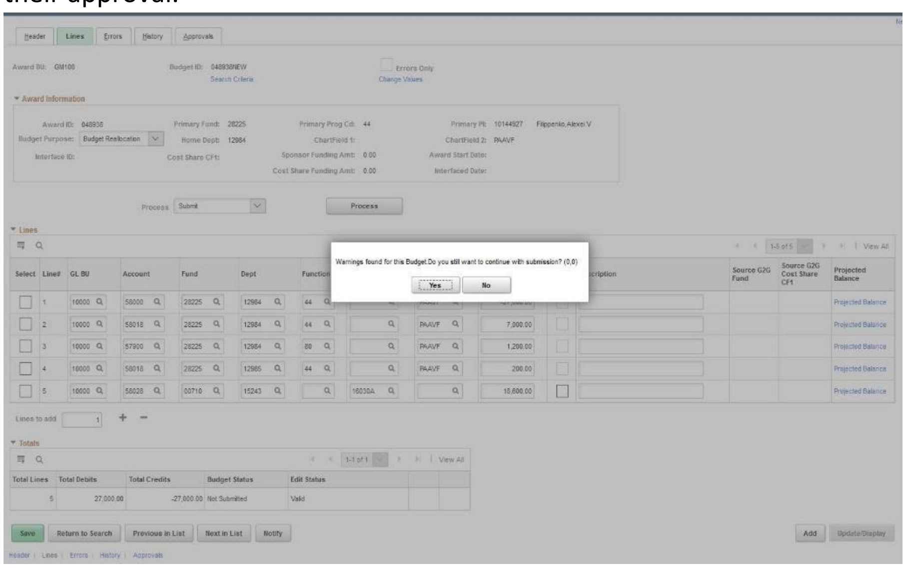
Note: Online edit Validations –

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)



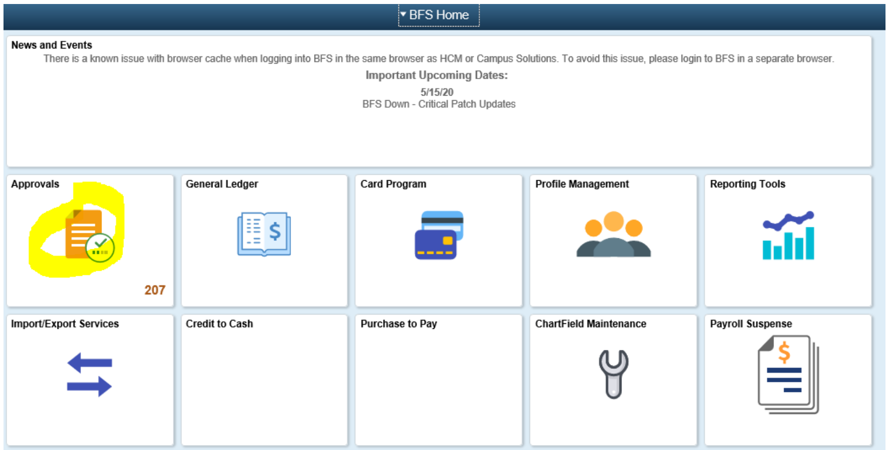
5. RA can submit the budget with warning. RA will select “Submit” and click on Process Button. Once RA will confirm submission, the Budget reallocation will be routed to RA Supervisor for their approval.



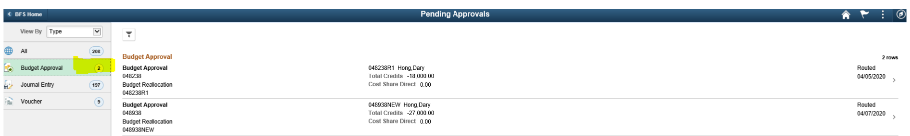
Note: *In case of any errors, RA need to get errors fixed and required to re-run the “Edit” Process again.*

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

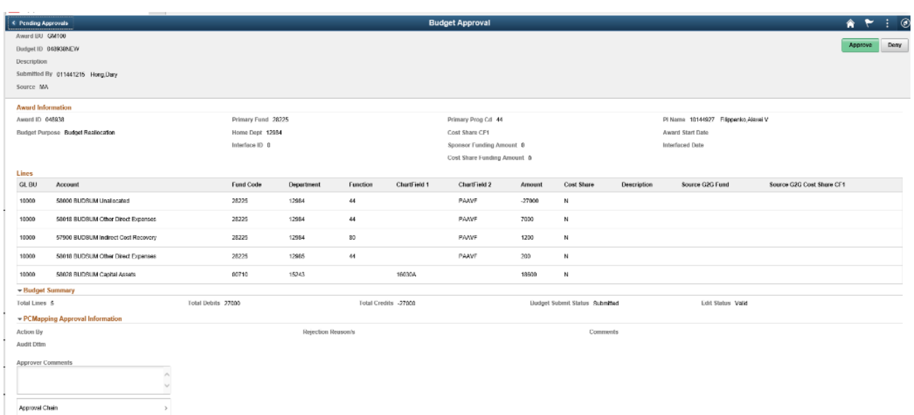
Navigation: Approvals Tile



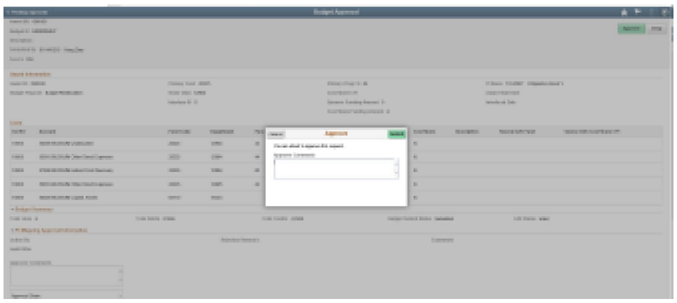
7. RA Supervisor will click on “Budget Approval” section in Approval Tile.



8. 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.



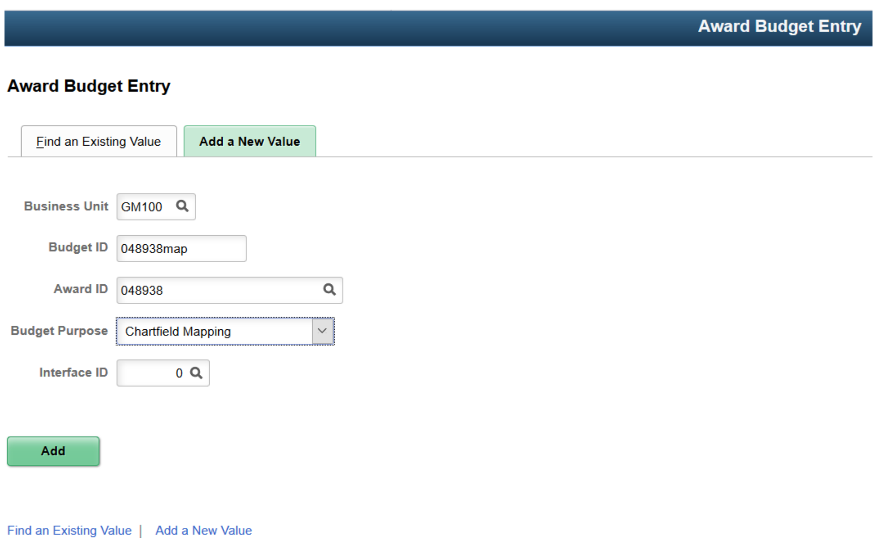
Chartfield Mapping

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.

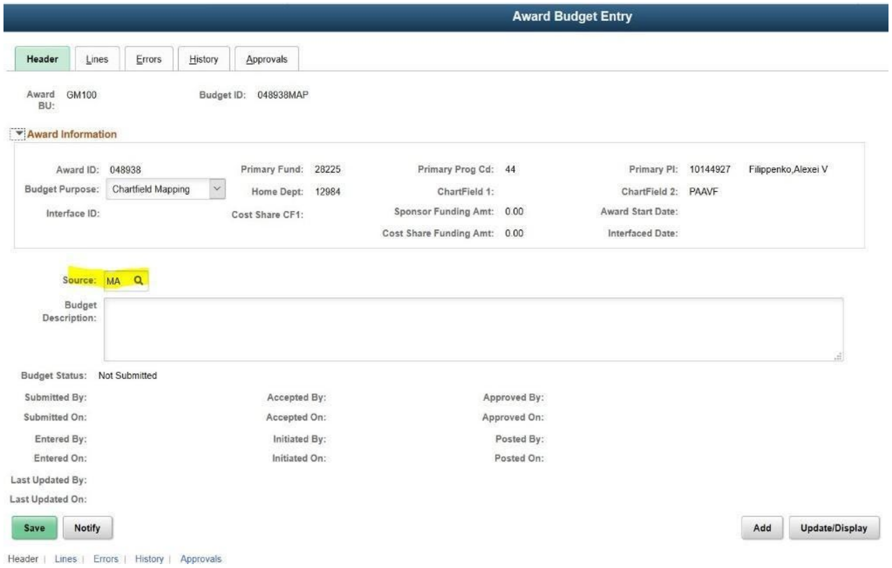
   Navigation: RA Grants Workcenter >> Award Setup and Maintenance >> Award Budget Entry

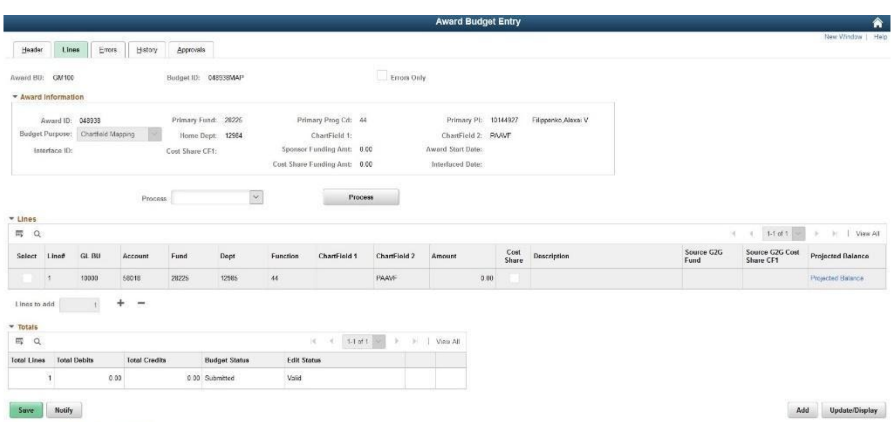
   Please ensure to add Business Unit, Budget ID, Award ID, Budget Purpose (= “Chartfield Mapping”) and Click Add Button.

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

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.

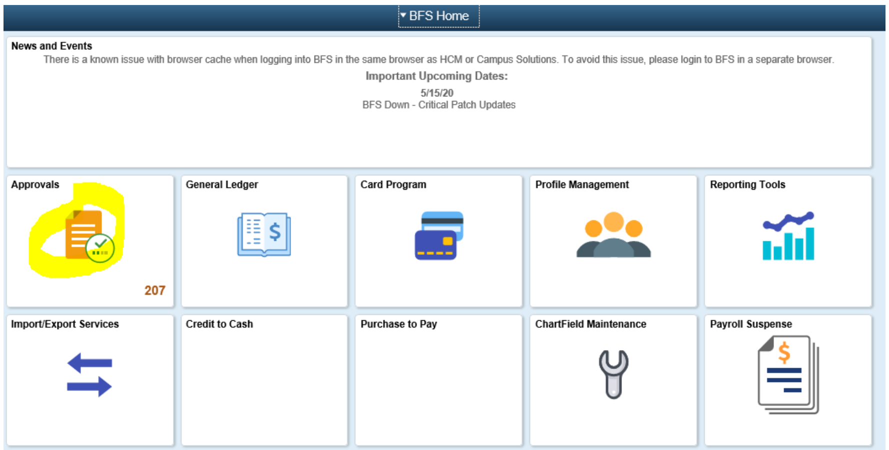


3. RA will need to populate the Chart-String in order to complete Chartfield Mapping Request on Line page
   a) RA will click "Save" button once Chartfield Mapping Request is completed.
   b) RA will select Process "Edit" and click process Button on Line Page. It will run the "Edit" process to ensure there are no errors associated with Chartfield Mapping Request.
   c) RA will Click on Error Page to review Errors/Warnings(if any)
   d) RA will select "Submit" and click on Process Button. Once RA confirms submission, the Chartfield mapping request will be routed to RA Supervisor for their approval.



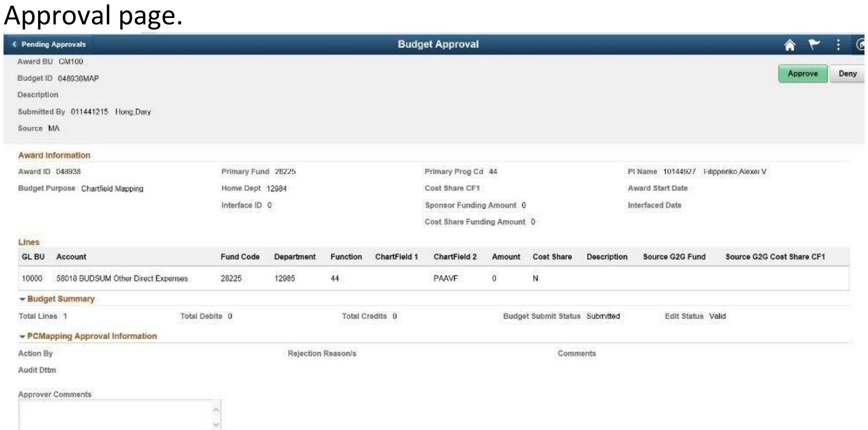
4. RA Supervisor will login and click on Approvals Tile. RA Supervisor will login and Click on Approval Tile (New Approval workflow to RA Supervisor)

Navigation: Approvals Tile



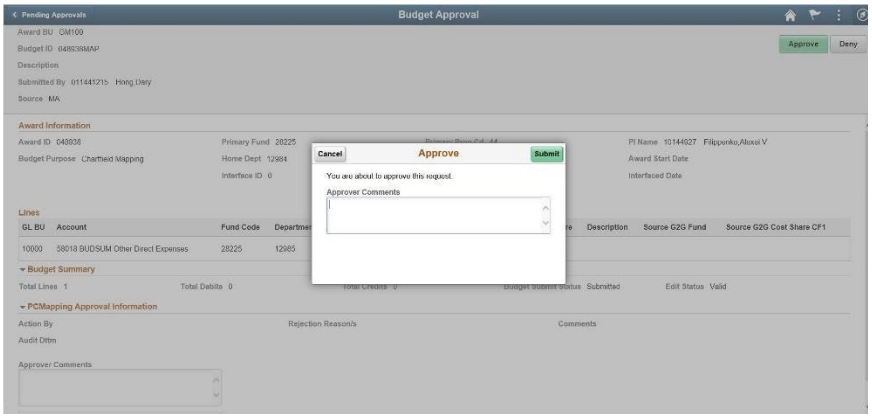
5. RA supervisor will click on the Budget Approval Section and Review the Chart Mapping request.

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



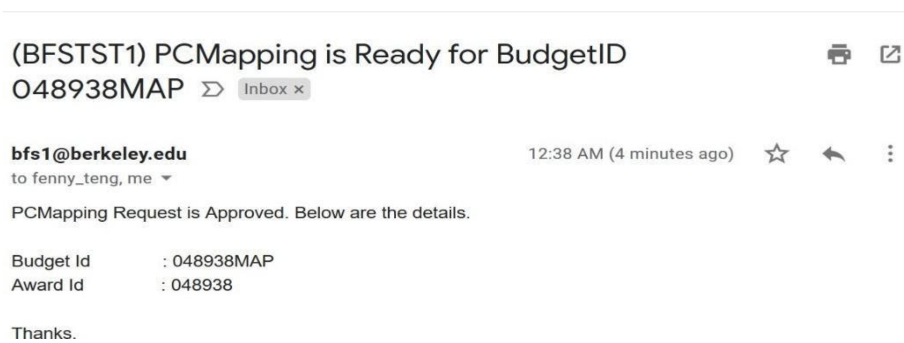
7. RA supervisor will click on “Approve” button, add the approver comments and then “Submit” button in order to approve the Chartfield mapping request.

   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

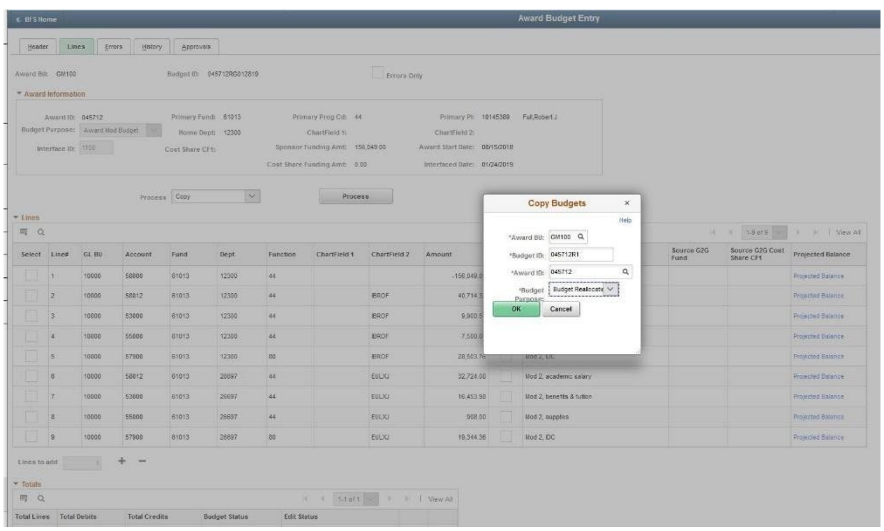
In case of Award Mod, the CGA AA will review the Award Mod and submit for CGA Supervisor approval. Once the CGA Supervisor will review and approve the Award Mod, the BFS system will process the Award mod during scheduled nightly job. The Award Mod will be available for RA(s) to distribute the Unallocated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

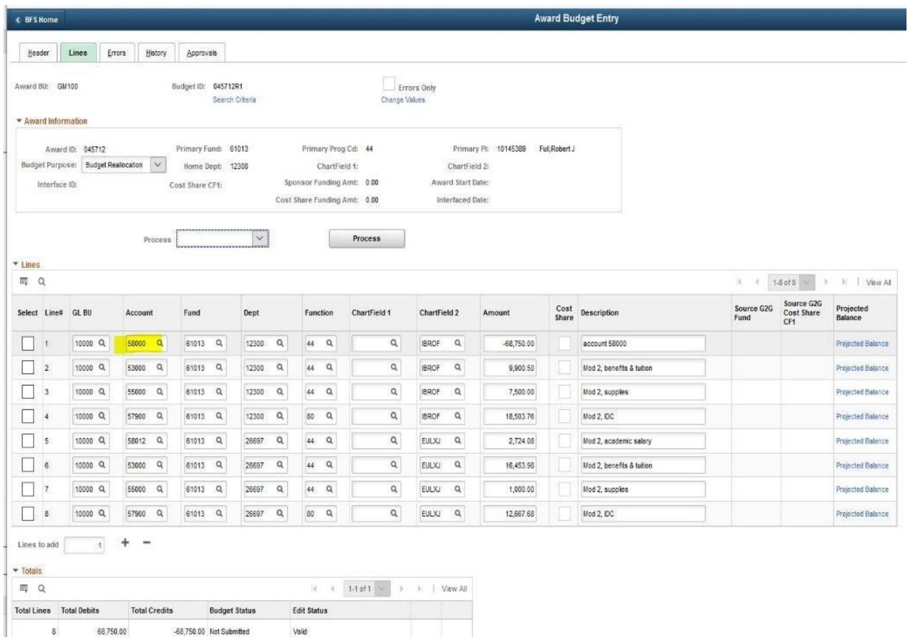
1. RA will distribute the budget using the Award Budget Entry page. RA can use "Copy" feature to populate the Budget Lines from the Original Budget (if needed) or follow the same steps as "Award Budget"

   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



2. RA will need to populate the budget lines in order to complete Budget Re-allocation on Line page
    a) RA need to ensure account 58000 unallocated budget row with base chart string and then redistributes the budgets accordingly. (***Note:*** *The system will copy default 58000 unallocated budget row when using the Copy Feature.)*
    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.



BFS Home — Award Budget Entry

Header | Lines | Errors | History | Approvals

Award BU: GM100   Budget ID: 045712R1   Search Criteria   Errors Only   Change Values

Award Information

Award ID: 045712   Primary Fund: 61013   Primary Prog Cd: 44   Primary PI: 10145389 Ful,Robert J
Budget Purpose: Budget Reallocation   Home Dept: 12300   ChartField 1:   ChartField 2:
Interface ID: Cost Share CF1:   Sponsor Funding Amt: 0.00   Award Start Date:
Cost Share Funding Amt: 0.00   Interfaced Date:

Process   Process

Lines   1-8 of 8   View All

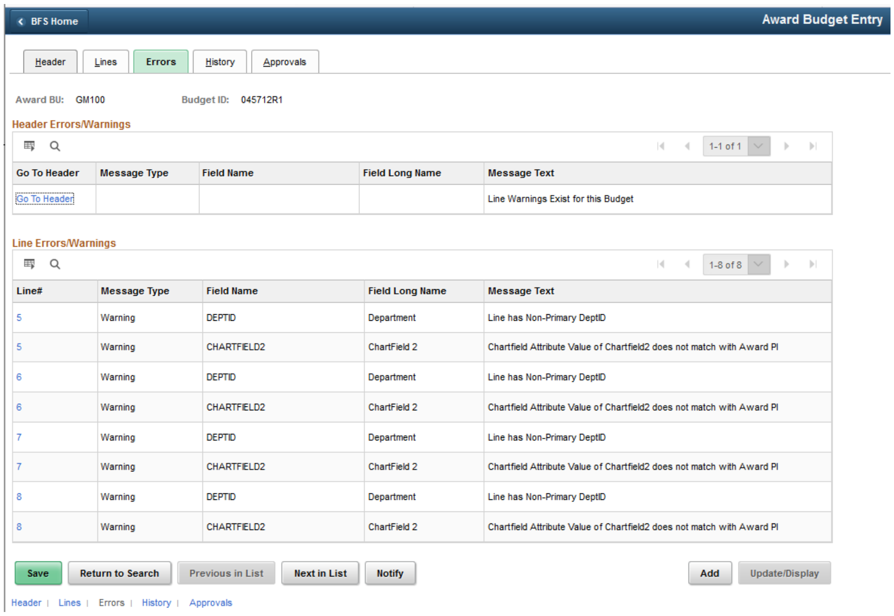
Select	Line#	GL BU	Account	Fund	Dept	Function	ChartField 1	ChartField 2	Amount	Cost Share	Description	Source G2G Fund	Source G2G Cost Share CF1	Projected Balance
	1	10000	58000	61013	12300	44		IBROF	-68,750.00		account 58000			Projected Balance
	2	10000	53000	61013	12300	44		IBROF	9,900.50		Mod 2, benefits & tuition			Projected Balance
	3	10000	55000	61013	12300	44		IBROF	7,500.00		Mod 2, supplies			Projected Balance
	4	10000	57900	61013	12300	80		IBROF	18,503.76		Mod 2, IDC			Projected Balance
	5	10000	58012	61013	26697	44		EULXJ	2,724.08		Mod 2, academic salary			Projected Balance
	6	10000	53000	61013	26697	44		EULXJ	16,453.98		Mod 2, benefits & tuition			Projected Balance
	7	10000	55000	61013	26697	44		EULXJ	1,000.00		Mod 2, supplies			Projected Balance
	8	10000	57900	61013	26697	80		EULXJ	12,667.68		Mod 2, IDC			Projected Balance

Lines to add 1

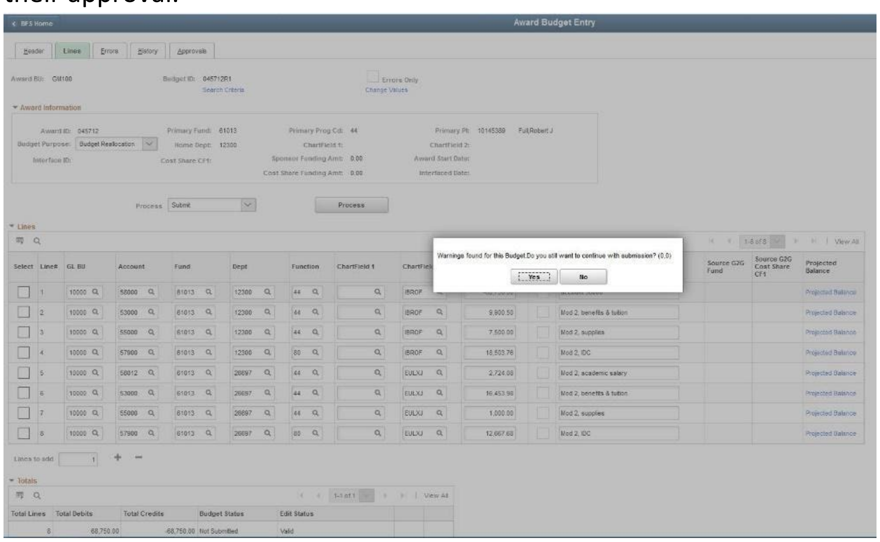
Totals   1-1 of 1   View All

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

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

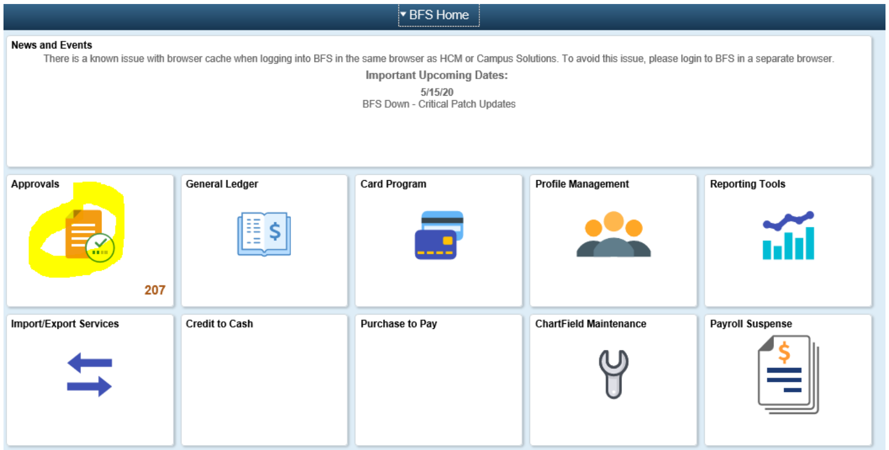


4. RA can submit the budget with warning. RA will select “Submit” and click on Process Button. Once RA will confirm submission, the Budget reallocation will be routed to RA Supervisor for their approval.



5. RA Supervisor will login and click on Approvals Tile.

Navigation: Approvals Tile



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

7. 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.