

BP.010.026 – ADDING NEW GRANTS BUDGETS

Purpose	To add new grant and project non-personal services budgets for the next fiscal year.
Description	The Grants data update page allows users to create budget lines in the PROJ_GRT ledger. Any new Grants lines will be included in the new year's budget and in original budget journals.
Security Role	BOR_BP_UPDATES
Dependencies/ Constraints	<ul style="list-style-type: none"> • User completed all Budget Prep Setup steps. • User ran the Financials Import process in Create Report/Run Financials Import mode. • Project ID does not already exist in Budget Prep data. • Project ID exists in projects ChartField setup.
Additional Information	None

Procedure

Below are complete step-by-step instructions on adding new Grants budgets using the Grants page in Budget Prep Data Update.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the BOR Menus link.
4.	Click the BOR Budget Prep link.
5.	Click the Budget Prep Data Update link.
6.	Click the Grants link.
7.	Click the Add a New Value tab.
8.	Enter the appropriate Business Unit in the Business Unit field.
9.	Enter a Project ID in the Project field.
10.	Click the Add button. The system navigates to the Update Grants page.
11.	Enter a Fund number in the Fund Code field. <i>Note: Grant budgets should typically be setup with the fund code between 20000 and 29999 for entries on this page.</i>
12.	Enter a Department ID in the Department field.
13.	Enter a Program number in the Program Code field.
14.	Enter a Class number in the Class Field .
15.	Enter an Account in the Account field.
16.	Verify the date in the Date field is July 1 of the Budget Year in development.
17.	Enter an amount in the Proposed Budget field.
18.	Verify the Create PRMST checkbox is checked. <i>Note: For new grant entries, this option creates PRMST ledger budget journal entries.</i>
19.	Enter notes in the Comments field if necessary.
20.	Click the plus (+) sign at the top right of the page to enter additional rows. The left arrow and right arrow navigate between multiple rows, or View All can be clicked to show all rows on one page.
21.	Click the Save button.