

## **Adding Agency Business Units**

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The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

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## **Adding Agency Business Units**

### **Adding Agency Business Units Overview**

Each Fund must have a Balance Sheet Business Unit to account for assets, liabilities, and fund equity. The number of this Business Unit will be the same number as the Fund number. Funds will also have other types of business units to account for revenues and expenditures. These can be simple Income Statement, Grant or Warehouse Business Units.

A Business Unit is a separate entity within a Fund used to track activity. A Business Unit can be a grant, project, warehouse location or cost center. These types of Business Units will account for expenditures and revenues.

### **Adding Agency Business Units Lesson**

#### **Procedure**

In this lesson you will learn how to add an agency business unit.

#### **Navigation:**

We have listed three ways to navigate to the Add business units process. This lesson will be using the Accounting navigational steps.

#### **Accounting**

Accounting > Business Units > Add Business Units.

#### **Budget**

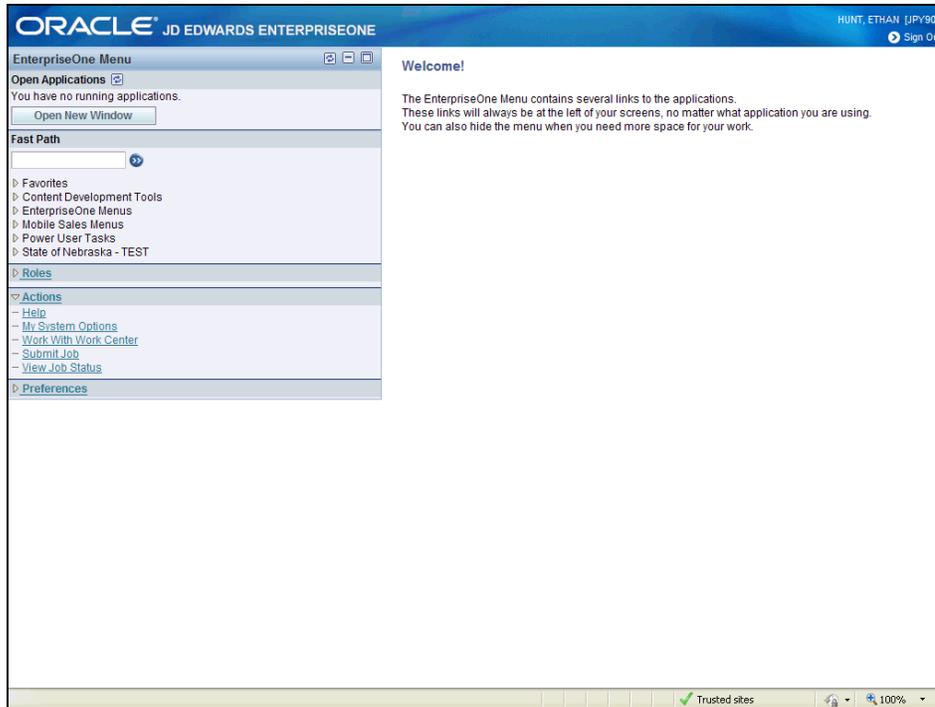
Budget > Organizational Structure > Business Units > Add Business Units.

#### **Grants and Projects**

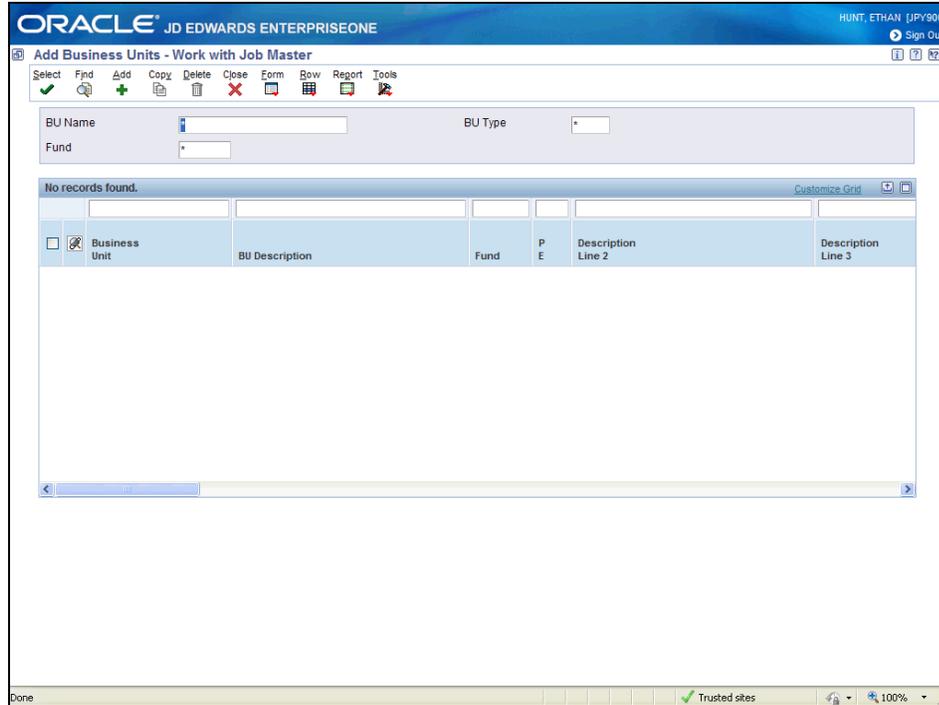
Grants & Projects > Organizational Structure > Business Units > Add Business Units.

# Training Guide

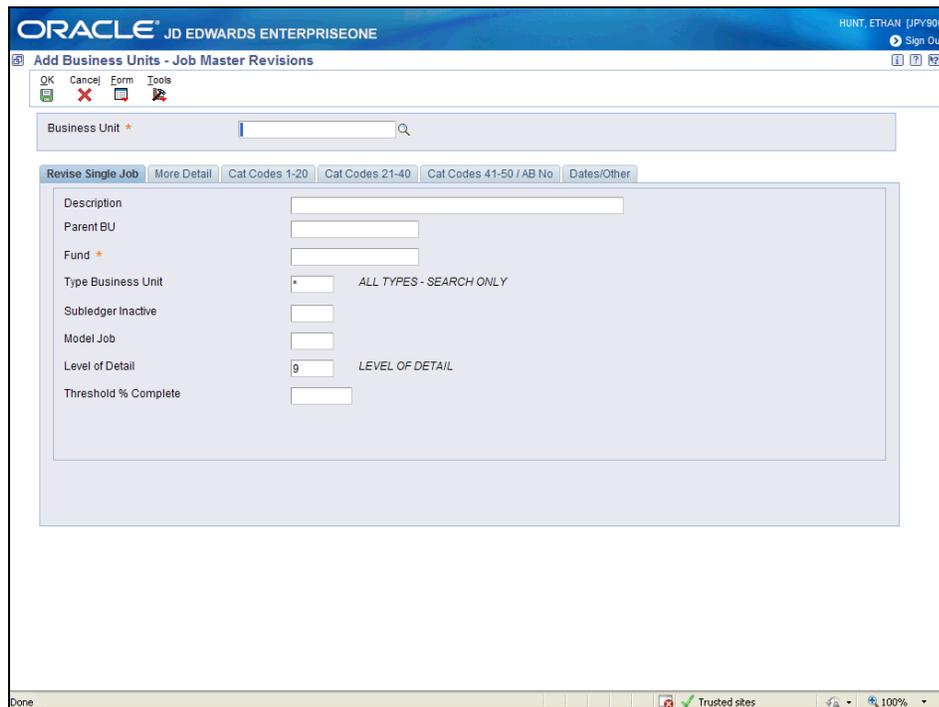
## Adding Agency Business Units



Step	Action
1.	Click the <b>State of Nebraska</b> link. <a href="#">State of Nebraska</a>
2.	Click the <b>Accounting</b> link. <a href="#">Accounting</a>
3.	Click the <b>Business Units</b> link. <a href="#">Business Units</a>
4.	Click the <b>Add Business Units</b> link. <a href="#">Add Business Units</a>



Step	Action
5.	Click the <b>Add</b> button. 



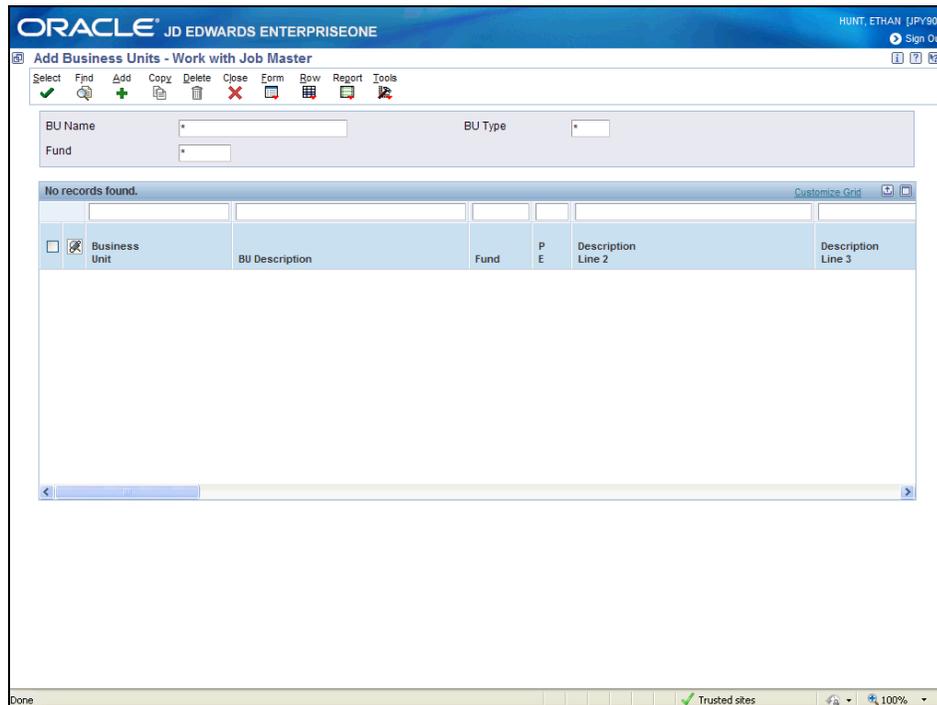
# Training Guide

## Adding Agency Business Units



Step	Action
6.	<p>Enter the new business unit into the <b>Business Unit</b> field.</p> <p><b>Warning:</b> If you attempt to add a BU (Business Unit) number that already exists, you will be notified of the error by a red background in the <b>Business Unit</b> field.</p> <p><b>Note:</b> This is a system required field. The first two digits represent the agency and the last six are used at agency discretion to fit into security groups, to make the BU more user-friendly, or to otherwise assist the agency in organizing BUs. This field should be numeric values only.</p>
7.	Make sure you are on the <b>Revise Single BU</b> tab.
8.	Click in the <b>Description</b> field.
9.	Enter the title or purpose of the business unit, grant, or project into the <b>Description</b> field.
10.	The <b>Parent BU</b> field is optional. If you wish to tie this business unit to others through a Parent/Child relationship use this field.
11.	Click in the <b>Fund</b> field. <input type="text"/>
12.	Enter a five-digit number representing the source of funding into the <b>Fund</b> field. Use the Visual Assist tool if necessary.
13.	Click in the <b>Type Business Unit</b> field. <input type="text"/>
14.	Enter a two letter code characterizing the source of funding into the <b>Type Business Unit</b> field. Use the visual assist tool if necessary.
15.	Click the <b>More Detail</b> tab. <input type="button" value="More Detail"/>
16.	<b>Description Line 2</b> and <b>Description Line 3</b> fields - complete if additional description is required. This is generally completed for 309 projects.
17.	Click in the <b>Grant/Project Type</b> field. <input type="text"/>
18.	<p>Enter the appropriate code in the <b>Grant/Project Type</b> field. Use the visual assist tool if necessary.</p> <p><b>Note:</b> If this is a Grant business unit, and you entered GX or GY in the Type BU field on the Revise BU tab, State Accounting requires you to complete the Grant Number field on the More Detail tab.</p> <input type="text"/>
19.	Click the <b>Cat Codes 1-20</b> tab. <input type="button" value="Cat Codes 1-20"/>
20.	Complete any of the fields on the <b>Cat Codes 1-20</b> tab required by your agency.
21.	Click the <b>Cat Codes 21-40</b> tab. <input type="button" value="Cat Codes 21-40"/>

Step	Action
22.	<p>Complete any of the fields on the <b>Cat Codes 21-40</b> and <b>Cat Codes 41-50/AB No</b> tabs required by your agency.</p> <p><b>Note:</b> If this is a Grant business unit, and you entered GX or GY in the Type BU field on the Revise Single BU tab, State Accounting requires you to complete the CFDA field on the Cat Codes 21-40 tab. If the CFDA number is not assigned, please contact State Accounting via email (as.stateaccounting@nebraska.gov).</p> <p><b>Note:</b> Cat Code 50 (BU Workflow) will default to 1.</p>
23.	<p>Click the <b>OK</b> button.</p> 
24.	<p>Click the <b>Cancel</b> button.</p> 



Step	Action
25.	<p>Click in the <b>Business Unit</b> field in the QBE line.</p> 
26.	<p>Enter the new business unit number into the <b>Business Unit</b> field.</p>
27.	<p>Click the <b>Find</b> button to ensure the business unit was added.</p> 

# Training Guide

## Adding Agency Business Units



Step	Action
28.	Click the <b>Close</b> button. 
29.	You have successfully completed this lesson.  <b>Note:</b> All Business Units must be submitted to State Accounting for review. To submit to State Accounting please follow the Business Unit Workflow procedures. <b>End of Procedure.</b>