

Setting up a Grant
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SYSTEM POLICIES

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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Setting up a Grant

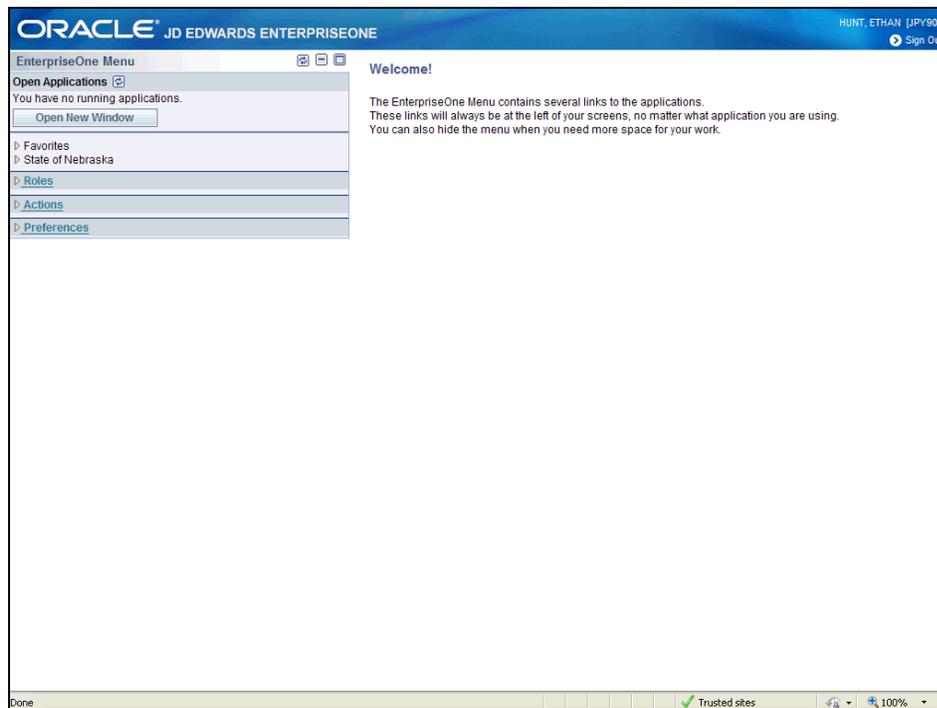
Setting up a Grant Overview

This work instruction describes the steps to create a business unit (BU) record to represent a new grant in NIS, and to revise an existing BU record. A grant will be represented by one or more BU depending on how it is distributed within an organization and on whether matching contributions are required. This work instruction, deals with the case of a one-to-one match of grant and BU.

Add A Grant Lesson

Procedure

In this lesson you will learn how to add a grant.

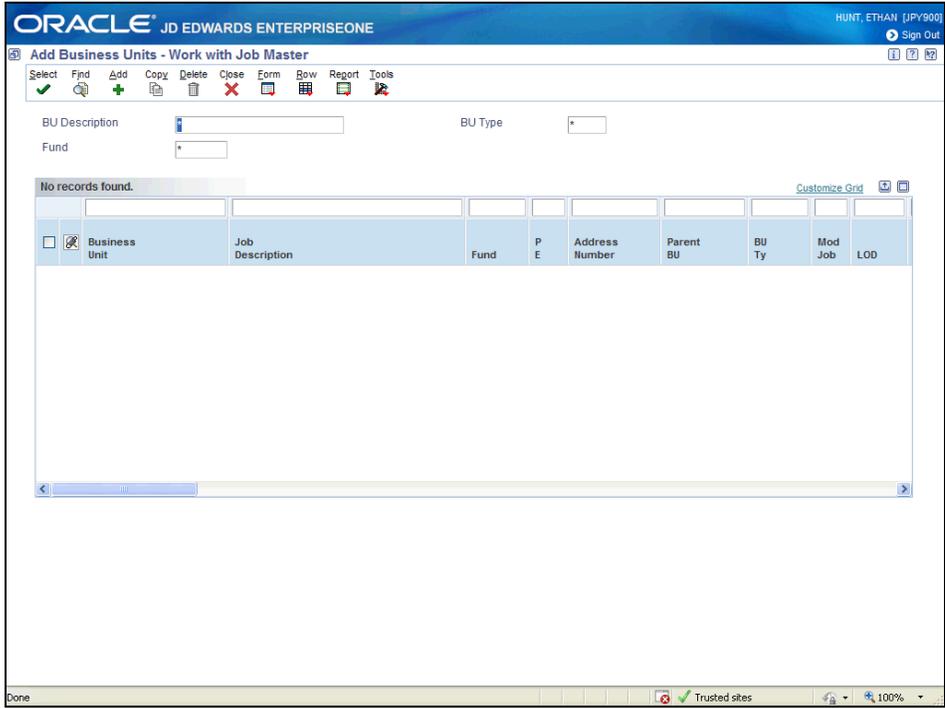


Step	Action
1.	Click the State of Nebraska link. State of Nebraska
2.	Click the Grants & Projects link. Grants & Projects
3.	Click the Organizational Structure link. Organizational Structure
4.	Click the Business Units link. Business Units

Training Guide

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Step	Action
5.	Click the Add Business Units link.



Step	Action
6.	Click the Add button.

The screenshot shows the Oracle JD Edwards EnterpriseOne interface for adding business units. The main window is titled 'Add Business Units - Job Master Revisions'. At the top, there's a search bar for 'Business Unit'. Below that, there are several tabs: 'Revise Single BU', 'More Detail', 'Cat Codes 1-20', 'Cat Codes 21-40', 'Cat Codes 41-50 / AB No', and 'Dates/Other'. The 'Revise Single BU' tab is active, showing a form with the following fields: 'Description' (text input), 'Parent BU' (text input), 'Fund *' (text input), 'Type Business Unit' (dropdown menu with 'ALL TYPES - SEARCH ONLY' selected), 'Subledger Inactive' (checkbox), 'Model Job' (text input), 'Level of Detail' (text input with '9' selected and 'LEVEL OF DETAIL' label), and 'Threshold % Complete' (text input). The bottom of the window shows a browser status bar with 'Trusted sites' and '100%' zoom.

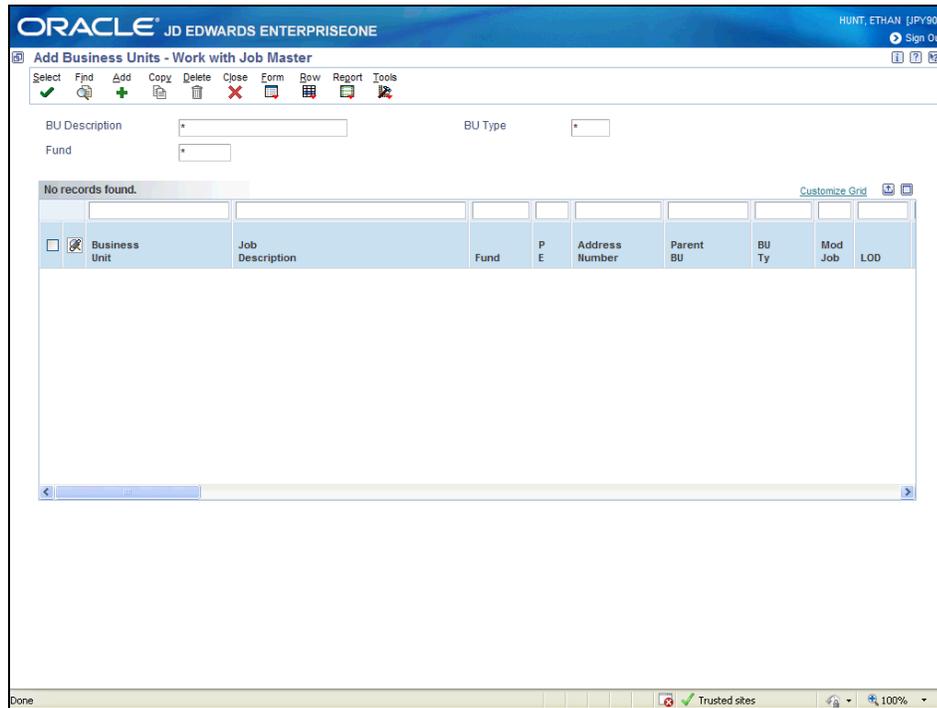
Step	Action
7.	<p>Enter the new business unit number into the Business Unit field.</p> <p>Warning: If you attempt to add a BU number that already exists, you will be notified of the error by a red background in the Business Unit field.</p> <p>Note: This is a required field. The first two digits represent 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>
8.	Press [Tab] .
9.	Enter the title or purpose of the business unit, grant, or project into the Description field.
10.	Parent BU - optional, if you wish to tie this BU to others through a Parent/Child relationship.
11.	Click in the Fund field. <input type="text"/>
12.	Enter a five-digit number representing the source of funding into the Fund field.
13.	Press [Tab] .
14.	<p>Type Business Unit – a two letter code characterizing the source of funding, use visual assist if needed.</p> <input type="text"/>

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Step	Action
15.	Click the More Detail tab. 
16.	Complete the following fields as needed: Description 2, 3, and 4 - complete if additional description is required. This is generally completed for 309 projects. Grant/Project Type - use the visual assist to find the appropriate code. Note: 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. Complete any additional fields as required by your agency. In this lesson we will not complete any of these fields.
17.	Click the Cat Codes 1-20 tab. 
18.	Complete any the following fields as needed: Agency Number - enter 3-digit agency number Program Number - enter valid 3-digit program number Agency Subprogram - 3-digit number, enter 000 (three zeros) if none. Agency Division - 3-digit, enter 000 (three zeros) if none. Complete any additional fields as required by your agency.
19.	Click the Cat Codes 21-40 tab. 
20.	Complete any fields as required by your agency. 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 CFDA field on the Cat Codes 21-40 tab. If CFDA number is not assigned, please contact State Accounting via the Mail-in Database links on the State Accounting website. Navigate to the following website (http://www.das.state.ne.us/accounting/nis/contacts.htm (http://www.das.state.ne.us/accounting/nis/contacts.htm)) and click Business Units email link.
21.	Click the OK button. 

Step	Action
22.	Click the Cancel button. 



Step	Action
23.	Click in the Business Unit field. 
24.	Type the new BU number in the Business Unit field on the QBE line.
25.	Click the Find button. 
26.	You will see the new business unit has been added.
27.	Click the Close button. 

Step	Action
28.	<p>All Business Units must be submitted to State Accounting for review. (Submit business units to State Accounting via the Mail-in Database links on the State Accounting website. Navigate to the following website (http://www.das.state.ne.us/accounting/nis/contacts.htm) and click Business Units email link. State Accounting will review, and change the posting edit code to Y(es), or K, therefore activating the Business Unit.</p> <p>You have successfully completed this lesson. End of Procedure.</p>

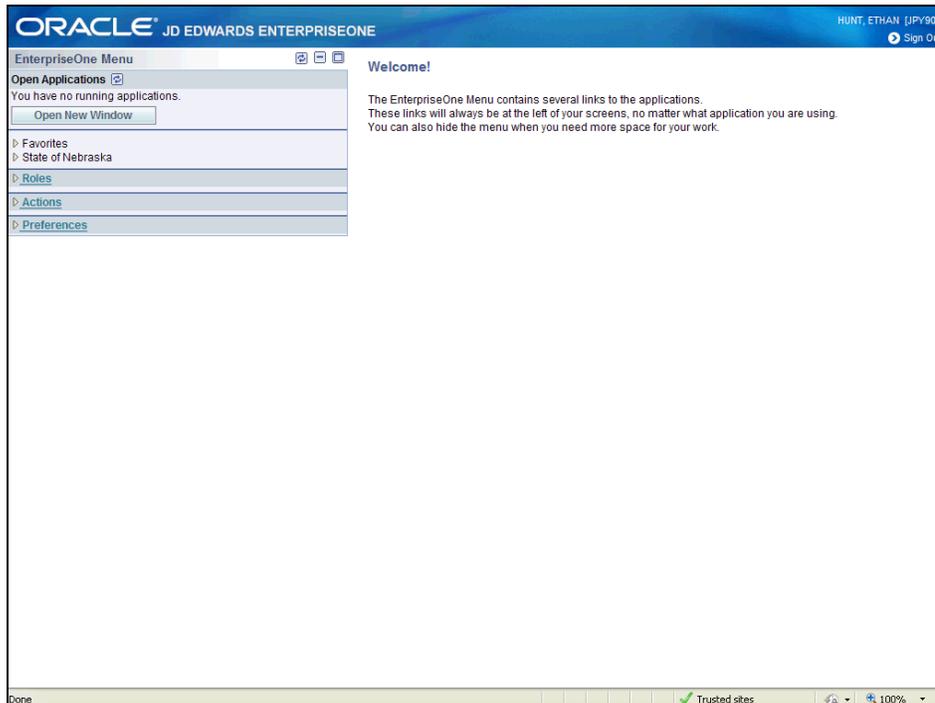
Add Accounts to a Grant

Each business unit must have the appropriate accounts attached to it for use. If many accounts need to be added, they can be copied from an existing business unit. To copy accounts, please follow the work instructions for Copying Accounts from Business Units to Business Units. However, if only a few accounts need to be added, and they are not in a range, they can be added on an individual basis. To add accounts on an individual basis, please follow the work instructions for Adding Accounts to Business Units - Agency.

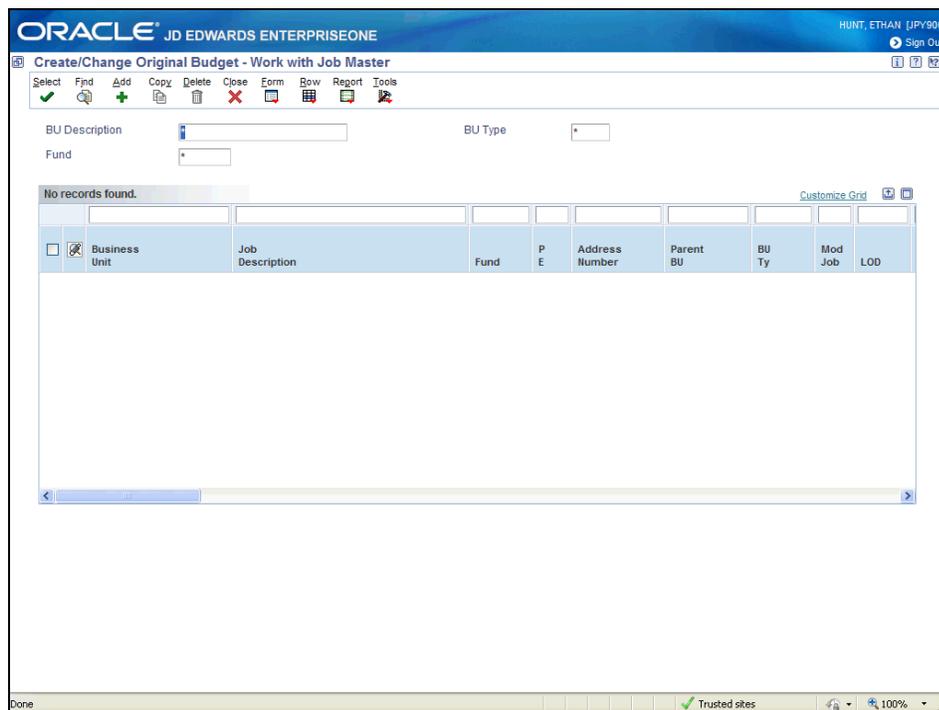
Add Budgets to a Grant

Procedure

In this lesson you will learn how to add budgets to a grant.



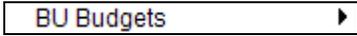
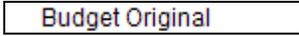
Step	Action
1.	Click the State of Nebraska link.
2.	Click the Grants & Projects link.
3.	Click the Budgets link.
4.	Click the Create/Change Original Budget link.

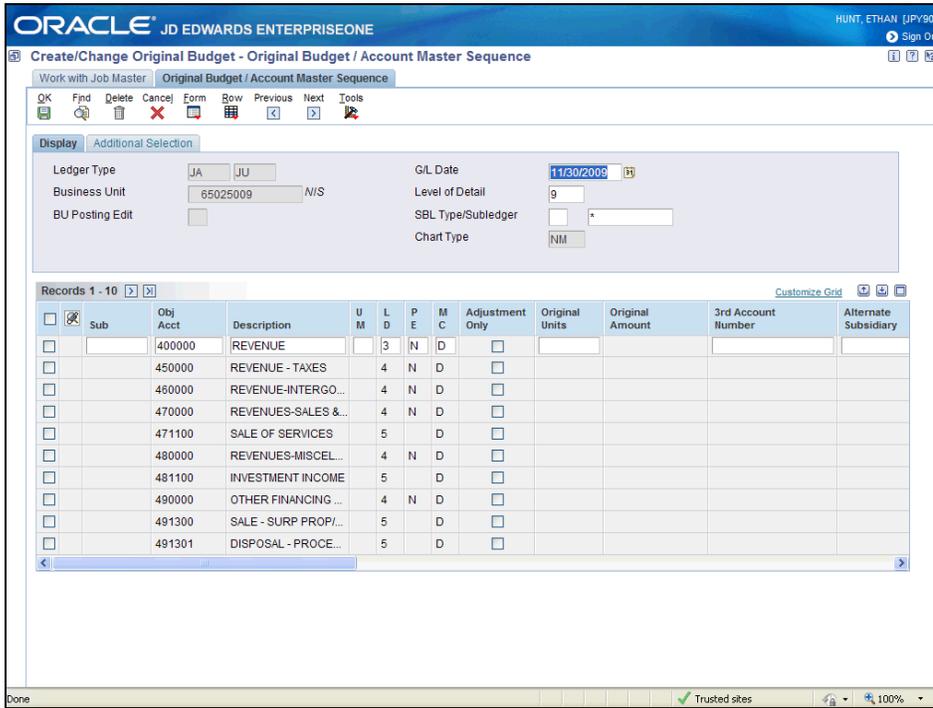


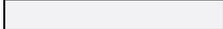
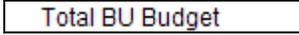
Step	Action
5.	Click in the Business Unit field.
6.	Enter the desired business unit in the Business Unit field in the QBE line.
7.	Click the Find button.
8.	Choose the desired business unit by clicking the check box next to it.
9.	Click the Row button.

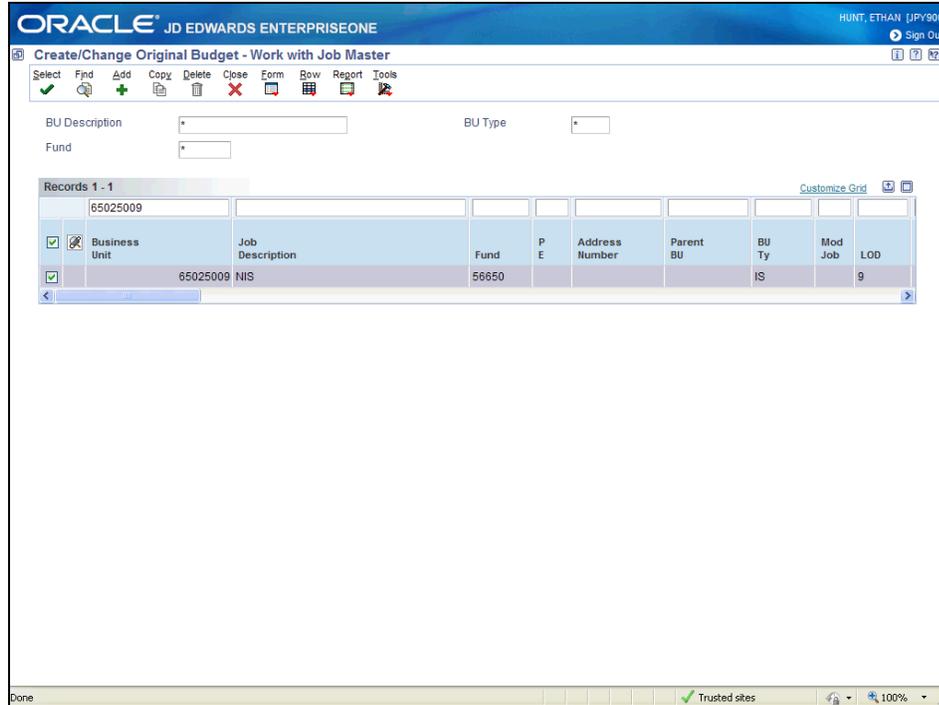
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Step	Action
10.	Click the BU Budgets menu. 
11.	Click the Budget Original menu. 



Step	Action
12.	Click in the Original Amount field for the rows containing the desired Objects. 
13.	Enter the original budget amount.
14.	Click the OK button. 
15.	Click the Form button. 
16.	Click the Total BU Budget menu. 
17.	The Total Amount will display in the Header.
18.	Click the Cancel button. 



Step	Action
19.	Click the Close button. 
20.	You have successfully completed this lesson. Note: For the overall Grant Spending Budget, and to have the budget appear on the Grant Project Status Report, it must be added to object account 961000. End of Procedure.

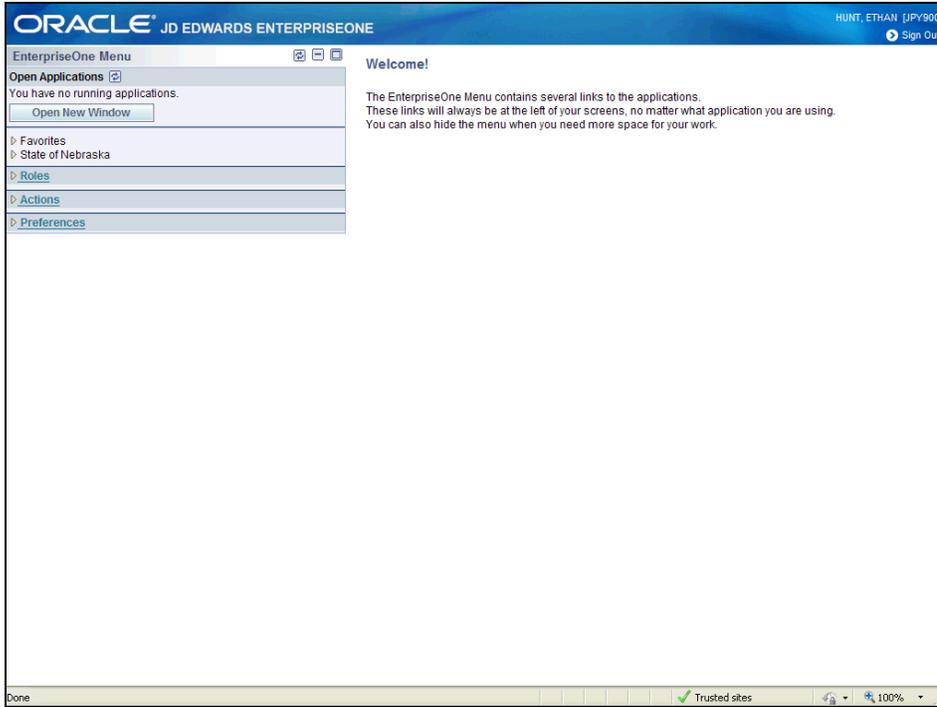
Revise Budgets on a Grant

Procedure

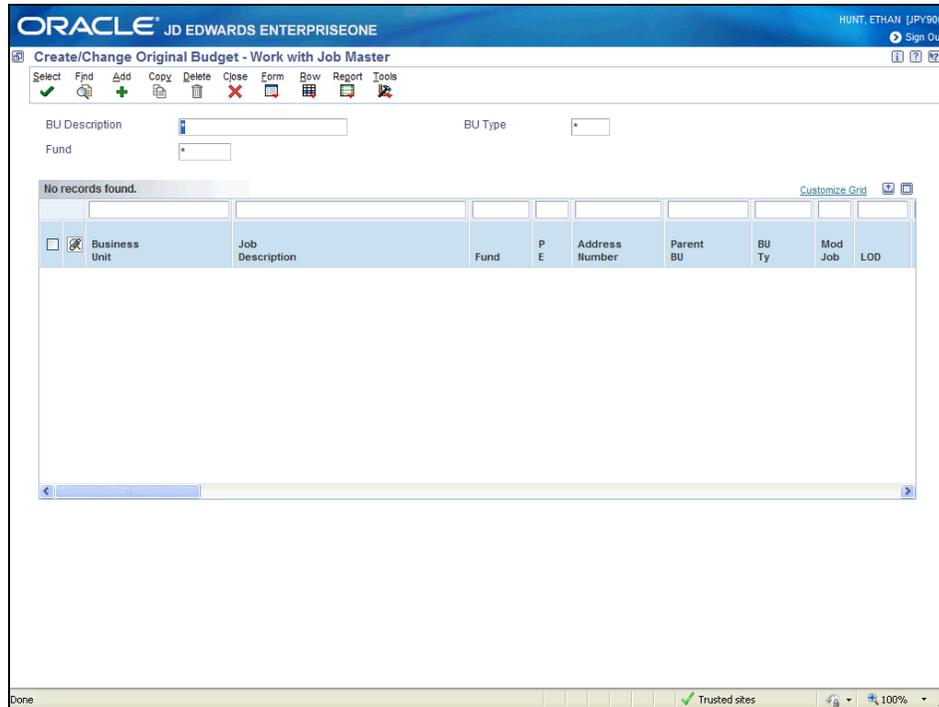
In this lesson you will learn how to revise budgets on a grant.

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Setting up a Grant



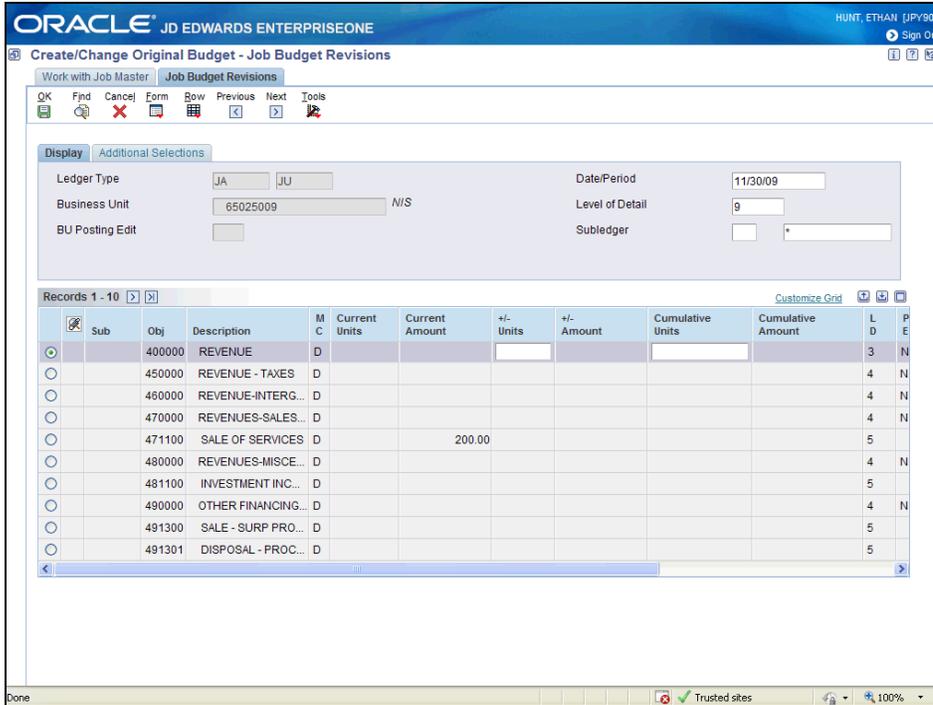
Step	Action
1.	Click the State of Nebraska link. State of Nebraska
2.	Click the Grants & Projects link. Grants & Projects
3.	Click the Budgets link. Budgets
4.	Click the Create/Change Original Budget link. Create/Change Original Budget



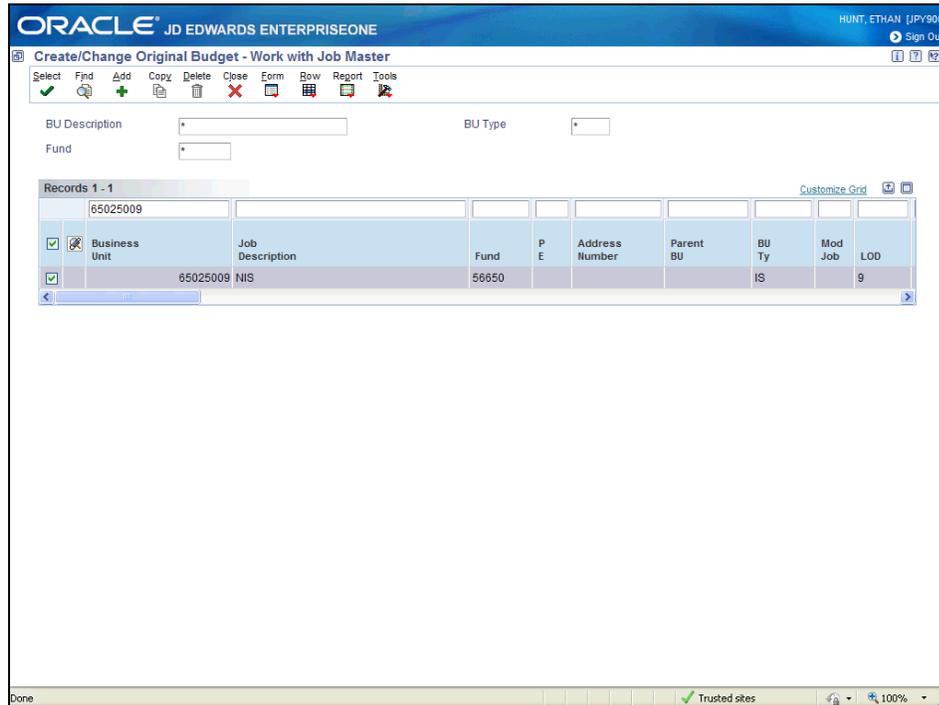
Step	Action
5.	Click in the Business Unit field. <input type="text"/>
6.	Enter the desired business unit into the Business Unit field.
7.	Click the Find button. 
8.	Choose the desired business unit by clicking the check box next to it. <input type="checkbox"/>
9.	Click the Row button. 
10.	Click the BU Budgets menu. <input type="text" value="BU Budgets"/>
11.	Click the Budget Revisions menu. <input type="text" value="Budget Revisions"/>

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Setting up a Grant



Step	Action
12.	<p>Click in the row containing the specific objects to change and enter the information into the +/- Amount field. At least two rows must be changed. This must be balanced.</p> <p>Note: To change the original amounts, you will have to go through Budget Original. This process must be followed to revise object account 961000.</p> <p>Note: To create/change the original budget – a warning message will appear that says the information has changed. Before you enter data, press Find to refresh the screen.</p> <div style="border: 1px solid black; width: 100px; height: 15px; margin-left: 20px;"></div>
13.	<p>Click the OK button.</p> 
14.	<p>Click the Form button.</p> 
15.	<p>Click the Total BU Budget menu.</p> <div style="border: 1px solid black; padding: 2px; width: 150px; margin-left: 20px;">Total BU Budget</div>
16.	<p>The Total Amount Budget field will appear in the header for the business unit.</p> <p>Note: Review the information entered and note the changes to the Current Amount column.</p>
17.	<p>Click the Cancel button.</p> 



Step	Action
18.	Click the Close button. 
19.	You have successfully completed this lesson. End of Procedure.