

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.

This work instruction shows:

[Add a Grant](#)

[Add Accounts to a Grant](#)

[Add Budgets to a Grant](#)

[Revise Budgets on a Grant](#)

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. 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: <http://www.das.state.ne.us/>.

Navigation

Click Roles, Grants.

(Citrix users – right click on the menu, choose View by Role, choose Grants.)

Grants and Projects > Organizational Structure > Budgets Units > Add Business Units

Steps

Add a Grant

Navigation: Grants and Projects > Organizational Structure > Budgets Units > Add Business Units

Adding Agency Business Units

Start this instruction from the Add Business Units – Work with Job Master window.

1. Click **Add**. The Add Business Units – Job Master Revisions window appears.

2. Enter Business Unit – number of the new business unit

 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.

 This is an NIS-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.

3. At the **Revise BU** tab, enter data into these fields:

Description – the title or purpose of the business unit, grant, or project

Parent BU - optional, if you wish to tie this BU to others through a Parent/Child relationship

Fund – a five-digit number representing the source of funding

Type Business Unit – a two letter code characterizing the source of funding, use visual assist if needed

4. Fill in any other fields required by your agency, then click the **More Detail** tab and complete the following fields:

- Description 1 and 2 - 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
-  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.
5. Fill in any other fields required by your agency, this click the **Cat Codes 1-20** tab and complete the following fields:
 - Agency Number - enter 3-digit agency number
 - Program Number - enter valid 3-digit program number
 - Subprogram - 3-digit number, enter 000 (three zeros) if none.
 - Division - 3-digit, enter 000 (three zeros) if none.
 6. Fill in any other fields required by your agency, this click the **Cat Codes 21-30** tab.

 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 21-30 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 and click **Business Units** email link: <http://www.das.state.ne.us/accounting/nis/contacts.htm>).
 7. Click **OK** to accept the information and clear the window.
 8. Click **Cancel**.
 9. Type the new BU number in the Business Unit field on the QBE line.
 10. Click **Find** to refresh the window to ensure the new BU was added.
 11. Click **Close**.
-  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 and click Business Units email link: <http://www.das.state.ne.us/accounting/nis/contacts.htm>). State Accounting will review, and change the posting edit code to Y(es), or K, therefore activating the Business Unit.

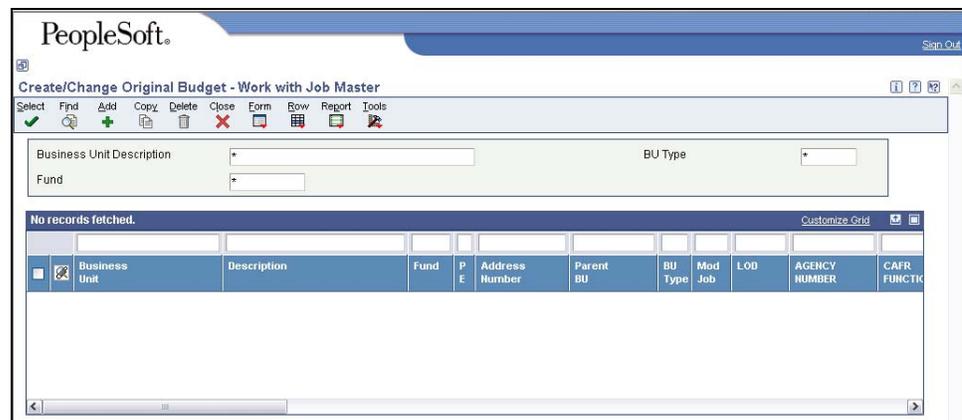
Add Accounts to a Grant

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](#).

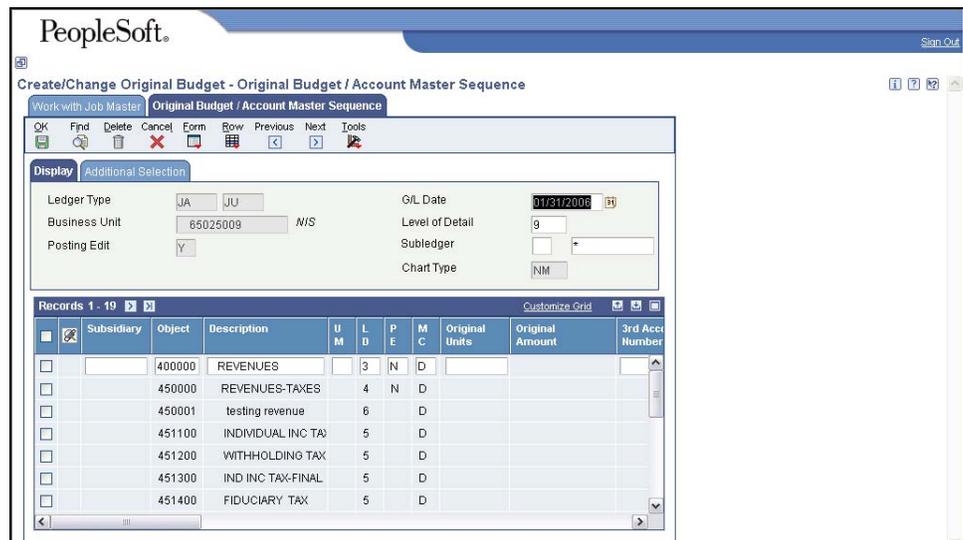
Add Budgets to a Grant

Navigation: Grants and Projects > Organizational Structure > Budgets > Create/Change Original Budget

Start this instruction in the Create/Change Original Budget – Work with Job Master window.



1. Enter the desired business unit in the QBE field above Business Unit.
2. Click **Find**.
3. Choose the desired business unit.
4. Click **Row, Job Budgets, Budget Original**. The Create/Change Original Budget – Original Budget / Account Master Sequence window appears.



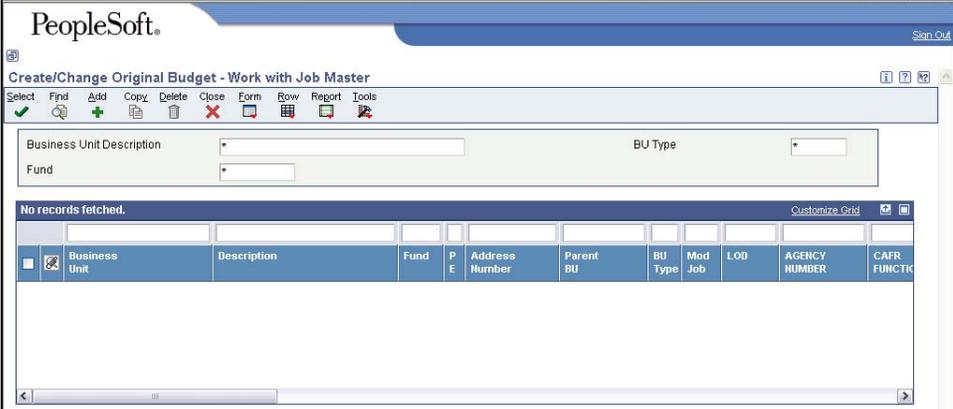
5. Click the **Original Amount** field in the rows containing the desired Objects and enter the original budget amounts.
6. Click **OK**.
7. Click **Form, Total Job Budget** to show the Total Amount (Budget) in the header for the business unit.
8. Click **Cancel**.
9. Click **Close**.

 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.

Revise Budgets on a Grant

Navigation: Grants and Projects > Organizational Structure > Budgets > Create/Change Original Budget

Start this instruction in the Create/Change Original Budget – Work with Job Master window.



1. Enter the desired business unit in the QBE field above Business Unit.
2. Click **Find**.
3. Choose the desired business unit.
4. Click **Row, Job Budgets, Budget Revisions**. The Create/Change Original Budget – Job Budget Revisions window appears.

PeopleSoft

Create/Change Original Budget - Job Budget Revisions

Work with Job Master Job Budget Revisions

OK Find Cancel Form Row Previous Next Tools

Display Additional Selections

Ledger Type JA JU Date/Period 01/31/06

Job Number 65025009 N/S Level of Detail 9

Job Posting Edit Y Subledger

Records 1 - 19 Customize Grid

	Cost Code	Cost Type	Description	M C	Current Units	Current Amount	+/- Units	+/- Amount	Cumulative Units
		40000C	REVENUES	D					
		45000C	REVENUES-TAXES	D					
		450001	TESTING REVENUE	D					
		45110C	INDIVIDUAL INC TAX	D					
		45120C	WITHHOLDING TAX	D					

- 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.

 To change the original amounts, you will have to go through Budget Original. This process must be followed to revise object account 961000.

 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.

- Click **OK**.
- Click **Form, Total Job Budget** to show the Total Amount (Budget) in the header for the business unit.

 Review the information entered and note the changes to the Current Amount column.

- Click **Cancel**.
- Click **Close**.