

Work Instruction

Enter a Sponsored Budget Using the BUS

Purpose

Use this procedure to enter an approved award budget that can be uploaded to the General Ledger via the Budget Tool.

Trigger

- The award has been accepted.
- You have received the Notice of Grant Award (NoGA) for the award.

Prerequisites

- Intermediate Excel skills.
- Excel is loaded onto your computer.
- You have prepared the proposal budget for this award using Excel spreadsheets.
- Excel spreadsheets are linked to the appropriate proposed amount cells in the Summary tab of the BUS.

Helpful Hints

Create a folder on your computer in which to save all budget files you enter and modify.

Reconcile Proposed Budget to Approved Budget

- For each approved budget item, enter the amount by which the proposed budget increased or decreased in the **Adjustments** column.





Approved award amounts must appear in the **Award Amount (NoGA)** column.

- In the **Sub-activity** column, enter the appropriate Sub-activity value for each Object code being entered for the award budget.



A **Sub-activity** value must be entered into every cell in the Sub-activity column. If this is not done, you will receive an error message when you create the sponsored upload file.

- If necessary, perform one of the following actions to revise the BUS between the two black lines:

If You Need To	Then
Add a budget line item to the budget	<ol style="list-style-type: none"> Insert an entire row. Copy and paste the appropriate Object code and description from the Object Code Aid tab in the BUS.  Be sure to create any necessary links from other spreadsheets.
Change a Sub-Activity value	<ol style="list-style-type: none"> Press the Delete key on your keyboard to erase the value in the cell. Enter the appropriate Sub-activity value for the appropriate Object code.  Be careful not to alter the cell formatting.

- Verify that the budget totals for each project year equal the amounts provided on the NoGA.
- Save the BUS file to your budget files folder.



If it is available, you may want to include the Activity value in the file name.

Chart Segment Values

ASSIGN CHART VALUES :			
	Value		
TUB	370		
ORG	31575		
FUND	132341		
ACTIVITY	339038		Create Sponsor Upload File
ROOT	13510		

6. Using information from the Action Memo for the approved award, complete the following required fields:

In This Field	Enter
Tub	3-digit Tub value
Organization	5-digit Organization value
Fund	6-digit Fund value
Activity	6-digit Activity value
Root	5-digit Root value

Budget Period

ENTER CURRENT BUDGET PERIOD		
		Select Years
	(MM/YYYY)	
Budget Start	07/1999	<input checked="" type="checkbox"/>
	07/2000	<input checked="" type="checkbox"/>
	07/2001	<input checked="" type="checkbox"/>
	07/2002	<input checked="" type="checkbox"/>
	07/2003	<input checked="" type="checkbox"/>

7. In the **MM/YYYY** column, enter the month and year in which the project begins.
8. Press **Enter**.



The start dates of the next four project years will automatically display.

9. In the **Select Years** column, select the box that corresponds to the project year for which you are creating and uploading a budget.



If you select a year for which a budget already exists in the General Ledger, the existing budget will be overwritten. If you select multiple years, they must be continuous.

Create Sponsor Upload File

ASSIGN CHART VALUES :			
	Value		
TUB	370		
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FUND	132341		
ACTIVITY	339038		
ROOT	13510		

10. Click at the top of the BUS.



In the Save As window, the award, Activity value will automatically display as the file name.

11. Select the correct directory and folder in which to save the BUS file.



This could be the budget files folder you created on your computer.

12. Click to save the upload file as a .bgt file.

13. Click .

Result

You have successfully created an **Upload** file. The upload file can be viewed in the Upload tab of the BUS, and the budget is automatically fiscalized over the appropriate fiscal years.

Next Step

Refer to the work instruction *Upload a Sponsor Upload File to the General Ledger* to use the Budget Tool to upload this file to the General Ledger.

Comments

You have completed this procedure. Select **File** → **Exit** to exit the BUS.