# UPDATE OR CORRECT BUDGET

BUD

## QUICK REFERENCE GUIDE BUD-22

## Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to update or correct budgets in the North Carolina Financial System (**NCFS**) for the life to date control budget. This includes grant authorizations in federal budget codes for all agencies and for the Department of Public Safety special disaster budget codes.

## Introduction and Overview

This QRG covers the process of making budget revisions using the Application Development Framework Desktop Integration (ADFDI) spreadsheet for the life to date control budget only. These revisions are then uploaded to the Budgetary Control Module from the spreadsheet. The budget revision and grant authorization corrections and updates entered through the Budgetary Control Module replaces the NCAS document type 15 functionality.
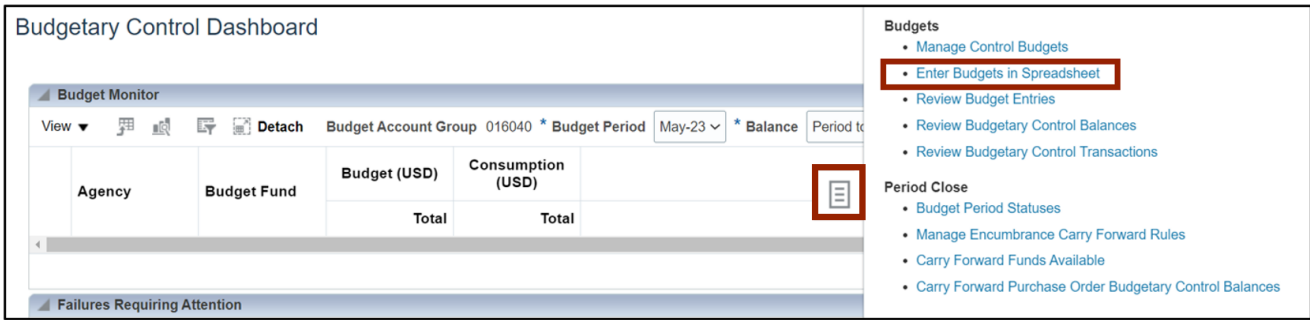
## Update or Correct Budget

To update or correct the NC LTD budget, please follow the steps below:

1.  Log in to the NCFS portal with your credentials to access the system.

2.  On the **Home** page, click the **Budgetary Control** tab and click the **Budgetary Control** app.
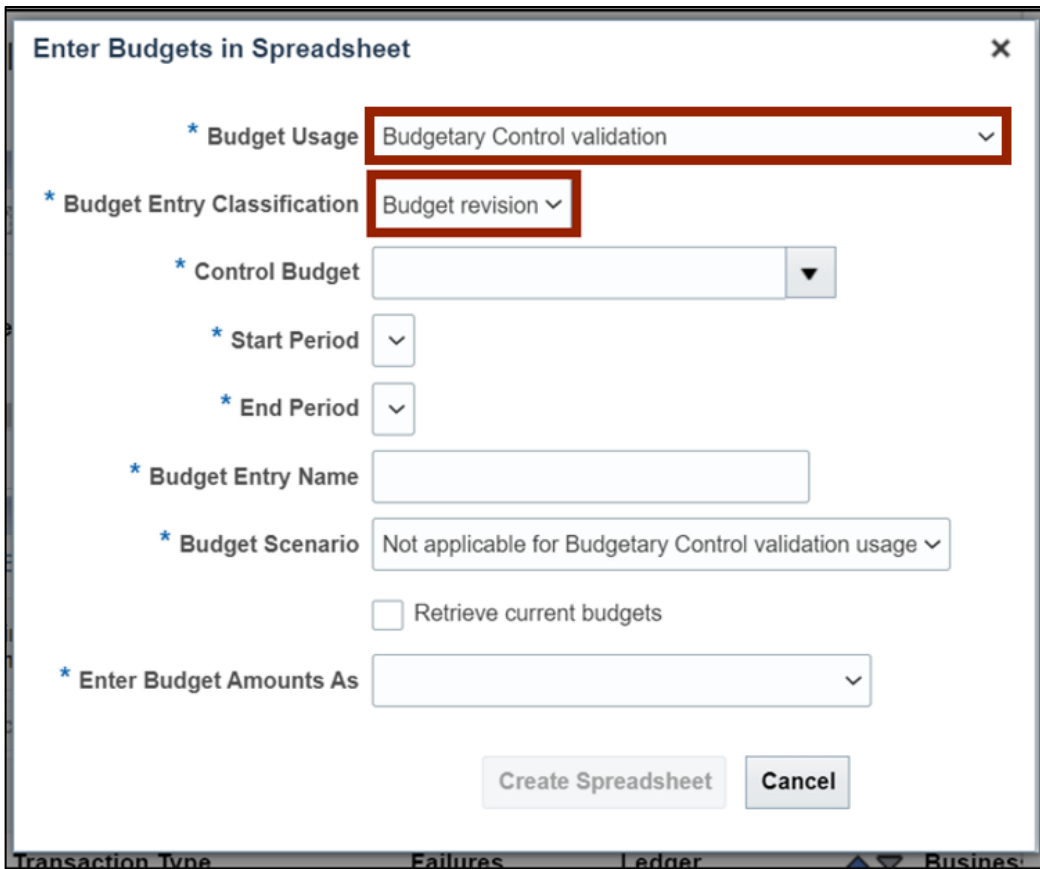
NCFS
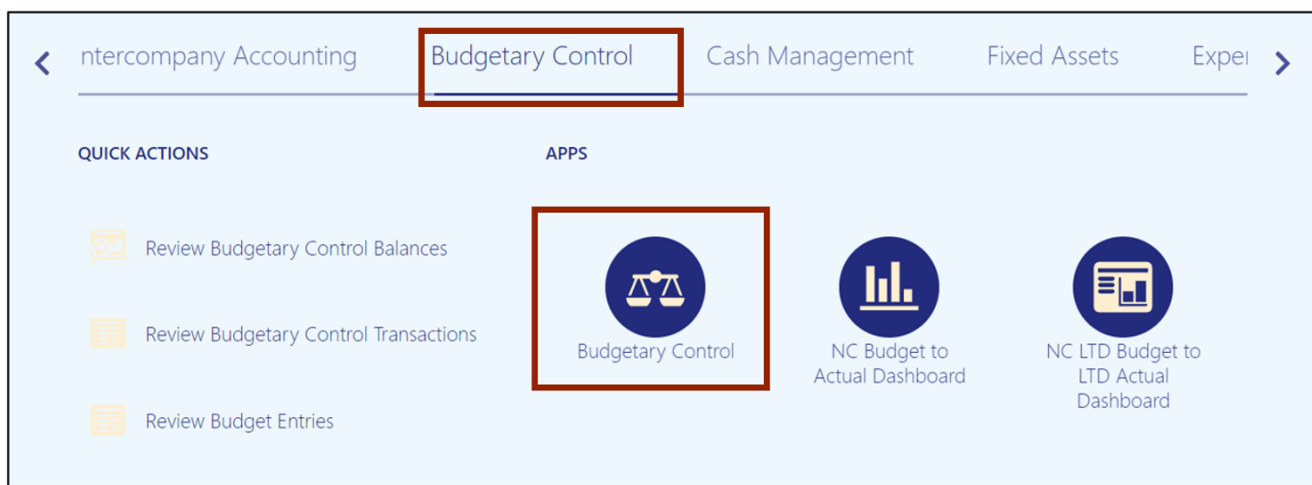
3.  Click the **Tasks** icon [ ▤ ] and click **Enter Budgets in Spreadsheet** from the **Tasks** pane.



4.  The *Enter Budgets in Spreadsheet* pop-up appears. Select the following details from the respective drop-down choice lists:
    \**Budget Usage:* **Budgetary Control validation**
    \**Budget Entry Classification:* **Budget Revision**

5.  On the *Control Budget* field, select **NC LTD Budget** from the drop-down choice list. The *Start Period, *End Period, *Budget Entry Name,* and *Budget Scenaio* fields are now auto filled.

6.  Change the *Start Period* and *End Period* fields, if required. In this example, we choose **May-23** on the *Start and End Period* field.

**Enter Budgets in Spreadsheet** ✕

| | |
|---|---|
| * Budget Usage | Budgetary Control validation ⌄ |
| * Budget Entry Classification | Budget revision ⌄ |
| * Control Budget | NC LTD Budget ▼ |
| * Start Period | May-23 ⌄ |
| * End Period | May-23 ⌄ |
| * Budget Entry Name | 2023 Revision 17-07-23 14:02:20 PM |
| * Budget Scenario | Not applicable for Budgetary Control validation usage ⌄ |
| | ☐ Retrieve current budgets |
| * Enter Budget Amounts As | Addition to or subtraction from current budget ⌄ |

**Create Spreadsheet**   **Cancel**

7. On the *Enter Budget Amounts As field, select **Addition to or subtraction from current budget**. Then, click the **Create Spreadsheet** button.



8. The *Downloads* pop-up appears. Click the **Open** button to open the downloaded Excel file or click the **Save As** button to save a copy of the downloaded Excel file.

9. Click the **Enable Editing** button.
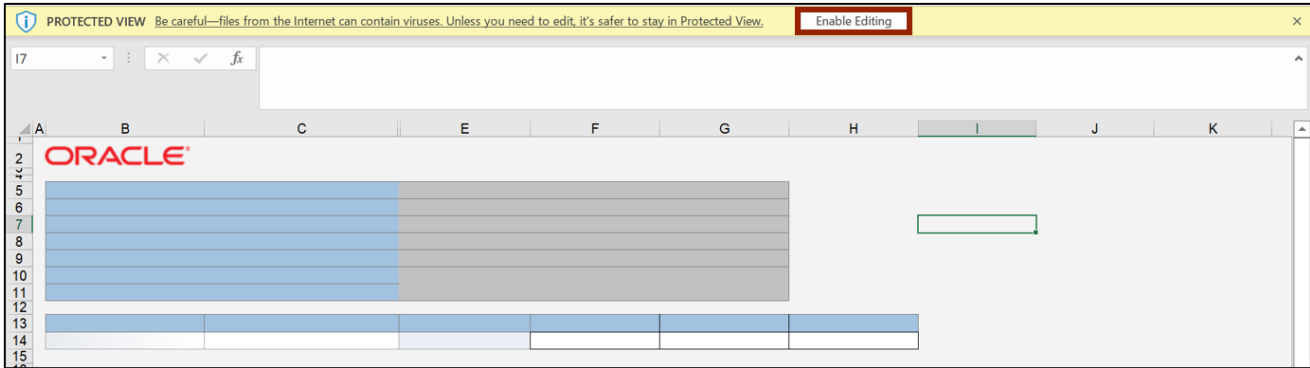


10. The *Connect* pop-up appears. Click the **Yes** button to successfully connect to the server.
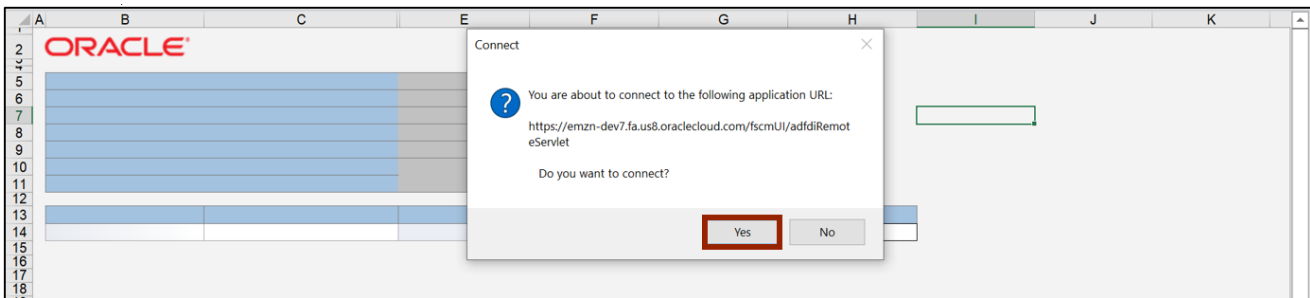


11. On the NCFS portal *Login* pop-up, enter the **User ID** and **Password** credentials and click the **Sign In** button.
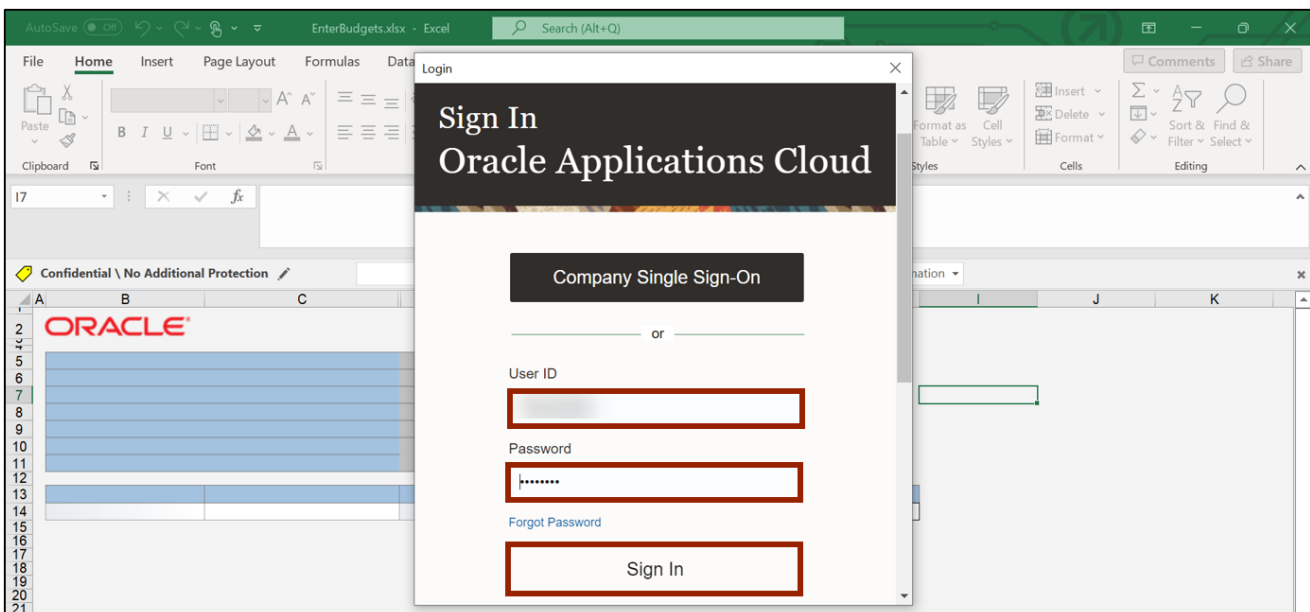
12. The spreadsheet opens. Enter the budget values as required.



13. Scroll to the right and enter the budget amount information. Next, make a comment if required.

In this example, we choose to write **Budget Revision** on the *Comment* fields.



14. Under the **Enter Budget Amounts** tab on top of the sheet, click the **Submit** button.

15. The *Upload Options* pop-up appears. Click the **OK** button.
    - The first option should be checked. If it is not checked, the process will stop as soon as it encounters an error.
    - If the second option is checked, then the entire data that is successfully uploaded, can be downloaded.

      Note: This option is usually not checked because there is already a copy of the data on the sheet.



16. The *Confirmation* pop-up appears, which indicates that the process was submitted.



17. Once submitted, the *Row Status* fields get updated with **Row Inserted Successfully.**

18. Note: If the process fails, no confirmation will appear, and an error appears in the Row Status column. You will need to correct the field(s) that are in error and submit again.



19. Navigate back to the **Budgetary Control Dashboard** page on NCFS. Click the **Tasks** icon [ ☰ ] and select **Review Budget Entries** to view the budget revision.

20. On the *Search* section, select the *Control Budget, From Budget Period,* and *To Budget Period* from the respective drop-down choice lists.

    In this example we choose:
    * *Control Budget:* **NC LTD Budget**
    * *From Budget Period:* **May-23**
    * *To Budget Period:* **May-23**



21. Click the **Search** button.



22. The newly added budget revision can be viewed here.

## Wrap-Up

Update or correct budgets by making budget revisions through the ADFDI spreadsheet using the steps above.

## Additional Resources

**Virtual Instructor-Led Training (vILT)**

- GM100: Grants Management