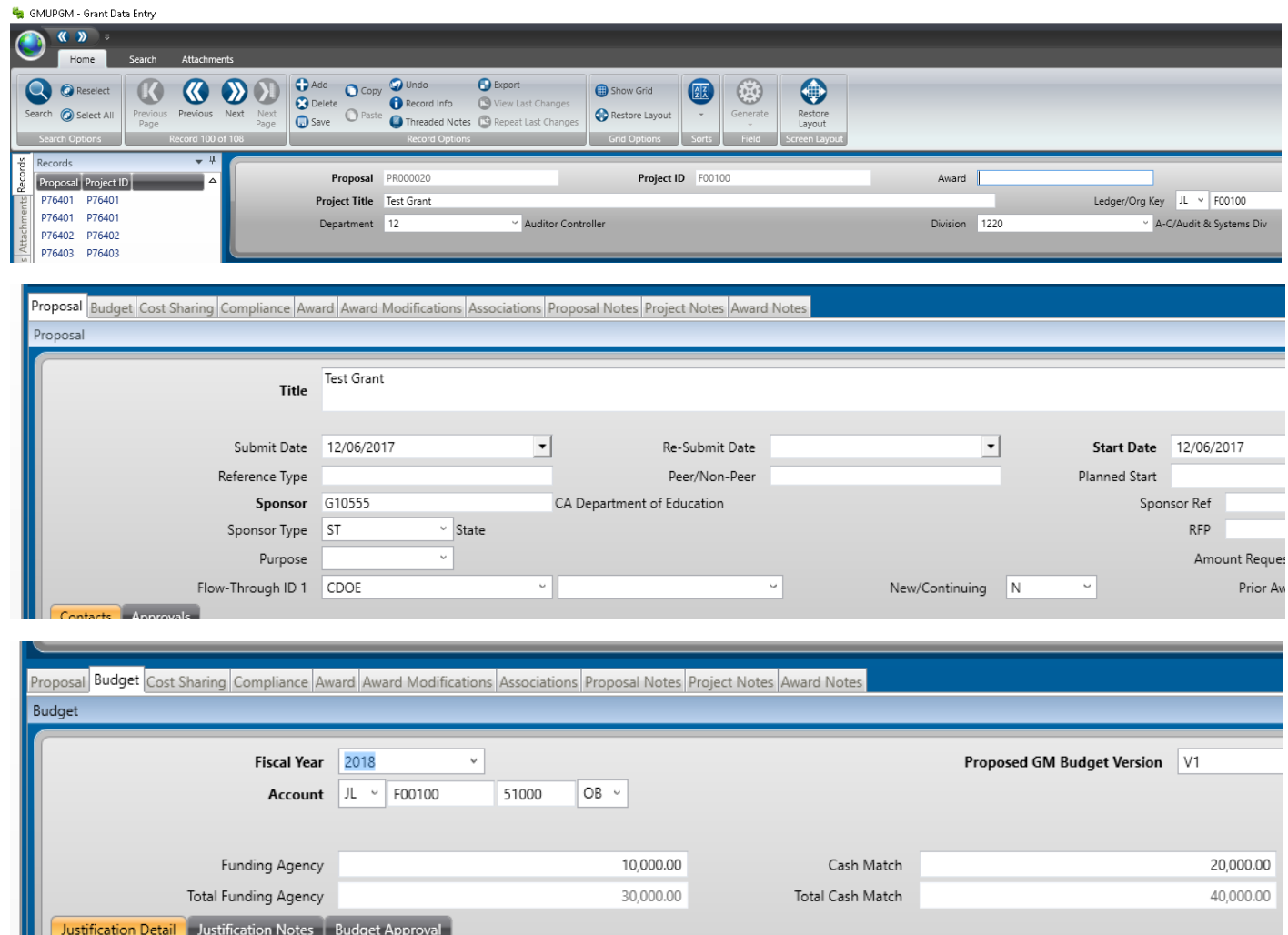


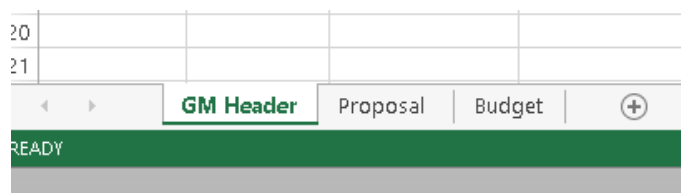
Upload Template Instructions for GMUPGM

The Auditor's office can upload basic information related to your grants based on an Excel template populated with basic information about your department's grants.

Information from the Header Section, Proposal tab and Budget Tab on the GMUPGM screen can be uploaded.



The Excel template contains tabs for each section of the GMUPGM screen where information will be uploaded, Header, Proposal and Budget.



Header Tab

The Header Tab contains the fields shown below:

Proposal	Project ID	Cash Match (Y/N)	Status	Project Title	GL/JL	GL/JL Key	Department	Division
			PR					

1. Be sure to enter information in all the fields with a **bold** heading

Proposal	Project ID	Cash Match (Y/N)	Status	Project Title	GL/JL	GL/JL Key	Department	Division
			PR					

2. Proposal and Project ID are normally system generated fields, but you must make up a number for this field for the upload. It may be a good idea to start a log of Proposal and Project IDs for your department's grants.

1	Header Information
2	Proposal Project ID
3	
4	
5	

2. If the Grant has a cash match, put a "Y" in the cash match field, and otherwise leave it blank.

Project ID	Cash Match (Y=Yes)	Status
	Y	PR

3. When uploading grants it is best to always use the PR status, even if the grant is awarded. If the grant is awarded, please change the status after the upload is complete.

Status	Project
PR	

- Enter the Project Title. The title is limited to 60 characters

E	
Project Title	GL/JL
rojs GMGmname.Projtitle	GMGr
This is the project title	

- The fields with a header highlighted in yellow are attached to a drop down menu in the GMUPGM screen. Be sure you have valid entries in these fields if you use them.

F	G	H	I	J
Project Title	GL/JL	GL/JL Key	Department	Division

- If a GL or JL key has been assigned to track the financial transactions for the grant, enter which ledger (GL or JL) and the key assigned. If no GL or JL has been selected or created specifically for tracking the grant, you can enter this information manually into the GMUPGM screen later.

F	G	H
GL/JL	GL/JL Key	Department
GMGmname.	GMGmname.	GMGmna
JL	F00100	

- Enter the Department and Division applying for the grant.

H	I	J
Department	Division	
GMGmname.	GMGmname.	
12	1210	

Proposal Tab

The Proposal Tab contains the fields shown below:

Proposal Information								
Proposal	Project ID	Proposal Title	Submit Date	Start Date	End Date	Sponsor	Sponsor Type	Amount Requested
GMProposal.Proposalno	GMProposal.Projectno	GMProposal.Proptitle	GMProposal.Subm	GMProposal.Props	GMProposal.Propend	GMProposal.Sponcode	GMProposal.Spor	GMProposal.Projcost

- Enter the same Proposal number and Project ID as you did for the Header tab

Proposal Information	
Proposal	Project ID
GMProposal.Proposalno	GMProposal.Projectno

- Enter the Proposal Title. This field is limited to 255 characters

Proposal Title
GMProposal.Proptitle

- If you would like to enter a submission date for the grant application, enter it with the format mm/dd/yyyy

Submit Date
GMProposal.Subm
12/20/2017

- Enter the planned start and end date for the grant with the format mm/dd/yyyy

Start Date	End Date
GMProposal.Props	GMProposal.Propend

12. Enter the Sponsor code for the grant.

G
Sponsor
GMProposal.Sponcode

This must be a valid code set up in the ONESolution system prior to the upload. If you need to request a sponsor code please fill out the online request form located at the web address:

<http://www.santacruzcounty.us/Departments/Auditor-ControllerHome/GrantSponsorCodeRequestForm.aspx>

If you would like to see the available sponsor codes currently in ONESolution, click into the Sponsor code field in the ONESolution GMUPGM screen and use the Lookup button to see a list of currently available codes.

The screenshot shows the ONESolution GMUPGM screen with the 'Sponsor' field highlighted in yellow. The screen includes tabs for Proposal, Budget, Cost Sharing, Compliance, Award, and Award Modification. The 'Sponsor' field is located below the 'Reference Type' field and above the 'Sponsor Type' field.



The screenshot shows the 'Data Lookup' dialog box with a list of sponsor codes. The 'Filter' is set to 'PE ID' and the search criteria is 'like'. The list includes the following entries:

PE ID	NAME
G00001	US Department of Transportation
G00002	Federal Emergency Management Agency
G00003	CA Emergency Management Agency
G00004	Monterey Bay Unified Air Pollution Control Dist
G00005	CA State Coastal Conservancy
G00006	CA State Department of Water Resources
G00007	Monterey Peninsula Foundation
G00008	California Wildlife Conservation Board
G10000	U.S. Department of Agriculture

13. Enter the code for the sponsor type.

H
Sponsor Type
GMProposal.SporC

The options for this field are:

Sponsor Type	<none>
Purpose	<none>
Law-Through ID 1	CI City
	CO County
	DON Donation
	FED Federal
	FND Foundation
	REG Regional
	ST State
	TBD TO BE DEFINED(3C)GMUPCD

14. Enter the proposed grant award amount

I
Amount Requested
GMProposal.Projcost

15. There are many other available fields on the GMUPGM Proposal tab. Please fill out these fields manually in ONESolution if you would like to record this information.

Budget Tab

The Budget Tab contains the fields shown below:

Proposal	Project ID	Fiscal Year	GM Budget Version	Ledger (GL/JL)	Key	Object	Funding Agency Total	Cash Match Total						
GMPropbu	GMPropbu	GMPropbudg	F GMPropbudg	Propbu	GMPropbudg	Ledg	GMPropbudg	Orgke	GMPropbudg	Objec	GMPropbudg	FundAgency	GMPropbudg	Cashm
			V1											

16. Enter the Proposal and Project IDs that were entered on the Header and Proposal Tabs.

1	Budget Information
2	Proposal Project ID Fi
3	GMPropbu GMPropbu GM
4	
5	

17. For each additional budget line, enter the same Proposal and Project ID. For example, if you have budget details for 3 different object codes, you will enter the same Proposal and Project ID 3 times

Proposal	Project ID	Fiscal Year	GM Budget Version	Ledger (GL/JL)	Key	Object	Fu				
GMPropbu	GMPropbu	GMPropbudg	F GMPropbudg	Propbu	GMPropbudg	Ledg	GMPropbudg	Orgke	GMPropbudg	Objec	G
PR001	PJ001		V1		JL	F00100	51000				
PR001	PJ001					F00100	82856				
PR001	PJ001					F00100	86110				

18. Enter the fiscal year. If the budget covers multiple years, you can use 9999 as the fiscal year.

n	
ID	Fiscal Year
GMPropbu	GM
	2018
	2018
	2018

19. Enter V1 (version 1) as the budget version, unless, for some reason, you are loading multiple budget versions for the same grant.

D	
GM Budget Version	
F GMPropbudg	Propbu
.8	V1

20. Enter the ledger (GL or JL) you are using to track expenditures related to the grant.

E	
Ledger (GL/JL)	
GMPropbudg.Ledg	
JL	

21. Enter the GL/JL Key and Object for the budget items you would like to document in ONESolution for the grant

F		G	
Key	Object	Fur	
GMPropbudg.Orgke GMPropbudg.Objec GMV			
F00100		51000	
F00100		82856	
F00100		86110	

22. Enter the funding agency total for each budget line

F		G		H	
Key	Object	Funding Agency Total		C	
GMPropbudg.Orgke GMPropbudg.Objec GMPropbudg.FundAgency C					
F00100		51000		10000	
F00100		82856		20000	
F00100		86110		5000	

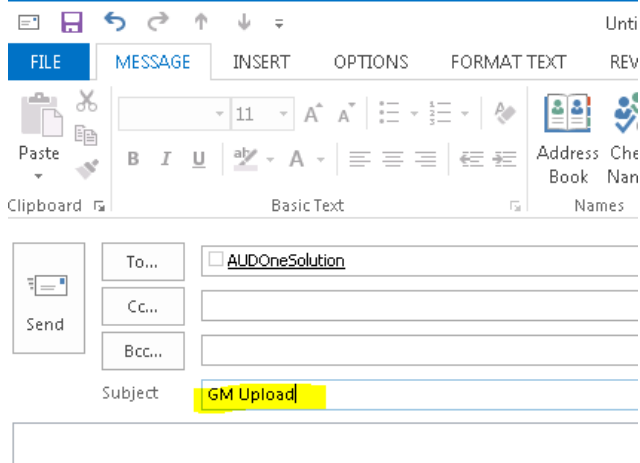
23. If applicable, enter the cash match total for each budget line

F		G		H	
Key	Object	Funding Agency Total	Cash Match Total	C	
GMPropbudg.Orgke GMPropbudg.Objec GMPropbudg.FundAgency GMPropbudg.Cashmatch					
F00100		51000	10000	10000	
F00100		82856	20000	20000	
F00100		86110	5000	5000	

Submitting the Excel Template

24. Submit your Excel template to AUDonesolution@santacruzcounty.us and the Auditor's office will upload your Grant information into the system for you.

25. Include "GM Upload" in the Subject line of your email



26. Once you are notified that your grant information is uploaded, go to the GMUPGM screen and add any additional information you need/would like to enter for each of your grants.

