

Add a Funding Source and Funding Account

Purpose: To update the list of funding sources that can be used in processes and the corresponding funding account.

Revision Date: August 30, 2017

Applies to: e-B Setup, Custom Fields for Dynamic Grids

Who does it:

E=B Admin

When to do it:

Annually at the end of the fiscal year to anticipate new funding sources and funding accounts or as needed to support DoF usage of e-Builder.

What to do:

Changes should first be made in the e-B Test environment, tested and then moved to production. The steps below apply to both environments.

1. Obtain the new Funding Source and Funding Account information. For example, the Funding Source might be CRSP-FY19 and the Funding Account might be 1733519.
2. Under **Administration Tools** on the left side of the page click on **Dynamic Grids**. The Dynamic Grids section of the menu expands.
3. Click on **Custom Fields**.
4. On the **Dynamic Grids Custom Fields** page locate **Funding Source**.
5. Click the **Edit** link for **Funding Source**.
6. Type the new funding source into the **Drop Down List Options** text box.
7. Click the **Next** button. The **Edit Custom Field** page appears.
8. Click the **Save** button.

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Are you looking for:

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9. The **Dynamic Grids Custom Fields** page appears.
10. On the Dynamic Grids Custom Fields page locate **Funding Account Number**.
11. Click the **Edit** link for **Funding Account Number**.
12. Type the new Funding Account Number into the **Drop Down List Options** text box.
13. Click the **Next** button. The **Edit Custom Field** page appears.
14. Click the **Save** button.
15. The **Dynamic Grids Custom Fields** page appears.
16. Click the **Field Dependencies** button.
17. Locate the **Funding Source** controlling field.
18. Click the **Edit** link for **Funding Source**.
19. Select the new **Controlling Field Value**.
20. In the **Unselected Field Values** list box, select the new **Funding Account Number**.
21. If the correct steps have been followed you will see a Saved message in the **Selected Field Values** list box.
22. Exit **Setup**.

Notes:

1. To verify that the new Funding Source and Account number have been added run the MPEB process in the environment you have changed and in apply the new options in the Governance Review step.
2. If you have made and tested the changes in Test you must duplicate the SOP steps in Production.