

BUDGET CATEGORIES AND MAPPING

Coeus budget categories and cost elements

Cost elements in Coeus are mapped to budget categories. Budget categories are maintained via the Code Table maintenance in the application. The mapping of cost elements to budget categories is done in the application using the Cost Element Details window.

Institutions can change the Coeus budget categories if they choose. However, if the budget categories are changed, then the mapping for printing and EDI must be changed as well.

Budget category mapping

The EDI and printing modules in Coeus contain hard codes for budget categories. These codes are required by NSF for EDI transactions, and are the codes found in the 194 Implementation Guide. These codes are HARD CODED in the Coeus printing and EDI packages, so it is important to map the Coeus budget categories correctly if you want printing and EDI to work.

The tables that are involved are `OSP$BUDGET_CATEGORY`, `OSP$BUDGET_CATEGORY_MAPS`, and `OSP$BUDGET_CATEGORY_MAPPING`.

`OSP$BUDGET_CATEGORY_MAPS` lists the category code and descriptions that are required by EDI or specific printing forms. This table should not be changed. The codes that are in this table are used by the EDI and printing packages.

`OSP$BUDGET_CATEGORY` contains the Coeus budget categories. It is the table that is updated when you maintain budget categories in the application with the Code Tables Maintenance module.

`OSP$BUDGET_CATEGORY_MAPPING` provides the link between the `OSP$BUDGET_CATEGORY` and `OSP$BUDGET_CATEGORY_MAPS`. So if you change the Coeus budget categories, you should update the mapping in this table. There is no interface in the application to do this.

Further explanation of EDI package logic

When printing the budget segments for the EDI transmission to NSF, the package loops through all the NSF budget categories in `osp$budget_category_mapping`. It then selects the line item details for all cost elements that fall under the same NSF category type. So if

you have cost elements in your budget that are not mapped, they will not be picked up by the package.