

Run a Basic Budget

PREREQUISITE: Editable Proposal Record

▶ Create a New Budget

1. A proposal record must first be open in Edit
2. Click on the "Budget" link located in the left hand navigation pane.
3. The Proposal Details will close and the screen will change to reflect the Budget module

▶ Complete Personnel Salary Calculations

Print	Name	Job Code	Appointment Type	Eff Date	Base Salary	Remove
	REYNOLDS, MALCOLM	EZZ	9M DURATION	07/01/2009	\$200,000.00	Remove
	TAM, SIMON	EZZ	9M DURATION	07/01/2009	\$85,000.00	Remove
	TOMPKINS, CHRISTOPHER M	AZ4	12M DURATION	07/01/2009	\$40,625.00	Remove

Personnel
 Adjust Periods
 Proposal Rates

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1. Click on the Personnel link found in the Budget Set Up section of the left hand navigation pane.
2. Click "Add Employee"; complete the standard Person search and select the desired person from the results list. -OR- Click "Add TBA" and select appropriate TBA type from list.
3. Complete Appointment Type: select 9M for AY and 12M for FY
4. Enter Eff Date: ALWAYS enter the preceding July 1st
5. Confirm Base Salary is accurate or enter desired TBA annual salary.
6. Save and repeat for each additional Person

▶ Add Salary Lines

Name: TOMPKINS, CHRISTOPHE | Salary Type: Personnel - Administrative/Supervis | Edit | Remove
 Period: Calendar | %Charged: 30.00 | %Effort: 30.00
 Start Date: 01/01/2010 | End Date: 12/31/2010 | Months: 3.6
 Requested Salary(\$): \$12,431.25 | Fringe Benefit(\$): \$4,798.47 | Funds Requested(\$): \$17,229.72

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1. Click on the Personnel Budget link in the Budget Periods section of the left navigation pane.
2. Click "Add Person"
3. Select the individual to have salary budgeted by checking the box next to their name.
4. Click "Save". The individual will have a new salary line created in the Personnel Budget window.
5. Define Salary Type from the option list
6. Define Period: Select appropriate value from the option list
7. %Charged: Enter the percentage of salary for this line to be charged to project
8. %Effort: Enter the percentage of time that will be spent on project
9. Start Date: Define the start date of the salary budgeted for this line

10. End Date: Define the end date of the salary budgeted for this line
11. Click "Save"
12. Repeat for all remaining Salary lines

► Add Non-Salary Lines

Type	Description	Funds Requested (\$)	Edit	Remove
Communications	Misc	\$5,000.00	Edit	Remove
Other Supplies & Expenses	Misc	\$35,000.00	Edit	Remove
Subcontracts without F&A	University of Test	\$12,000.00	Edit	Remove
Total Other Direct Costs		\$52,000.00		

1. Click the appropriate category from the Budget Periods section of the left navigation pane
2. Click Add Equipment to generate a new line (if applicable)
3. Enter "Description". Free text field for internal reference only.
4. "Qty" field: DO NOT USE
5. Enter "Funds Requested(\$)". Amount to be budgeted for this project period.
6. Click "Save"
7. Repeat for all additional equipment to be budgeted.

► Generate and Adjust all Periods

Prepare entire budget for period 1 and use the Generate Periods utility to forward the data for subsequent years. This process will copy Period 1 line item content of each section to create budget for subsequent years.

This utility will expire after initial use. So please make sure you have completed all required information for Period 1 under each section. Click **Generate Periods** to continue

1. Project Period 1 must be fully complete with all budgeted costs.
2. Click the "Generate All Periods" link found in the left navigation pane.
3. A new window will open asking for confirmation. Click "Generate Periods"
4. Click on any budget component in the left navigation pane. All project periods will now be listed by tab.
5. Review or revise future periods by clicking on the Period tabs at the top of each screen.

Period 1	Period 2	Period 3
Direct Cost: \$35,229.72	Indirect Cost: \$18,495.60	Total Cost: \$53,725.32