



Change Budgetary Controls

The budgetary control levels are entered on the **Budgetary Control** tab of the **Award Management** form at the time an award is established. These controls apply to all projects, tasks, resource groups and resources associated with the award.

Changing Budgetary Controls

Make budgetary control changes in the **Award Management** form for a project, task, resource group or resource that is associated with an award.

Make individual budgetary control changes for a specific task, resource group or resource, e.g., you have multiple tasks on a project and you want to change the budgetary control level for just one task.

Prerequisites

- You must have one of the following responsibilities to change the individual budgetary controls:
 - ORG Account Establishment Specialist
 - ORG Account Establishment Specialist with Budget Approval
 - ORG Account Establishment Administrator
- The Project/Task/Award was created in the business applications.
- The budget was created and submitted for approval (baselined) in the business applications.
- The default budgetary controls were established.

To change budgetary controls in the Award Management form for a project, task, resource group or resource that is associated with an award, and transfer that information to the Budgetary Control form:

1. Select **Awards** to open the **Find Award** form.
2. Enter the **Award** number, click **Find**, click **Open**.
3. Click **Find** to go to the **Award Management Folder** form for the award.
4. Click the box next to the award that you want to modify.
5. Click **Open** to open the **Award Management** form.
6. Click the **Budgetary Controls** tab on the **Award Management** form.

The screenshot shows the 'Award Management' window. The top section contains various fields for award details:

- Operating Unit: The Research Foundation
- Number: 72160
- Short Name: CS, Crump-Owens
- Full Name: Cost sharing for Award 72159
- Start Date: 01-JUL-2015
- Close Date: 30-JUL-2020
- Purpose: Cost Sharing
- Organization: 030 Center for Academic
- Award Amount: 438,974.00
- Funding Source Name: SUNY Cost Share
- Funding Source Award Number: A-72159
- Pre-Award Date: (empty)
- End Date: 30-JUN-2020
- Award Type: Non-sponsored
- Status: Closed
- Funded Amount: 438,974.00

Below the fields are buttons for 'Cost Sharing Matching Information' and 'Funding Summary'. A tabbed interface at the bottom includes 'Installments', 'Terms and Conditions', 'Budgetary Control', 'Funding Source Details', 'Contacts', and 'Personnel'. The 'Installments' tab is active, showing a table with the following data:

Number	Issue Date	Type	Description	Active	Billable	I	J
1	14-JUL-2015	Award	Cost sharing for A72159 / P1126563 - Year 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	13-OCT-2016	Award	Cost sharing for A72159 / P1133743 - Year 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	14-JUN-2017	Award	Cost sharing for A72159 / P1140257 - Year 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the window are buttons for 'Reports' and 'Project Funding'.

7. On the Levels region,

a. Select **Award** and choose from the List of Values.

- **Absolute** -- No expenditures over the budget are allowed
- **Advisory** -- Expenditures over budget are allowed, but the system will generate a warning
- **None** -- No restrictions are placed on expenditures

b. Select **Task** (Optional) and choose from the List of Values.

- **Absolute** -- No expenditures over the budget are allowed
- **Advisory** -- Expenditures over budget are allowed, but the system will generate a warning
- **None** -- No restrictions are placed on expenditures

c. Select **Resource Groups** (Optional) and choose from the List of Values.

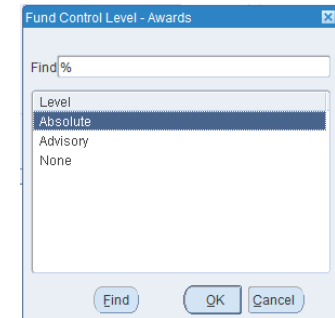
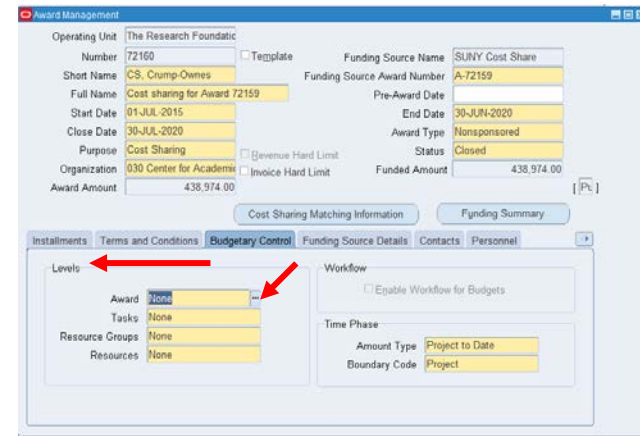
- **Absolute** -- No expenditures over the budget are allowed
- **Advisory** -- Expenditures over budget are allowed, but the system will generate a warning
- **None** -- No restrictions are placed on expenditures

d. Select **Resources** (Optional) and choose from the List of Values.

- **Absolute** -- No expenditures over the budget are allowed
- **Advisory** -- Expenditures over budget are allowed, but the system will generate a warning
- **None** -- No restrictions are placed on expenditures

8. Select **File > Save** to save your changes.

9. Click the **Close** button (the **X** in the upper right corner of the form) to close the **Award Management, Award Management Folder** and **Find Award** forms.



1. Select **Budgets > Budgetary Controls** to open the **Budgetary Control** form.
2. Enter the **Project Number**, press **Tab**. The system automatically populates the form from the Award Management form.
3. Choosing from the List of Values, change the **Budgetary Control Settings** on one or all of the Award Numbers or Task Numbers.

Budgetary Control - ORG Account Establishment Administrator @ TRAINX - 26-MAR-2019

Project Number: 1148520 Project Name: 15093700C

Award

Number	Name	Budgetary Control Settings
72160	CS, Crump-Owens	None

Default Setup

Task

Number	Name	Budgetary Control Settings
40	T,40 Purch-Student	None
45	T,45 Supplies	None
46	T,46 Travel	None
CS	CS, Crump-Owens	None

Resources

Budgetary Control - ORG Account Establishment Administrator @ TRAINX - 26-MAR-2019

Project Number: 1148520 Project Name: 15093700C

Award

Number	Name	Budgetary Control Settings
72160	CS, Crump-Owens	Absolute

Default Setup

Task

Number	Name	Budgetary Control Settings
40	T,40 Purch-Student	Absolute
45	T,45 Supplies	Absolute
46	T,46 Travel	Absolute
CS	CS, Crump-Owens	Absolute

Resources

4. Select **File > Save** to save your changes.