



## Modify Award and Project Budget

Use these instructions to increase, decrease or transfer funds between budget categories for an award, project and task.

### Prerequisites

- You will need the project and award number for the budget that needs to be modified.

### To modify an award and project budget:

- Select **Budgets > Award Budgets** to open the **Award Budgets** form.
- Complete the following fields on the **Award Budgets** form:
  - Award Number
  - Award Name (The system automatically fills in this field when you enter the award number.)
  - Project Number
  - Project Name (The system automatically fills in this field when you enter the project number.)
- Click **Find Draft**.

Totals					
	Labor		Burdened		
	UOM	Quantity	Raw Cost	Cost	Revised Date
Draft					
Current					

4. Complete the following fields on the **Award Budgets** form:

- Version Name (The system automatically fills in this field based on information from the **Budget** form.)
- Change Reason
- Description

**Find Budget**

Award Number: 78003      Award Name: Cardiology Butler Duke Univ  
 Project Number: 1139324      Project Name: Cardiology Butler DukeU  
 Budget Type: Approved Cost Budget     

**Draft Budget**

Version Name:       Status: Working  
 Change Reason: Official Award Amount  
 Description:        New Original

**Entry Options**

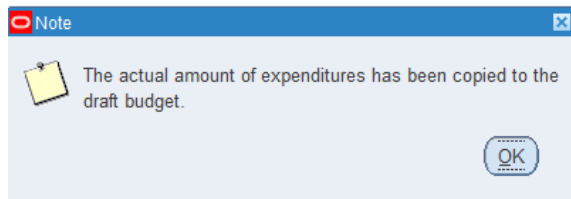
Entry Method: Task-Resource-Period      Resource List: Expenditure Categories and Typ

**Totals**

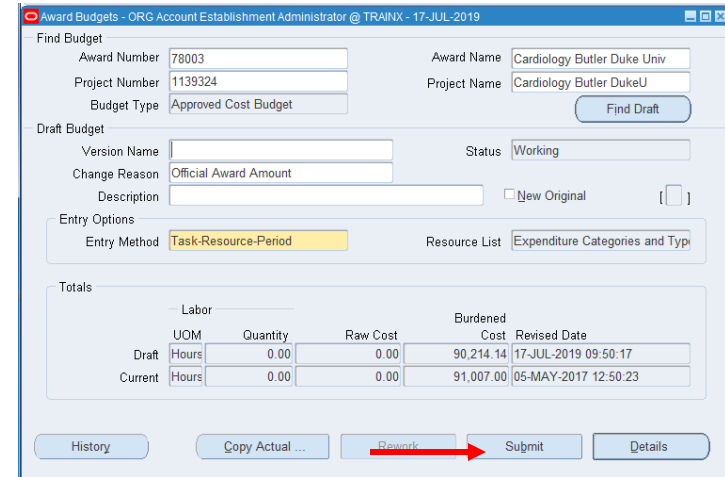
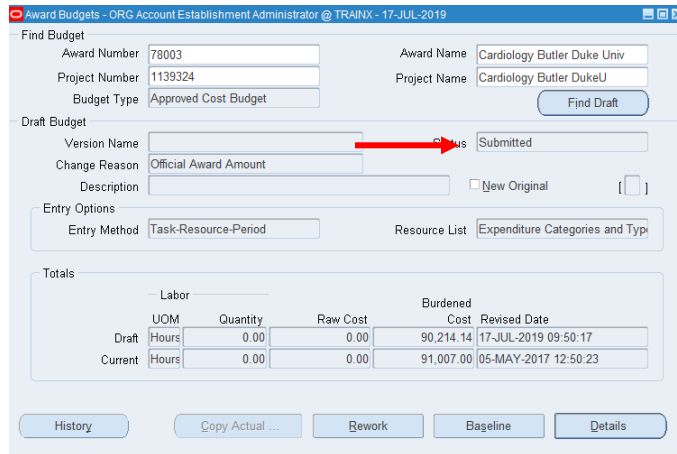
	Labor		Burdened		Revised Date
	UOM	Quantity	Raw Cost	Cost	
Draft	Hours	0.00	0.00	91,007.00	05-MAY-2017 12:50:23
Current	Hours	0.00	0.00	91,007.00	05-MAY-2017 12:50:23

If all you need to do is to **Reduce the budget to equal expenditures** proceed as follows:

1. Select **Copy Actuals** button.
2. Leave the default date periods and select the **OK** button. Click **OK** on the Note popup.

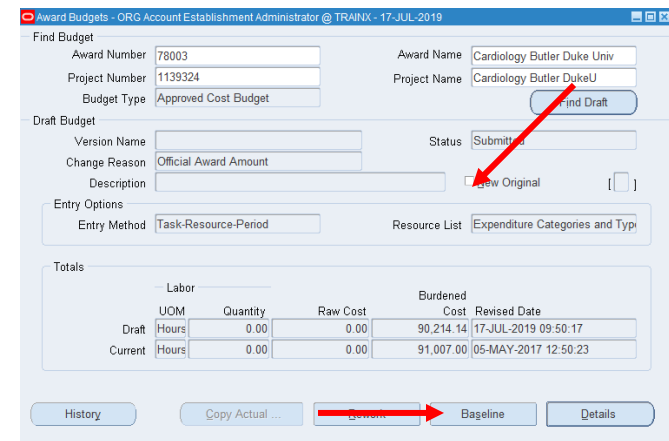
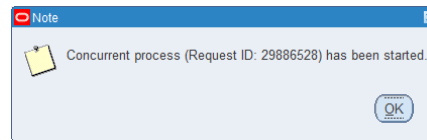


3. Click **Submit** to recalculate the award budget (the baselining process).
4. Verify that the award budget status has changed to **Submitted**.



5. Click **Baseline** to go to a **Note** window, which displays the **Request ID** number, which is useful to find the baselining request to ensure that baselining has successfully completed.

- Write down the **Request ID** number, and then click **OK**.
- Select **File > Close Window** to return to the **Navigator** window.
- Select **View > Requests** to go to the **Find Requests** window.
- Click the **Specific Request** option button.
- Click **Find** to go to the **Requests** window.
- Click **Refresh Data** until the **Phase** field displays **Completed**. The request has successfully completed when the **Phase** and **Status** fields display **Completed** and **Normal**. You still must see if the baselining completed successfully.



- To see if the award budget baselined successfully, select the appropriate Request ID. Then, click **View Output**.

```
----- Records that Errored Out NOCOPY -----
---- End Report ----
The baseline budget version was successfully created and a project budget for project (1139324) was summarized.
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- If the award budget did not baseline successfully, review the award to determine why the budget did not baseline properly.

If the original budget was done at the task level, follow steps 1 – 4 above. Click **Details**. The **Task Budgets** form opens.

- Place the cursor next to the task you need to re-budget.
- Click **Budget Lines** to go to the **Budget Lines** form.

Task Number	Task Name	UOM	Quantity	Raw Cost	Burdened Cost
1	Task 1	Hours	0.00	0.00	51,521.00

Project Total: 0.00, 0.00, 51,521.00

[Budget Lines](#)

Note: You should enter your entire budgeted amount in

the earliest period for each expenditure category or type that coincides with the effective date of funding. However, funds checking is available on a project-to-date basis.

Find Budget

Award Number: 78008, Award Name: Physics Jung Fermi Lab  
 Project Number: 1139331, Project Name: Physics Jung Fermi Lab  
 Budget Type: Approved Cost Budget

Draft Budget

Version Name: , Status: Working  
 Change Reason: Official Award Amount  
 Description: ,  New Original

Entry Options

Entry Method: Task-Resource-Period, Resource List: Expenditure Categories and Typ

Totals

	UOM	Quantity	Raw Cost	Burdened Cost	Revised Date
Draft	Hours	0.00	0.00	51,521.00	08-MAY-2017 08:58:13
Current	Hours	0.00	0.00	51,521.00	08-MAY-2017 08:58:13

[History](#) [Copy Actual ...](#) [Rework](#) [Submit](#) [Details](#)

3. Complete the following fields to modify the budgeted expenditure:
  - Resource (The expenditure categories or expenditure types.)
  - Amount Type (The system automatically enters Burdened Cost in this field.)
  - Month-XX (The months and years within a budgeting period (displayed in several columns).)
  - Change Reason
  - Comments
4. Select **File > Save**.
5. Close the **Budget Lines** and **Task Budgets** forms by selecting **File > Close Form** until you return to the **Award Budgets** form.
6. Click **Submit** to recalculate the award budget (the baselining process).
7. Select **File > Close Form** to close the **Award Budgets** form.
8. Select **Award Summary Inquiry** to open the **Find Awards** window.
9. Verify that the award budget status has changed to **Submitted**.

Budget Lines - 1139331, 78008 - ORG Account Establishment Administrator @ TRAINX - 17-JUL-2019

Version Number: Draft, Task Number: 1, View Lines For: BURDENED COST, Task Name: Task 1, Periods For Totals: May-17 - May-17

Resource	Amount Type	May-17	June-17	July-18	August-18	Period Totals
FAC F and A Co	Burdened Cost	10,631.00				10,631.00
GNS Consultant	Burdened Cost	40,890.00				40,890.00
Totals		51,521.00	0.00	0.00	0.00	51,521.00

Change Reason: [ ] Comments: [ ]

Award Budgets - ORG Account Establishment Administrator @ TRAINX - 17-JUL-2019

Find Budget: Award Number: 78008, Project Number: 1139331, Budget Type: Approved Cost Budget, Award Name: Physics Jung Fermi Lab, Project Name: Physics Jung Fermi Lab

Draft Budget: Version Name: [ ], Change Reason: Official Award Amount, Description: [ ], Status: Working, Entry Method: Task-Resource-Period, Resource List: Expenditure Categories and Typ

Totals		Labor		Raw Cost	Burdened Cost	Revised Date
		UOM	Quantity			
Draft	Hours		0.00	0.00	51,521.00	08-MAY-2017 08:58:13
Current	Hours		0.00	0.00	51,521.00	08-MAY-2017 08:58:13

Buttons: History, Copy Actual ..., Rework, Submit, Details

Award Budgets - ORG Account Establishment Administrator @ TRAINX - 17-JUL-2019

Find Budget: Award Number: 78008, Project Number: 1139331, Budget Type: Approved Cost Budget, Award Name: Physics Jung Fermi Lab, Project Name: Physics Jung Fermi Lab

Draft Budget: Version Name: [ ], Change Reason: Official Award Amount, Description: [ ], Status: Submitted, Entry Method: Task-Resource-Period, Resource List: Expenditure Categories and Typ

Totals		Labor		Raw Cost	Burdened Cost	Revised Date
		UOM	Quantity			
Draft	Hours		0.00	0.00	51,521.00	08-MAY-2017 08:58:13
Current	Hours		0.00	0.00	51,521.00	08-MAY-2017 08:58:13

Buttons: History, Copy Actual ..., Rework, Baseline, Details

10. Click **Baseline** to go to a **Note** window, which displays the **Request ID** number, which is useful to find the baselining request to ensure that baselining has successfully completed.
11. Write down the Request **ID** number, and then click **OK**.
12. Select **File > Close Window** to return to the **Navigator** window.
13. Select **View > Requests** to go to the **Find Requests** window.
14. Click the **Specific Request** option button.
15. Click **Find** to go to the **Requests** window.
16. Click **Refresh Data** until the **Phase** field displays **Completed**. The request has successfully completed when the **Phase** and **Status** fields display **Completed** and **Normal**. You still must see if the baselining completed successfully.
17. To see if the award budget baselined successfully, select the appropriate Request ID. Then, click **View Output**.
18. If the award budget did not baseline successfully, review the award to determine why the budget did not baseline properly.
- 19.

Select **File > Close Window** to return to the **Navigator** window.

Select **View > Requests** to go to the **Find Requests** window.

Click the **Specific Request** option button.

Click **Find** to go to the **Requests** window.

Click **Refresh Data** until the **Phase** field displays **Completed**. The request has successfully completed when the **Phase** and **Status** fields display **Completed** and **Normal**. You still must see if the baselining completed successfully.

To see if the award budget baselined successfully, select the appropriate Request ID. Then, click **View Output**.

If the award budget did not baseline successfully, review the award to determine why the budget did not baseline properly.