



Work Instruction

Enter a Sponsored Budget

Purpose

Use this procedure to enter a sponsored budget directly into the budget tool.

Trigger

You receive an Action Memo for the award.

Prerequisites

- Chart of Accounts values (tub, org, fund, activity, subactivity, and root) have been set up for the award.
- You have decided which object code and amount to assign to each approved budget line item.
- If more than one subactivity is assigned to the award, you have planned any budget distribution among subactivity values.

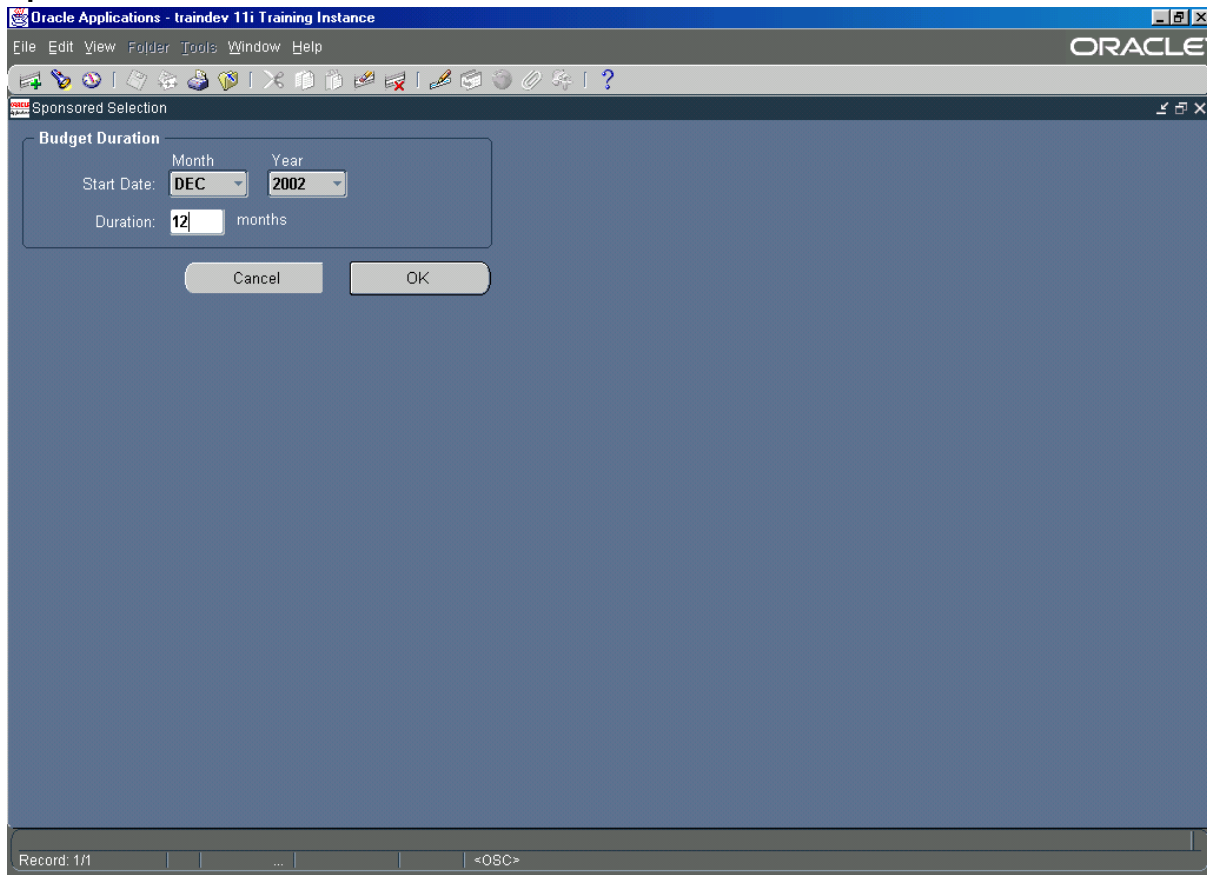
Helpful Hints

Review sponsor requirements to determine the appropriate level of budget detail.


Procedure


1. Start the task by selecting **Sponsored → Create New Award Budget** to go to the *Sponsored Selection* screen.

Sponsored Selection



2. Complete the following required fields:

In This Field	Select or Enter
Start Date:	Start date (month and year) of the grant award budget you are entering  You must select the Month and Year from the pulldown lists for the system to register the date.

In This Field	Select or Enter
Duration:	Number of months for which the grant you are entering has been awarded  Use whole numbers only.



Enter only the budget start date and duration of the budget being entered. If the start date and duration of an existing budget are entered, the existing budget information will be overwritten.

- Click  to go to the *Create New Award Budget* screen.

Create New Award Budget

4. Using information from the Action Memo for the approved award, complete the following required fields:

In This Field	Enter
Tub	3-digit tub value
Organization	5-digit org value
Fund	6-digit fund value
Activity	6-digit activity value
Sub-Activity	4-digit subactivity value
Root	5-digit root value

5. In the **Object** field, enter the object code for your first budget line item.
6. Click **Add** to add the object code to the list of object code values for this award.




Press **Alt + D** to add the selected object code values for this award.

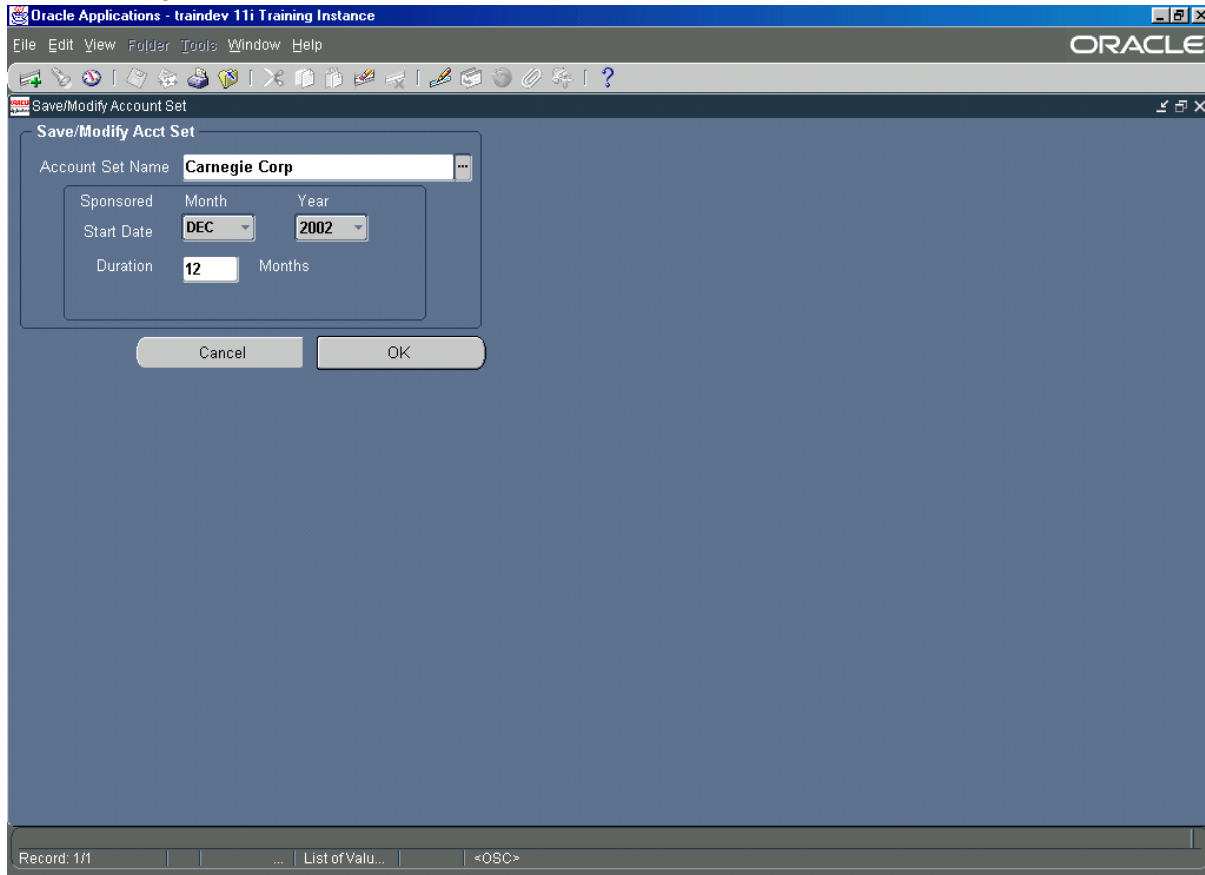
7. Perform one of the following:


If You Need To	Then
Add more object codes to the list	Repeat Steps 5 and 6 until object codes for all budget line items are listed.
Remove an object code from the list	<ol style="list-style-type: none"> 1. Highlight the appropriate object code line. 2. Click Remove.

8. Perform one of the following:

If	Then	Go To
The list of object codes is complete for all budget lines for the subactivity listed	Click Save And Go to create journal entries.  Once accounts are created, they cannot be removed from the General Ledger.	Step 12
You want to save your account settings	Click Create Acct Set .	Step 9


Save/Modify Account Set



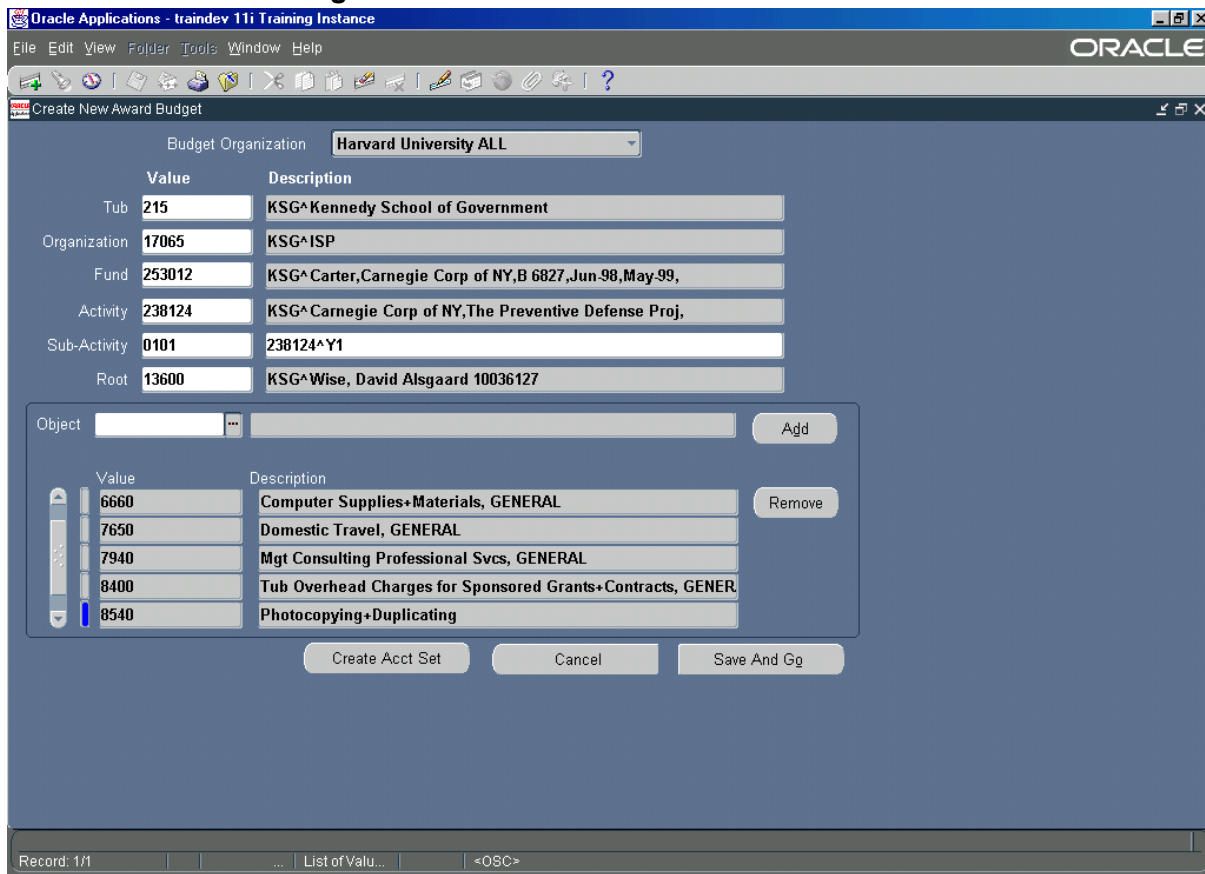
9. Enter a name for the saved account set, and click .



Saved account sets are associated with the responsibility in use when they were created. You can only access ones created with budget responsibilities you have. Everyone with the same responsibility will be able to use and modify a saved account set.

10. Click  to return to the *Create New Award Budget* screen.

Create New Award Budget



Budget Organization: **Harvard University ALL**

	Value	Description
Tub	215	KSG^Kennedy School of Government
Organization	17065	KSG^ISP
Fund	253012	KSG^Carter, Carnegie Corp of NY, B 6827, Jun-98, May-99,
Activity	238124	KSG^Carnegie Corp of NY, The Preventive Defense Proj,
Sub-Activity	0101	238124^Y1
Root	13600	KSG^Wise, David Alsgaard 10036127

Object: Add

	Value	Description	
	6660	Computer Supplies+Materials, GENERAL	Remove
	7650	Domestic Travel, GENERAL	
	7940	Mgt Consulting Professional Svcs, GENERAL	
	8400	Tub Overhead Charges for Sponsored Grants+Contracts, GENER	
	8540	Photocopying+Duplicating	

Buttons: Create Acct Set, Cancel, Save And Gg

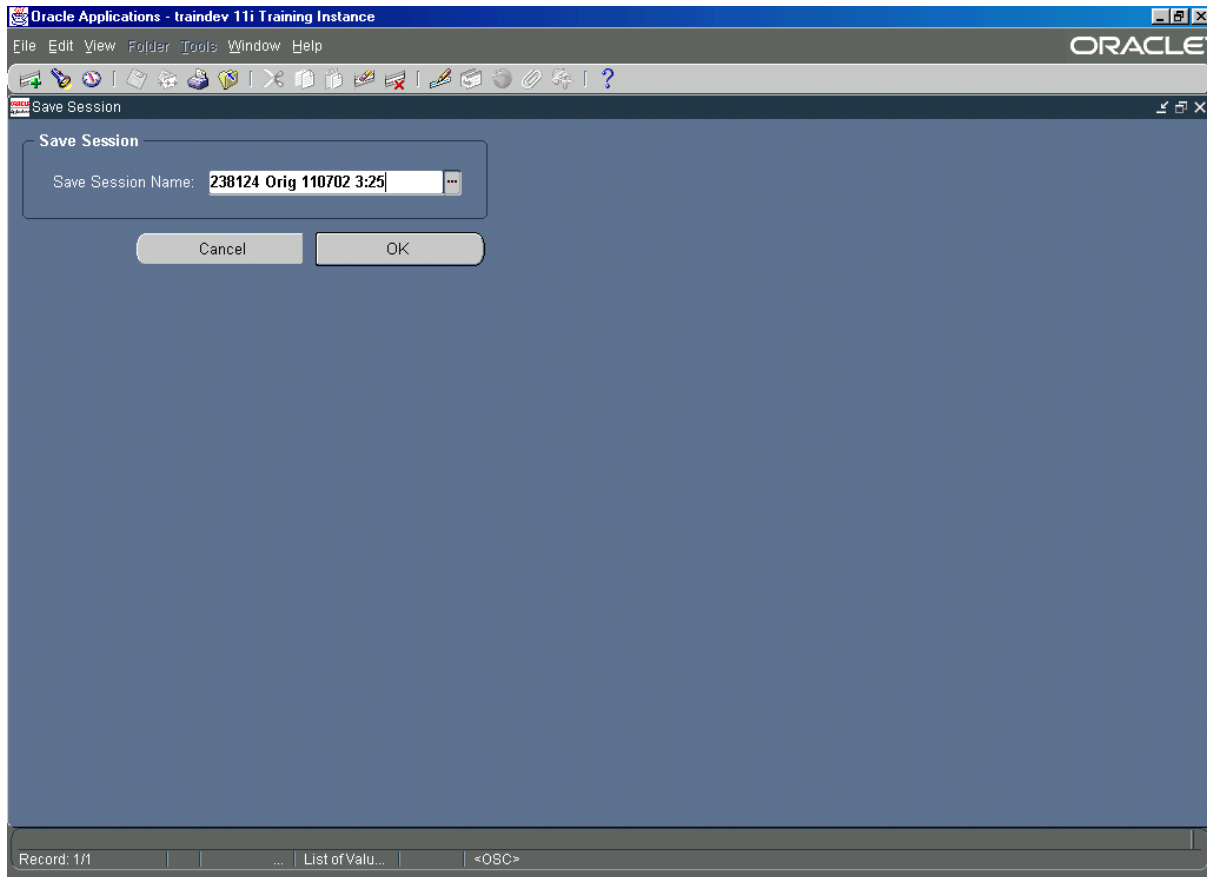
Record: 1/1 | ... | List of Valu... | <OSC>

- Click **Save And Gg** to go to the *Sponsored Budget Input* screen.




If You	Then
Have completed your budget and are ready to submit the budget to the General Ledger	Click Submit to go to the <i>Save Session</i> window.
Need to enter a budget for another subactivity assigned to this award	Click Submit to go the <i>Save Session</i> window.

Save Session





15. Complete the following required field:

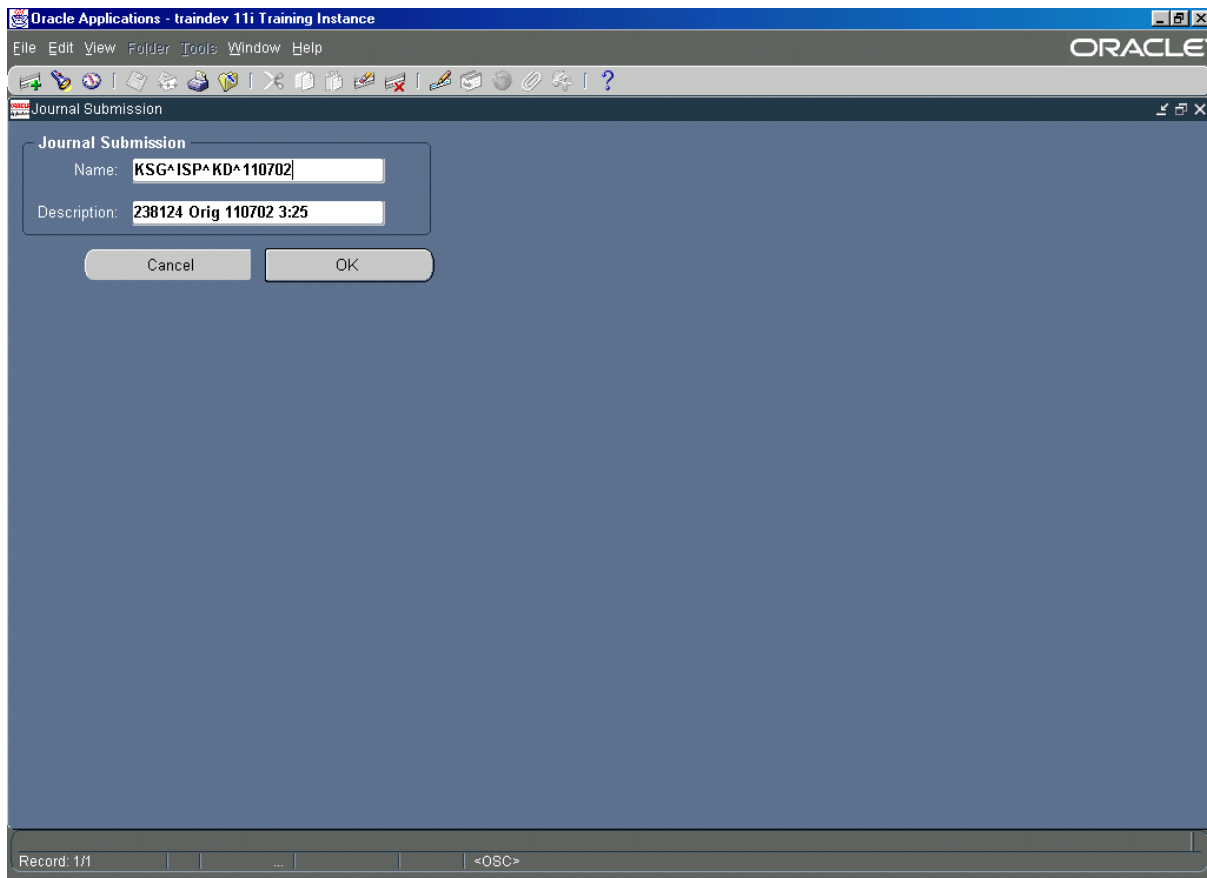
In This Field	Enter
Save Session Name:	Session name  This is your private session, so use a description that reminds you of what you are budgeting. Use the following naming convention to name the session: Activity Description MM-DD-YY Time.

16. Click .


17. Perform one of the following:

If You	Then	Go To
Have completed your budget and are submitting it to the General Ledger	—	Step 18
Need to enter a budget for another subactivity assigned to this award	—	Step 1
Are temporarily saving your work without submitting the budget to the General Ledger	Your budget is temporarily saved for thirty days. To resume working on your budget, select Sponsored → Resume Session from the Navigator menu to recall the <i>Sponsored Budget Input</i> screen.	—

Journal Submission



18. Complete the following required field:

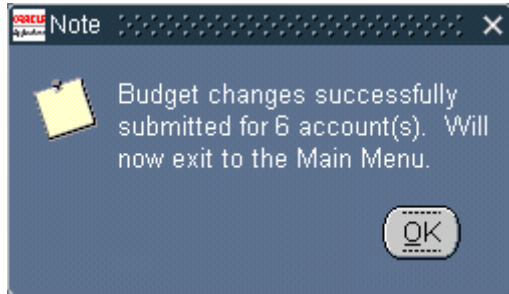
In This Field	Enter
Name:	<p>Name of the journal</p> <p> Use the following naming convention to name the journal:</p> <p>TUB prefix^Org abbreviation^Your initials^Date (month-day-year)</p> <p>Example: KSG^ISP^KD^11-07-02</p>



The **Description** field is automatically populated with the information you entered in the **Save Session Name** field. It is recommended that the same information appear in both the **Description** and **Save Session Name** fields.

19. Click .

Note



A note displays indicating that the budget changes have been successfully submitted.

20. Click .

21. Perform the following:

If You Need To	Then	Go To
Enter a budget for another subactivity assigned to this award	Repeat this procedure using another subactivity value.	Step 1

Result

You have successfully entered a sponsored budget to the General Ledger.

Comments

You have completed this procedure. Select **Action** → **Exit Oracle Applications** to exit the system.