

Work Instruction

Modify a Sponsored Budget Using the BUS

Purpose

Use this procedure to modify an approved award budget that will be uploaded to the General Ledger via the Budget Tool.

Trigger

- You have entered the original budget to the General Ledger using the BUS.
- A budget change is required.

Prerequisites

- If necessary, you have obtained sponsor and/or OSR approval to change the budget.
- Intermediate Excel skills.
- Excel is loaded onto your computer.

Helpful Hints

Create a folder on your computer in which to save all budget files you enter and modify.

Access Original Budget Upload Spreadsheet and Revise Budget Detail

1. Open the existing Budget Upload Spreadsheet for the budget you are modifying.
2. For each budget item you are changing, enter the amount the budget increased or decreased in the **Adjustments** column.



Actual award amounts must appear in the **Award Amount (NoGA)** column.

3. If necessary, perform one of the following actions to revise the BUS between the two black lines:




If You Need To	Then
Add a budget line item to the budget	<ol style="list-style-type: none"> 1. Insert an entire row. 2. Copy and paste the appropriate object code and description from the object Code Aid tab in the BUS.  Be sure to create any necessary links from other spreadsheets.
Overwrite a budget amount that was initially uploaded in error	<ol style="list-style-type: none"> 1. Select the row to be overwritten (zeroed out). 2. Enter the appropriate amount in the Adjustments column so that \$0 appears in the Award Amount (NoGA) column. 3. Place an X in the column to the right of the Award Amount (NoGA) column to upload a budget amount of \$0.
Change a Sub-Activity value	<ol style="list-style-type: none"> 1. Press the Delete key on your keyboard to erase the value in the cell. 2. Enter the appropriate subactivity value for the appropriate object code.  Be careful not to alter the cell formatting.
Add a year of funding	Enter the award budget using the appropriate Year # column on the Summary spreadsheet.

Chart Segment Values

ASSIGN CHART VALUES :				
	Value			
TUB	370			
ORG	31575			
FUND	132341			
ACTIVITY	339038			
ROOT	13510			

4. Review the following required fields to verify that the chart values are correct as listed on the Action Memo.

This Field	Shows
Tub	3-digit tub value
Organization	5-digit org value
Fund	6-digit fund value
Activity	6-digit activity value
Root	5-digit root value  A root value will be used for all sponsored accounts in all tubs.

Budget Period

ENTER CURRENT BUDGET PERIOD		
	(MM/YYYY)	Select Years
Budget Start	07/1999	<input checked="" type="checkbox"/>
	07/2000	<input checked="" type="checkbox"/>
	07/2001	<input checked="" type="checkbox"/>
	07/2002	<input checked="" type="checkbox"/>
	07/2003	<input checked="" type="checkbox"/>

5. In the **MM/YYYY** column, enter the month and year in which the project begins.
6. In the **Select Years** column, select the box that corresponds to the budget year(s) you are modifying and uploading.



If you select a year for which a budget already exists in the General Ledger, the existing budget will be overwritten. If you select multiple years, they must be continuous.

Create Sponsor Upload File

ASSIGN CHART VALUES :				
	Value			
TUB	370			
ORG	31575			
FUND	132341			
ACTIVITY	339038			
ROOT	13510			

Create Sponsor Upload File

7. Click **Create Sponsor Upload File** at the top of the BUS.



In the *Save As* window, the award's Activity value will automatically display as the file name.

8. Select the correct directory and folder in which to save the BUS file.



This could be the budget files folder you created on your computer.

9. Click **Save** to save the upload file as a .bgt file.

10. Click **OK**.

Result

You have created an **Upload** file for the modified budget. The upload file can be viewed in the **Upload** tab of the BUS, and the budget is automatically fiscalized over the appropriate fiscal years.

Next Step

Refer to the work instruction *Upload a Sponsor Upload File to the General Ledger* to use the Budget Tool to upload this file to the General Ledger.

Comments

You have completed this procedure. Select **File** → **Exit** to exit the BUS.