## **PPM TASK: ADD A PPM BUDGET**

Use this task to create or update the Project Budget for a PPM Project

## PREREQUISITE: BEFORE ADDING A BUDGET TO PPM

The department or academic will receive funding for an internal award, general funding, gift or other source. Before a budget can be added to PPM:

- 1. **RPM** will process a **Journal Entry** in the **General Ledger** and add the funding to the Project.
- 2. RPM will send a copy of the Journal Entry to the Business Officer.

Only after receiving the above documentation can a business manager create a budget in PPM.

## **NAVIGATION:**

Oracle Home Page > Projects > Project Financial Management

Step	Action
1.	When a funding form is received with a Journal Entry attached for a PPM Project, create the budget in PPM.
2.	Search for the Faculty, Department or Recharge Project.
3.	Click on the <b>Project Name</b> or <b>Project Number</b> to reveal the sub menu.
4.	Select Manage Project Budget.



Step	Action
5.	Note: A budget has already been created. <b>Version 1</b> is the conversion and <b>Baseline Budget.</b> Every time the budget is updated a new <b>Working Version</b> will be created.
6.	Select Version 2 or the current working version of the budget.

Manage Budget Versions Grace Woodmansee SISKIYOU		
Currency =	usd rview	
Cost B	udget	
	\$1 Spent \$0 Budget to Date \$0	
Actions	▼ I ▼ I ▼ I ▼ I ▼	
	Version 2 Current Working	
🔊 <del>60</del>	Version 1 Current and Original Baseline	

Step	Action
7.	The current budget showing the project and tasks will appear in the budget panel.
8.	Select the <b>Row</b> with the <b>Task</b> where you will add the budget. <b>Note</b> : You can select multiple tasks by holding the <b>CTRL key</b> and selecting the left side of each <b>Task Row</b> .

. /	Actions $\checkmark$ View $\checkmark$ + X $\mathcal{P}$ $ $ $\checkmark$ $ $ $\checkmark$	📑 📓 Detach Go to Task	▼ La
	Task Number or Resource	Task Name	Planning Currency
	FPSISK6236	Grace Woodmansee SISKIYOU PPM ONLY	
	⊿ 📋 IAW001	ANR AWARD HRDY 46137	
	Supplies		USD

Step	Action
9.	Select the <b>Actions</b> drop down menu.
10.	In the drop-down menu, select Manage Assignments for Selected Tasks.

Edit Budget: Version 2 Grace Woo	odmansee S	ISKIYOU PP	no M	ILY		
* Name Version 2	* Name Version 2 Display Task structure Version 2 Current Plane					
UCD Internal Project Financial Plan Planning Level: Project and all tasks	▼ 11: 11 DI	etach GotoTask		•		
Manage Assignments for Selected Tasks Task Name Plannin Curren		ing ncy				
Replace Resource Assignments Grace Woodmansee SISKIYOU PPM ONLY						
Edit Period Amounts	ANR AWARI	D HRDY 46137				
Refresh Rates USD						
Refresh Conversion Rates	START UP F	UNDING FY2223				

Step	Action
11.	Select the <b>Plus Icon +</b> next to the expenditure category on the funding form. See the example of an Internal Award funding form below.

Budget Breakdown:	Year 2	\$13,172
	<u>Amount</u>	<u>Sub</u>
Salary	\$10,832	SUBG
Employee Benefits	\$0	SUB6
Supplies/Expense	\$50	SUB3
Travel	\$2,290	SUB5
Other	\$0	0
Total	<mark>\$13,172</mark>	

Step	Action
12.	The selected expenditure category will move from the <b>Available Resources</b> column to the <b>Assignments</b> column and is ready to be populated.

Available Resources		Assignments Hide Prior Assignments			
Contracts (Subrecipients)	F	LAW001: ANR AWARD HRDY 46137			
Equipment	F	Supplies (USD)	1.00	USD	×
Fellowship & Scholarships	F	Salaries and Wages (USD)		USD	×
Fringe Benefits	F	Travel (USD)		USD	×

Step	Action
13.	Enter the <b>budgeted amount</b> from the <b>funding form</b> in the cell next to the expense category.

Assignments			
Hide Prior Assignments			
E IAW001: ANR AWARD HRDY 46137			
Supplies (USD)	50.00	USD	×
Salaries and Wages (USD)	10,832.00	USD	×
Travel (USD)	2,290.00	USD	×

Step	Action
14.	Select Save and Close.
15.	Check the budgeted amount entered to make sure it matches the <b>funding form</b> and amount funded on the <b>Journal Entry</b> .

🖌 🛅 FPSISK6236	Grace Woodmansee SISKIYOU PPM ONLY	13,172.00 USD
⊿ 📋 IAW001	ANR AWARD HRDY 46137	13,172.00 USD
Salaries and Wages	USD	10,832.00 USD
Supplies	USD	50.00 USD
► Travel	USD	2,290.00 USD

Step	Action
16.	Select the <b>Plus Icon •</b> and attach the <b>Funding Form</b> and <b>Journal Entry</b> to the budget.

Current Planning Period	Oct-23	•		
	Planni Attach	ng Options ments: None 🕂	Cost \$13,7	<sup>Budget</sup> 172.00
▼ Layout	Budget Lines	•		
ng Qua	antity	Raw Cost	Raw Cost Rate	e
		13,172.00 USD		

Step	Action
17.	Add a note stating the reason for the budget adjustment using the <b>Text</b> Attachment Tool.
18	Select the <b>Type</b> of file <b>TEXT</b> . Select <b>Category</b> Project Budget.
19.	Type the reason for the budget addition or adjustment in the <b>Text Box</b> .
20.	Select Add Button [Add] on the right of the Add Attachments panel. Select OK

Add Attachm	ents × Add
Туре	Text 🗸
Category	Project Budget 🗸
* Text	To add funds for HRDY internal award 46137 Year 2 funding from 07/1/2023-06/30/2024
Title	Add HRDY Budge

Step	Action
21.	Add the backup documentation to the budget transaction.
22.	Select the <b>Plus Icon •</b> again and attach the <b>Funding Form</b> and <b>Journal Entry</b> to the budget.
23.	Select the <b>Type</b> of file. <b>Select Category</b> Project Budget. Select <b>Choose Files</b> and navigate to the file.
24.	The file is uploaded. To view all files uploaded, select the Attachment List Icon.
25.	Select <b>OK</b> .
26.	The files and Text note are uploaded and listed in the attachments window.

✓ Current Planning Period	Oct-23	•
Planning Options Attachments: Woodmansee HF	RDY #22-17 YR2 Fun 🕂 📷	×

Step	Action
27.	Select <b>Submit</b> to submit the budget for approval.
28.	A summary of the changes made appears. Do NOT select Create Primary Forecast Upon Approval.

Abilit version. version 2					
	Number 2				
	Financial Plan Type UCI	D Internal Project Finan	cial Plan		
Create primary forecast upon appr	oval				
Project Level Control I	Budget				
√iew ▼ 📄 Detach					
roject Name	Current Working Budget Cost	Current Baselir Budget Co	te Consumed Am	ounts Proposed Incre Decrease in F	ease or Budget
PSISK6236 ssociated Control Budgets FPSISK6236 I Top Resource Level C	13,172.00	1.	00	0.00 13	;,171.00
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FPSISK6236  ssociated Control Budgets FPSISK6236  Top Resource Level C View  Fop Resource Salaries and Wages Bupplies	13,172.00 control Budget <u>Cu</u>	1.1 rrent Working Budget Cost 10,832.00 50.00	00 Current Baseline Budget Cost 0.00 1.00	0.00 13	Proposed Increase o Decrease in Budge 10.832.0 49.0
PPSISK6236 ssociated Control Budgets FPSISK6236 ▲ Top Resource Level C View ▼  ☐ Detach Top Resource Salaries and Wages Supplies Travel	13,172.00 control Budget <u>Cu</u>	1.1 rrent Working Budget Cost 10,832.00 50.00 2,290.00	00 Current Baseline Budget Cost 0.00 1.00 0.00	0.00 13	Proposed Increase o Decrease in Budge 10,832.0 49.0 2,290.0
FFPSISK6236  Top Resource Level C View  Detach  Top Resource  Salaries and Wages  Supplies  Fravel  ssociated Control Budgets FFPSISK6236_Top_Resource	13,172.00 control Budget	1.1 Trent Working Budget Cost 10,832.00 50.00 2,290.00	00 Current Baseline Budget Cost 0.00 1.00 0.00	0.00 13	Proposed Increase o Decrease in Budge 10,832.0 49.0 2,290.0

Step	Action
29.	Select <b>OK</b> .
30.	Select <b>Done.</b> End of Procedure