

# [ Budget Line Summary ]

Use the Budget Line Summary to build a budget for your grant proposal after you have created the proposal and budget header with the UF Start Proposal Page.

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- ▶ Log into the system via the myUFL portal, using your GatorLink user ID and password (<http://my.ufl.edu>)
- ▶ Navigate to Grants > Proposals > Budget Line Summary
- ▶ Perform a Budget Line Summary search
  - ▶ If you know the proposal ID or project ID, click the drop down next to one or both of those fields and choose "contains"
  - ▶ Type in proposal ID and/or project ID without leading zeros
  - ▶ If you do not know the proposal or project ID, you can search by other fields such as employee ID or department
  - ▶ Click "Search" button
  - ▶ Click the hyperlink for your Budget Line Summary
- ▶ For first line item:
  - ▶ Use lookup to identify budget category
  - ▶ Enter amount in Total Direct field or click Details button to calculate amount
- ▶ If category is PERSON (Personnel), the Personnel Detail page contains the following fields:
  - ▶ Row\_Number: Use lookup to choose employee
  - ▶ Empl Rcd#: If employee has multiple jobs, click the lookup and choose the correct job. To add more than one Empl Rcd# use the add-a-row button to add records
  - ▶ Appointment Type: If applicable, you can check the appropriate box  
Note: the system calculates salary on a 12-month basis regardless of appointment type. (Use the Begin/End Dates fields to reflect a 9-month appointment, for example)
  - ▶ Begin/End Dates: Adjust the beginning and ending dates as necessary to reflect the appointment type or the employee's period of work on this project
  - ▶ Effort Pct: Adjust this field to reflect the percentage of employee's total time she or he will be spending on the project
  - ▶ COL Incr Pct and Dt: If applicable, use these fields to enter cost-of-living increase percentage and the effective date
  - ▶ Merit Incr Pct and Dt: If applicable, use these fields to enter anticipated merit pay increase percentage and the effective date
  - ▶ Salary and Fringe
    - ▶ Amounts default in based on HR information
    - ▶ If employee is not in system or you want to adjust the defaulted amounts:
      - ▶ Enter salary in Fixed Salary Amt field
      - ▶ Enter fringe information in Fixed Fringe Amt
      - ▶ Note: If you enter a fixed salary amount or a fixed fringe amount, those amounts become the total salary and fringe for that record and the system no longer calculates using such features as Percent of Effort



Created in conjunction with  
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- ▶ To add multiple employees to the Personnel Detail page, use the add-a-row button to add records
- ▶ Click "OK" to return to Budget Line Summary
  
- ▶ For additional lines: Click the add-a-row button to add more lines
  - ▶ Use the lookup to enter category
  - ▶ Type amount in Total Direct or use the Details button to calculate amount
  
- ▶ Budget totals, including both direct costs and Facilities and Administrative (F&A) costs, will calculate and recalculate based on your selections

#### **Notes**

- ▶ Click on the "Save" button to save work
- ▶ You cannot change the category for a line once you have entered it. Instead, you will need to delete the row and add a new row
- ▶ When appropriate, use the copy budget period (Grants>Proposals>Copy Budget Period) functionality to build Budget Line Summaries for multiple budget periods
- ▶ Total Sponsor Budget on Budget Line Summary should equal the amount for Target Sponsor Budget (entered on UF Start Proposal Page for that budget period and populated on Budget Header pages)
  - ▶ Note: Budget Line Summary calculates to the nearest cent. If your target sponsor budget is rounded to the nearest dollar, this may cause your budget totals to be off by a few cents. If this occurs, you will get the following error message, "Warning -- Total Sponsor Budget does not equal Target Sponsor Budget." (9395,126) To adjust this, change your Target Sponsor Budget for the period(s) and the sum of the periods, and you will no longer receive the error message

#### **If you need help with...**

- ▶ Technical questions or issues, contact the UF Help Desk at 392-HELP or [helpdesk@ufl.edu](mailto:helpdesk@ufl.edu)
- ▶ Grant proposal policies and procedures, contact the Division of Sponsored Research at 392-9267 or [ufproposals@rgp.ufl.edu](mailto:ufproposals@rgp.ufl.edu)