

[Re-Budgeting Grant Awards*]

**This feature only applies to level three grant awards.*

The myUFL system now has a feature called "UF Project Management" for grant award budgeting that allows you to allocate funds into more descriptive budget categories that translate into your expense accounts. Using this new component, you can add new budget categories in addition to those brought over from the pre-award proposal and reallocate the funds from the award between the more descriptive budget categories. This instructional guide is designed to explain this new functionality and provide appropriate navigation.

The security role needed to access this component is UF_GM_PC_BUDREPRT_MGR.

Grant award budgets are categorized by their spending levels. There are four levels (levels three through six) that may be designated to a project, and this level is based on the sponsors' spending restrictions. Level three is least restrictive, and expenses are only organized into direct and indirect (overhead) account types. Level six is most restrictive; however, level six is rarely used. To the right is a list of common expense accounts and their associated spending restriction level.

Level	Account Type	Account No.
3	Direct	DIRECT
3	Indirect	INDIR
5	Salary	600005
5	Other	700005
5	Travel	771005 or 772005
5	Capital Equipment	780005
5	Indirect	812005

Please note that this first step towards managerial accounting is only available for level three awards; however, there will be view-only access for level five and six awards. Additionally, reporting will be available starting March 2006.

Navigation:

- ▶ Log in to the myUFL portal, using your GatorLink username and password (<http://my.ufl.edu>)
- ▶ Follow the navigation: Grants > Awards > UF Project Management

The screenshot shows the myUFL Project Management search page. On the left is a navigation menu with categories like 'My Account', 'Calendars', 'Grants', and 'Awards'. Under 'Awards', 'UF Project Management' is selected. The main area is titled 'Project Management' and has a search form. The form has a tab 'Find an Existing Value' and five search fields: 'Business Unit' (with a dropdown 'begins with' and value 'GRANT'), 'Project' (with a dropdown 'begins with' and empty field), 'Activity ID' (with a dropdown 'begins with' and value '1'), 'Department' (with a dropdown 'begins with' and empty field), and 'Fund Code' (with a dropdown 'begins with' and empty field). Below the fields are 'Search' and 'Clear' buttons, and links for 'Basic Search' and 'Save Search Criteria'.

Searching:

At the "Find an Existing Value" search page, you can search by several key fields such as the Project ID, Department ID, and Fund Code. The search results will only display grant awards that apply to your department.

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Re-budgeting funds:

1. Click the "Add a New Row" button (+) to add a new budget category.
Note: The list of available categories is limited by the FA Base ID value (e.g., TDC, NIHTR). Also, all categories defined in the pre-award proposal are automatically added.
2. Repeat step one until you have added all the budget categories by which you want to manage the funds.
Note: The only fund category you cannot modify is the Facilities and Administration budget category.

Project Management Delete Page

Business Unit: GRANT **Project:** 00053171 Sponsored_Programs

Sponsor: NASA LEWIS/GLENN RESEARCH **Project PI:** Orazem,Mark E
CTR

Department: 19030100 **Fund:** 201 **FA Base ID:** MTDC **FA Rate %:** 45.50

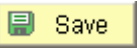
Budget Details Customize | Find | View All | First 1-7 of 7 | Last

*Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget
1 DOTRAV	Domestic Travel	5,000.00	0.00	6,200.36
2 FACADM	Facilities and Administration	43,451.00	0.00	43,451.00
3 GRADST	Graduate Students	53,571.00	0.00	52,370.64
4 OTHER	Other Expenses	0.00	0.00	1,500.00
5 PERSON	Personnel - Salary	26,562.00	0.00	25,062.00
6 SUPL	Materials and Supplies	10,361.00	0.00	10,361.00
7 TUITIO	Tuition	15,516.00	0.00	15,516.00

Sponsor Direct: 111,010.00 **Sponsor FA:** 43,451.00 **Total Sponsor:** 154,461.00

Pending Amount: 0.00

Should your budget have multiple lines with the same category, you will need to work with your appropriate core office to fix your project prior to being able to successfully save your re-budget request.

3. Edit the amount of funds allocated in each budget category. The total amount of the award will not change, and the changes will not be applied until the changes are saved.
Note: Use the Pending Amount field to see whether more funds need to be allocated or moved around. If the value is negative, then you have over-funded a category and will not be able to save. If the value is positive, then you have under-funded a category and need to allocate the funds available in the Pending Amount field to a budget category.
4. To remove a category, click the delete row button (-) next to the budget category you want to remove. A confirmation message will appear requesting you confirm deletion of the budget category.
5. Click  Save.
Note: Your changes will be saved and the audit log at the bottom of the page will be updated with your UF ID and the date and time.

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Customizing the Audit Log

The Audit Log keeps track of the user who has applied changes to the budget categories, the action that was taken (e.g., adding, delete, or change budget categories), and the date/time the changes were saved. By default, the action items stored in the audit log are sorted from first to last. However, you may customize the appearance of items in your audit log so that the latest transaction appears at the top of the list and the earliest at the bottom.

Audit Log		Customize	Find	View All	First	47-48 of 48	Last
User	Description	Date/Time	Action				
47 18254540	Stewart,Dawn L	01/26/06 8:44:46.753238AM	Change				
48 18254540	Stewart,Dawn L	01/26/06 8:44:46.756022AM	Change				

1. Click the [Customize](#) link.

Audit Log

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.



User
Description
Date/Time
Action

Hidden
 Frozen

Date/Time (desc)

Descending

OK Cancel Preview [Copy Settings](#)

2. Click **Date/Time** in the Column Order box.
3. Click  to add this field to the Sort Order box.
4. Check the Descending checkbox so that it is enabled. (See above)
5. Click  to apply your changes.

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Additional Information:

If your grant award has budget allocated for both level three and level five funds, you will be able to modify the level three budgeted funds using the UF Project Management component after gaining approval from the appropriate Contracts and Grants office (i.e., C&G Main, C&G IFAS, C&G ENG).

Common Messages / Warnings:

Error Condition	Message	Description
Negative Revised Budget Amount	"A Revised Budget Amount is not greater than zero. Please correct the entry."	The user has a revised budget that is a negative amount. Revised budgets must be zero or greater to save.
Number entered is not in a two decimal format	"A number must have a 2 decimal format."	The user has entered in a budget amount that has more than two numbers on the right of the decimal point.
PC_Res_Fund Total Amt does not equal the L3 page Total Sponsor Budget	"All budget amounts have not been allocated. Please distribute any remaining Pending Budget Amounts to a budgeted category."	There is a Pending amount that needs to be posted.
Budget category move between unlike F&A categories	<p>"You are attempting to post or move budget categories which directly impact the F&A calculations.</p> <p>a) If you are trying to post new funds released, make sure that the category in which C&G released those funds are F&A consistent with the category you are trying to use on this L3 Budget Page.</p> <p>b) If you need to transfer funds from one category to another, where F&A is impacted, you must contact your C&G office.</p> <p>This type of budget move can only be completed by your corresponding C&G office."</p>	The budget changes are involving a transfer between a category covered in the F&A list and one that is not in the list. Please review the "F&A Budget Categories Bases" Excel spreadsheet.
Duplicate Budget Category	"A duplicate budget category has been selected. Please Revise the Budget for the budget category that already exists."	The page has the same category more than one time. User must combine budgets into a single row. If the page still does not save the budget may contain a chartfield error and the user will need to work with their core office.

Now let's take a look at an example.



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Re-budgeting Example

1. Navigation: Grants > Awards > UF Project Management
2. At the Project Management search page enter in the Project ID from your list of projects (00053171). Should the project have more than one department, or fund, then a list will appear, similar to the one below:

Search Results

View All First 1-2 of 2 Last

Business Unit	Project	Activity ID	Department	Fund Code
GRANT	00053171	1	19020100	201
GRANT	00053171	1	19030100	201

3. Select the department needing the budget change (e.g., 19030100).

Project Management

Business Unit: GRANT Project: 00053171 Sponsored_Programs Delete Page

Sponsor: NASA LEWIS/GLENN RESEARCH Project PI: Orazem,Mark E

Department: 19030100 Fund: 201 FA Base ID: MTDC FA Rate %: 45.50

New Budget for Category after re-budgeting

Detail	*Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget
1	<input type="text" value="DOTRAV"/>	Domestic Travel	5,000.00	0.00	5,100.00
2	FACADM	Facilities and Administration	43,451.00	0.00	43,451.00
3	<input type="text" value="GRADST"/>	Graduate Students	53,571.00	0.00	53,471.00
4	<input type="text" value="OTHER"/>	Other Expenses	0.00	0.00	0.00
5	<input type="text" value="PERSON"/>	Personnel - Salary & Benefits	26,562.00	0.00	26,562.00
6	<input type="text" value="SUPL"/>	Materials and Supplies	10,361.00	0.00	10,361.00
7	<input type="text" value="TUITIO"/>	Tuition	15,516.00	0.00	15,516.00

To add or remove a category

Sponsor Direct: 111,010.00 Sponsor FA: 43,451.00 Total Sponsor: 154,461.00

Direct Budget 111,010.00 Indirect Budget 43,451.00 Pending Amount: 0.00

Amount to adjust

Should your budget have multiple lines with the same category, you will need to work with your appropr to fix your project prior to being able to successfully save your re-budget request.

4. Once the project is opened, the user will be able to determine whether any budget changes have been made in Project Budget. These changes will appear in the Pending Amount field.



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5. To move money from one category to another use the Adjustment Amount column and either increase (positive amount) or decrease (negative amount) the budget category. As changes are made the Pending Amount field will indicate the balance that still needs to be adjusted prior to saving the project.

Project Management Delete Page

Business Unit: GRANT **Project:** 00053171 Sponsored_Programs

Sponsor: NASA LEWIS/GLENN RESEARCH **Project PI:** Orazem,Mark E
CTR

Department: 19030100 **Fund:** 201 **FA Base ID:** MTDC **FA Rate %:** 45.50

Budget Details		Customize Find View All	First 1-7 of 7 Last	
*Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget
1 DOTRAV	Domestic Travel	5,000.00	200.00	6,200.36
2 FACADM	Facilities and Administration	43,451.00	0.00	43,451.00
3 GRADST	Graduate Students	53,571.00	0.00	52,370.64
4 OTHER	Other Expenses	0.00	0.00	1,500.00
5 PERSON	Personnel - Salary	26,562.00	0.00	25,062.00
6 SUPL	Materials and Supplies	10,361.00	0.00	10,361.00
7 TUITIO	Tuition	15,516.00	0.00	15,516.00

Sponsor Direct: 111,010.00 **Sponsor FA:** 43,451.00 **Total Sponsor:** 154,461.00

Pending Amount: -200.00

Should your budget have multiple lines with the same category, you will need to work with your appropriate core office to fix your project prior to being able to successfully save your re-budget request.

Project Management Delete Page

Business Unit: GRANT **Project:** 00053171 Sponsored_Programs

Sponsor: NASA LEWIS/GLENN RESEARCH **Project PI:** Orazem,Mark E
CTR

Department: 19030100 **Fund:** 201 **FA Base ID:** MTDC **FA Rate %:** 45.50

Detail		Customize Find View All	First 1-7 of 7 Last	
*Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget
1 DOTRAV	Domestic Travel	5,000.00	200.00	5,100.00
2 FACADM	Facilities and Administration	43,451.00	0.00	43,451.00
3 GRADST	Graduate Students	53,571.00	0.00	53,471.00
4 OTHER	Other Expenses	0.00	0.00	0.00
5 PERSON	Personnel - Salary & Benefits	26,562.00	-200.00	26,562.00
6 SUPL	Materials and Supplies	10,361.00	0.00	10,361.00
7 TUITIO	Tuition	15,516.00	0.00	15,516.00

Sponsor Direct: 111,010.00 **Sponsor FA:** 43,451.00 **Total Sponsor:** 154,461.00

Pending Amount: 0.00

Should your budget have multiple lines with the same category, you will need to work with your appropriate core office to fix your project prior to being able to successfully save your re-budget request.



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6. Once all the changes have been made and the Pending Amount is zero, then the user will click the Save button. The Adjustment Amount column will clear at that point and the Revised Budget category column will reflect the new budget amounts.

Project Management

Delete Page

Business Unit: GRANT **Project:** 00053171 Sponsored_Programs

Sponsor: NASA LEWIS/GLENN RESEARCH **Project PI:** Orazem,Mark E
CTR

Department: 19030100 **Fund:** 201 **FA Base ID:** MTDC **FA Rate %:** 45.50

Budget Details		Customize Find View All	First 1-7 of 7 Last	
Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget
1 DOTRAV	Domestic Travel	5,000.00	0.00	6,400.36
2 FACADM	Facilities and Administration	43,451.00	0.00	43,451.00
3 GRADST	Graduate Students	53,571.00	0.00	52,370.64
4 OTHER	Other Expenses	0.00	0.00	1,500.00
5 PERSON	Personnel - Salary	26,562.00	0.00	24,862.00
6 SUPL	Materials and Supplies	10,361.00	0.00	10,361.00
7 TUITIO	Tuition	15,516.00	0.00	15,516.00


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Pending Amount: 0.00

Should your budget have multiple lines with the same category, you will need to work with your appropriate core office to fix your project prior to being able to successfully save your re-budget request.



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7. To add a new category click , and a row will be inserted. Click the lookup button (i.e., the magnifying glass) to select the category.
























Project Management

Business Unit: GRANT **Project:** 00053171 Sponsored_Programs

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CTR

Department: 19030100 **Fund:** 201 **FA Base ID:** MTDC **FA Rate %:** 45.50

Customize | Find | View All |  First  1-8 of 8  Last

Detail					
*Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget	
1 DOTRAV 	Domestic Travel	5,000.00	<input type="text" value="0.00"/>	5,300.00	 
2 FACADM	Facilities and Administration	43,451.00	<input type="text" value="0.00"/>	43,451.00	 
3 GRADST 	Graduate Students	53,571.00	<input type="text" value="0.00"/>	53,471.00	 
4 OTHER 	Other Expenses	0.00	<input type="text" value="0.00"/>	0.00	 
5 PERSON 	Personnel - Salary & Benefits	26,562.00	<input type="text" value="0.00"/>	26,362.00	 
6 SUPL 	Materials and Supplies	10,361.00	<input type="text" value="0.00"/>	10,361.00	 
7 <input type="text" value=""/>		0.00	<input type="text" value="0.00"/>	0.00	 
8 TUITIO 	Tuition	15,516.00	<input type="text" value="0.00"/>	15,516.00	 

Sponsor Direct: 111,010.00 **Sponsor FA:** 43,451.00 **Total Sponsor:** 154,461.00

Pending Amount: 0.00




Should your budget have multiple lines with the same category, you will need to work with your appropriate core office to fix your project prior to being able to successfully save your re-budget request.
























Project Management

Business Unit: GRANT **Project:** 00053171 Sponsored_Programs

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Department: 19030100 **Fund:** 201 **FA Base ID:** MTDC **FA Rate %:** 45.50

Customize | Find | View All |  First  1-8 of 8  Last

Detail					
*Budget Category	Description	Original Budget Amount	Adjustment Amount	Revised Budget	
1 DOTRAV 	Domestic Travel	5,000.00	<input type="text" value="0.00"/>	5,300.00	 
2 FACADM	Facilities and Administration	43,451.00	<input type="text" value="0.00"/>	43,451.00	 
3 GRADST 	Graduate Students	53,571.00	<input type="text" value="0.00"/>	53,471.00	 
4 OTHER 	Other Expenses	0.00	<input type="text" value="0.00"/>	0.00	 
5 PERSON 	Personnel - Salary & Benefits	26,562.00	<input type="text" value="0.00"/>	26,362.00	 
6 SUPL 	Materials and Supplies	10,361.00	<input type="text" value="0.00"/>	10,361.00	 
7 GRADST 	Graduate Students	0.00	<input type="text" value="0.00"/>	0.00	 
8 TUITIO 	Tuition	15,516.00	<input type="text" value="0.00"/>	15,516.00	 

Sponsor Direct: 111,010.00 **Sponsor FA:** 43,451.00 **Total Sponsor:** 154,461.00

Pending Amount: 0.00

Should your budget have multiple lines with the same category, you will need to work with your appropriate core office to fix your project prior to being able to successfully save your re-budget request.

8. Once the category is added, the re-budgeting will act the same as a change made to the original rows.



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