

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:

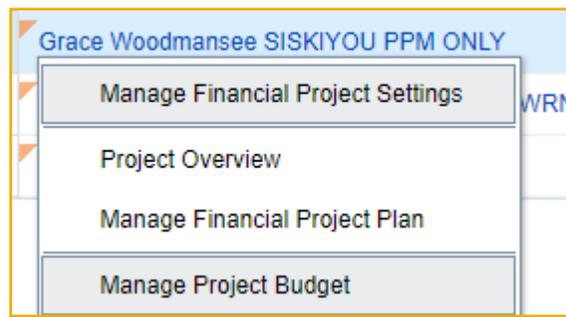
1. **RPM** will process a **Journal Entry** in the **General Ledger** and add the funding to the Project.
2. **RPM** will send a copy of the **Journal Entry** to the Business Officer.

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

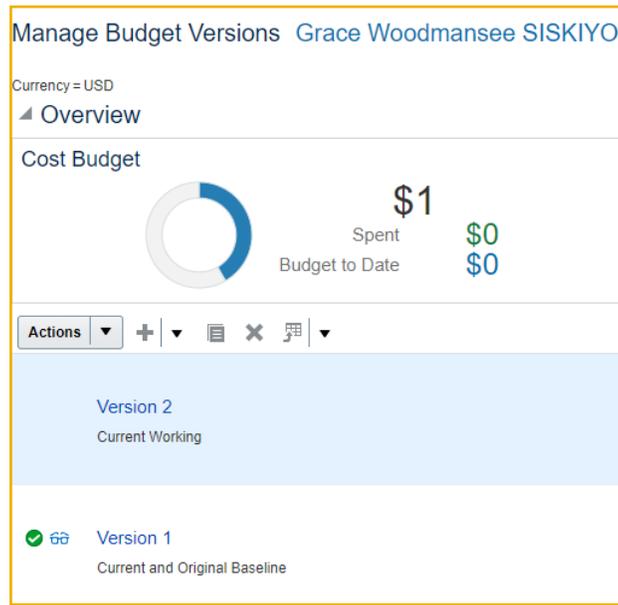
NAVIGATION:

Oracle Home Page > Projects > Project Financial Management

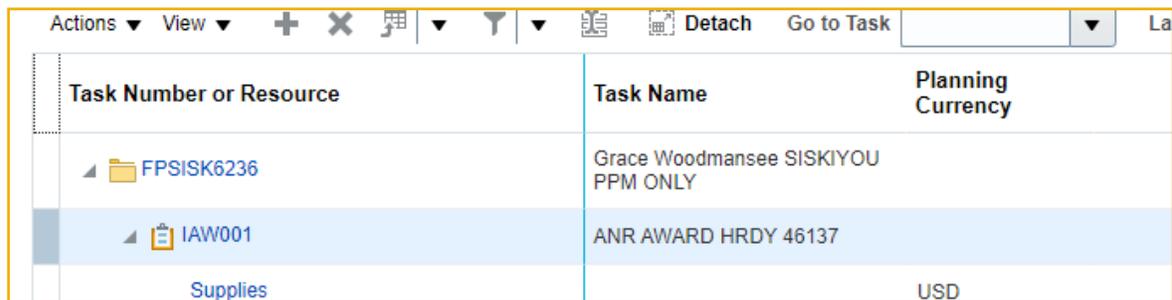
Step	Action
1.	When a funding form is received with a Journal Entry attached for a PPM Project, create the budget in PPM.
2.	Search for the Faculty, Department or Recharge Project.
3.	Click on the Project Name or Project Number to reveal the sub menu.
4.	Select Manage Project Budget .



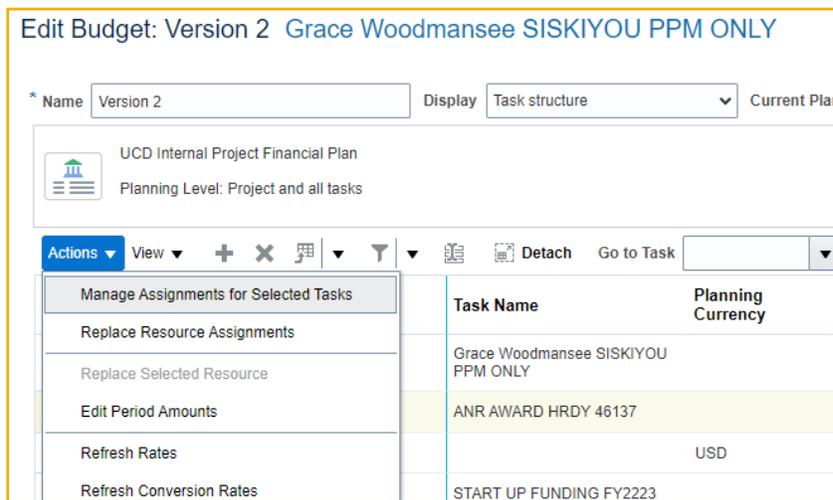
Step	Action
5.	Note: A budget has already been created. Version 1 is the conversion and Baseline Budget . Every time the budget is updated a new Working Version will be created.
6.	Select Version 2 or the current working version of the budget.



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



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



Step	Action
11.	Select the Plus Icon  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
	Amount	Sub
Salary	\$10,832	SUBG
Employee Benefits	\$0	SUB6
Supplies/Expense	\$50	SUB3
Travel	\$2,290	SUB5
Other	\$0	0
Total	\$13,172	

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

Available Resources

- Contracts (Subrecipients) +
- Equipment +
- Fellowship & Scholarships +
- Fringe Benefits +

Assignments

[Hide Prior Assignments](#)

IAW001: ANR AWARD HRDY 46137

Supplies (USD)	<input type="text" value="1.00"/>	USD	✕
Salaries and Wages (USD)	<input type="text"/>	USD	✕
Travel (USD)	<input type="text"/>	USD	✕

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

Assignments

[Hide Prior Assignments](#)

IAW001: ANR AWARD HRDY 46137

Supplies (USD)	<input type="text" value="50.00"/>	USD	✕
Salaries and Wages (USD)	<input type="text" value="10,832.00"/>	USD	✕
Travel (USD)	<input type="text" value="2,290.00"/>	USD	✕

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

<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> Salaries and Wages Supplies Travel 	Grace Woodmansee SISKIYOU PPM ONLY ANR AWARD HRDY 46137	13,172.00 USD 13,172.00 USD 10,832.00 USD 50.00 USD 2,290.00 USD
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Step	Action
16.	Select the Plus Icon  and attach the Funding Form and Journal Entry to the budget.

Current Planning Period Oct-23 ▼

Planning Options

Attachments: None 



Cost Budget

\$13,172.00

Layout Budget Lines ▼

	Quantity	Raw Cost	Raw Cost Rate
		13,172.00 USD	

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

Add Attachments ✕

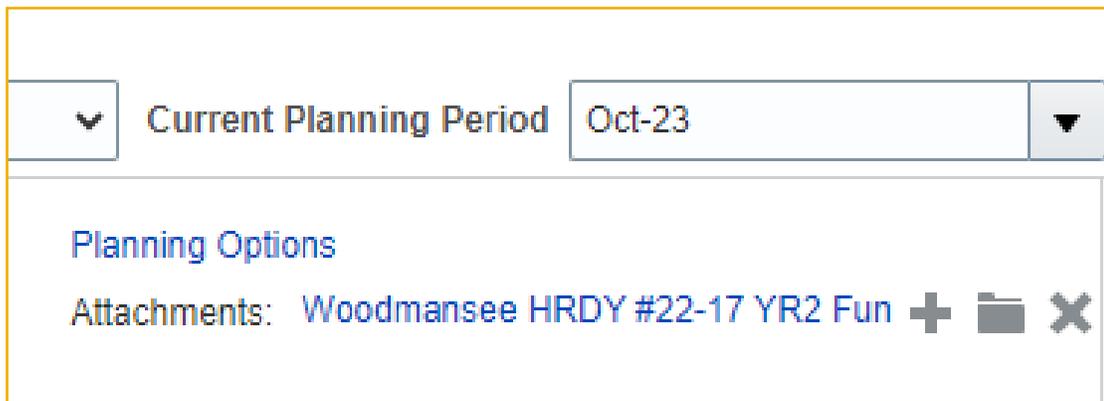
Type

Category

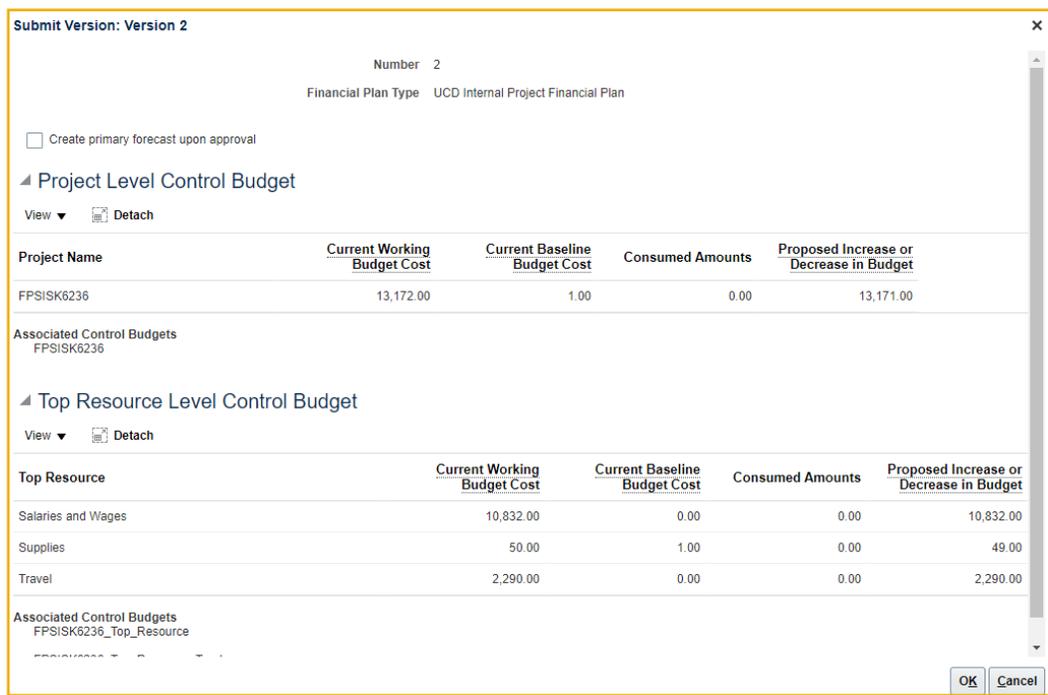
* Text

Title

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



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



Step	Action
29.	Select OK .
30.	Select Done . End of Procedure