Carnegie Mellon University
Sponsored Projects Accounting
(PA03) Entering a Budget—Procedure
Updated: March 27, 2006

Frequency: Varies
Responsible Staff: SPA Accountant
Approval Required: None

Summary:
When a new award is received, it is the responsibility of the department to input the budget into Oracle. However, because of restrictions on how the departments can input the budgets, SPA will input a high-level budget if requested by the department.

Procedure:
1. From the Navigator screen in Oracle, go into the Award Budget screen under Budgets.

2. Enter the project number associated with the new award. Press the Tab key - the project name should populate automatically.

3. Enter the award number then click Find Draft button – which will activate the Detail button.

4. Click the Detail button to get to the Task Budget screen. Select a task by putting the cursor next to the task number that you want to view. Click the Budget Lines button.

5. Verify that the correct month is viewed on the screen. Enter the Expenditure Type in the Resource column either by typing the name of the Expenditure Type or by selecting it from the List of Values. Tab into the next field – the Amount Type column. Press the F9 key to view your options and select the correct Amount Type. Tab to the correct month and enter the budget amount.

6. Repeat step 5 to enter the budgets for all of the Expenditure Types.

7. Save the information. Close the screen and return to the Award Budgets screen. Click on the Submit button. This will activate the Baseline button. Click the Baseline button.

8. Oracle will notify you that the process has begun. From the Navigator screen in Oracle click on the Help drop-down box and choose the View My Requests tab. Click the Refresh Data button to determine when the process has been completed. (NOTE: Clicking the Refresh Data button will not cause the processes to run faster, it just informs you when the processes have completed).

9. From the Navigator screen in Oracle, go into the Project Budget screen under Budgets.

10. Enter the project number associated with the new award. Press the Tab key - the project name should be automatically populated. Click the Summarize button. Click on the Submit button. This will activate the Baseline button. Click the Baseline button.