

9.2 Establishing the Proposal Budget

Purpose: Use this document as a reference for establishing the proposal budget in ctcLink.

Audience: Finance/Grant Fiscal Staff.

❗ You must have at least one of these local college managed security roles:

- ZZ Proposal Processing

You must also set these User Preference Definitions:

- [FSCM 9.2 - Grants Security](#)

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Grants > Proposals > Maintain Proposal

Establishing the Proposal Budget

1. Select the **Find an Existing Value** tab on the **Maintain Proposal** search page.
2. Enter or select the appropriate business unit in the **Business Unit** field.
3. Enter or select the proposal number needing a budget in the **Proposal ID** field.
4. Enter or select the version in the **Version ID** field.
5. Select **Search**.

Maintain Proposal

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Business Unit =

Proposal ID begins with

Version ID begins with

PI ID begins with

Sponsor ID begins with

Type =

Status =

Department ID begins with

Short Title begins with

Template Proposal begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

6. Select the **Budgets** tab.
7. Select the number within the **Period** field in the **Budget Period** section for the **Project** that will have budget added to it. The **Enter Budget Detail** page will display.

Note: Every project on a proposal has a budget that can be established. If there is more than one project to the proposal make sure it is done for every project.

Proposal | Projects | **Budgets** | Resources | Certifications | Reports | Attachments

Proposal ID 00000000000000000350 Version ID V101
Description Reimbursable Desc Currency USD

Proposal Project Find | View All First 1 of 1 Last

Project ID 0000002007 Title Reimbursable Title

Budget Header Find | View All First 1 of 1 Last

Budget ID R BUDGET Description R Budget Desc
Start Date 09/01/2018 End Date 08/31/2020
☒ Include in Proposal

Budget Period Personalize | Find | View All First 1-2 of 2 Last

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
2	09/01/2019	08/31/2020		Program Income	
1	09/01/2018	08/31/2019	13,800.00	Program Income	

F & A and Pricing Setup Total 13,800.00

Go To Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Save Return to Search Notify Refresh Add Update/Display

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments

8. Use the **Details, CostShare, Justification** section of the **Enter Budget Detail** page to enter the overall proposal cost share.
9. Enter or select a budget item in the **Budget Item** field.
10. Select the **Details** button. The **Budget Detail** page will display.

Enter Budget Detail

Proposal 00000000000000000350 Currency USD
Version V101 Start Date 09/01/2018 End Date 08/31/2020
Title Reimbursable Title ☐ Modular?

Project ID 0000002007 Budget Period 2
Budget ID R BUDGET Start Date 09/01/2019 End Date 08/31/2020
Overall Cost Share View F&A Rate

Details, CostShare, Justification

Line Data More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share			
10	GOODS&S	Goods & Services	Details		0.00	Cost Share	<input type="checkbox"/>					
Sponsor Direct				0.00	Sponsor F&A				0.00	Total Sponsor Budget		
Institution Cost Share				0.00	Institution Cost Share F&A				0.00	Total Inst C/S Budget		
Third Party Cost Share				0.00						Total TP C/S Budget		
Total Direct				0.00	Total F&A				0.00	Total Budget		

Return To Main Proposal

Save Return to Search Notify

11. Use the **Enter Budget Detail** page to store detailed budget information by budget item. The page divides the total funding responsibilities of the sponsor and total cost sharing between

the institution and any third parties. It also displays a breakdown of direct and FA (indirect) budget amounts.

IMPORTANT: If creating a proposal that lists specifically funded amounts for the overall budget and budget details are not entered for each period, the system sets the contract totals and award funding totals to zero when running the award generation process. The system uses the budget detail amounts entered to create the resulting contract and funding amounts on the award pages. Therefore, budget details are not entered before the award generation process is run, the information will have to be entered manually in both Grants and Contracts.

12. Enter a description in the **Description** field.
13. Enter an amount in the **Total Direct** field.

Note: If the **Quantity** and **Unit Cost** are entered, this field automatically computed. If entries are made in this field, leave the **Quantity** and **Unit Cost** fields blank.

14. Enter start and end dates in the **Start Date** and **End Date** fields.
15. Enter a quantity in the **Quantity** field.
16. Enter a unit cost in the **Unit Cost** field.
17. As necessary, click the **Add a new row** button to add additional lines.
18. Select **OK**.

The screenshot shows the 'Budget Detail' window. At the top, it displays 'Budget Period 2', 'Start Date 09/01/2019', 'Budget Line Number 10', 'End Date 08/31/2020', and 'Budget Item GOODS&SERVICES Goods & Services'. Below this is a table with the following columns: Description, Total Direct, Start Date, End Date, Quantity, Unit Cost, and two empty columns. The first row contains the following data: 'Reimbursable Grant Budget P2', '0.00', '09/01/2019', '08/31/2020', '1.00', '10000.00', and two empty cells. Below the table, it shows 'Total Direct Budget 0.00'. At the bottom, there are 'OK' and 'Cancel' buttons.

Description	Total Direct	Start Date	End Date	Quantity	Unit Cost		
Reimbursable Grant Budget P2	0.00	09/01/2019	08/31/2020	1.00	10000.00	+	-

Total Direct Budget 0.00

OK Cancel

19. If the amount in the **Total Direct** field is a whole dollar amount, then the values in the **Sponsor Direct** and **Cost Share** (if applicable) fields will also be in whole dollar amounts.
20. If cost sharing in the proposal is needed, select the **Cost Share** link to distribute cost sharing commitments by budget summary line. The **Cost Share** page will display.

Enter Budget Detail

Proposal00000000000000000350

CurrencyUSD

VersionV101

Start Date09/01/2018

End Date08/31/2020

TitleReimbursable Title

☐ Modular?

Project ID0000002007

Budget Period2

Budget IDR BUDGET

Start Date09/01/2019

End Date08/31/2020

Overall Cost Share

View FA Rate

Details, CostShare, Justification

Line Data

More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share			
10	GOODS&: Q	Goods & Services		10,000.00	10,000.00	Cost Share Cost Share	<input type="checkbox"/>			+	-	
Sponsor Direct				10,000.00	Sponsor F&A				3,800.00	Total Sponsor Budget13,800.00		
Institution Cost Share				0.00	Institution Cost Share F&A				0.00	Total Inst C/S Budget0.00		
Third Party Cost Share				0.00						Total TP C/S Budget0.00		
Total Direct				10,000.00	Total F&A				3,800.00	Total Budget13,800.00		

Return To Maintain Proposal

Save

Return to Search

Notify

21. Enter the cost sharing and cost sharing distribution details, as appropriate for the budget item.
22. When finished, select **OK**. The **Enter Budget Detail** page will display.

Cost Share

Budget Period2

Start Date09/01/2019

End Date08/31/2020

Budget Line Number10

Budget ItemGOODS&SERVICES

Goods & Services

Cost Sharing

Total Direct10,000.00

Sponsor Direct10,000.00

Cost Share Percent0.00

Cost Share Direct0.00

Cost Sharing Distribution

Institution

*Department

C/S Pot

C/S Direct

Third Party

Description

C/S Pot

C/S Direct

Distribution Totals0.000.00

OK

Cancel

23. If the proposal budget is complete, select **Save**.
24. Select the **Return to Maintain Proposal** link.

Enter Budget Detail

Proposal00000000000000000350

CurrencyUSD

VersionV101

Start Date09/01/2018

End Date09/31/2020

TitleReimbursable Title

☐Modular?

Project ID0000002007

Budget Period2

Budget IDR BUDGET

Start Date09/01/2019

End Date09/31/2020

Overall Cost Share

View F&S Rate

Details, CostShare, Justification

Line Data

More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share			
10	GOODS&S	Goods & Services		10,000.00	10,000.00	Cost Share	<input type="checkbox"/>			+	-	
Sponsor Direct				10,000.00	Sponsor F&A				3,800.00	Total Sponsor Budget		13,800.00
Institution Cost Share				0.00	Institution Cost Share F&A				0.00	Total Inst C/S Budget		0.00
Third Party Cost Share				0.00						Total TP C/S Budget		0.00
Total Direct				10,000.00	Total F&A				3,800.00	Total Budget		13,800.00

Return To Maintain Proposal

Save

Return to Search

Notify

25. On the **Maintain Proposal** page, verify the proposal **Budget Period** section displays correctly.

ProposalProjectsBudgetsResourcesCertificationsReportsAttachments

Proposal ID00000000000000000350

Version IDV101

DescriptionReimbursable Desc

CurrencyUSD

Proposal ProjectFind | View AllFirst1 of 1Last

Project ID0000002007

TitleReimbursable Title

Budget HeaderFind | View AllFirst1 of 1Last

Budget IDR BUDGET

DescriptionR Budget Desc

Start Date09/01/2018

End Date08/31/2020

☒Include in Proposal

Budget PeriodPersonalize | Find | First1-2 of 2Last

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
2	09/01/2019	08/31/2020	10,000.00	Program Income	
1	09/01/2018	08/31/2019	13,800.00	Program Income	

F & A and Pricing Setup

Total23,800.00

Go ToLocationProtocolsComponentSetup LevelKeywordsGender & Minority StudyTraineeAttributes

Save

Return to Search

Notify

Refresh

Add

Update/Display

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments

26. Process complete.