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:

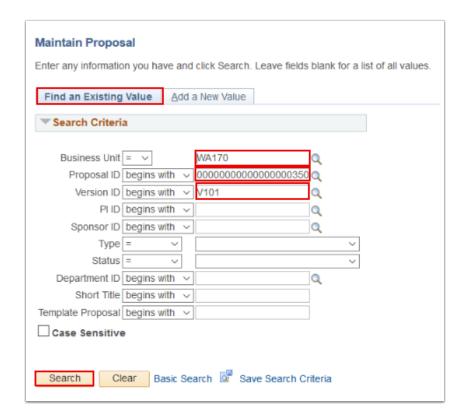
• FSCM 9.2 - Grants Security

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.

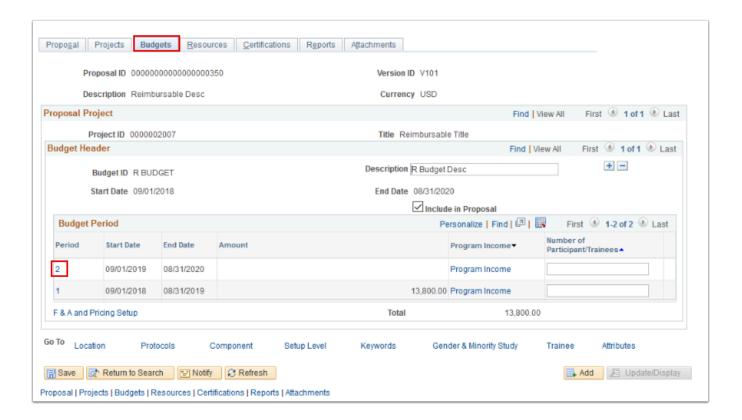
Navigation: NavBar > Navigator > Grants > Proposals > Maintain Proposal

Establishing the Proposal Budget

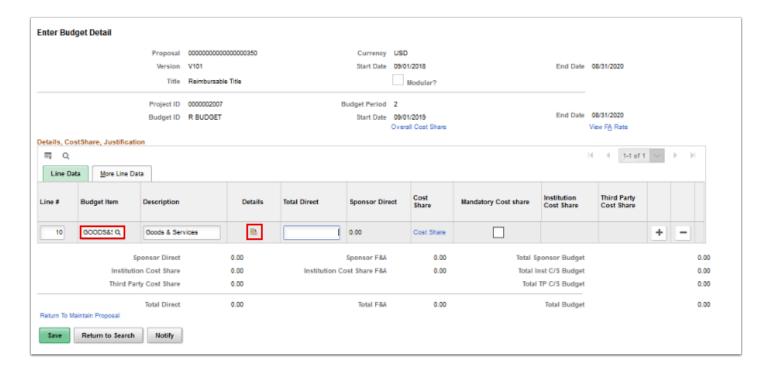
- 1. Select the **Find an Existing Value** tab on the **Maintain Proposal** search page.
- 2. Enter or select the appropriate business unit in the **Business Unit** field.
- 3. Enter or select the proposal number needing a budget in the **Proposal ID** field.
- 4. Enter or select the version in the **Version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



- 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.



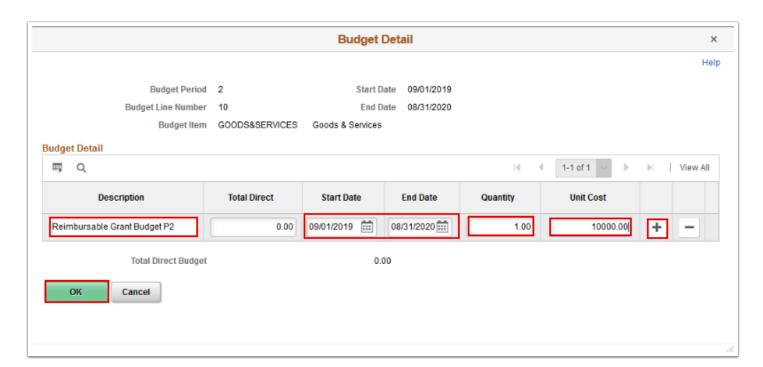
- 8. Use the **Details, CostShare, Justification** section of the **Enter Budget Detail** page to enter the overall proposal cost share.
- 9. Enter or select a budget item in the **Budget Item** field.
- 10. Select the **Details** button. The **Budget Detail** page will display.



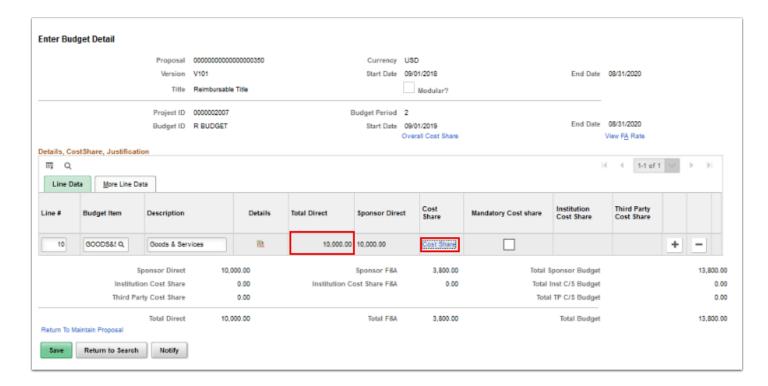
11. Use the **Enter Budget Detail** page to store detailed budget information by budget item. The page divides the total funding responsibilities of the sponsor and total cost sharing between

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

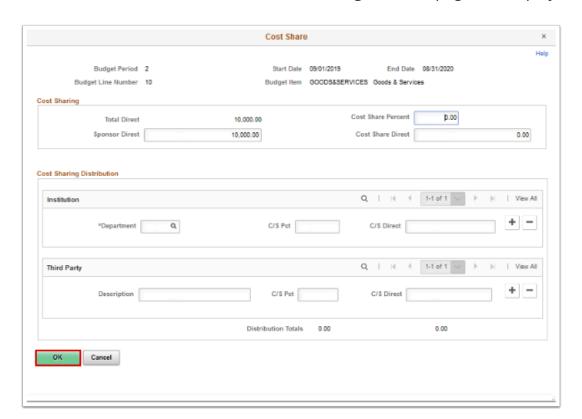
- IMPORTANT: If creating a proposal that lists specifically funded amounts for the overall budget and budget details are not entered for each period, the system sets the contract totals and award funding totals to zero when running the award generation process. The system uses the budget detail amounts 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.



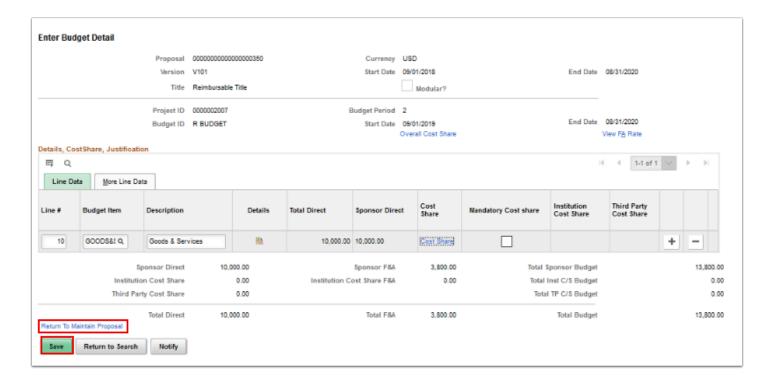
- 19. If the amount in the **Total Direct** field is a whole dollar amount, then the values in the **Sponsor Direct** and **Cost Share** (if applicable) fields will also be in whole dollar amounts.
- 20. If cost sharing in the proposal is needed, select the **Cost Share** link to distribute cost sharing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



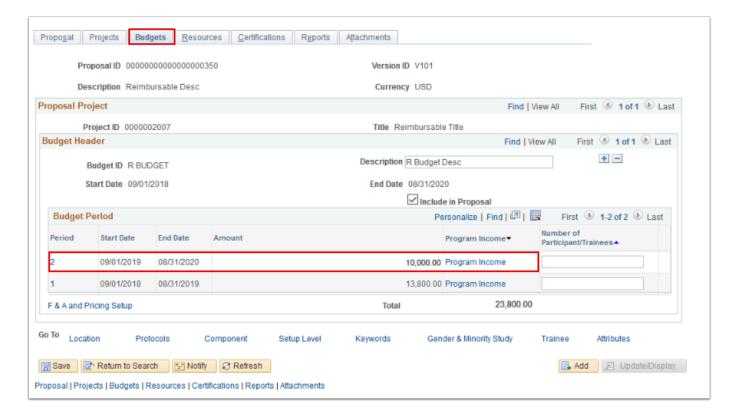
- 21. Enter the cost sharing and cost sharing distribution details, as appropriate for the budget item.
- 22. When finished, select **OK**. The **Enter Budget Detail** page will display.



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



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



26. Process complete.