

## 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:

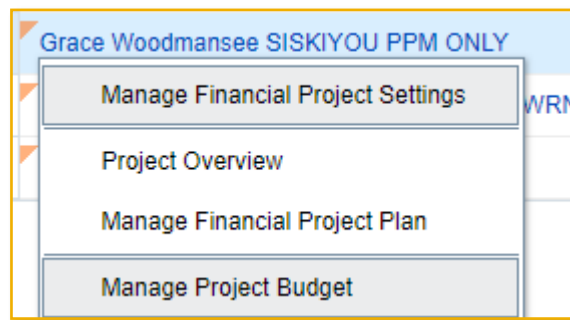
1. **RPM** will process a **Journal Entry** in the **General Ledger** and add the funding to the Project.
2. **RPM** will send a copy of the **Journal Entry** to the Business Officer.

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

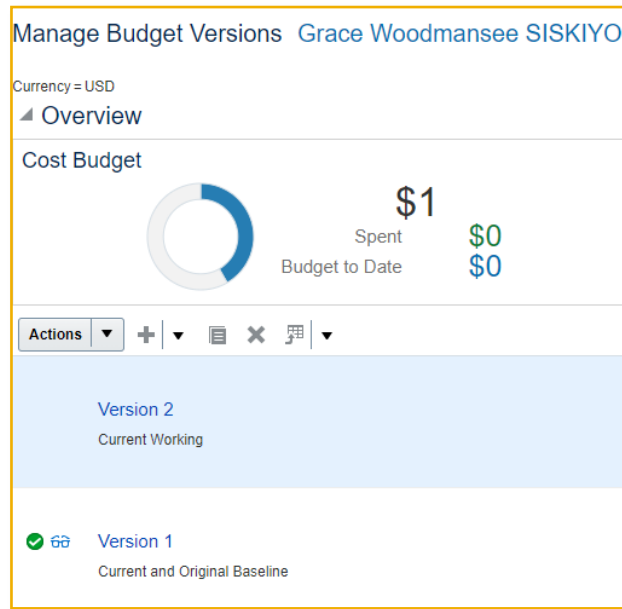
### NAVIGATION:

Oracle Home Page > Projects > Project Financial Management

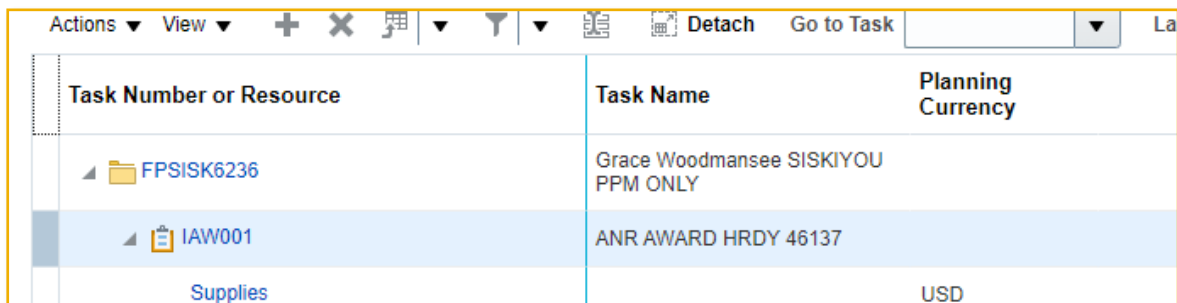
Step	Action
1.	When a funding form is received with a Journal Entry attached for a PPM Project, create the budget in PPM.
2.	<b>Search</b> for the Faculty, Department or Recharge Project.
3.	Click on the <b>Project Name</b> or <b>Project Number</b> to reveal the sub menu.
4.	Select <b>Manage Project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



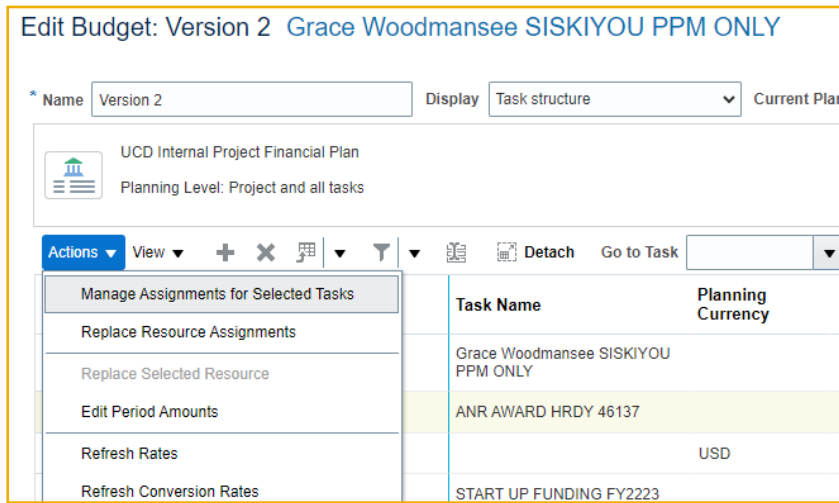
Step	Action
5.	Note: A budget has already been created. <b>Version 1</b> is the conversion and <b>Baseline Budget</b> . Every time the budget is updated a new <b>Working Version</b> will be created.
6.	Select <b>Version 2</b> or the <b>current working version</b> of the budget.




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



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



Step	Action
11.	Select the <b>Plus Icon</b>  next to the expenditure category on the funding form. See the example of an Internal Award funding form below.

<b>Budget Breakdown:</b>	<b>Year 2</b>	<b>\$13,172</b>
	<b>Amount</b>	<b>Sub</b>
<b>Salary</b>	\$10,832	SUBG
<b>Employee Benefits</b>	\$0	SUB6
<b>Supplies/Expense</b>	\$50	SUB3
<b>Travel</b>	\$2,290	SUB5
<b>Other</b>	\$0	0
<b>Total</b>	<b>\$13,172</b>	

Step	Action
12.	The selected expenditure category will move from the <b>Available Resources</b> column to the <b>Assignments</b> 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 <b>budgeted amount</b> from the <b>funding form</b> 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 <b>Save and Close</b> .
15.	Check the budgeted amount entered to make sure it matches the <b>funding form</b> and amount funded on the <b>Journal Entry</b> .


<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>Salaries and Wages</li> <li>Supplies</li> <li>Travel</li> </ul> </li> </ul> </li> </ul>	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 <b>Plus Icon</b>  and attach the <b>Funding Form</b> and <b>Journal Entry</b> to the budget.

Current Planning Period Oct-23 ▼

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Planning Options

Attachments: None 



Cost Budget


**\$13,172.00**

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Layout Budget Lines ▼

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Quantity	Raw Cost	Raw Cost Rate
	13,172.00 USD	

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


**Add Attachments** ✕

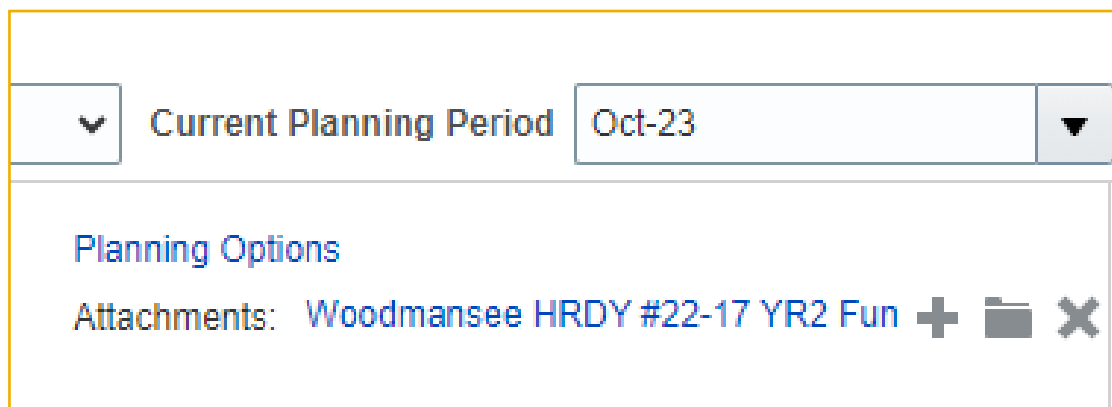
Type

Category

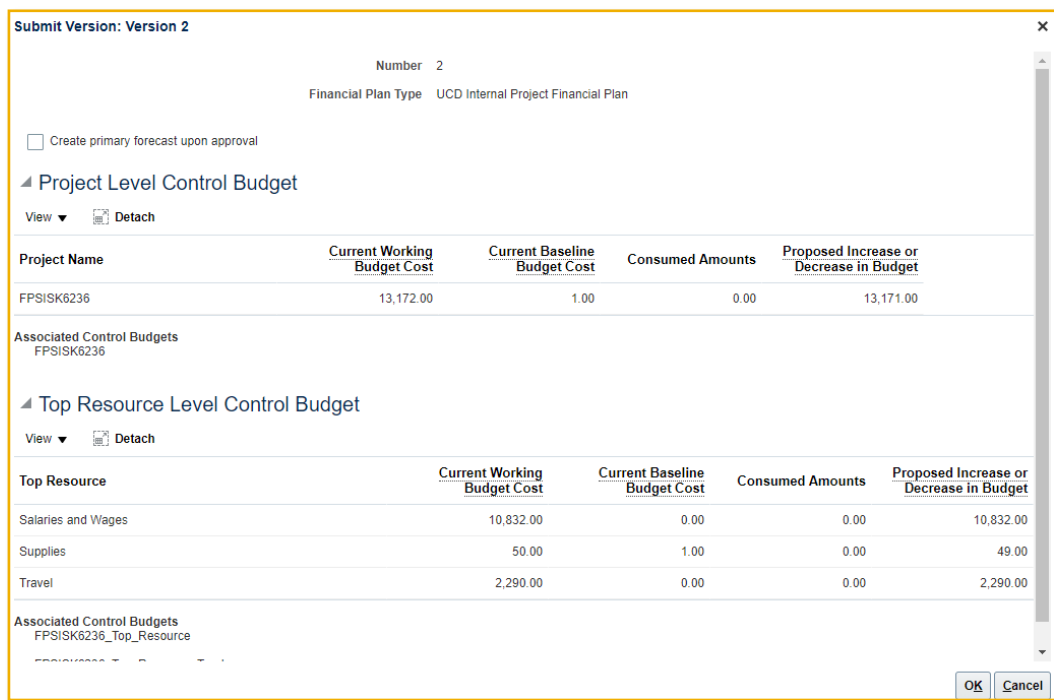
\* Text

Title

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



Step	Action
27.	Select <b>Submit</b> 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 <b>OK</b> .
30.	Select <b>Done</b> . End of Procedure