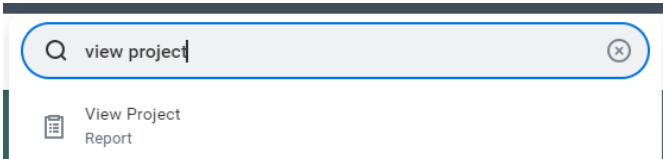


Audience / Role	Project Manager Project Specialist
Description	This job aid provides instructions to create a project budget manually.
Before You Start	Ensure that the project has already been created.

Create Project Budget

1	In the Search bar, enter View Project. In the search results, select View Project report. 
2	For the View Projects report, in the Project field, search for and select the project. Select OK.
3	For the Project, navigate to the Financials tab, and from the Financials tab, select the Budget tab. Select Create Budget.
4	Under Create Project Budget, enter the following information into the fields: • Budget name – use project name. • Budget Calculation Type – select calculation type that correlates to type of budget you are creating. • Project Budget Template – Select the Project Budget Template that matches the budget structure you selected. This prefills the ledger account for you when you begin entering your budget values. • Forecast Source – leave blank. • Resource Forecast – leave blank. • Budget Currency – defaults to USD. • Project Duration – sets a total expense budget for the project throughout its duration. A project can have multiple budgets, but only one can be turned on for budget checking. Select OK. Select DONE.
5	The budget template has been created in draft mode. To add budgeted amounts, select the Related Actions button on the budget name, then select Maintain Budget. Leave all fields as populated. Select OK.
6	Under Budget Lines, enter the following: • Enter ledger account summary (should be populated if you chose a template)

	• Enter Project. • Enter Debit amount. • Memo – add if needed. • Use + to Enter additional budget lines if needed to distribute budget to multiple phases. • Add Attachments if needed. After all budget lines are entered, select OK. Select Done.
7	To submit the budget, navigate to the Related Actions button on the budget. Select Budget . Select Submit Budget for Approval .
8	Select OK .

What Happens Next?

- The project budget routes for review and approval by the Project Hierarchy Manager.
- Once approved, the budget status should change to Available.
- Once approved, to turn on budget check, navigate to the **Related Actions** button on the budget. Select **Budget** then select **Edit Budget Check Options**
 - From there you select **Enable Budget Check**, select **Include Reserved Journal Lines** and **Allow Credit Transactions to Pass**.
 - In the **Budget Check Options** field, choose Control (hard stop with red flag) or Warn (still allows transactions to pass with yellow flag).
 - In **Evaluation Date**, choosing Budget Date will check based on the service date of transaction being within project dates; choosing Accounting Date will check based on accounting date of transaction being within the project dates.
 - In **Cumulative Control Periods**, choose Control by Duration
 - In **Ledger Types for Budget Check**, choose Actuals, Encumbrance and Pre-Encumbrance
 - Selecting **Allow Budget Check Override** will allow the ability to request permission from the Budget Office that transactions pass budget check if they happen to fail.

Related Reports

- Find Projects

Related Job Aids

- Create Budget Amendments