Instructions for Using the Grants Budget Revision Web Form

This form is only for transfer of dollars WITHIN one Project - bottom line must equal 0. If you wish to process budget changes that change the total dollar amount of a project budget, you must contact OVPR.

Budget revisions are entered on two pages, instructions follow for each page.

PLEASE NOTE THAT ALL BUDGET AMOUNTS SHOULD BE ENTERED IN WHOLE DOLLARS.

Use of your browser's "back" button will cause you to lose any information that you have entered on your form - please use the form buttons only - found at the bottom of the form.

PAGE 1 - Enter header information

1. Enter a short description for your budget revision - may not exceed 30 characters.
2. Enter an explanation for your budget revision. Please include any information that may help the Budget Office understand why you are processing this entry.
3. Ledger group "GRANTS BUDGET" is already selected for you.
   This form is only for transfer of dollars WITHIN one Project - bottom line must equal 0. If you wish to process budget changes that change the total dollar amount of a project budget, you must contact OVPR.
4. Type in a Journal Date, the date format is: 06/13/2003, you must include the slashes. (For folks who will be doing reports: Please note the journal date will translate into whatever accounting period this represents.) Dates which are bank holidays or which are "closed" periods in PeopleSoft will return an error.
   No adjusting periods are permitted on this form, thus period 991 and 992 are not valid.

PAGE 2 - Enter line items

1. Enter a SpeedType. If you don't know your SpeedType, you can look it up by clicking on the "lookup" link underneath the SpeedType.
2. Enter a class if applicable. The "lookup" function also works here. (You will have a second opportunity to enter the class after you add the line, if you fail to do so here.)
3. Enter a User Field if applicable. (Please note that you will have a second opportunity to enter a User Field after you add the line.)
4. Enter a Debit or a Credit.
   a. The only PS Accounts that should be used on this form are those beginning with a "1" signifying that they are expense-related. Thus a Debit represents an increase and a credit represents a decrease to the budget.
   b. Please note that all amounts should be in whole dollars - no pennies.
5. Click on "Add line"
6. Enter an Account for the line that you just entered. The "lookup" function also works here. You may change or add a class, user field, ProjectID/Grant, Source, Resource Type, Resource Category or Resource Subcategory on the first row if you choose. Please note that you may not change the Project ID/Grant or source on subsequent rows.
7. Enter information on Line 2 (and as many additional lines that you need) by repeating steps 1 through 6.

8. When you have entered all of the lines you need, make sure your debits and credits are equal, **THEN click the Next Step button.**

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**PAGE 3 - Routing**

1. Enter UD UNIX IDs for employees that you either want copied or to approve. It is NOT necessary to enter the extension @udel.edu.

2. Click "Finish and submit" button.