

# Budget Tool – Non-Personnel Budget Items

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Created: 10-16-2023

Reviewed: 1-10-2024

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## General Notes

This document is intended to describe how to add non-personnel items to the InfoEd Budget Tool. Capitalized words indicate an object in InfoEd. Italicized words indicate a field or parameter in that object or a reference to additional documentation. Bold is used for emphasis in lists.

### Common Objects or Terms in InfoEd

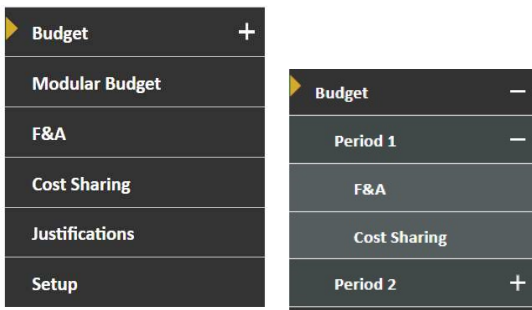
**User:** A person who can log in and use InfoEd

**Portal:** The landing page that is first seen after login, a.k.a. the Home page

**Record:** A generic term for an object in the system such as a Proposal or a COI Disclosure

**Widget:** A generic term for the white text boxes on the portal screen (a wide variety of widgets are available in InfoEd with additional widgets developed as needed)

## Budget Tool Left Navigation Menu



**Budget, Modular Budget, F&A, Cost Sharing** – These screens are used for all budget data entry. Modular budget is available only when selected on the Setup Questions Screen on the Proposal. See *Budget Tool (07) – Modular Budget* for more information.

**Justifications** – Budget Justification(s) can be uploaded here. See *Budget Tool (06) – Justifications* for more information.

**Setup** – The Setup tab controls budget behavior and is used to add or delete budget periods, to change project and/or budget period dates, and to change the PI if needed.

## Budget Menu Item

This is the primary budget screen where all types of line items are entered and edited. Clicking the “+” icon on the menu expands the budget item into sub menus for each budget period (see screen shots above). Each period can be expanded further into F&A and Cost Sharing sub menu items. Users are advised to avoid the period-specific sub menus; in most cases all functions on the sub menus can be accessed from the main Budget screen.

## Non-Personnel Line Item Section

Non-personnel expenses are listed in this section.

### Adding a Single Non-Personnel Line Item in Budget

Select Budget Category  Select Object Code  Add Item

*\* Un-mapped object codes will not reconcile into budget categories \**

1. Click the budget category field.
2. Scroll to locate and then click the desired category. Selecting the budget category will limit the list of object codes in the next drop down.
3. Select the object code.
4. Click the “Add Item” button. This will open a new pop-up window of additional details (see below).

### Non-Personnel Line Item Detail Screen – Detail Tab

Complete the non-personnel line item on the detail screen.

PERIOD	START DATE	END DATE	TOTAL
1	15-May-2024	14-May-2025	0
2	15-May-2025	14-May-2026	0
3	15-May-2026	14-May-2027	0
Total			\$ 0

1. **Annual Inflation** defaults to “Manual Entry” and 0% inflation. Use the drop down to select a different Inflation rate if applicable to the item.
  - Manual Entry – allows the use of 0% or a non-standard inflation rate.
  - Standard 1%

- Standard 2%
  - Standard 3%
2. Provide more specific descriptive text in *Description* – optional but recommended for certain line items.
  3. The *Budget Category* and *Object Code* are populated from the initial selection.
  4. Enter the *Total* requested amount for period 1 and the system will automatically populate all future periods.
  5. Edit amounts in future period(s) as needed.
  6. Click the “Save” or “Save and Close” button.

### Non-Personnel Line Item Detail Screen – Justifications Tab

The Justifications tab allows users to input comments regarding specific line items in the budget. This is an internal reminder to the research team and/or the Grants Coordinator and will not be presented to the sponsor unless so designated on the Justification tab. The comprehensive budget justification document will be uploaded on the Justification screen. See *Budget Tool (06) – Justifications* for more information.

### Non-Personnel Line Item Detail Screen – Cost Sharing Tab

The Cost Sharing tab allows users to edit cost share, track sources, and document the nature and type of support. See the *Budget Tool (05) - Cost Sharing* help guide for details.

### Adding Bulk Non-Personnel Line Items in Budget

This feature allows the addition of multiple non-personnel expenses on a single screen.

1. Click the “Add Bulk Entry” button located at extreme right of the Non-Personnel heading.

Non-Personnel [Hide]		PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS	
Detail	Other Costs (2) Multiple	\$ 4,879	\$ 5,203	\$ 5,554	\$ 15,636	Delete
Detail	Research & Devt. Supplies & Non-Capital Equip (3) Multiple	20,000	15,000	10,000	45,000	Delete

2. A screen will pop up that has multiple places for adding line items.

Add Close

	INFLATION	AMOUNT
Consultant Services	Period 1 <input type="text"/> %	\$ 4,000
71105 - Consultant Fees	Period 2 1.000 %	\$ 4,040
Description: Consultant Services		
Inflation: Standard 1%		
Supplies	Period 1 <input type="text"/> %	\$ 500
72106 - Maintenance Supplies	Period 2 <input type="text"/> %	\$ 500
Description: Supplies		
Inflation: Manual Entry		
Select Budget Category	Period 1 <input type="text"/> %	\$ 0
Select Object Code	Period 2 <input type="text"/> %	\$ 0
Description: <input type="text"/>		
Inflation: Manual Entry		
Select Budget Category	Period 1 <input type="text"/> %	\$ 0

3. In the first available row, select Budget Category. The Budget Category limits the list of object codes.
4. Select the Object Code.
5. Enter Description text if desired.
6. Choose inflation value if desired. Leave as Manual Entry for 0%.
7. Enter the amount for the first period and adjust any remaining periods as needed.
8. Repeat Steps 2-6 for each line-item row.
9. If more rows are required, click the “Add New Row” button at the bottom.
10. Once all entries are complete, click the “Add” button in upper right corner of window.

Note: Justifications and Cost Share will need to be added individually to each item if necessary. Bulk entry only addresses the data on the detail tab.

## Budget Period-Specific SubMenu Items

Each period of the Budget can be viewed separately from the others by using the Period-Specific SubMenus. It presents a slightly different format, but many of the functions from the main Budget Menu Item are available here as well. It is recommended to make changes from the main Budget menu item rather than from the Budget Period-Specific SubMenus.

## Budget Period-Specific SubMenu – Non-Personnel Costs Section

Non-Personnel Costs [Hide]						Add Bulk Entry	
	CATEGORY	OBJECT CODE	DESCRIPTION	TOTAL			
<input type="button" value="Detail"/>	Supplies 72402 - Research Supplies	72402 - Research Supplies	Fancy paper and pens	Cost Sharing 5,000	<input type="button" value="Delete"/>		
<input type="button" value="Detail"/>	Travel-Domestic 73103 - Travel - Employee - Domestic	73103 - Travel - Employee - Domestic	Conference	Cost Sharing 5,000	<input type="button" value="Delete"/>		
				<b>Total</b>	<b>\$ 10,000</b>		
<input type="text" value="Select Budget Category"/>		<input type="text" value="Select Object Code"/>		<input type="button" value="Add Item"/>			

- Total Amount for the period can be edited here and affects this period ONLY.
- Object Code for the budget line can be edited here and affects this period ONLY.
- Clicking the “Detail” button to the left of the Category Name brings up the standard Detail screen with access to all periods and cost sharing just as on the main Budget Menu Item screen.
- Clicking the “Cost Sharing” button to the left of the *Total* field brings up a limited cost share screen that allows changes for the selected period only.
- Clicking the “Delete” button to the far right of the non-personnel line will remove that budget line from the specific period but DOES NOT remove the line item from other periods.