

Copy One Budget Period to Another

C-2. Using the Copy Budget Period feature

The **Copy a Budget Period** page enables you to copy information from a source budget period to subsequent budget periods, thus avoiding much of the data entry work.

There are two ways to utilize this copy feature:

- A. **Budget Template:** Start in Copy Budget Period with the Proposal Project and Period to be copied. You enter the Proposal ID, Version ID, Proposal Project, Budget ID and the Budget Period to which the copy is going.
- B. **Building a Multi-Period Budget:** Start in Enter Budget Detail with the Project and Budget Period you want to copy (e.g. Period 1). In the Menu, you select Copy Budget Proposal to copy subsequent budget periods (Periods 2, 3...).

A. BUDGET TEMPLATE:

Navigation:

- Go to UD Financials **Main Grants**→**Proposals**→**Copy Budget Period**

Copy Budget Period

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Business Unit: =

Proposal ID: begins with

Version ID: begins with

Proposal Project ID: begins with

Budget ID: begins with

Budget Period: =

Description: begins with

PI ID: begins with

Sponsor ID: begins with

Proposal Type: =

Proposal Status: =

Department: begins with

Short Title: begins with

Case Sensitive

Search Clear [Basic Search](#) [Save Search Criteria](#)

Search Results

[View All](#)

Business Unit	Proposal ID	Version ID	Proposal Project ID	Budget ID	Budget Period	Description	PI ID	Sponsor ID	Proposal
UOD01	12A01206	V101	000000000014561	1	1	DOE PHASE II TESTING	19617	0700	New
UOD01	12A01206	V101	000000000014561	1	2	DOE PHASE II TESTING	19617	0700	New
UOD01	12A01206	V101	000000000014565	1	1	(blank)	19617	0700	New
UOD01	12A01206	V101	000000000014565	1	2	(blank)	19617	0700	New

1. Enter **Proposal ID, Sponsor ID, PI ID, Department**, etc. to search for your proposal.
2. Click the **Search** button
3. Click on the desired **Proposal Project ID** from the **Search Results**

Copy Budget Period

From: 4

Business Unit: UOD01

Proposal ID: 12A01206

Version ID: V101

Proposal Project: 000000000014561

Budget ID: 1

Budget Period: 1

To:

Business Unit: UOD01

*Proposal ID: 12A01206

Version ID: V101

Proposal Project: 000000000014561

*Budget ID: 1

To Budget Period: 2

Escalation: 0.00

Copy

Save Return to Search Previous in List Next in List Notify

4. Verify that the **“From”** data is correct.
5. Enter the **“To”** information using the “lookup” icons:
 - **Proposal ID** – This should be the same as the “From” proposal ID unless you are copying a budget period from a different proposal.
 - **Version ID**
 - **Proposal Project**
 - **Budget ID** always equals 1
 - **Budget Period**
 - **Escalation** (percentage increase that is applied across all budget categories)
6. Click **Copy** button
7. Click **Save** button

B. BUILDING A MULTI-PERIOD BUDGET

In this scenario you will start in the **Enter Budget Period** page.

Enter Budget Detail

Proposal: 12A01206
Version: V101
Title: DOE PHASE II TEST
Project ID: 000000000014561
Budget ID: 1

USD
03/20/2013 End Date 03/19/2015

1
03/20/2013 End Date 03/19/2014 [View FA Rate](#)

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	PERSON	Personnel - Salary & Ben		12,540.00	12,540.00	Cost Share	<input type="checkbox"/>		
20	GRADST	Graduate Students		21,640.00	21,640.00	Cost Share	<input type="checkbox"/>		
30	TRAVEL	Travel		5,000.00	5,000.00	Cost Share	<input type="checkbox"/>		
40	EQUIP	Equipment		150,000.00	100,000.00	Cost Share	<input checked="" type="checkbox"/>	50,000.00	
50	SUPL	Supplies		5,000.00	5,000.00	Cost Share	<input type="checkbox"/>		
60	SUB<25	Subaward Direct < \$25,0		25,000.00	25,000.00	Cost Share	<input type="checkbox"/>		
70	SUB<25	Subaward Direct < \$25,0		75,000.00	50,000.00	Cost Share	<input checked="" type="checkbox"/>		25,000.00

Sponsor Direct: 219,180.00 Sponsor F&A: 63,165.00 Total Sponsor Budget: 282,345.00
 Institution Cost Share: 50,000.00 Institution Cost Share F&A: 0.00 Total Inst C/S Budget: 50,000.00
 Third Party Cost Share: 25,000.00 Total TP C/S Budget: 25,000.00
 Total Direct: 294,180.00 Total F&A: 63,165.00 Total Budget: 357,345.00

1. You are in the **Enter Budget Detail** page with the **Project** and **Budget Period** that you want to copy. This is **Period 1** with the budget entries completed.
2. To copy **Budget Period 1** to **Budget Period 2**:
 - In the breadcrumbs at the top of the page, click on **Proposals**
 - Click on **Copy Budget Period**.
 - This will immediately open the **Copy Budget Period** page.

ORACLE

Favorites Main Menu > Grants > Proposals > Copy Budget Period

Copy Budget Period

From: To: 1

Business Unit: UOD01 Business Unit: UOD01

Proposal ID: 12A01206 *Proposal ID: 12A01206

Version ID: V101 Version ID: V101

Proposal Project: 000000000014561 Proposal Project: 000000000014561

Budget ID: 1 *Budget ID: 1

Budget Period: 1 To Budget Period: 2

Escalation: 0.00

Copy

Save Return to Search Notify

The copy process automatically adjusts the “Start” and “End” dates from the original period budget to the next period’s correct budget period dates.

1. “TO” fields default from the original budget period being copied. This includes:
 - **Proposal ID**
 - **Version ID**
 - **Proposal Project**
 - **Budget ID**
 - **To Budget Period** - Notice the budget period is one number greater than the “From Budget Period”.
2. **Escalation** (optional).
 - This rate may be manually changed.
 - All budget categories copied will be increased by the rate entered here.
3. Click the **Copy** button to copy the budget period.
4. Click the **Save** button

Enter Budget Detail

Proposal: 12A01206 Currency: USD
 Version: V101 Start Date: 03/20/2013 End Date: 03/19/2015
 Title: DOE PHASE II TESTING Modular?

Project ID: 00000000014561 Budget Period: 2
 Budget ID: 1 Start Date: 03/20/2014 End Date: 03/19/2015 [View FA Rate](#)

Details, CostShare, Justification Customize | Find | First 1-5 of 5 Last

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	PERSON	Personnel - Salary & Ben		12,804.00	12,804.00	Cost Share	<input type="checkbox"/>		
20	GRADST	Graduate Students		23,804.00	23,804.00	Cost Share	<input type="checkbox"/>		
30	TRAVEL	Travel		5,000.00	5,000.00	Cost Share	<input type="checkbox"/>		
50	SUPL	Supplies		5,000.00	5,000.00	Cost Share	<input type="checkbox"/>		
70	SUB<25	Subaward Direct < \$25,0		100,000.00	75,000.00	Cost Share	<input checked="" type="checkbox"/>		25,000.00

Sponsor Direct: 121,000.00 Sponsor F&A: 64,452.00 Total Sponsor Budget: 186,060.00
 Institution Cost Share: 0.00 Institution Cost Share F&A: 0.00 Total Inst C/S Budget: 0.00
 Third Party Cost Share: 25,000.00 Total TP C/S Budget: 25,000.00

Total Direct: 146,608.00 Total F&A: 64,452.00 Total Budget: 211,060.00

[Return To Maintain Proposal](#)

Save Return to Search Previous in List Next in List Notify

5. **Budget Period 2** is now in the proposal with all supporting detail.

This process can be repeated beginning with any budget period and progressing to the final budget period. Some points to keep in mind:

- Budget periods *cannot* be jumped (e.g. you cannot copy budget period 1 to budget period 3).
- The typical process will be:
 - Begin with budget period 1 entry in *Enter Budget Detail*
 - Copy period 1 to period 2 with *Copy Budget Period*
 - Adjust and save budget period 2 in *Enter Budget Detail*
 - Copy period 2 to budget period 3 with *Copy Budget Period*
 - Adjust and save period 3 in *Enter Budget Detail*
 - And so on until all the budget periods are completed.

For example: Budget period 2 will differ from budget period 1. Those changes can be made and saved in *Enter Budget Detail* after the copy function is performed. An equipment purchase may be planned in budget period 1. Using the copy process to produce budget period 2 will include that piece of equipment. The equipment in year two will need to be deleted.