1. **Basic Budgeting**

Budgeting for grants may involve interacting with multiple pages in the Navigation Panel at the left of the screen, especially Personnel. Large majority of building a budget will take place on the Budget Tab of the Navigation Panel on the left.
2. **Entering Personnel Budget**

1. Click Detail Button to Add or Modify a person's salary and person months in the budget.

2. Enter number of Person Months for the person on the proposal. Depending on the person's appointment type (Calendar or Academic) in the URI HR database, the appropriate fields will appear for data entry.

3. The system automatically calculates the person's salary based on number of calendar, academic or summer months entered.

4. Click Save and you will see the system automatically calculate the budgeted salary and fringe benefits. Save and Close to exit from the budget detail for this person.
**Note:** For Individuals with academic year appointments, please note the base salary will show as academic and summer salary combined.

### 2.1 Adding more Personnel to Budget

Initially, only the PI will appear. Additional personnel can be added directly here within the budget or on the full personnel tab.

<table>
<thead>
<tr>
<th>NAME</th>
<th>Role</th>
<th>PERIOD 1</th>
<th>PERIOD 2</th>
<th>PERIOD 3</th>
<th>DIRECT COSTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hayden, Katherine</td>
<td>PD/PI</td>
<td>42,179.70</td>
<td>42,999.55</td>
<td>43,836.08</td>
<td>125,019.14</td>
</tr>
<tr>
<td>Cirelli, Franca</td>
<td>Co-Investigator</td>
<td>6,211.87</td>
<td>6,316.55</td>
<td>6,427.90</td>
<td>18,958.32</td>
</tr>
</tbody>
</table>

**Subtotal Personnel:** 48,391.57, 49,315.10, 50,364.79, 147,977.46

1. To add additional personnel to the budget, type in a part of their last name and then once found, click on the name to select the person.

2. Select the Type as Key Personnel or Non-Key Personnel.

3. Select appropriate Role for the person.

4. Click on Add Person to add the person into the Budget.

**Note:** If the person being sought does not exist (e.g., in the case of a “to be named” individual), type TBN – and you will see the following three options:
Select TBN, GRA if you are entering a Graduate Research Assistant. Select TBN, University of Rhode Island for all other TBN positions.

The “person” will now be listed just if s/he had been selected from a list; you can continue as above

3. **Entering Non-Personnel Budget**

Non-personnel budgets are the easiest direct costs to enter.

Click the budget category field. Scroll to locate and then click the desired category.

On the popup window, the Description (yellow) will default to the budget category name selected but can be changed to reflect the purpose of the budget line. This is especially useful if you will be entering multiple lines for a single budget category.
Note - BIG TIME SAVER --- To add multiple lines at a time, click ADD BULK ENTRY; the same data entry fields are available.
4. Entering Subaward Budget

1. To add a new subaward, click the institution name field box and type in any part of the desired institution’s name and then - once found - click on the name to select it.

   Note: If the institution that you need is not listed, contact your OSP administrator.

2. Click the subaward PI box and then type in any part of the PI’s name and if found - Click the name to select it.

Note - If the person is not found, complete the New subcontractor Request form form https://web.uri.edu/research-admin/new-subcontractor-requests-form/
5. **Entering Budget Justification**

Use the Justifications page to select a file from your computer (highlighted in yellow) and UPLOAD it (highlighted in blue). Uploads can be in any file format, .pdf and .doc files being the most common. (If the file is not in .pdf format, a PDF copy will automatically be created, leaving both it and the original. The original – while in view-only mode – remains in its original format and so can be downloaded, flagged as editable, updated, and re-uploaded.)
6. Basic Personnel Tab

**Important Note** - It is recommended that you complete the Budget tab before completing the Personnel tab. If you have developed your budget first, then all personnel that have a budget will already have been entered into the proposal and...
will automatically appear on the Personnel tab. Then you will only need to enter any personnel who do not have a budget, such as “other significant contributors” and “consultants.” (Consultants’ budgets are entered as “non-personnel”).

The Mode indicator (green rectangle) shows whether or not you can make changes to personnel. Only when the Mode is “edit” will this be allowed.

Area ① is used to add personnel. Note the yellow highlighted “show/hide” toggle. This allows you to hide this section to limit the amount of detail being shown at any one time. See Details: Show/Hide.

Area ② lists existing personnel and their proposal roles. See Verifying Personnel below.

Area ③ is used to manipulate the list in a variety of ways. See Manipulating Personnel below.

Area ④ provides a means to send emails to the personnel and to see if any mandatory information is missing. See Verifying Personnel below and Details: Personnel.

Area ⑤ shows the person’s home entity and their home department within that entity. For external personnel such as those on a subaward, the two will often be the same. Internal personal will generally have different values in the two.

Area ⑥ is normally view only and shows the person-months or effort (based on the value in the dropdown list) computed from the budget across all periods of the project.

Area ⑦ is used to upload and view bio-sketches or current/pending support documents. Such documents can be in Word and will be automatically converted to PDF files upon upload.

Area ⑧ can be used to remove personnel entered in error. If you click the Remove icon, you have the ability to remove the person selectively from all or some budget periods.
6.1 Entering Personnel

If you want to add personnel on the personnel tab, follow the steps below.

1. Will always default to Prime
2. Personnel Type - choosing the type as Key or Non-Key - only - will insert the person into the budget pages also.
6.2 Entering Consultants

Type in any part of the desired person's name and once the name is found, click on the name to select it.

Select their role.

Select External Consultant - Key and Enter the External Institution Name and search for the name. If the name is not available to select from, Click create profile and enter information (first name, last name) about the consultant and select department as External entity and then under that Consultant or other contributor.
Enter consultant name and set Department to External Entity and under that to Consultant or other contributor.
Your consultant has now been added. Select Save and they will be added to the Personnel section.

7. **Verifying Personnel**

**Note** - Clicking *any* name provides a popup window (blue arrow) that shows a complete list of the person’s contact information and sponsor credentials (such as a Commons Id). You will need to complete this information for Consultants and Other Contributors. It will be complete for all internal personnel.
The existence of an icon in the Alert column indicates that mandatory personal information is missing. Hovering over the icon causes a popup window to appear, listing the specific missing items. Click the person’s name and update the missing fields.

### Table

<table>
<thead>
<tr>
<th>PI</th>
<th>INC</th>
<th>NAME/ROLE</th>
<th>MAIL</th>
<th>ALERT</th>
<th>ORGANIZATION / DEPARTMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>InfoEd Administrator</strong></td>
<td></td>
<td></td>
<td>University of Denver</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>PO/PI</strong></td>
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<td></td>
<td>University of Denver</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Certifications and Training</strong></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td><strong>Joseph Pelier</strong></td>
<td></td>
<td></td>
<td>University of Delaware</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>SubAward PI</strong></td>
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<td>University of Delaware</td>
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<td><strong>Certifications and Training</strong></td>
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</tr>
<tr>
<td></td>
<td></td>
<td><strong>Leslie Smith</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** After the completion of the personnel section, verify if the budgets tab is marked as completed. If not, navigate to the budgets tab and mark it as completed. This is because, certain sections of the budgets tab and personnel tab are interlinked and any edits to one section, will un-complete the other section.