SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Redistribute Project Budgets

You may run into a situation where the overall project budget for the award and billing limit for the contract does not change but you need to change the project budget ChartFields. For example, you may need to move part of the project budget from one activity to a different activity. You may also run into situation where you need to decrease a project budget and add the budget to a different project for the same award.

In this case, adding a contract amendment and updating the billing limit would not be necessary. You will use the *Project Budgets* page to make the changes because you would not be changing the total amount of the award, contract and project.

This guide covers redistributing project budgets for an Award.

Steps to complete:

Step 1: Adjust Project Budget

Begin by adjusting the Project Budget.

1. Navigate to the *Project Budget* page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards, left-menu, Project Budgets.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left-menu, Links section, Maintain Award, Project Budgets.

2. At the *Project Budgets* page, verify the *Business Unit* and enter the *Project ID* for the project you want to update.

3. Click on the **Search** button.

4. Click on the Project in the **Search Results**, if necessary. The *Budget Detail* page displays.

   - **Note**: You cannot change budgets that have been finalized.

   - You can click on the **Show All Columns** icon to view all of the fields. Otherwise, you'll need to use the scroll bar on the bottom of the page to scroll to the far right, and then use the scroll bar located in the **Budget Amounts for Period** section at the far right to view the remaining fields.

Budget Detail

Project	G02FSDDC180	State Developmental Disabiliti				Finalize
Budget Period	1		Begin Date 10/01/2017	End Date 09/30/2020		Process Monitor

Project Budget Summary

Cost Share Direct	$0.00	Currency USD	Total Budget	$1,028,414.00
Sponsor Budget	$1,028,414.00	Security Status	None	

Budget Amounts for Period

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General | Project Detail | General Ledger Detail | Commitment Control Detail | Grants Detail

Fund Code	Financial Department ID	Appropriation ID (CF3)	Budget Item	Account	Amount	Activity	Analysis Type	Source Type	Category	Su
3000	G0231081	G021332	ALL		128,240.00	1800	BUD	BUD		
3000	G0231081	G021332	ALL		170,000.00	1801	BUD	BUD		
3000	G0231081	G021332	ALL		80,000.00	1802	BUD	BUD		
3000	G0231081	G021332	ALL		120,000.00	1803	BUD	BUD		
3000	G0231081	G021332	ALL		210,000.00	1804	BUD	BUD		
3000	G0231081	G021332	ALL		50,000.00	1805	BUD	BUD		
3000	G0231081	G021332	ALL		17,500.00	1806	BUD	BUD		
3000	G0231081	G021332	ALL		182,674.00	1807	BUD	BUD		
3000	G0231081	G021332	ALL		50,000.00	1808	BUD	BUD		
3000	G0231081	G021332	ALL		20,000.00	1809	BUD	BUD		

5. In the **Budget Amounts for Period** section, scroll over to the far right and click on the **Add New Row** (+) sign. A new line is added. For one adjustment, you will need to add at least two lines and the net change should be zero "0".

		Finalize		Process Monitor	
ate 09/30/2020					
,414.00					

1-10 of 10

ctivity	Analysis Type	Source Type	Category	Subcategory	Unit of Measure	Currency	
00	BUD	BUD			1.00	USD	+
01	BUD	BUD			1.00	USD	+
02	BUD	BUD			1.00	USD	+
03	BUD	BUD			1.00	USD	+
04	BUD	BUD			1.00	USD	+
05	BUD	BUD			1.00	USD	+

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6. For each row you need to add, enter the Budget Item, ChartField values and amount as described below.

- In this example we will work within one Project Budget, reducing dollars for one activity and adding the dollar to another activity so two lines have been added.

- If you need to reduce one project budget and increase another, you'll need to adjust two Project Budgets. This will require adjustments to the contract if the projects are associated with different contracts.

Budget Detail

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Budget Period	1		Begin Date 10/01/2017	End Date 09/30/2020	**Finalize** Process Monitor

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Budget Amounts for Period

General | Project Detail | General Ledger Detail | Commitment Control Detail | Grants Detail

Fund Code	Financial Department ID	Appropriation ID (CF3)	Budget Item	Account	Amount	Activity	Analysis Type	Source Type	Category
3000	G0231081	G021332	ALL		128,240.00	1800	BUD	BUD	
3000	G0231081	G021332	ALL		170,000.00	1801	BUD	BUD	
3000	G0231081	G021332	ALL		80,000.00	1802	BUD	BUD	
3000	G0231081	G021332	ALL		-30,000.00	1800	BUD	BUD	
3000	G0231081	G021332	ALL		30,000.00	1801	BUD	BUD	

a. Enter the following on the **General** tab:

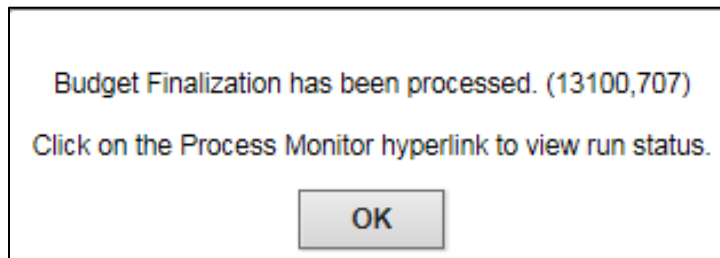| Field Name	Field Description
Amount	Enter a negative amount for a reduction or a positive amount for an addition to funding.
***Analysis Type**	Select "BUD" (Total Cost Budget) to update the Sponsor Direct amount. Select "CBU" to update the Cost Sharing Budget. Make sure to also check the Cost Sharing Checkbox described below.
Budget Item and ChartFields	The *Budget Item(s)* ChartField values you will enter vary depending on the agency and *Budget Item* (activity). Available ChartFields include Fund, Appropriation ID, Account, Subaccount, Agency Cost 1 and 2, Activity, Category and Subcategory.
***Source Type**	Select "BUD" the default for Budget Transactions.

b. Enter the following on the **Grants Detail** tab.

Field Name	Field Description
Cost Sharing Checkbox	The Cost Sharing Checkbox should be checked if this row relates to a Cost Share amount.
Facilities & Administration	The Facilities & Administration checkbox **should not** be checked. **Note**: This box is only used by agencies who have consulted with the SWIFT Module Support Unit (AgencyAssistance.MMB@state.mn.us) and are setup to have the F & A process run centrally.

c. Verify the following on the **Commitment Control** tab.

Field Name	Field Description
*Build Parent Budget Checkbox	The Build Parent Budget checkbox should always be checked.
*Ledger (Display only)	This Ledger varies by Business Unit: "KK_PRC_BUD" for all Business Units except B2202, H6001, and H5502. "KK_PRCDBUD" for B2202, H6001, and H5502 Business Units only.
*Ledger Group (Display Only)	This Ledger Group varies by Business Unit: "KK_PRJ_CHD" for all Business Units except B2202, H6001, and H5502. "KK_PRJ_CDE" for B2202, H6001, and H5502 Business Units only.

7. Click on the **Save** button.

8. After you have verified the budget entries, click on the **Finalize** button.

> Budget Finalization has been processed. (13100,707)
>
> Click on the Process Monitor hyperlink to view run status.
>
> OK

9. Click on the **OK** button at the message indicating you should click on the *Process Monitor* link to verify the status of the process.

10. Click on the *Process Monitor* link.

11. At the *Process List* page, click on **Refresh** button until the Run Status = Success, and the Distribution Status = Posted.

12. Click on the *Details* link. The *Process Detail* page displays.

13. At the *Process Detail* page, click on the *Message Log* link.

- You should see messages indicating the rows have been successfully inserted into the "PC" Project Costing and Commitment Control modules.

- You will most likely see a number of warning messages which you can ignore. If there are errors, refer to the "Correct Commitment Control Errors" guide for assistance.