

# Getting started on your Budget

Before you begin: Disable any pop-up blockers, have your documentation handy, and go to <http://www.sims.psu.edu> to login.

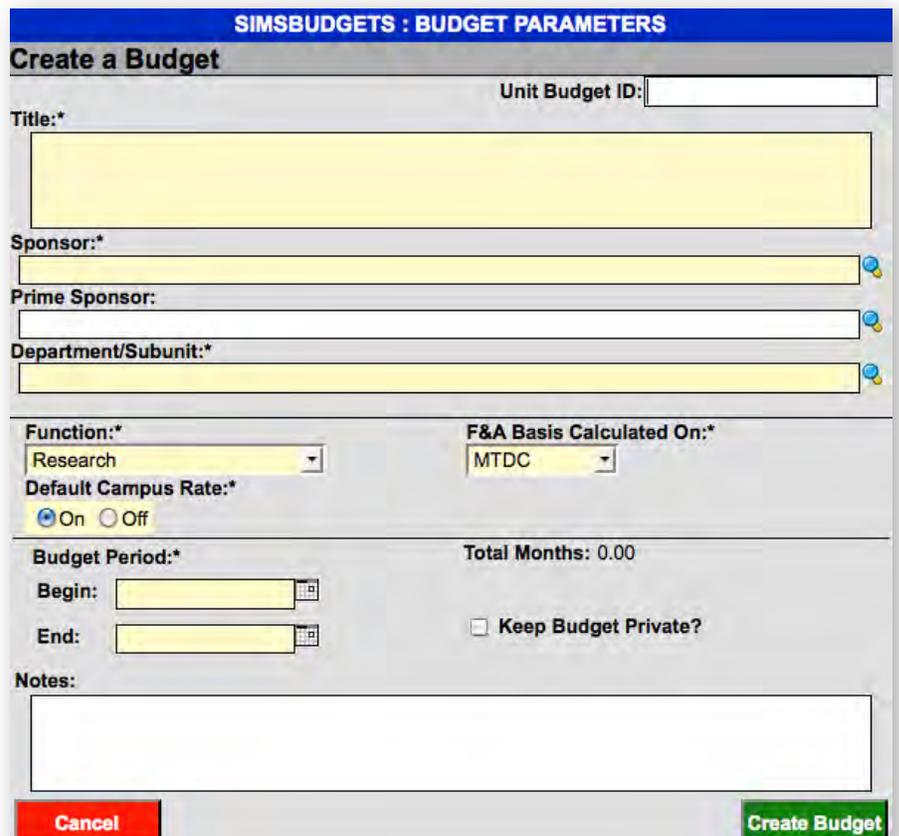
## Step 1 Create Your Budget



The screenshot shows the top navigation bar with the date 'May 21, 2010' and the title 'SIMSBUDGETS : BUDGET L'. Below the navigation bar, there are several menu items: 'New Budget' (circled in red with a callout box saying 'Select New Budget'), 'PIAF Locator', and 'PIAF'. Below the menu items, there is a table with columns for 'Primary Investigator', 'Sponsor', and 'Title'. The table is currently empty. At the bottom right, there is a footer with the text: 'SIMS budgets v.2.0', '©2009 Penn State Univers', 'Contact SIMS Support', and 'Page generated by on Friday, May 21, 2010'.

## Step 2 Identify Your Budget Parameters

**Note:** Budget periods default to 12 months.



The screenshot shows the 'SIMSBUDGETS : BUDGET PARAMETERS' interface. The main heading is 'Create a Budget'. The form contains the following fields and options:

- Title:\***: A large text input field.
- Unit Budget ID:**: A text input field.
- Sponsor:\***: A text input field.
- Prime Sponsor:**: A text input field.
- Department/Subunit:\***: A text input field.
- Function:\***: A dropdown menu with 'Research' selected.
- F&A Basis Calculated On:\***: A dropdown menu with 'MTDC' selected.
- Default Campus Rate:\***: Radio buttons for 'On' (selected) and 'Off'.
- Budget Period:\***: Two date pickers for 'Begin:' and 'End:'.
- Total Months:** 0.00
- Keep Budget Private?\***: A checkbox.
- Notes:**: A large text area.

At the bottom, there are two buttons: 'Cancel' (red) and 'Create Budget' (green).

### Step 3

## Confirm Default Rates

**Note:** Rates will be set to Penn State default rates unless sponsor rates apply.

**Modify Default Rates**

FY	COL	COL		Fringe			
		Tuition	F&A	Category 1	Category 2	Category 3	Category 4
2010	3.00	7.00	48.00	29.90	15.90	8.30	0.70
2011	3.00	7.00	48.00	29.90	15.90	8.30	0.70
2012	3.00	7.00	48.00	29.90	15.90	8.30	0.70
2013	3.00	7.00	48.00	29.90	15.90	8.30	0.70
2014	3.00	7.00	48.00	29.90	15.90	8.30	0.70

**Save Rates & Recalculate** will save rates and recalculate all existing line items and replace any custom rates.  
**Save Rates** will save rates and leave all existing line items unchanged.

Save Rates & Recalculate Save Rates Close

### Step 4

## Add Line Items

**Add Line Item(s)**

**Select Object Code Type**

All  Category I  Category II

- 101 - Salaries-Standing Appointment, Ex
- 102 - Salaries-Standing Appointment, Ad
- 103 - Salaries-Standing Appointment, Ac
- 104 - Salaries-Standing Appointment, Ac
- 105 - Salaries-Standing Appointment, Ex
- 106 - Salaries-Standing Appointment, No
- 108 - Salaries-Standing Appointment, Tex
- 109 - Salaries-While on Sabbatical Leave
- 113 - Salaries-Non-Standing - Academic,
- 114 - Salaries-Non-Standing - Academic,
- 171 - Salaries-Non-Standing - Non-Acade
- 172 - Salaries-Non-Standing - Non-Acade
- 174 - Salaries-Non-Standing - Academic,
- 175 - Salaries-Non-Standing - Non-Acade
- 176 - Salaries-Non-Standing - Non-Acade
- 178 - Salaries-Non-Standing - Non-Acade

**Add Line Item(s)**

All  Category I  Category II  Category III  Category IV  MTDC  TDC

- 301 - Stationery and Office Supplies
- 302 - Medical and Hospital Supplies
- 303 - Laboratory Supplies
- 304 - Food Supplies
- 305 - Custodial and Housekeeping Supplies
- 306 - Laundry Supplies
- 307 - Recreational and Athletic Supplies
- 308 - Motor Vehicle Supplies
- 309 - Miscellaneous Supplies
- 310 - Supplies and Materials for Resale
- 312 - Hardware
- 321 - Telecommunication Services
- 322 - Postage
- 323 - Cellular Services
- 329 - Meeting Expenses
- 331 - Registrations
- 332 - Group Meals
- 335 - Conference Meals
- 336 - Travel In State
- 337 - Travel - Domestic (CONUS)

### Step 5

## Print Budget

**Page Level Controls**

Reset Budget Format

Draft Watermark

Description Width: 3.00in

Period Width: 0.75in

Show Period Titles

Show Budget Notes

Heading Controls

Line Item Section Header Controls

Line Item Controls

Line Item Section Total Controls

Footer Controls

Select Print View

Project	02/01/2010 - 01/31/2011	02/01/2011 - 01/10/2013	01/11/2013 - 01/11/2014	Total
<b>Direct Costs</b>				
<b>Category I</b>				
Gindhart, David Charles	50,547	166,229	62,024	278,800
Lose, Chris D	23,817	48,200	8,660	80,677
Technician A	30,525	30,888	0	61,413
Technician B	0	30,888	16,647	47,535
Technician C	0	61,774	33,294	95,068
Salaries-Standing Appointment, Executive	0	0	0	0
<b>Total Category I</b>	<b>104,889</b>	<b>337,979</b>	<b>120,625</b>	<b>563,493</b>
<b>Category II</b>				
Cost for Grad Student 1	24,721	50,027	0	74,748
Cost for Grad Student 2	0	50,027	26,965	76,992
<b>Total Category II</b>	<b>24,721</b>	<b>100,054</b>	<b>26,965</b>	<b>151,740</b>
<b>Category III</b>				
To be named, assistant Aim 1	23,040	46,872	0	69,912
To be named, assistant Aim 2	23,040	46,872	25,344	95,256
To be named, assistant Aim 4	0	46,872	25,344	72,216
Wages-Academic	0	0	0	0
<b>Total Category III</b>	<b>46,080</b>	<b>140,616</b>	<b>50,688</b>	<b>237,384</b>
<b>Category IV</b>				
Wages-Tech-Service Student Wages	8,322	16,352	8,328	33,002
<b>Total Category IV</b>	<b>8,322</b>	<b>16,352</b>	<b>8,328</b>	<b>33,002</b>
<b>Total Salaries and Wages</b>	<b>184,012</b>	<b>595,001</b>	<b>206,606</b>	<b>985,619</b>