

KEY FEATURES

1 Function, navigation, and shortcut keys



The dynamic PDF budget template works best with Adobe Acrobat or Reader.



Before entering data, save the template, then open it directly in Acrobat or Reader.



Click the green + button to add a new row or table with a corresponding narrative section.



Click the red x button to delete **only** the row or table with the X button and its corresponding narrative section. You cannot delete a row if it is the last remaining row.



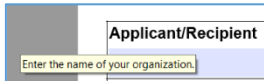
Use the bookmarks or Adobe thumbnails feature for faster navigation between pages.



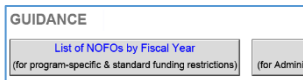
The “hot” keys in the table below may be used when entering text in data fields.

| | Windows OS | Mac OS |
|------------------|------------|----------------------------------|
| Select All | CTRL + A | CTRL + A or Command (or Cmd) + A |
| Bold | CTRL + B | CTRL + B or Command (or Cmd) + B |
| Italics | CTRL + I | CTRL + I or Command (or Cmd) + I |
| Underline | CTRL + U | CTRL + U or Command (or Cmd) + U |
| Copy | CTRL + C | CTRL + C or Command (or Cmd) + C |
| Cut | CTRL + X | CTRL + X or Command (or Cmd) + X |
| Paste | CTRL + V | CTRL + V or Command (or Cmd) + V |
| Undo | CTRL + Z | CTRL + Z or Command (or Cmd) + Z |
| Reduce font size | CTRL += | CTRL += or Command (or Cmd) += |

2 Guidance is provided via tool tips, text boxes, and buttons



To view tool tips (yellow pop-up boxes) with instructions and guidance, hover your mouse over the table headers, text boxes, and data fields.



Guidance and buttons with instructions/guidance are visible only on the screen – they will not appear when the budget is printed to PDF.

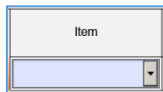
3 Fillable data fields are highlighted

| % Level of Effort (LOE) | Personnel Cost |
|-------------------------|----------------|
| | \$0 |

Data may be entered only in highlighted fields (if you have enabled “fields highlight color” in Acrobat or Reader). Auto-calculated or read-only fields will **not** appear highlighted.

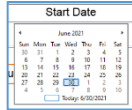
Text fields in tables are limited to between 60 and 300 characters (including spaces) or up to several lines of text. However, text fields in narrative sections are unlimited.

4 Drop-down lists and calendar windows



Items may be selected from drop-down lists. In the Travel table, items selected from the drop-down list will auto-populate the Basis column.

In the IDC budget category, the type of IDC Rate or Cost Allocation Plan selected from the drop-down list will display the relevant IDC table.



Dates must be selected from the calendar window in the date fields.

5 Connections between budget categories to auto-populate data and totals

- ✓ The Budget Year selection on page 1 auto-populates the Year(s) in the Budget Summary, Budget Summary for Requested Future Years, and Funding Limitations/Restrictions tables.
- ✓ Relevant data from the Personnel table auto-populates the Fringe Benefits Cost table.
- ✓ The name of the organization or consultant used to identify each agreement only has to be entered once to auto-populate the budget detail section for that agreement.
- ✓ The Budget Summary table is completely auto-populated.

6 Validation errors

Values/amounts exceeding certain thresholds will be flagged as errors that must be addressed before the line-item cost can be calculated. Examples include:

- ✗ Annual Salaries/Hourly Rates in the Personnel and Contractual budget categories (except when Consultant is selected) cannot exceed the Executive Level II salary of the Federal Executive Pay Scale.
- ✗ Levels of Effort (LOE) cannot exceed 100%.
- ✗ Total Fringe Rate cannot exceed the sum of the fringe component rates.
- ✗ Percentage of Equipment Cost Charged to the Project cannot exceed 100%.
- ✗ Unit Cost for Supplies cannot exceed \$5,000.
- ✗ Base used to calculate Indirect Charges cannot exceed the Total Direct Costs.

7 Validation warnings

Validation warnings will prompt you to review the values/amounts entered if certain thresholds are exceeded.