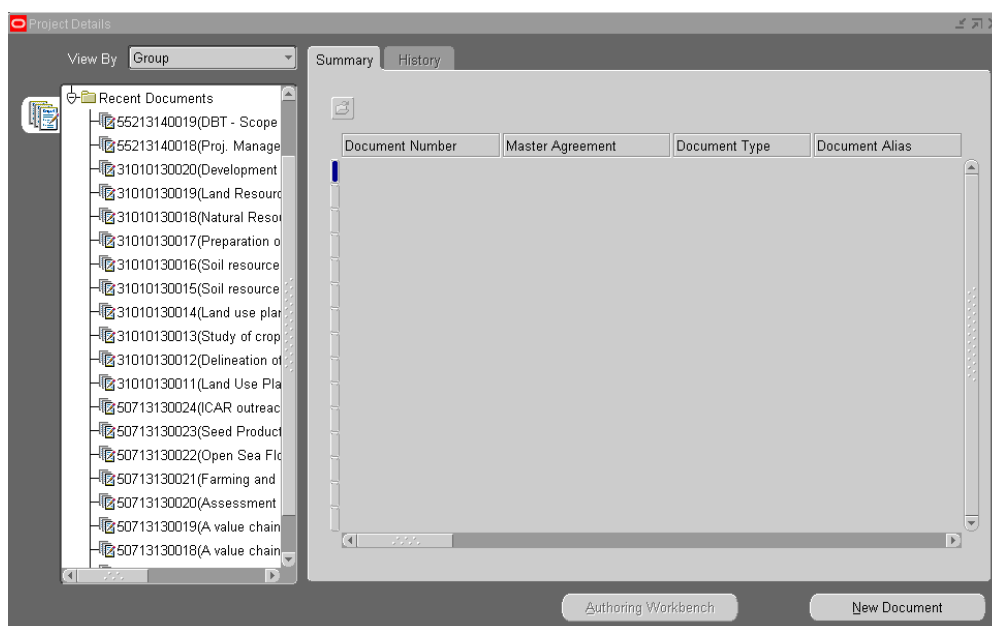


Manual for Creating Externally Funded/Consultancy Project in ICAR ERP

(With least basic amount of information)

Note: Example screenshots taken is of IARI; process remains the same for CMFRI.

1. Go to CMFRI Projects folder in home page, appearing immediately after login and click on “Project Details” from the list appearing on right side.
2. Click on New Document button present at bottom right corner.



3. Select the first option “Create RPPI ” and Click on Next button



4. On the next screen, select type as “CMFRI-RPPI (Externally Funded)” for externally funded projects or select “CMFRI-RPPI (Consultancy)” for Consultancy projects and select project start date in the Start Date field.

Finally click on “Finish” button. A note will appear. Click on OK.

Contract Authoring Wizard, Step 3 of 3: New Document Information

Please enter the following information for your new contract document.

Type: IARI-RPPI (Externally Funded)

NA: Buy

Start Date: 01-OCT-2013

Item Master Org: IMO - Item Master Organization

Institute Name: IARI - Indian Agricultural Research Institute

Buttons: Cancel, < Back, Next >, Finish

A new screen will appear as shown below: Enter Project Title and End Date.

Contract Authoring Workbench (IARI-RPPI (Externally Funded): 15613140013)

Filters: None

15613140013

Project Header | External Members/Member Contribution | Project Items | Project Team Info/Doc Approval

Organizations

Type: IARI-RPPI (Externally Funded)

Number: 15613140013

Project Code: 15613140013

Type of Project: [Empty]

Lead Division: [Empty]

Priority Area: [Empty]

Status: Document Created

Start Date: 01-OCT-2013

End Date: [Empty]

Organizations

Institute: IARI - Indian Agricultural Research Institute

Prime Contract: [Empty]

Project Title: [Empty]

Buttons: Team Concurrence, Change Document Status

Contract Authoring Workbench (IARI-RPPI (Externally Funded): 15613140013)

Filters: None

15613140013

Project Header | External Members/Member Contribution | Project Items | Project Team Info/Doc Approval

Organizations

Type: IARI-RPPI (Externally Funded)

Number: 15613140013

Project Code: 15613140013

Lead Division: []

Priority Area: []

Status: Document Created

Project: []

Type of Project: []

Start Date: 01-OCT-2013

End Date: 30-SEP-2015

Organizations

Institute: IARI - Indian Agricultural Res

Prime Contract: []

Project Title: Creation of an Externally Funded RPPI Document

Team Concurrence | Change Document Status

- Click on the tab “Project Team Info/Doc Approval” in the top right corner. A note will appear – click on OK.

Contract Authoring Workbench (IARI-RPPI (Externally Funded): 15613140013)

Filters: None

15613140013

Project Header | External Members/Member Contribution | Project Items | Project Team Info/Doc Approval

Type	Workflow Name	Process Name
Approve	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]

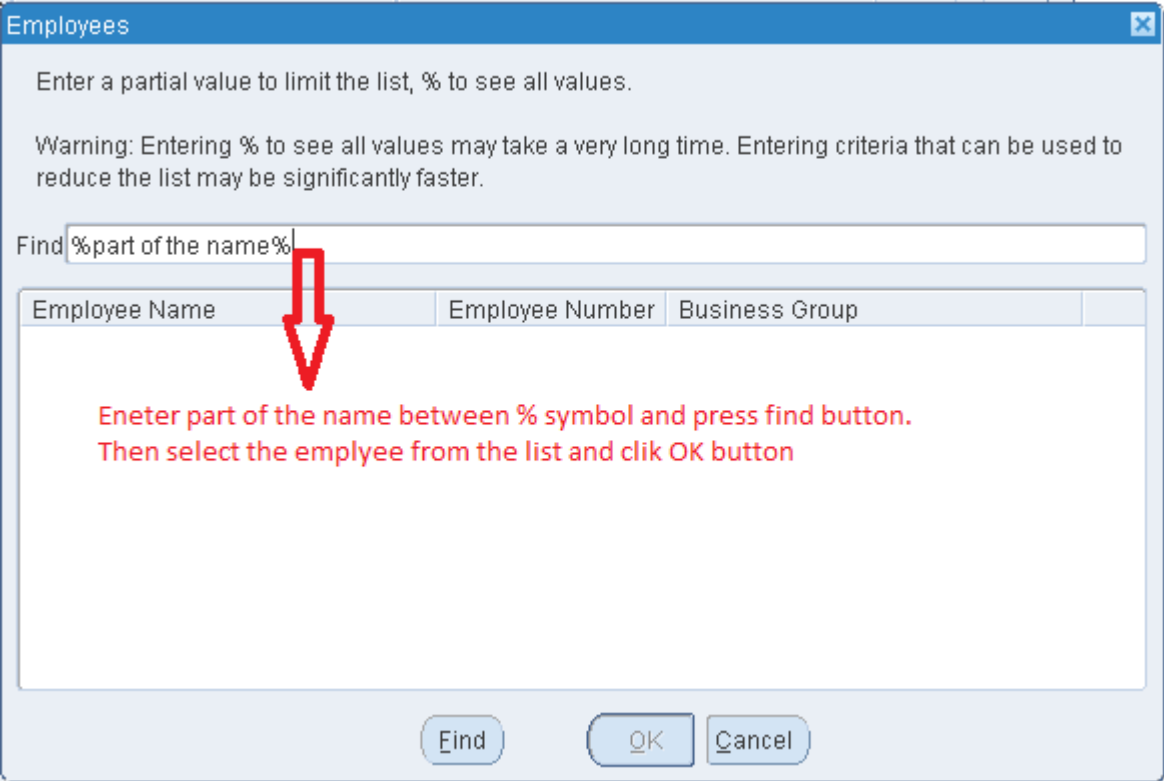
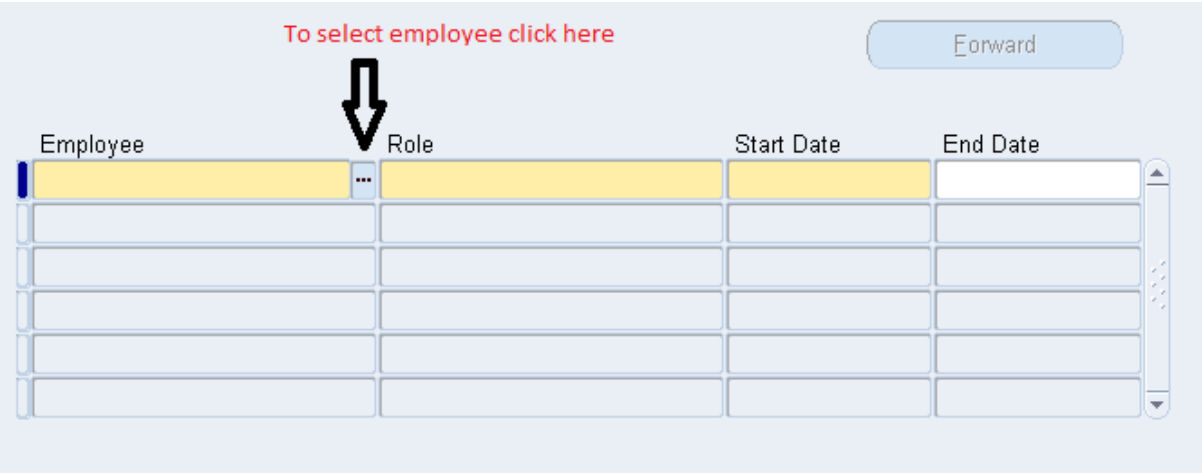
Forward

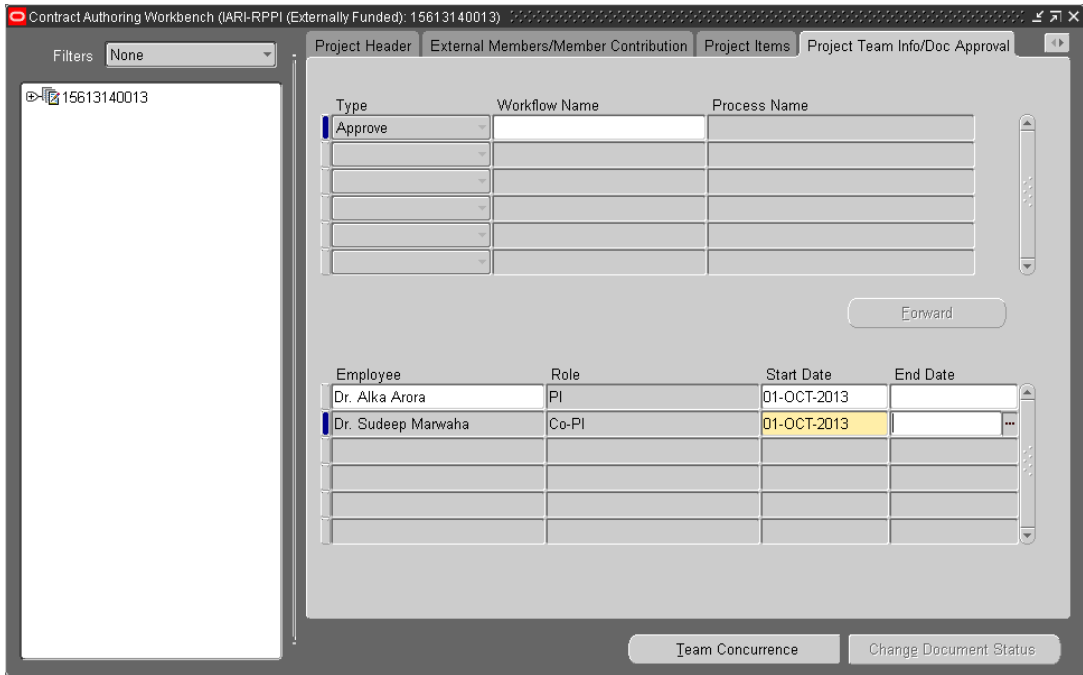
Employee	Role	Start Date	End Date
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]

Team Concurrence | Change Document Status

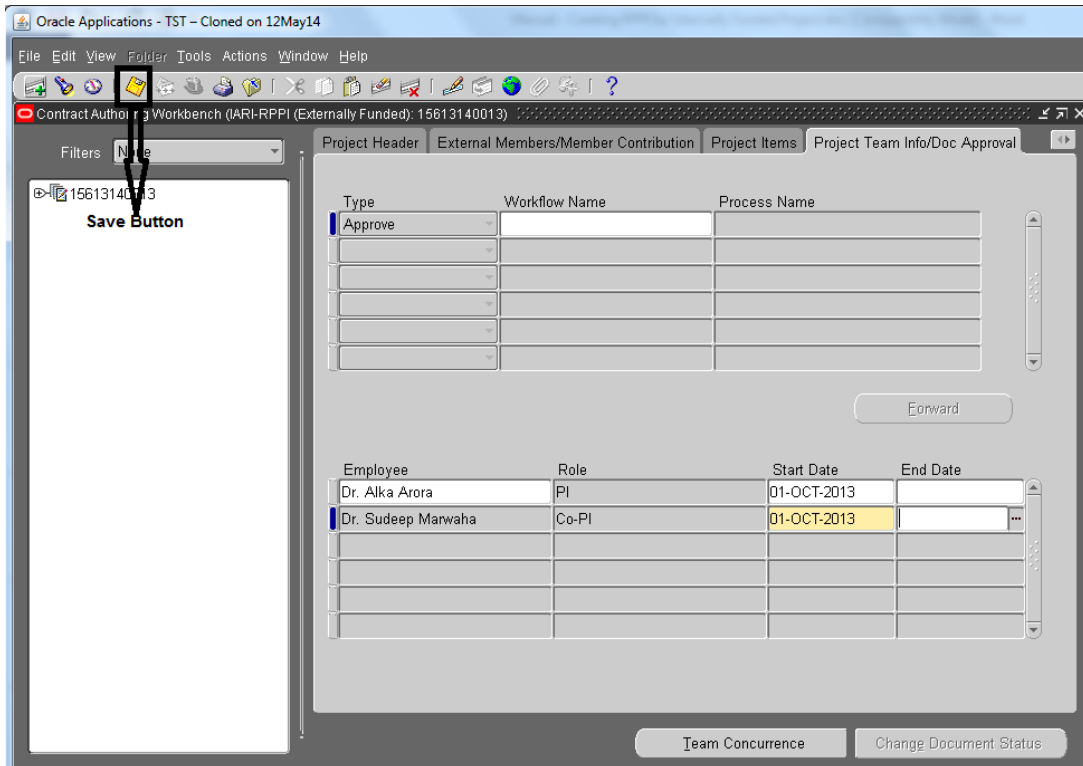
- In the bottom portion, enter the team member details i.e. employee name, role and start date (same as project start date). PI's name and role is mandatory .

Employee name should be selected from the list using the below given procedure





- Finally after this, save your document: press "Ctrl+S" from the keyboard or click on Save button (yellow icon as shown below).



8. Go back to the first tab – “**Project Header tab**”. A note will appear. Click on OK.
With this a seven digit project number will automatically get generated on “Project” field.
9. Click on “Project” field and copy it for future references .

The screenshot displays the 'Contract Authoring Workbench (IARI-RPPI (Externally Funded): 15613140013)' interface. The 'Project Header' tab is active, showing the following details:

- Organizations: Type: IARI-RPPI (Externally Funded)
- Number: 15613140013
- Project Code: 15613140013
- Type of Project: [Empty field]
- Lead Division: [Empty field]
- Priority Area: [Empty field]
- Status: Document Created
- Project: 1001488 (highlighted with a black box)
- Start Date: 01-OCT-2013
- End Date: 30-SEP-2015
- Institute: IARI - Indian Agricultural Res
- Project Title: Creation of an Externally Funded RPPI Document

Buttons at the bottom include 'Team Concurrence' and 'Change Document Status'.

Note: This 7 digit number (1001488 in our example) will be used to enter budget in the ICAR ERP.

Manual for Creating Project Budget in ICAR ERP

Importance of Project Budget

Project information is needed for indent/PO/Bill to get processed. But this information can only be entered if Project Budget has been entered in the system. So until PI enters project budget in ICAR-ERP, project related indent/PO/bill will not get processed.

For entering budget amounts, a set of Major and Minor Expenditure Heads have been proposed by ICAR HQ. All the amounts have to be entered under these major and minor heads. They have been listed below for your ready reference:

Major Expenditure Heads:

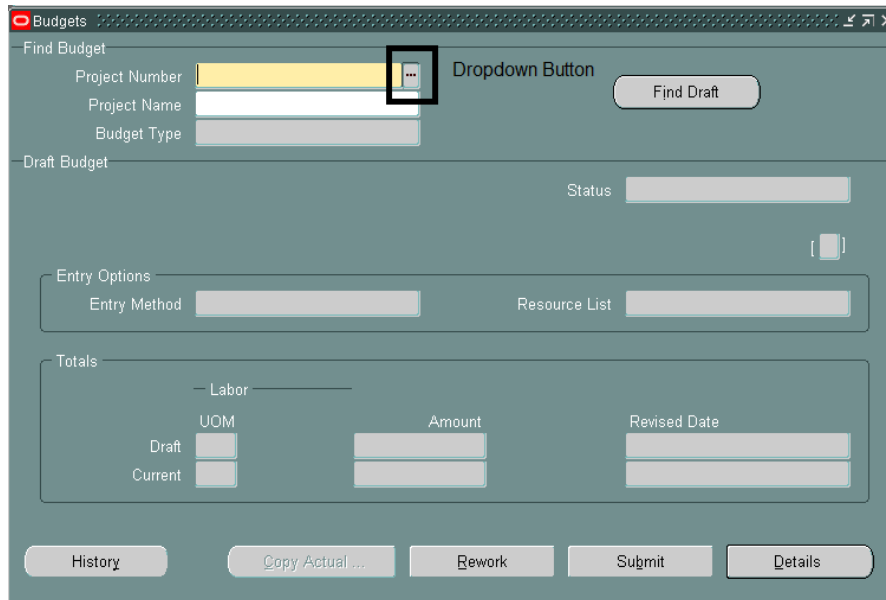
1. Grants – Capital (similar to non recurring expenditures)
2. Grants – General (similar to recurring expenditures)
3. Grants – Salaries

Minor Expenditure Heads:

Grants – Capital	Grants – General	Grants – Salaries
Capital-Others	GAD-Communication	Salaries-Contractual
Equipments	GAD-Infrastructure	Salaries-Establishment Charges
Furniture & Fixtures	GAD-Others(excluding TA)	Salaries-Overtime Allowance
Information Technology	GAD-R&M-Equip,Vehicles & Oth	Salaries-SRFs/RAs
Library Books and Journals	GAD-R&M-Minor Works	Salaries-Scientific
Livestock	GAD-R&M-Office Build.	Salaries-Supporting
Vehicles & Vessels	GAD-R&M-Residential Build.	Salaries-Technical
Works-Building-Minor Works	GME-Guest House Maint.	Salaries-Wages
Works-Building-Office Building	GME-HRD	
Works-Building-Resi. Building	GME-Other Items (Fellow, Sc)	
Works-Land	GME-Other Miscellaneous	
	GME-Publicity&Exhibitions	
	GPO-Pension & Other	
	GRO-Operational Expenses	
	GRO-Research Expenses	
	GTA-Domestic TA/Transfer	
	GTA-Foreign TA	
	Institutional Charges	

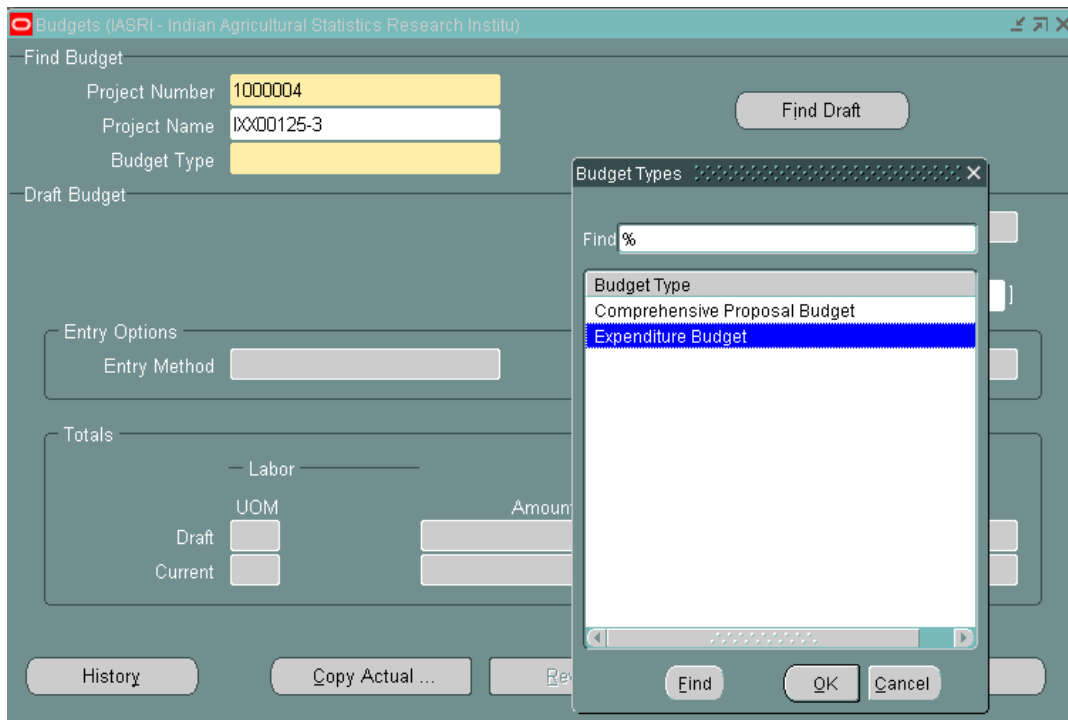
How to Enter Project Budget

1. Login into the ERP Application and click on the “CMFRI Projects” folder
2. Click on “Enter Budget” link from right side list. The following window will open up.



The screenshot shows the 'Budgets' application window. The 'Find Budget' section contains three input fields: 'Project Number' (highlighted in yellow), 'Project Name', and 'Budget Type'. A dropdown button (three dots) is circled in black next to the 'Project Number' field. A 'Find Draft' button is located to the right of the 'Project Name' field. Below this is the 'Draft Budget' section with a 'Status' field. Further down are 'Entry Options' with 'Entry Method' and 'Resource List' fields. At the bottom is a 'Totals' section with a 'Labor' radio button and a table with columns 'UOM', 'Amount', and 'Revised Date'. The table has two rows: 'Draft' and 'Current'. At the very bottom are buttons for 'History', 'Copy Actual ...', 'Rework', 'Submit', and 'Details'.

- a) In the “Project Number” field, enter your project number generated when creating project and click OK button.
3. The next field to be filled is Budget Type. Click on drop down button (...) and select “Expenditure Budget”.



This screenshot shows the same 'Budgets' application window as the previous one, but with the 'Budget Types' dropdown menu open. The 'Project Number' field now contains '1000004', 'Project Name' contains 'IXX00125-3', and 'Budget Type' is highlighted in yellow. The 'Budget Types' dropdown menu is open, showing a search field 'Find %' and a list of budget types: 'Comprehensive Proposal Budget' and 'Expenditure Budget' (highlighted in blue). The 'Find Draft' button is visible to the right of the 'Project Name' field. At the bottom of the dropdown menu are buttons for 'Find', 'OK', and 'Cancel'.

4. A new window will open up. Here enter the following values:
- Fund Type: Select “Deposit Schemes – Domestic “ from the list
 - Scheme Code: Select the name of the scheme under which your project is running or Funding agency name can be selected from the list.
 - Division Name: Select the name of the division under which this project is running.
 - Enter the name of the funding agency and Funding Agency Country
 - Click on OK.

The screenshot displays the 'Budgets (IASRI - Indian Agricultural Statistics Research Institu)' application. The main window is divided into several sections:

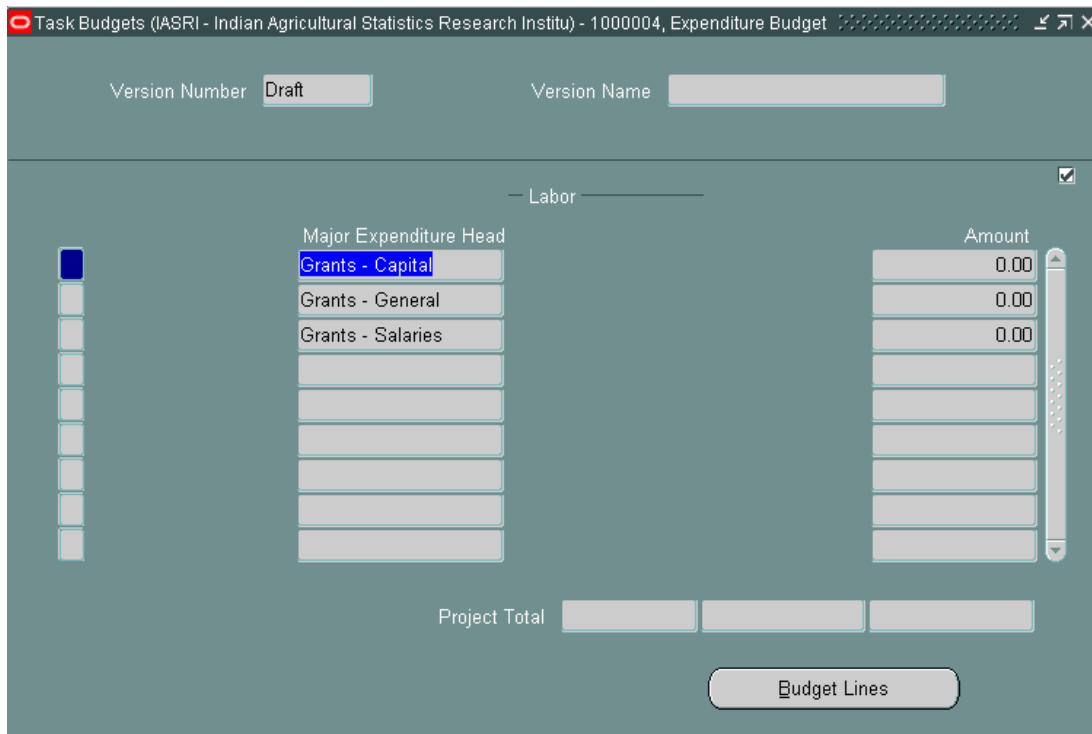
- Find Budget:** Contains input fields for Project Number (1000004), Project Name (XX00125-3), and Budget Type (Expenditure Budget), along with a 'Find Draft' button.
- Draft Budget:** Features a 'Status' dropdown menu currently set to 'Working'.
- Entry Options:** Includes an 'Entry Method' dropdown set to 'ICAR Budget Entry'.
- Totals:** Shows a 'Labor' section with 'UOM' and checkboxes for 'Draft' and 'Current'.

A 'Budget Versions' dialog box is overlaid on the main window, containing the following information:

- Fund Type: 801 (Deposit Schemes - Domestic)
- Scheme Code: 13751 (Scaling up of Water productivity in Agriculture)
- Division Name: 10067 (Division Socio Economics And Extension)
- Funding Agency Name: DBT
- Funding Agency Country: India

The dialog box includes 'OK', 'Cancel', 'Clear', and 'Help' buttons. At the bottom of the main application window, there are buttons for 'History', 'Copy Actual ...', 'Rework', 'Submit', and 'Details'.

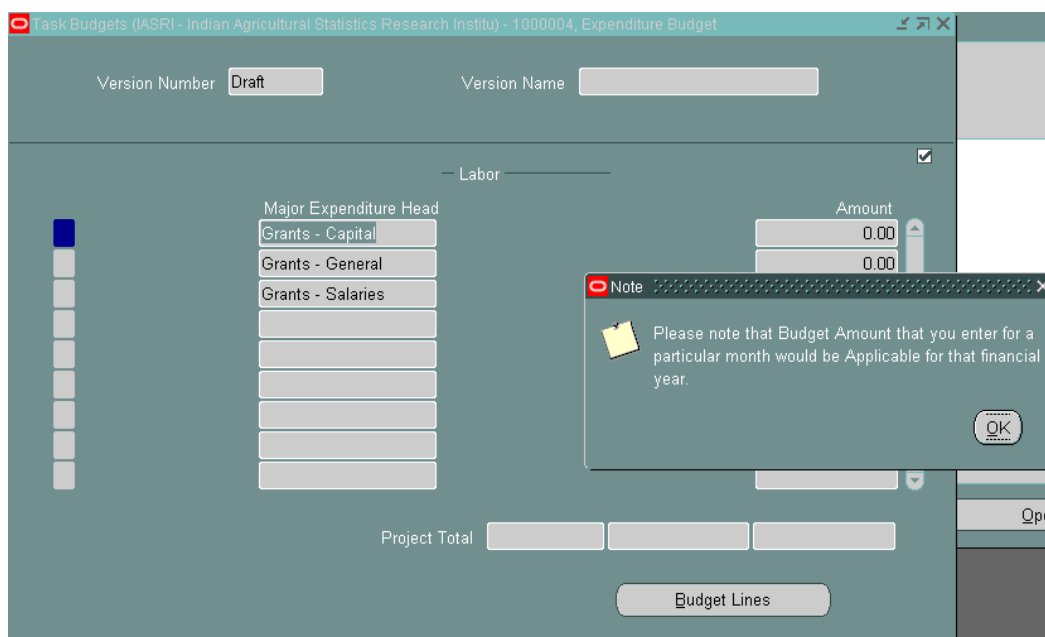
5. Now user needs to allocate budget in the project. To accomplish this, click on “Details” button. A new window will open.



- Here user can see the 3 major expenditure heads. There are separate minor heads under each major head. Process to enter budget in all minor heads will remain the same. In this example, let us allocate under equipments. Equipments will come under Grants – Capital. So select Grants – Capital from the window above and click on Budget Lines Button.

A note will appear which says:

“Please note that Budget Amount that you enter for a particular month would be applicable for that financial year.”

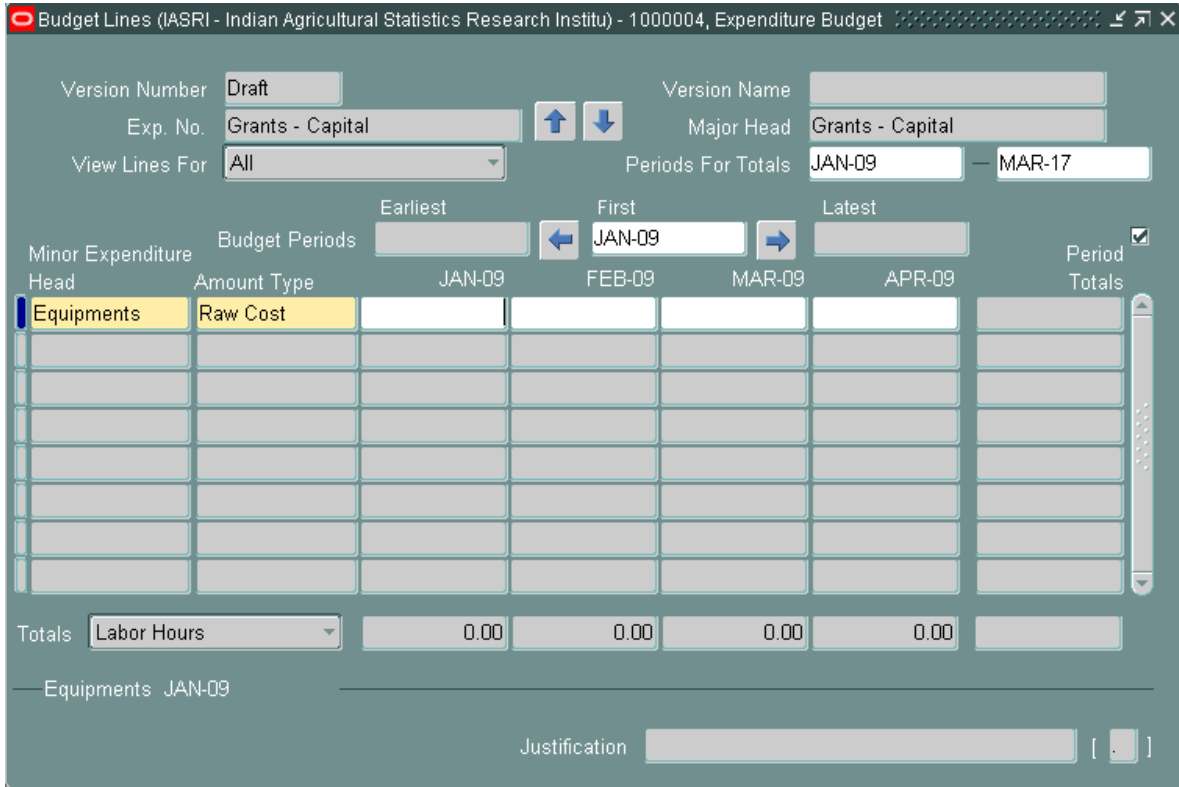


Click on OK. A new window will open.

7. Here enter the following information:

- a. Minor Expenditure Head: Click on the drop-down button and you can see the minor heads under that particular major head (in this example, Grants – Capital).
- b. Select the appropriate minor head and click on OK.
- c. In Amount Type field, Click on the dropdown button. Value “Raw Cost” will come automatically.

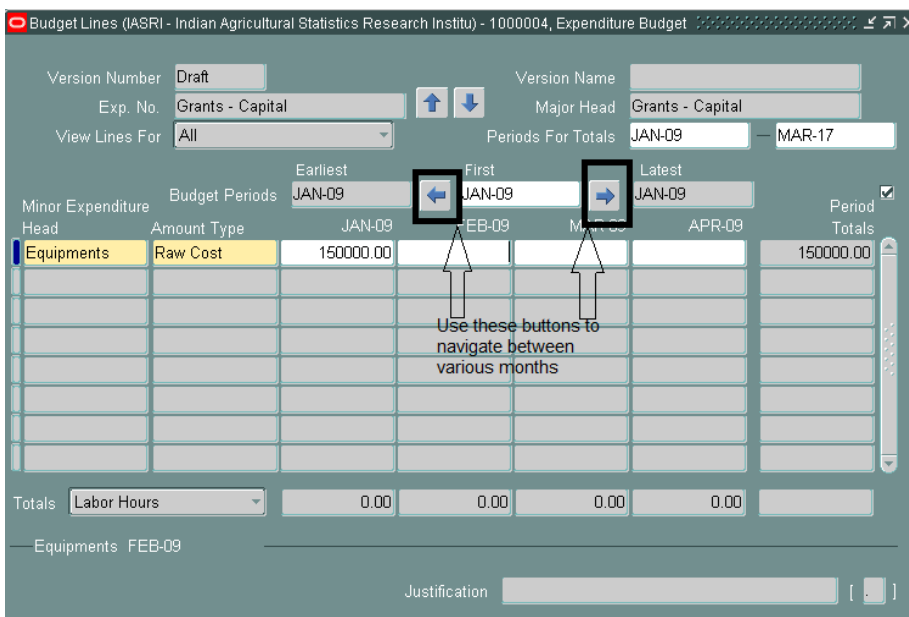
Resource	Resource Name	UOM
Capital-Others	Capital-Others	Currency
Equipments	Equipments	Currency
Furniture & Fixtures	Furniture & Fixtures	Currency
Information Technology	Information Technology	Currency
Library Books and Journals	Library Books and Journals	Currency
Livestock	Livestock	Currency
Vehicles & Vessels	Vehicles & Vessels	Currency
Works-Building-Minor Works	Works-Building-Minor Works	Currency
Works-Building-Office Building	Works-Building-Office Building	Currency
Works-Building-Resi. Building	Works-Building-Resi. Building	Currency
Works-Land	Works-Land	Currency



In the next 4 columns, user can see four months. Remember the note which says “Please note that Budget Amount that you enter for a particular month would be Applicable for that financial year.”

Therefore:

- A. User may enter the budget in any month; he will be able to use that amount for the entire financial year. For example, if user enters amount in November 2012, he/she will be able to use that budget for April 2012-March 2013.
- B. To enter budget in some other month, user can navigate using the arrow buttons on the window.



- Click Save button for Saving the raw: As soon as you save your work, two more lines will be generated with amount type "Currency" and "NA".

These rows are generated automatically by the system and are used for integration with other areas. User needs to enter only the "raw cost". Note: Do not enter the same "minor expenditure head" twice. A minor head can be entered only once on a budget; to enter values for multiple years use the arrow buttons to navigate.

Minor Expenditure Head	Amount Type	JAN-09	FEB-09	MAR-09	APR-09	Period Totals
Equipments	Currency					0.00
Equipments	Raw Cost	150000.00				150000.00
Equipments	NA	150000.00				150000.00
Totals		0.00	0.00	0.00	0.00	0.00

- In a similar fashion, enter budget for other minor heads.
- After the completion of minor heads budget entry, close that window and select another major head like General or Salary to enter fund under its minor heads (if any)
- Close windows and reach the first window which is shown below.

Find Budget

Project Number: 1000004
 Project Name: IX00125-3
 Budget Type: Expenditure Budget

Draft Budget

Status: Working

Entry Options

Entry Method: ICAR Budget Entry
 Resource List: ICAR Resource List

Totals


UOM	Amount	Revised Date
Draft	150000.00	24-JAN-2014 13:18:27
Current		

Buttons: History, Copy Actual ..., Rework, Submit, Details

12. Submit and Baseline: All the information that user enters will get saved in the draft status only. To change the status from draft to final, click on the “submit” button once. The name of button will change to “baseline”. Then click on “baseline” button. And the status is changed to “In progress” and later it will change to “Working”.

Note: Until user submits and baselines the budget, he/she will not be able to create an indent, PO or bill against that project budget.

Updating Budget

- a) Use the same procedure (Steps 1 to 7 of Budget creation) to open Budget lines to be updated
- b) For adding fund under a minor head, select the “Raw Cost” line of that minor head and enter the amount to be added below the any month of that financial year.
- c) To delete a particular minor head, go to three lines of that minor head and use delete button  for remove budget .
- d) **Important:** If expenditure started in a particular Budget Line, that budget should not be deleted.
- e) Save budget lines after changes and close window
- f) **Submit and Baseline:** All the information that user enters will get saved in the draft status only. To change the status from draft to final, click on the “submit” button once. The name of button will change to “baseline”. Then click on “baseline” button. And the status is changed to “in Progress” and later it will change to Working.

Enter Project Budget in ICAR ERP for New Financial Year

Budget Amount that you entered for a particular project would be applicable for that financial year only. Hence it is necessary to carry forward the balance amount to Next Financial year using the following procedure.

1. Login into the ERP Application and click on the “CMFRI Projects” folder
2. Click on “Enter Budget” link from right side list.
3. Now Enter the Project Number and click on Details
4. Select the Budget Major head where you want to Enter the Budget

5. Don't delete the old budget amount you have already entered.

6. Click on Budget Period Forward button and select the April or any of the month current financial year.

Minor Expenditure Head	Amount Type	APR-14	MAY-14	JUN-14	JUL-14	Period Totals
GME-HRD	Currency					0.00
GME-HRD	Raw Cost	105000000.00				105000000.00
GME-HRD	NA	105000000.00				105000000.00
GRO-Operational	Currency					0.00
GRO-Operational	Raw Cost	200000.00				200000.00
GRO-Operational	NA	200000.00				200000.00
GTA-Domestic Tr	Currency					0.00
GTA-Domestic Tr	Raw Cost	100000.00				100000.00
Totals	Labor Hours	0.00	0.00	0.00	0.00	0.00

7. Now enter the actual balance fund available in the field, which is against to the row cost line of the respective minor heads and under a month in that financial year.

8. After entering the budget, Click on save button.

9. Follow the same procedure in each minor head wherever fund has to be carry forwarded

Budget Lines (IASRI - Indian Agricultural Statistics Research Institu) - 1001527, Expenditure Budget

Version Number: Draft | Version Name: | Exp. No.: Grants - General | Major Head: Grants - General | View Lines For: All | Periods For Totals: APR-14 - APR-14

Budget Periods: Earliest APR-14 | First APR-15 | Latest APR-15

Minor Expenditure Head	Amount Type	APR-15	MAY-15	JUN-15	JUL-15	Period Totals
GME-HRD	Currency					0.00
GME-HRD	Raw Cost	17394900.00				105000000.00
GME-HRD	NA					105000000.00
GRO-Operational	Currency					0.00
GRO-Operational	Raw Cost	178250.00				200000.00
GRO-Operational	NA					200000.00
GTA-Domestic Tr	Currency					0.00
GTA-Domestic Tr	Raw Cost	66780				100000.00
Totals Labor Hours		0.00	0.00	0.00	0.00	0.00

Totals: Labor Hours | 0.00 | 0.00 | 0.00 | 0.00 | 0.00

GTA-Domestic TA/Transfer APR-15

Justification: []

9. Once completed close the window after saving, then click on Submit button and then click on baseline. And the status is changed to "in Progress" and later it will change to Working.

Budgets (IASRI - Indian Agricultural Statistics Research Institu)

Find Budget: Project Number: 1001527 | Project Name: OXX01283 | Budget Type: Expenditure Budget | Find Draft

Draft Budget: Status: Working

Entry Options: Entry Method: ICAR Budget Entry | Resource List: ICAR Resource List

Totals: Labor

	UOM	Amount	Revised Date
Draft		339098930.00	19-MAR-2015 12:34:01
Current	Hours	321459000.00	20-OCT-2014 12:15:18

Buttons: History | Copy Actual ... | Rework | Submit | Details