Changing Overhead Rates in Project Codes:

Overhead rates are associated with each Project/Sub/Cost Type combination. Each combination may have a different overhead rate.

The overhead rates for each Project/Sub/Cost Type combination are normally entered when the Project is first established via the New Project form. (Project:Projects then click on the "New Project" button). If the overhead rates should be changed, the changes may also be made via the Project form (Project:Projects then double-click on the project of interest). However, if there are many changes to be made, this can be a tedious process.

Another form exists to rapidly view and edit the overhead rates associated with a Project.

In order to access this form, first open the Projects Display form (Project:Projects). At the top of the form you will see a new menu bar. In the Utilities menu, select the "Edit OH Rates..." option.

A new form will open.

Entering a project code will display all of the Subs, Cost Types and overhead rates associated with this Project. The rates may be changed individually for each Cost Type or they may be changed en masse for each overhead rate.
Changing the overhead rate for a single cost type:

1. Click on the Cost Type of interest. The Cost Type description and the associated rate will be displayed at the top of the form.
2. Enter the new overhead rate in the field at the top of the form. Hit the "Tab" key. You should see the new overhead rate entered in the "New OH Rate" column.
3. Repeat steps 1 & 2 until all of the desired changes have been entered.
4. Click on the "Save Changes" button near the bottom of the form.
GUS will then make the modifications you have requested and then reload the information so that you can confirm that the overhead rates have been changed.

### Changing multiple instances of the same overhead rate:

1. In the "Search & Replace Overhead Rate" area near the top of the form enter the both the old and new overhead rates.
2. Click the "Replace" button.
You should see the changes. 3. Click on the "Save Changes" button near the bottom of the form.
You should now be able to see that the changes have been made.

**Checking Overhead in Budget Transactions:**

Even in the most ideal situation, the time lag which exists between data entry in GUS and the equivalent data entry in the campus accounting systems practically ensures that at least some budget transactions will be entered in GUS at an overhead rate different from that on the GLO. The affected transactions will be any which have been entered into GUS which have not yet appeared on the GLO.

In order to find and correct these transactions, use the "Check OH Rates" form which can be opened either via the "Budget:Check OH Rates" menu or by opening the projects menu (Project:Projects) and then selecting (Utilities:Check OH Rates) from the new menu bar.
Typically you will want to examine transaction overhead by Project Code or Account/Fund. You will also probably be interested in examining reconciled transactions by particular GLO dates. You will probably also wish to examine the overhead rates associated with unreconciled budget transactions.

In the above example, we examine the overhead rates associated with project GSCO2 which were reconciled for a particular fiscal month. In this case we can see that there is a discrepancy between the overhead rates associated with the posted transactions and the current overhead rates in the Project.

For the purposes of this example, we also decide that the overhead rates should be updated. In order to do so, click the "Check OH Rates" button at the top right of the form. GUS will examine all of the transactions currently selected to see which are candidates to be changed.
If you agree, GUS will make the changes, resulting in the following:
Notes:

Overhead rates on single transactions can be changed by double-clicking on the individual transaction itself. You don't need to use the "Check.." and "Update.." buttons.

Individual budget transactions may have their overhead rates changed by users with Budget_Edit authority. The mass changes ("Update… button") require Budget_Mgr authority.

You will probably only need to do this for projects which have had their overhead rates changed and only for the GLO date immediately following the change and for unreconciled transactions associated with that project.

You may also find this form to be generally useful during the monthly reconciliation process to identify discrepancies between overhead charges calculated by GUS and those on the GLO.