BUDGET DECISION TREE
for sponsored awards

START
Retrieve Award Budget Entry file from BFS; confirm total award or amount to be allocated

Step 1
Is reporting by type of expenses (cost categories) required?

Yes
Enter expense category budget rows using BUDSUM accounts

No
Enter Direct/Indirect budget rows using BUDSUM accounts

ADD ACCT
DEFAULTS
1 Project for entire award, 1 Activity for entire award

ADD DEPTID
and CF2(+PI)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

ADD CF1(+task/fab)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

ADD CF1(+fund year)
CREATES
Multiple Activities for the one DEFAULT Project -OR-
Multiple Activities for each Project created in Step 2

MODIFY CF1
created in 3b. Each CF1 value
CREATES both a Project and an Activity

Step 2
Are there allocations to other campus units/PIs?

Yes
Split rows by DeptID and add Primary PI's CF2 and other PIs CF2

No

ADD DEPTID
and CF2(+PI)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

Step 3a
Does reporting require defining a Body of Work?

Yes
Split rows and create a CF1+Attribute that defines the body of work.

No
Split rows and create a CF1+Attribute that defines the body of work.

ADD CF1(+task/fab)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

ADD CF1(+fund year)
CREATES
Multiple Activities for the one DEFAULT Project -OR-
Multiple Activities for each Project created in Step 2

Step 3b
Does reporting require defining a Body of Work?

Yes
Split rows and create a CF1+Attribute that defines the body of work.

No

ADD CF1(+task/fab)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

ADD CF1(+fund year)
CREATES
Multiple Activities for the one DEFAULT Project -OR-
Multiple Activities for each Project created in Step 2

Step 4a
Is there more than one defined funding period with carryforward restrictions or approval required?

Yes
Use or create a CF1+fund year for each period, split each budget row and apply the CF1s.

No

ADD DEPTID
and CF2(+PI)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

ADD CF1(+fund year)
CREATES
Multiple Activities for the one DEFAULT Project -OR-
Multiple Activities for each Project created in Step 2

Step 4b
Is there more than one defined funding period?

Yes
Modify the CF1 values created in 3b to represent both Projects AND fund years, use on every row.

No

ADD FUND,
DEPTID,
and CF1(+cost share)
(cost share rows DO NOT create Project or Activity)

ADD DEPTID
and CF2(+PI)
CREATES
a Project for each row
DEFAULTS
1 Activity for entire award

ADD CF1(+fund year)
CREATES
Multiple Activities for the one DEFAULT Project -OR-
Multiple Activities for each Project created in Step 2

Step 5
Is there a Cost Share requirement?

Yes
Enter cost share rows using cost share Fund, DeptID, and CGA defined Cost Share CF1.

No

END
Submit Budget via Award Budget Entry

Last updated: 07.06.2017