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Navigation
To begin, navigate to the Award Budget Entry. The menu path is as follows:

OR, enter via the RA Grants WorkCenter>Award Setup and Mainteneance>Award Budget Entry
More Navigation Options

OR, use the “Budget Allocations Needed” query under RA Grants Workcenter Reports/Queries. A Pivot Grid will open with filter options sorted into Award Mod Budget, New Award Budget and STIP budget. Click the ‘count’ hyperlink to see the outstanding items with the option to enter an individual budget from the query.
New Award Budget Set Up

1. Click ‘Add a New Value’.

2. Enter the Business Unit. Enter ‘Budget ID’ (Award, your two initials, date – XXXXXXYYDD/DD/DD, eg., 041146LG51017, if you are entering more than one budget activity – new award and award mod – on the same date you will need to add a number between your two initials. For instance, 041146L1G51017 and 041146L2G51017). Then enter ‘Award ID’ (Use the eyeglass to find the award ID given the fund number.) and from the dropdown menu select ‘New Award Budget’. Next click on the eyeglass next to Interface ID Field.
3. Select the Interface ID number.

4. Click Add. Similar to financial journals, you will be taken to the Header tab. It will auto populate with award information. The effective date will pre-populate with the first of the current month. If you are processing a new budget in the first couple days of the month, and will need to use the new chartstring in
5. Click on the Lines tab. The awarded funds will prepopulate in the first line. Note that SPO award feeds are rounded up to the nearest dollar. The budget submission will match the rounded amount.
6. Click on the + sign to create rows in order to distribute the Sponsor Funding Amount between BUDSUM Expense Account Codes and Indirect Costs. Then select Edit from the drop down menu and Process.

7. After the balance of debits to credits is confirmed to equal zero and Edit Status is Valid, submit the budget.
8. Once submitted, you can follow the workflow in the Approvals tab. It will be in the Analyst’s queue and then in the Supervisor’s.

New Award Budget Set Up with Cost Share
1. Follow Steps 1 through 6 of New Award Set Up. In the Lines tab, the Cost Share Funding Amount will be listed below Sponsor Funding Amount. It will also be already set up under 58000 in the obligated amounts by category as either Institutional, Third Party or Grant2Grant.
2. An example of the distribution to the appropriate account codes for the sponsor funding amount and the cost share commitments is below.

3. Follow Steps 6 through 8 of New Award Budget Set Up instructions.

Campus funds entered for cost share will automatically be mapped with a blank program code (as well as the combination entered in the Award Budget Set Up) to allow Operating Transfers by contributing units.

**Award Modification Budget Entry**

1. Enter the Business Unit. Enter ‘Budget ID’ (see naming convention p. 3 step 2), enter ‘Award ID’ (Use the eyeglass to find the award ID given the fund number.), and from the dropdown menu select ‘Award Mod Budget’. Next click on the eyeglass next to Interface ID.
2. If there is more than one modification pending, then they will both be available but will need to be completed separately.

3. Select the Interface ID and click Add.
4. The associated Sponsored Funding change in the award modification will appear in the Sponsor Funding Amount on the Header.

5. The amount of funding change will also appear in the Lines tab as the top control amount to distribute against in your BUDSUM account allocation distribution. Add as many rows as required with the + icon.
6. When all lines have been entered, select Edit from the drop down menu and Process. After the Edit process confirms the lines are valid, then the Edit Status will be updated to Valid.

7. Select Submit from the drop down menu and Process.
8. The Budget Status will reflect that it was successful when it displays ‘Submitted’.

**Budget Reallocations**

1. For an existing award, when you want to change the current budget allocations, complete a ‘Budget Reallocation’. Enter the Business Unit. Enter ‘Budget ID’ (see naming convention p. 3 step 2), enter ‘Award ID’ (Use the eyeglass to find the award ID given the fund number.), and from the dropdown menu select ‘Budget Reallocation’. Because a ‘Budget Reallocation’ is not the result of a notification from SPO, there is no interface id.
2. Select Add.

![Award Budget Entry](image)

3. Since there is no interface id, the Header and Lines tabs will have zeroes in the amount fields because we are not changing the overall dollar amount.

![Budget Entry Example](image)
4. Select the Lines tab and enter the reduction of budget as a negative and the increase of budget as a positive number.

![Budget Entry Process Image](image)

5. You will not be able to Submit if you are reallocating an amount from a chartstring, including account, which does not have sufficient budget available. An error message will be received.

A new feature in the far right margin of each budget row is **PROJECTED BALANCE**. After clicking SAVE (you will be prompted if you forget), select **PROJECTED BALANCE** and it will open a display that will show the amount of budget available and the resulting balance with the effect of the entry you have just entered. In this case, the chartstring combination had a budget of $53,901 and if a $5,600 reduction is processed the budget will become $48,301.

![Projected Balance Image](image)
6. After completing the budget reallocation, select Edit from the drop down menu and Process.

7. Once the validation checks have processed, the Edit Status will show Valid and you will be able to select Submit from the drop down menu and Process.

**STIP Budget Allocation**

For awards that require interest to be applied to the project funding STIP funding will now be automatically applied to 58000 on a monthly basis under the STIP Revenue Allocation program. Interface IDs will now be captured in ‘Budget Allocations Needed’. Budget entry can be done by the RA or department if the automated allocation does not use adequate chartfields. Or you may choose to leave STIP where it sits and let pending interface IDs go unprocessed so long as a blank chartfield2 is not obscuring available funds from the PI in PI Portfolio.

1. Enter the Business Unit. Enter ‘Budget ID’ (see naming convention p. 3 step 2) and enter ‘Award ID’ (Use the eyeglass to find the award ID given the fund number.). Then select ‘STIP Budget’ from the dropdown menu. Next click on the eyeglass next to Interface ID.
2. Select the Interface ID. For STIP there will be one ID for each month of interest.
3. Click Add.

4. The Award Information section of the Header and Lines tabs will display the amount of the STIP interest recorded in BUDSUM account 58000 in need of distribution.
5. Use the + icon to add as many lines as required to distribute the STIP.

6. Once the lines have been entered, perform the Edit/Process check and if the Edit Status is Valid, then Submit/Process.
Chartfield Mapping

1. Enter the Business Unit. Enter ‘Budget ID’ (see naming convention p. 3 step 2), enter ‘Award ID’ (Use the eyeglass to find the award ID given the fund number.), and from the dropdown menu select ‘Chartfield Mapping’. There will not be an Interface ID.

2. Enter the five field validation you are requesting for the award in the rows on the Lines tab and select Edit/Process.

Note: A warning may be generated if an allocation is to a Dept ID which is not the award’s Home Dept, however it will not prohibit you from submitting it.