



Creating & Amending Award Budgets

Once the Post-Award Team has approved an award, individuals with the Workday role of Grant Manager will receive an action item in My Tasks. Using the award link in their tasks, Grant Managers can create budgets for awards in Workday. Grant Managers must also have the workday role of **Grant Budget Specialist** to create and amend budgets.

Follow the steps below to create an award budget.

CREATE AWARD BUDGET

Selecting the award number linked in your Tasks will take you to the **award overview** screen:

1. Select the **Budget tab**.
2. Select **Maintain Budget**.

Note: When budgeting for multiple grants, the “Maintain Budget” task would need to be completed for each grant (individually) before submitting the entire budget.

3. **Search or filter** the appropriate Grant in the **Organizing Dimension** field.
4. Select **OK**.
5. In the **Budget Lines**, use the prompt icon to filter the **Ledger Account/Summary** and **Object Class** fields.
6. Input the appropriate **Amount(s)** for the **Year(s)** of the award you are budgeting for.
7. Select the **addition (+) symbol** to add additional budget lines as needed.
8. Once all necessary budget lines have been completed, select **OK**.
9. From the Award Overview screen, review all **Budget Information** and added **Budget Lines**, then select **Done**.

Note: Selecting ‘Done’ does not submit the budget. After selecting ‘Done’ you will be taken back to the Award screen where you must Submit the budget from the ‘Budget’ tab.

10. Select the **Budget tab**.
11. Select **Submit Budget**.
12. Review the **Budget Template** and select **OK**.

Note: This kicks off the award business process. The award budget has gone to the Post-Award Finance team for Approval.

Overview Award Lines **1** Budget Award Tasks

Details

Budget Template zzDNU_Award Budget Structure : AWD000107: Investigating the role of 08/01/2017 (version 0)

Budget AWD000107: Investigating the role of the JAK/STAT3 Pathway in 08/0

Edit Budget Check Enabled No

Edit Budget Check Options **2** Maintain Budget Submit Budget

3 Organizing Dimension * x GR005492 4043790291 KHL138291-05:INVESTIGATING THE ROLE OF THE JAK/STAT3 PATH

Ledger Account/Summary

Worktags

4 OK Cancel

Budget Lines Attachments

Order	*Ledger Account/Summary	*Object Class	Year 1 Annual	Year 2 Annual	Year 3 Annual
+ -	x Corporate: Award Expenses for Budget	x Sponsored Programs: SALARIES	500,000	0.00	
+ -	x Corporate: Award Expenses for Budget	x Sponsored Programs: FRINGE_BENEFITS	0.00	250.00	

5 **6** **7** **8** OK Cancel

*Ledger Account/Summary	*Object Class	Year 1 Annual	Year 2 Annual	Year 3 Annual
Corporate: Award Expenses for Budget	Sponsored Programs: SALARIES	500,000	0.00	
Corporate: Award Expenses for Budget	Sponsored Programs: FRINGE_BENEFITS	0.00	250.00	

9 Done

Overview Award Lines **10** Budget Award Tasks

Details

Budget Template zzDNU_Award Budget Structure : AWD000107: Investigating th 08/01/2017 (version 0)

Budget AWD000107: Investigating the role of the JAK/STAT3 Pathway

Edit Budget Check Enabled No

Edit Budget Check Options Maintain Budget **11** Submit Budget **12** OK



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AMEND AWARD BUDGET

Searching the award number from the Workday Home screen will take you to the **award overview** screen:

1. Select the **Budget tab**.
2. Select the **Related Actions icon** next to the award budget hyperlink.
3. From the Related Actions menu, select the **Budget tab**, and then **Create Amendment**.
4. Ensure the required **Budget Structure, Company,** and **Budget Name** fields have pre-populated with the correct information. Select **OK**.
5. Input or filter the appropriate **Amendment Date, Description,** and **Amendment Type** required fields.
6. In the **Budget Amendment Lines**, select the **prompt icon** to filter the **Period, Ledger Account/Summary, Object Class, Additional Worktags,** and **Amount Change** fields.

Note: Only the Grant(s) associated with the award will appear as an 'Additional Worktag' option.

7. Select the **addition (+) symbol** to add additional budget amendment lines as needed.
8. Once all necessary budget amendment lines have been completed, select **Submit**.

Note: The Budget Amendment is routed to the Post-Award team for review and approval.

The screenshot illustrates the 'AMEND AWARD BUDGET' process in Workday. It shows the 'Budget' tab selected in the 'Award Overview' screen. A 'Details' section displays the 'Budget Template' and 'Budget' information. A 'Create Budget Amendment from Budget' dialog box is open, showing pre-populated fields for 'Budget Structure', 'Company', and 'Budget Name'. Below this, the 'Amendment Date', 'Description', and 'Amendment Type' fields are visible. At the bottom, the 'Budget Amendment Lines' table shows one line with columns for Order, Period, Ledger Account/Summary, Object Class, and Amount Change. The 'Submit', 'Save for Later', and 'Cancel' buttons are at the bottom right.

QUESTIONS?

Please email BusinessEducation@vumc.org.