

# Budget Tool – Orientation & Budget Summary

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## General Notes

This document is intended to give an orientation to the InfoEd Budget Tool. Capitalized words indicate an object in InfoEd. Italicized words indicate a field or parameter in that object or additional reference documentation. Bold is used for emphasis in lists.

### Common Objects or Terms in InfoEd

**User:** A person who can log in and use InfoEd

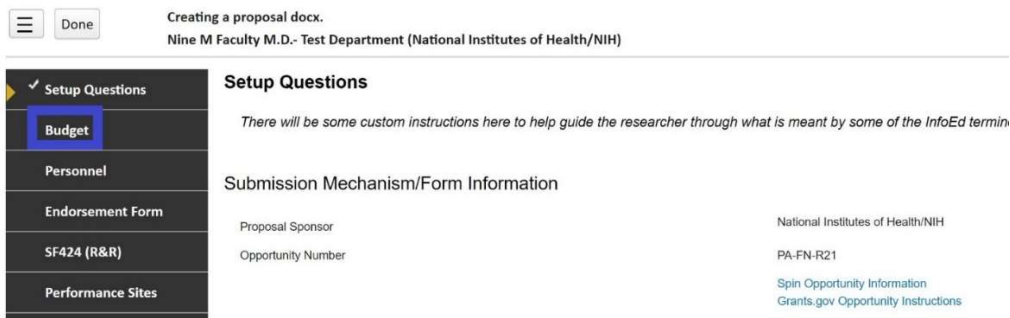
**Portal:** The landing page that is first seen after login, a.k.a. the Home page

**Record:** A generic term for an object in the system such as a Proposal or a COI Disclosure

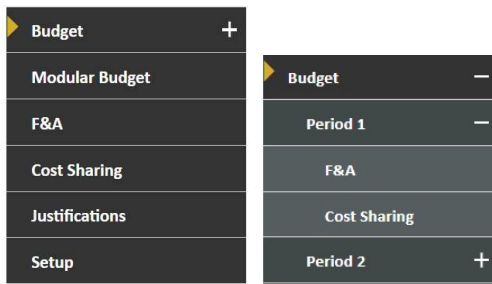
**Widget:** A generic term for the white text boxes on the portal screen (a wide variety of widgets are available in InfoEd with additional widgets developed as needed)

## Getting to the Budget Tool

The Budget tab becomes available in the left menu of the Proposal record after the Setup Questions screen has been completed. Clicking on Budget will open the tool in a new window.



## Budget Tool Left Navigation Menu



**Budget, Modular Budget, F&A, Cost Sharing** – These screens are used for all budget data entry. Modular budget is available only when selected on the Setup Questions screen on the Proposal. See *Budget Tool (07) – Modular Budget* for more information.

**Justifications** – Budget Justification(s) can be uploaded here. See *Budget Tool (06) – Justifications* for more information.

**Setup** – The Setup tab controls budget behavior and is used to add or delete budget periods, to change project and/or budget period dates, and to change the PI if needed.

## Budget Menu Item

This is the primary budget screen where all types of line items are entered and edited. Clicking the “+” icon on the menu expands the budget item into sub menus for each budget period (see screen shots above). Each period can be expanded further into F&A and Cost Sharing sub menu items. Users are advised to avoid the period-specific sub menus; in most cases all functions on the sub menus can be accessed from the main Budget screen.

## Top Section

### Budget Summary



**Project Period:** Displays the project period from the initial Create screen. The project period can be edited in the Setup Menu Item.

**Source View:** This dropdown contains the individual budget sources and the overall “Project” view as choices. The budget is in Sponsor view by default.

- Project: Shows budgets from all the sources.
- Sponsor: Shows only the budget to be requested from the sponsor.
- Institution: Shows only the budget to be requested from the institution.
- Unallowable: Shows only the budget disallowed by the sponsor. Unallowable is used for budget lines not eligible for charging to the sponsor or counted as cost share.
- Additional sources will appear in the *Source View* List as they are added.

The *Source View* drop down maintains its last chosen value across the Budget screens that it appears on. Navigating between menu items does not re-set the source view. The *Source View* drop down displays an alert icon to indicate when cost sharing is in use. When cost sharing is in use and “Project” is selected as the *Source View*, many fields are not editable, and a warning is displayed at the top of the screen.

**Rollup Subproject:** Allows user to see total budget for multi-project proposals (Rollup) or to view each component separately (Not Rollup).

**Proposal Structure:** Displays the structure of the proposal as a whole, including the main request (or “Prime”) together with any subawards and subprojects.

**Import/Export:** Gives user opportunity to import or export budget (pdf or excel formats).

**Build PDF:** Generate the appropriate budget based on the sponsor template in PDF form for review.

**Complete Budget:** Clicking this button has two main purposes. Note: Until the proposal is submitted for endorsement, completion can be toggled off, reopening the budget for further changes.

- 1) Flags completion by changing the page (and all other budget pages) from Edit to View Mode and displaying a checkmark in the left navigation menu of the Proposal
- 2) “Publishes” (pushes) the budget to the corresponding “requested” section of Proposal Tracking record.

## Budget Summary Section

Year/Period	Periods [hide]		Sponsor [show]	Cost Sharing [show]	Project [hide]		
	Start	End	Total	Total	Directs	F&A	Total
1	15-May-2024	14-May-2025	\$ 152,840	\$ 26,643	\$ 173,572	\$ 5,911	\$ 179,483
2	15-May-2025	14-May-2026	137,097	26,643	158,107	5,633	163,740
3	15-May-2026	14-May-2027	111,973	26,643	133,496	5,120	138,616
			\$ 401,911	\$ 79,929	\$ 465,175	\$ 16,664	\$ 481,840

**Periods:** This section displays the budget detail for each year and increment.

- Year/Period: Displays the year/period numbered chronologically.
- Start & End: Displays the start and end dates for each year/period.

Periods start default in “show” mode; when toggled to “hide,” only the numbered year/period is visible.

**Sponsor:** Displays the total requested to the sponsor. When toggled to “show,” the columns expand to display direct and indirect costs with subawards requested to sponsor.

**Cost Sharing:** Displays the total cost sharing for the project. When toggled to “show,” the columns expand to display total institution and unallowable cost share and F&A collected on the allowable cost share.

**Project:** Project starts out in “show” mode and displays the project directs costs and F&A costs and the total together. When toggled to “hide,” only the total cost is shown.

## Personnel Line Item Section – See Budget Tool (01A) – Named Personnel and Budget Tool (01B) - Unnamed Personnel

Initially the PI will be the only Personnel listed. Personnel who will be paid from the award need to be added to the Budget in this section. Refer to *Budget Tool (01A) – Named Personnel* and *Budget Tool (01B) – Unnamed Personnel* for more information.

## Non-Personnel Line Item Section – See Budget Tool (02) – Non-Personnel Line Items

Non-Personnel line items include things like supplies, equipment, and travel as well as tuition, fees, and insurance for supported grad students. Refer to *Budget Tool (02) – Non-Personnel Items* for more information

## Subaward Section – See Budget Tool (03) – Subcontracts

Subawards can be added manually or imported using the standard R&R Budget form. Refer to *Budget Tool (03) – Subcontracts* for more information

## Subproject Section – See Budget Tool (09) – Subprojects

Subprojects are used only in very specific circumstances. See additional documentation for appropriate usage.

## Budget Period-Specific SubMenu Items

Each period of the Budget can be viewed separately from the others by using the Period-Specific SubMenus. It presents a slightly different format, but many of the functions from the main Budget Menu Item are available here as well. It is recommended to make changes from the main Budget Menu Item rather than from the Budget Period-Specific SubMenus.

## Budget Period-Specific SubMenu – Personnel Costs Section

Requested Period 1

[Edit Mode](#)

Rollup Subprojects

Personnel Costs [Hide] Person Months

	NAME	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
<b>Key Personnel</b>									
<input type="button" value="Detail"/>	PI, John	PD/PI	124,372	2.00	0.00	0.00	Cost Sharing 20,729	Cost Sharing Faculty/Admin... 6,633	\$ 27,362
<input type="button" value="Detail"/>	Coinvestigator, Joe	Co-Investigator	92,843	0.00	1.00	3.00	Cost Sharing 41,956	Cost Sharing Faculty/Admin... 13,426	55,382 <input type="button" value="Remove"/>
<b>Non-Key Personnel</b>									
<input type="button" value="Detail"/>	Wisnieski, Stacey	Consultant	57,567	1.00	0.00	0.00	Cost Sharing 4,797	Cost Sharing Faculty/Admin... 1,535	6,332 <input type="button" value="Remove"/>
<input type="button" value="Detail"/>	TBD, Personnel 01	Graduate Student	0	12.00	0.00	0.00	Cost Sharing 28,000	Cost Sharing Students 560	28,560 <input type="button" value="Remove"/>
<b>Total</b>							<b>\$ 95,482</b>	<b>\$ 22,154</b>	<b>\$ 117,636</b>

Begin typing to select Personnel Name...  -- Select Type --  -- Select Role --

- For key personnel or named non-key personnel, effort for the selected period can be edited here.
- For TBD personnel, effort and salary can be edited here.
- Clicking the “Detail” button to the left of the person’s name brings up the standard Detail screen with access to all periods, appointment, and cost sharing just as on the main Budget Menu Item screen.
- Clicking the “Cost Sharing” button to the left of the *Salary* or *Fringe* fields brings up a limited cost share screen that allows changes for the selected period only. Note: *Salary* and *Fringe* cost share can be edited SEPARATELY from this screen, which is NOT desirable or typical.
- Adding a person from this screen also brings up the normal Detail screen and adds them to all periods.
- Clicking the “Delete” button to the far right of the personnel line will remove that person from the specific period but DOES NOT remove them from other periods. **This is important where Key Personnel will have zero effort in certain budget periods as zero effort is not allowed.**

## Budget Period-Specific SubMenu – Non-Personnel Costs Section

Non-Personnel Costs [Hide]

	CATEGORY	OBJECT CODE	DESCRIPTION	TOTAL
<input type="button" value="Detail"/>	Supplies 72402 - Research Supplies	72402 - Research Supplies	Fancy paper and pens	Cost Sharing 5,000 <input type="button" value="Delete"/>
<input type="button" value="Detail"/>	Travel-Domestic 73103 - Travel - Employee - Domestic	73103 - Travel - Employee - Domestic	Conference	Cost Sharing 5,000 <input type="button" value="Delete"/>
<b>Total</b>				<b>\$ 10,000</b>

Select Budget Category  Select Object Code

- Total Amount for the period can be edited here and affects this period ONLY.
- Object Code for the budget line can be edited here and affects this period ONLY.
- Clicking the “Detail” button to the left of the Category Name brings up the standard Detail screen with access to all periods and cost sharing just as on the main Budget Menu Item screen.
- Clicking the “Cost Sharing” button to the left of the *Total* field brings up a limited cost share screen that allows changes for the selected period only.
- Clicking the “Delete” button to the far right of the non-personnel line will remove that budget line from the specific period but DOES NOT remove the line item from other periods.