ResearchUVA Powered by Huron Training
Budget Development
https://mpclkuvastage.huronclick.com/GrantsTest

Exercise 1: Copy a Funding Proposal

ⓘ *We will create a copy of our Funding Proposal from the first training session and update the budget on the Funding Proposal copy in today's session. **If you already created copies at the end of the first session, skip to Exercise 2***

ⓘ ***If you do not have a funding proposal handy,** you may copy FP00000236 "RUVA PBH Budget Demo#1 COPY for DEMO"*

☐ Log in as yourself using your UVA username and password

☐ Find the copy the Funding Proposal you created in the first training session

☐ Click **Grants** >> **Funding Proposal** >> **Proposals Tab** to find the copy

☐ Click the **Name of the Funding Proposal** to open it

☐ From the Funding Proposal Workspace, click the **Copy** activity and then click **OK** in the Copy window

☐ Click on the **History** tab and then click the **Funding Proposal Name** to open the copy

Exercise 2: Complete the Sponsor Proposal Budget

☐ From the Proposal Workspace, click the **Budgets** tab and then click the **Budget Name** to navigate to the Sponsor Budget Workspace

☐ Click **Edit Budget** to open the Sponsor Budget SmartForm

☐ Complete the Sponsor Budget SmartForm pages, additional completion notes below

General Budget Information Page

☐ Enter questions as most appropriate to the budgets you typically prepare and click **Continue**

ⓘ *Remember to use the available help text for more instructions about a particular question. Click the **help text icon**

❓ *(or question mark icon) to access help text*

Personnel Cost Definition Page

☐ Click **Import Proposal Personnel**. This will import personnel information you entered in the Funding Proposal SmartForm

☐ Click **Update** for each person listed on the budget, update default information if needed, and enter the appropriate Workday Personnel Budget Category (this is a **required field** and must be entered for all personnel). When done, click **Continue**

ⓘ *The Add button allows you to add more personnel to the budget form, as necessary*

Personnel Costs Page

☐ Click **Show Effort**

☐ Enter the planned percentages of effort and salary on the project

☐ Modify the defaults for the Fringe Benefit rate and the base salary if appropriate

ⓘ ***To edit the base salary or Workday category for a person***, *click their name at the left, and edit the appropriate field in the form that appears*

☐ Click **the small arrows at the right of a budget period column** to replicate values in subsequent periods

☐ Click **Show Totals** to update the figures in the budget tables. When done, click **Continue**

Travel Cost Definition and Travel Cost Pages and Trainee Cost Definition and Trainee Costs Pages

☐ Do not add costs to these pages for today's exercise, leave them blank and click **Continue** to navigate forward

General Cost Definition Page

☐ Click **Add** and enter two general cost line items that are most appropriate to the budgets you typically prepare. Enter one line item with inflation applied and the other without inflation applied so you can see the differences on the next page. Include both line items in indirect cost calculations. When done, click **Continue**

ⓘ *The instructions for this form page are flexible to allow session participants to enter costs that most reflect the types of budgets they develop in their departments. Please ask a breakout room facilitator if you have questions about how you would enter costs for the budgets you typically prepare*

General Costs

ⓘ *Notice that the costs we entered as Yes to the inflation question are entered for every budget period with the inflation percentage specified on the General Budget Information page (note: costs will be uniform across periods if a 0% inflation rate is used). These costs are not editable on this page*

ⓘ *Notice that the costs we entered as No to the inflation question are entered in every budget period without inflation applied. These costs are editable by period*

☐ Click **Continue**

F&A Cost Overrides Page

ⓘ *There is no data entry on this page*

☐ Click **Continue**

Attachments Page

ⓘ *We will not include attachments on the Budget SmartForm. All attachments should be uploaded on the Funding Proposal Workspace (or SF424, if applicable)*

☐ Click **Finish** to return to the Sponsor Budget Workspace

Exercise 3: Create a Subaward Budget

☐ Update the sample subaward budget so the number of budget periods and budget period dates align with your sponsor budget

ⓘ *You must edit the sample R&R subaward budget attachment to ensure the number of budget periods and budget period dates align with your sponsor budget.* **Failure to complete this step will cause errors on this exercise**

Subaward Budget Information Page

☐ Click **Create Subaward** and enter the following mandatory information on the Subaward Budget Information page
1. **Title**: Enter a title
2. **Organization**: University of Florida (this is the organization listed on the sample upload file)
3. **Principal Investigator:** Leave as defaulted
4. **Subawardee PI:** click the **ellipses** (three dots) and complete the mandatory fields on the slide-in window
5. **Subaward budget detail level:** for training purposes, select SF424 Subaward Import
6. **Include in consolidated budgets?:** Yes
7. **Subaward indirect contribution limit:** leave as default ($25,000)

☐ Click **Continue** when done

SF424 Subaward Import Page

☐ Click **Choose File** to attach your updated file and click **Continue**

Attachments Page

ⓘ *We will not include attachments on the Budget SmartForm. All attachments should be uploaded on the Funding Proposal Workspace (or SF424, if applicable)*

☐ Click **Finish** to return to the Subaward Budget Workspace

ⓘ *Note: the subaward budget totals now appear in the Subaward Budget Workspace Financial tab*

Training Conclusion

Thank you for attending today's training session