Kuali Research Create Budget Quick Reference Guide

Overview:

Describes how to create a new detailed budget in a Kuali Research Proposal.

Note: User must have authorization for creating a budget within the proposal.

Procedure:

Creating a Detailed Budget

Kuali Research includes the ability to create a budget for the proposal, including personnel and non-personnel items. The system automatically calculates the rate of inflation, fringe benefits, and salary increases as well as overhead (F&A).

The default budget period length is 12 months, so the system will attempt to divide the Full Project Period (as determined by the Start & End dates) into 12-month periods based on the project start date. Any remaining months become the final budget period. Users can change the budget periods in the Periods & Totals section by manually entering new start/end dates or using the calendar date picking tool.

To create a Detailed Budget:

1. While in the Proposal, click on the **Budget** item on the **Navigation** panel. The **Budgets** screen will open.

Figure 1 – Budget Panel

2. In the **Budgets** screen, click the **Add Budget** button. For proposals with NIH as the sponsor, there will also be an option to create a modular budget.

Create a Budget Version window will appear.

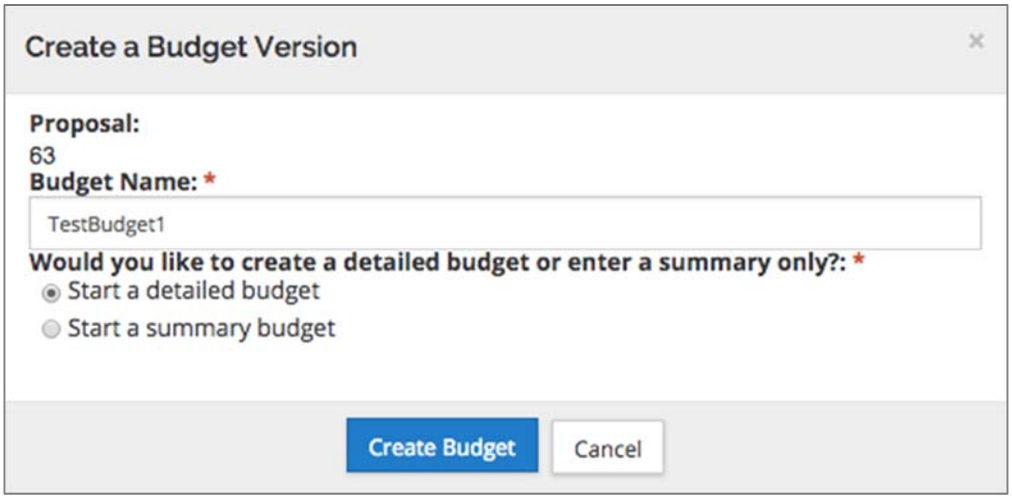


Figure 2 – Create a Budget Version Window

3. Complete the following fields in the **Budget Versions** window, as needed:

Field Name	Description
Budget Name	Required. Enter up to 40 characters of descriptive text to designate the name of each budget version. This name cannot be modified after the **Create Budget** button had been clicked.
Start a detailed budget	Click the radio button when preparing a detailed budget.
Start a summary budget	Click this radio button when preparing a summary budget for the proposal. **Note**: IMPORTANT- DO NOT start a summary budget if detailed line items are being entered. In most cases, Colorado State proposals will use a detailed budget, not a summary budget.

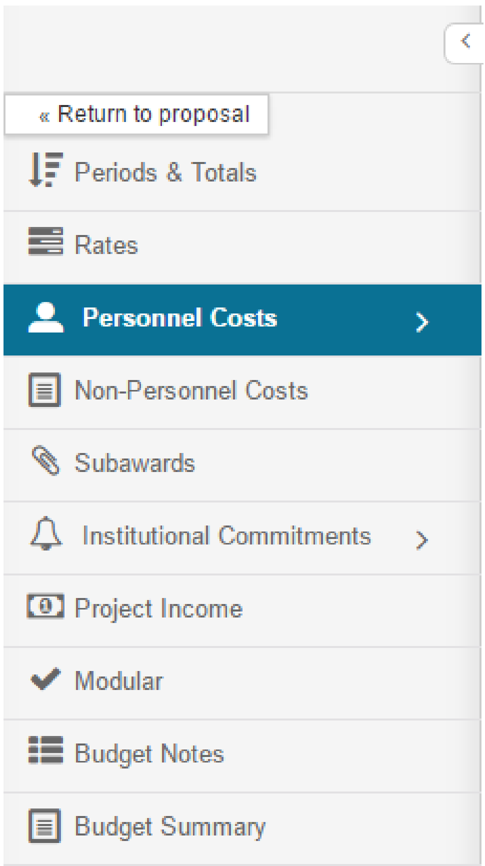
Table 1 – Create a Budget Version Fields

4. Click the **Create Budget** button.

5. The **Project Personnel** screen will display as the default view of the budget.

Navigation:

Once the **Budget Version** is accessed, the left hand navigation panel and the links at the top of the screen change and are now budget specific:

<table>
<tr><th>Left side menu</th><th>Description</th></tr>
<tr><td rowspan="11">

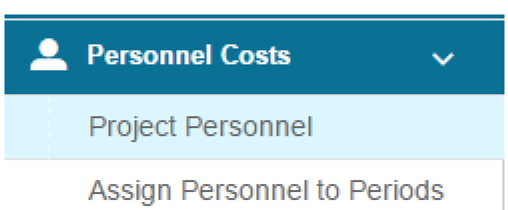
A side-facing arrow indicates subsections. Click to show these subsections for data entry:

</td><td>Use Return to proposal to exit the current budget version.</td></tr>
<tr><td>Periods & Totals A summary of all expenses entered in Personnel and Non-Personnel Costs sections. Cost-share is shown here, and period cost limits can be entered here.</td></tr>
<tr><td>Personnel: Budget all project personnel (CSU employees) in this section</td></tr>
<tr><td>Non-Personnel: For all other costs, including consultants and professional services personnel (non-CSU employees).</td></tr>
<tr><td>Subawards: Simplified upload of an R&R budget form or direct data entry for each specific subrecipient.</td></tr>
<tr><td>Institutional Commitments: Not being used at this time</td></tr>
<tr><td>Project Income: Enter details of any income that will be generated by the proposed project.</td></tr>
<tr><td>Modular: Use for s2s submissions to NIH/PHS sponsors who use the modular budget form.</td></tr>
<tr><td>Budget Notes: Information entered here can be consolidated and exported to create a source document for the required budget justification</td></tr>
<tr><td>Budget Summary: A view-only summary of all budget items.</td></tr>
</table>

Table 2: Left Side Navigation

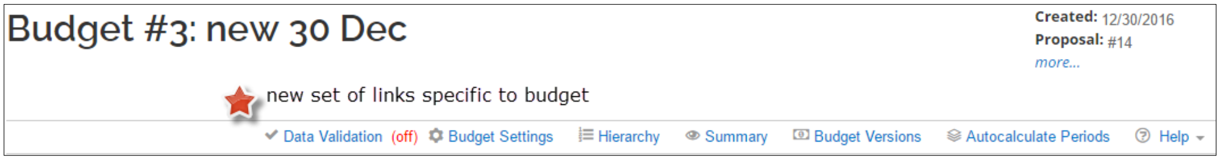


Figure 3 Top menu links

Top menu item	Description
Data Validation	Runs a check on the budget version for any errors or warnings
Budget Settings	Used to change on/off campus, F&A type, complete status, change modular budget indicator, add comments, toggle cost-sharing mapping to s2s budget form
Hierarchy	Indicates if a proposal is included in a hierarchy
Summary	Opens a lightbox version of the budget summary
Budget Versions	Opens a lightbox showing all budget versions. Allows creation of another budget version, or copying an existing version
Autocalculate Periods	Used to push all expenses from Period 1 into future budget periods. Can be used only once per budget version.
Help	Links to general application information by section. Not customized for CSU processes at this time.

Table 3: Top menu links

Figure 4 Action buttons

Action button	Description
Back	Takes the user to previous section.
Save	Saves any data entered and keeps the user in the current section.
Save and Continue	Saves data and moves user to the next section .
Complete Budget	When all data entry for a budget version is complete, clicking this button will put the version into view-only mode.
Close	Will close the entire proposal, not just the budget.

Table 4: Action buttons