SAGE Budget enables you to create accurate, detailed budgets for your grant and contract proposals. An easy-to-use wizard expedites budget set-up; the comprehensive budget worksheet minimizes errors and improves data quality.

Why use SAGE Budget?

**It's simple.** Set up your budget in five easy steps.

**It's accurate.** SAGE Budget automatically populates your budget with real-time salary and benefits information, calculates budget totals for each period, and identifies the correct F&A rate.

**It's efficient.** Apply inflation rate for Salary, Tuition, and other line items across budget periods. Cascade entries on non-salary line items, so the values you enter in one budget period are automatically propagated to subsequent budget periods.

**It's flexible.** With the click of a button, you can copy a budget and reuse it as a template for future budgets.

**It's tailored for the UW Research Community.** SAGE Budget is customized to comply with UW Accounting Rules, so you needn't memorize object codes or look up the latest F&A rates.

**It's tailored for you.** At your request, we've recently added the features you want, including rounding, Targets & Limits, customizable decimal display, and version control.

**It's convenient.** Connect your budget to an eGC1, and they will route together so reviewers can easily see budget details in a standard format.

The Budget Wizard

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The Budget Wizard walks you through the first steps of setting up a budget. Once you complete the wizard, the budget you created will be available for review and modification from the home page of SAGE Budget.

**Step 1:** Define Budget Properties
- Global Attributes: Inflation rates, APL & Sea Pay
- Advanced Settings: Rounding, Decimals, Targets & Limits

**Step 2:** Define Budget Period
- Start and end dates.

**Step 3:** Specify Funding Details and F&A Rate
- Select Type: Research, Training, Other Sponsored Activity
- Select Location: APL, On/Off Campus, Lake Union, or Harborview
- Select F&A rate. To use a standard rate, simply click **Get Rate**. To use a custom rate, specify the rate and items included in the base, and provide a justification.

**Step 4:** Set Access Rights
- Specify others who may review or edit your budget.

**Step 5:** Set Targets and Limits
- (optional step) Optimize use of available funds in your budget.

Access SAGE Budget

To sign in to SAGE, go to [http://sage.washington.edu/](http://sage.washington.edu/) and select the Budgets tab. To practice using SAGE Budget, sign in to the Training Server.

If you are unable to sign in, contact your unit's ASTRA Administrator to request access to SAGE.

Connect a Budget

To import budget data into your eGC1, go to the Budget page on your eGC1, click the **Connect a Budget** link and select your budget.

Any updates to your budget worksheet automatically display on the budget page of the connected eGC1. When a budget is connected to an eGC1, it shares the same routing path, and the user access and contacts lists are displayed on the shared centralized access page.
Navigate SAGE Budget

When you finish the wizard, SAGE Budget will display the following tabs which you can use to navigate your budget.

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Worksheet

The SAGE Budget worksheet helps you organize your budget using standard UW object-sub object codes. When you add people, their current salaries and benefit rates are automatically added. You can also manually change salaries and add "TBD" personnel.

Sub Budgets

You can create three types of sub budgets in SAGE Budget:

- Internal UW sub budgets are displayed in the parent budget as a single line item for each object code, and they inherit all of the parent's UW business rules, benefit rates, and F&A settings. You can also specify custom rates and settings. For example, use APL rates in your sub budget by updating the advance settings in the Properties tab.
- Fabrication sub budgets roll up to a single line on the parent under the (06) Equipment category.
- Subcontract sub budgets roll up to a single line on the parent budget under the (03-62) Other Contractual Services category. Subcontracts support custom external F&A rates and external benefit rates. If the parent budget is connected to an eGC1, the sub budgets will route with it and be viewable by approvers.

F&A (Facilities & Administration)

SAGE Budget automatically determines the correct F&A rate (also known as "overhead" or "indirect costs") based on the project location, type of research, and budget periods you specify. SAGE Budget also determines F&A rates that change from one year to the next and applies the appropriate rate to each period of your budget.

You can apply split F&A rates to your budget by creating a sub budget for any part of your proposal that requires a different F&A rate from the parent budget. You may also specify a custom F&A rate and select the budget items where the F&A will be applied.

Targets & Limits

With auto-adjusting entries, you can set a period minimum and maximum amount for specific Budget Line Items and prioritize the order in which remaining funds are allocated to each line item. This function is particularly helpful when you anticipate having some unspent dollars in your budget and would like to optimize the funds available in specific areas.

Target budget amounts may be applied by: 1) total direct costs only, 2) total direct costs less subcontract (consortium) F&A (only for subcontracts built using the sub-budget feature), or 3) total costs.

History

Track changes to your budget and access previous versions. Budget Edit Numbers in the Budget History enable you to see when a budget has been revised and to read comments associated with those changes. eGC1 Approval History & Comments for any connected eGC1s are also displayed, below the Budget History.