# SAGE BUDGET REDESIGN

# **GETTING STARTED**

The Office of Research Information Services has launched a newly redesigned SAGE Budget tool with a more streamlined, efficient, and intuitive look and feel. This job aid provides an overview of how to create and manage your budgets using the new design, as well as resources to help during this transition.

**NOTE:** For a limited time you can choose to create and manage your budgets using the old (legacy) SAGE Budget design *or* you can begin using the new (current) design.

# WHY USE THE NEW SAGE BUDGET?

The new SAGE Budget offers the following enhancements:

#### > More efficient budget entry

- Elimination of Budget Wizard
- Streamlined personnel and cost entry (in-line entry, fewer clicks)

#### > Simplified user experience

- More intuitive navigation
- Improved Excel export
- Personnel and object code search improvements
- · Easy-to-read summary view for reviewers and PIs
- More intuitive Facilities & Administrative (F&A) setup and simplified entry
- Customizable benefit rates

### ACCESS SAGE BUDGET

SAGE	BUDGETS	eGC1 FORMS	APPROVALS	ADVANCES	SUBAWARDS	
Budgets					Q Search for a budget	
CREATE BUDGET -						
TITLE	PRINCIPAL INVESTIGATOR	BUDGET NUMBER		ACTIVE LINKED APPLICATION	LAST EDITED	FORMAT
Deforestation in the PNW	Jill Thompson	B100002		-	6/01/2020 Samuel Summer	Current
Big Data Cloud Infrastructure	Susan Gants	B100086		-	6/01/2020 Samuel Summer	Current
Earthquake Resistant Foundations	Laura Cecil	B100094		-	6/01/2020 Samuel Summer	Current
Cosmic Crisp Apple Grafting	Samuel Summer	B100134		-	6/01/2020 Samuel Summer	Current
Blue Whale Conservation Efforts	Benjamin Cornell	B100152		-	6/01/2020 Samuel Summer	Current
Nanotube Construction at Scale	Vicki Paulus	B39289		A157639	6/01/2020 Samuel Summer	Current
Human Genome Sequencing	Christopher Carlson	8100181		-	6/01/2020 Samuel Summer	Current
					Items per page:	10 - 1-7of7

To access SAGE Budget, log in to SAGE as you normally would at <u>http://sage.washington.edu</u> and navigate to **BUDGETS** in the top menu.

From the Budget task list, you can do the following:

- > Create a new budget
- > View and open your list of existing budgets
- > Search for existing budgets



### **CREATE A NEW BUDGET**

SAGE	BUDGETS
Budgets 🥹	
+ NEW BUDGET -	
Current Budget Format	PRINCIPAL INVESTIGATOR
Legacy Budget Format	ject Anatoliy Klots
INative PINW Plants	Jill Thompson

To create a new budget, select the blue CREATE BUDGET dropdown button in the top left corner. For a limited time, you can select either Current Budget Format or Legacy Budget Format.

Current Format	Legacy Format
New SAGE Budget design	Old SAGE Budget design
Cannot revert a budget to the legacy format once current format is selected	Can upgrade a budget to the current format at any time (legacy budget num- ber and data will remain the same)

### COPY AN EXISTING BUDGET

SAGE	BUDGETS +GC1 FORMS	APPROVALS ADVANCES	SUBAWARDS		
- Bacterial Gene	ome Sequencing B1002	36 😧	\$0 Total Project Costs	\$0 Total Direct Colors	\$0 Facilities & Administrative
Summary (All Worksheets)	Budget Summary 👩	Including 1 of 1 worksheet			Copy Budget Export Budget to Excel
* Primary Worksheet				· ·	Delete Budget

You can also create a new budget by making a copy of an existing budget. To do this, within the budget you want to copy, select the more options menu icon in the top right corner of the Budget Header and select Copy Budget.

**NOTE:** Everything from this budget will be copied except for history, notes, and connections to any eGC1s.

# **CURRENT FORMAT BUDGET**

### BUDGET HEADER

CA CT	17	67
SAGE	BUDGETS	eact FORMS
New Budget :	100192	

Your new budget will display a header across the top of the page. This header includes your Budget Title (default name is "New Budget"), Budget Number (e.g. B111234), Total Project Costs, Total Direct Costs, and Total F&A amount (costs will automatically display in the header once you add them to your budget). Subaward amounts will also appear if you have a subaward worksheet. The header will stay pinned to the top of the page regardless of where you are in the SAGE Budget.

#### **BUDGET SETTINGS**

← New Budget B10	00182				\$0 Total Project Costs	\$0 Total Direct Costs	\$0 Facilities & Administrative	
Summary (All Worksheets)	✓ Periods	Establis	n dates for each time p	eriod				8
* Primary Worksheet	Equal Length Periods	Varied Length Periods						
	Budget Start Date							
	7/1/2020	Ē						
	Total Number of Periods							
	1	•						
+ ADD WORKSHEET	Length of Each Period (Mantha	1						
	12							
Budget Settings								
O History	Desotption							
COLLAPSE PANEL	Period 1	7/1/2020 - 6/3	30/2021					

When you create a new budget, by default the Budget Settings page will display with the Periods section open. You must select the budget period start date before adding costs. By default there will be one period listed, however you can update this to reflect your budget. Budget Settings affect your budget as a whole.

Select Budget Settings on the left navigation menu to edit the following details:

- > Salary Cap > Periods
- > General Information > Data & Calculation
- > Spending Targets > Access & Roles

To add Budget Setting details, click on the name of the section to expand it and click within the field to type your budget details. Clicking or tabbing outside of the field automatically saves the information you entered. To continue adding Budget Settings details, either click/tab on the name of the section to expand it, or click/tab to the NEXT SECTION or PREVIOUS SECTION to add details sequentially.

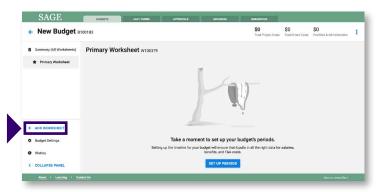
**NOTE:** If you navigate away from Budget Settings, the most recent section you were working on will automatically open when you return to Budget Settings.



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# **BUDGET WORKSHEETS**

### THE PRIMARY WORKSHEET



A budget will consist of a collection of editable "worksheets." The costs in this collection of worksheets roll up to the Budget Summary. By default, each budget will contain a Primary Worksheet which cannot be deleted. The F&A rate applied in the Primary Worksheet will be applied to any applicable subaward costs. You can add more worksheets for any subbudgets by selecting the **Add Worksheet** button in the left navigation.

Select a worksheet "type" (internal, subaward, or fabrication). The type chosen will determine how that data rolls up in the Summary.

### WORKSHEET HEADER



Every worksheet will have a header that displays a title and worksheet number (e.g. Primary Worksheet W111234).

Within your worksheet, you can edit the **Worksheet Settings** as well as add details like **Salary and Benefit Costs** and **Other Costs** (subobject codes included).

# WORKSHEET SETTINGS

Worksheet settings will vary based on the type of worksheet. For example, you can edit F&A rate and Org Receiving Funding in the Primary Worksheet settings, or in the case of subaward worksheet settings, you can edit the subrecipient details.

# SALARY AND BENEFIT COSTS

				\$1,145,721	\$736,798	\$408.923	
00183				Total Project Costs	Total Direct Costs	Facilities & Administrative	
Salary and Benefit Costs	ADD PERSONNEL CO	ST -				₿ REFRES	4
NAME	PROJECT ROLE		PERIOD 1 (7/1/2020-6/30/2021)			ALL PERIODS	
Xavier Wilson	Principal Investigator		\$110,160	\$	112,363	\$222,523	:
Nikhil Narain 🛛	Co-Investigator	*	\$91,800		\$93,636	\$185,436	1
Michelle Yang	Faculty	*	\$97,920		\$99,878	\$197,798	:
Joshus Kramer	Post Doctoral Associate	*	\$28,152		\$28,715	\$56,867	1
TBD	Graduate Student	*	\$18,360		\$18,727	\$37,087	1
TBD	Graduate Student	*	\$18,360		\$18,727	\$37,087	:
Salary & Benefit Costs Total			\$364,752	\$	372,046	\$736,798	
100.040						2 REFRES	
	NAAR Xarrier Wilson Nakhil Naran Xicharia Yang Jachara Kramer TiEO TiEO Salary & Benefit Costs Total	Salary and Benefit Costs ADD PERSONNEL CO NAME PROJECT NO.E Xarler Wilson Precipal Investigator Nahid Nurain C Do Investigator Mechania Vang Faculty Jachana Kommer Post Doctoral Associate TBD Graduate Student	Salary and Benefit Costs  Not PERSONNEL.COST NAME VIEWON V	Salary and Benefit Costs ADD PERSONNEL COST NAME PRODUCT NOX Proceedings of the second	Salary and Benefit Costs           None         Processing         Processing	National Benefit Costs         Filled State           National Benefit Costs         PR000 1           National Benefit Costs Italia         PR000 1           Benefit Costs Italia         PR000 1           Staty & Benefit Costs Italia         Staty 2	Kurst         Fight Parties & Administration           Name         Marce Intel State Class         257 677623           Name         Marce Intel State Class         257 677623           Name         Marce Intel State Class         100 978203941           Name         Marce Intel State Class         100 978203941           Name         Marce Intel State Class         100 97820394           Name         Marce Intel State Class         100 978203           Name Wilson         100 0000         5110,100         5112,243         5222,523           Name Wilson         100 0000         593,036         5145,434         522,523           Name Wilson         100 0000         593,036         5145,434         522,523           Name Wilson         100 0000         5110,100         5112,243         522,523           Name Wilson         100 0000         5110,100         5112,243         522,523           Too         Graduate Student         5116,300         5118,272         527,687           Too         Graduate Student         5116,300         5118,272         527,687           Too         Graduate Student         5116,300         5118,272         527,687           Statery & Bander Goots Teall         5344,372

To add personnel costs, select the blue **ADD PERSONNEL COST** drop-down menu and select either UW Personnel or Placeholder personnel.

**Adding UW Personnel** allows you to search by UW name or NetID. Begin typing and SAGE will display matching results. Select a result to add that person to your budget.

Adding Placeholder Personnel automatically adds a row to the top of the personnel list with TBD in the NAME column. You can edit a Placeholder in the **Edit Personnel Details** panel.

The **Edit Personnel Details** panel will appear on the right when you click on a person's name. You can close this panel by selecting the **blue X** in the top right corner, or by clicking anywhere outside of the panel. Within this panel you can add/edit the following:

- > First Name (for placeholder only)
- > Middle Name (for placeholder only)
- > Last Name (for placeholder only)
- > Title
- > Prefix
- > Suffix

Assign each personnel a **PROJECT ROLE** using the drop-down menu and click on the amount to edit the expense details.

When you click on the amount, the details will appear to the right. This panel allows you to view and adjust salary, effort, and benefit details used to calculate the cost for each person.

Visit the SAGE Budget user guide for more information on personnel roles, salary, effort, and benefit details: <u>http://www.washington.edu/research/tools/sage/guide/sage-budget</u>



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# **OTHER COSTS**

SAGE	BUCGETS	eOC1 FORMS APPROVALS	ADVANCES	SUBAMARDS	
- New Budget BI	00183			\$1,409,940 \$996,689 Total Project Costs Total Direct Costs	\$413,251 Facilities & Administrative
Summary (All Worksheets)	Other Cost	ADD OTHER COST -			₿ REFRESH
+ Primary Worksheet	SPEND CATEGORY	DESCRIPTION	PERIOD 1 (7/1/2020-6/30/2021)	PERIOD 2 (7/1/2021-6/38/2022)	ALL PERIODS
	04-21	Flights to Boston conference	\$0	\$1,899	\$1,899
	04-31	Flights to Berlin conference	\$3,600	\$0	\$3,600
	05-31	Liquid nitrogen	\$2,300	\$0	\$2,300
	06-11 Supplies and I Chemical Prod	Asterials. Chemicals and ster lucts	\$177,932	\$0	\$177,932
ADD WORKSHEET	08-05	Tution for students	\$37,080	\$37,080	\$74,160
Budget Settings	Other Costs Total		\$220,912	\$38,979	\$259,891
History	Worksheet Tota	ls			
COLLAPSE PANEL	DESCRIPTION		PERIOD 1 (7/1/2020-6/30/2021)	PERIOD 2 (7/1/2021-6/30/2022)	ALL PERIODS

Select the **ADD OTHER COST** drop-down menu to add other (non-personnel) costs to your worksheet. The categories are listed in order by object code. Select an object code to view the sub-object codes within that category. From the sub-object code list, select the sub-object code to add it to your worksheet. To search by keyword or to see a full list of choices, select **Search all object codes**.

Once you add a cost, the SPEND CATEGORY field will display the category's object and sub-object code together. Hover your mouse over the three horizontal dots to see the category's description.

Each new cost entry you add will display as the first item in the row. Click the **Sort By Spend Category** button in the top right corner to arrange other cost entries in order by object/subobject code and description. For personnel, selecting **Sort by Role** will arrange by project role.

Add cost details for each spending category by typing a dollar amount directly in the expense field. Once you click on the amount, a panel will appear to the right where you can edit/ view specific details related to each expense type such as quantity, unit price, and more.

### **WORKSHEET TOTALS**

ESI	CRIPTION		PERIOD 1 (7/1/2020-6/30/2021)	PERIOD 2 (7/1/2021-6/30/2022)	ALL PERICOS
	Total Direct Costs		\$585,664	\$411,025	\$996,689
,	Facilities and Administrative		\$205,712	\$207,539	\$413,251
	Base Type: Modified Total	Total Direct Costs	\$585,664	\$411,025	\$996,689
	Direct Costs (MTDC) Location: On Campus	Costs Subject to F&A	\$370,652	\$373,945	\$744,597
	cocesari un campus	F&A Rate	55.5%	55.5%	55.5%
		F&A Costs	\$205,712	\$207,539	\$413,251
	Total Worksheet Costs		\$791,376	\$618.564	\$1,409,940

Worksheet Totals display at the bottom of your worksheets. The totals displayed include the total costs for each period as well as the total costs for all periods combined. Total costs include:

- > Total Direct Costs (salary, benefit, and other costs)
- > Facilities and Administrative Costs (F&A)
- > Total Worksheet Costs (total direct plus F&A costs)

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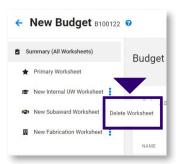
# ADD ENTRY NOTES, TURN CASCADING OFF, OR DELETE

There are a few additional worksheet details you can adjust. Click the **more options menu icon** to adjust these worksheet details:

- > Add Note
- > Edit Note (if there is an existing note)
- > Delete Note (if there is an existing note)
- > Turn Cascading Off/On (only affects this individual entry)

> Delete Personnel or Delete Other Cost (depending on which Cost you are editing)

### **DELETE A WORKSHEET**



To delete a worksheet, select the **more options menu icon** following the worksheet name on the left navigation menu. Then click **Delete Worksheet**.

**NOTE:** The Primary worksheet cannot be deleted. However, deleting other worksheets is permanent and cannot be reversed. If deleted, all worksheet costs will be lost. When you select **Delete Worksheet**, a confirmation dialog displays where you have the option to cancel or proceed with deleting the worksheet.





## **EXPORT A BUDGET TO EXCEL**

SAGE	BUCGETS	eggs FORMS	APPROVALS	ADVANCES	-	амалов			
New Budget B1	00183			\$1,409,940 Total Project Costs	\$996,689 Total Direct Costs	<b>\$996,689</b> TDC Less Sub F&A	<b>\$0</b> Subaward F&A	\$413,251 Facilities & Administrative	
Summary (All Worksheets)	Primary Works	heet w100379	9					Copy Budget	_
* Primary Worksheet	> Worksheet Settin	<b>js</b> Ad	dd worksheet details a	nd configure F&A				Export Budget to E	Ixce
🗃 Biology Department 🚦								Delete Budget	

The redesigned SAGE Budget expands the selection of export options and presents the data in an easy-to-read Excel file containing budget roll up information as well as by-period views in distinct tabs.

From the Budget header, select the **more options menu icon** in the right corner and select **Export Budget to Excel**.

Select the budget information you want to export.

xport <i>New Budget</i> To	Excer	×
/hat would you like to export?		
Budget Summary (all worksheets)		
R&R Detailed Budget Format		
Primary Worksheet		
New Internal UW Worksheet		
New Subaward Worksheet		
New Fabrication Worksheet		
	CANCEL	EXPORT

# **BUDGET HISTORY**

To view your budget's history, select **History** on the left navigation menu. History displays all point-in-time snapshots taken of your budget (either taken by you or automatically by SAGE).

**NOTE:** When you upgrade your legacy budgets to the current design, your existing budget snapshots will display.

Summary (All Worksheets)	History
+ Primary Worksheet	Snapshots
New Internal UW Worksheet	TIMESTAMP
New Subaward Worksheet	5/21/20, 8:47 AM
New Fabrication Worksheet	6/16/20, 5:23 PM 🗗
	6/16/20, 5:23 PM 🗗
ADD WORKSHEET      Budget Settings	+ ADD SNAPSHOT
History	
COLLAPSE PANEL	

### AUTOMATIC SNAPSHOTS

SAGE will automatically capture a snapshot when:

- > You create a new budget by copying an existing budget
- > You connect a budget period to an application
- > You route the connected application for review (locks the budget from editing)
- > OSP approves the connected application (unlocks the budget for editing)
- > You disconnect the budget from an application
- > You upgrade a legacy budget to a current budget

### MANUAL SNAPSHOTS

To add a snapshot at any time, click the **ADD SNAPSHOT** button below the snapshot table. SAGE will assign a default SNAPSHOT NAME/DESCRIPTION of, "Snapshot on [date], [time]." Click within the description field to customize the name/description.

# **SAGE BUDGET ICONS**

This quick reference shows the icons used within the redesigned SAGE Budget and what they represent.

<b>M</b>	Budget Summary
	Budget Summary
C	History
*	Primary Worksheet
	Internal UW Worksheet
	Subaward Worksheet
	Fabrication Worksheet
•	More Options Menu
2	Sort
$\langle \rangle$	Expand/Collapse
8	Help Link
G	Note on Line Item
•••	Object/Sub-Object Description for Other Cost
•	Budget Setting - General Information
Ħ	Budget Setting - Periods
<b>₩</b>	Budget Setting - Spending Target
\$	Budget Setting - Salary Cap
<b></b>	Budget Setting - Calculation Preferences
20	Budget Setting - Access & Roles



#### SAGE BUDGET USER GUIDE

> View the SAGE Budget user guide for more in-depth instructions on how to navigate the new SAGE Budget: <u>http://www.washington.edu/research/tools/sage/guide/</u> <u>sage-budget/</u>

### DEPARTMENT PRESENTATION

> Request a department presentation. If your department is interested in a demo or a focused discussion on your particular needs, contact us at <u>oris@uw.edu</u>.

### SAGE BUDGET CLASS

> Attend a SAGE Budget class offered quarterly through CORE: https://www.washington.edu/research/researchadministration-learning/sage-budget/