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

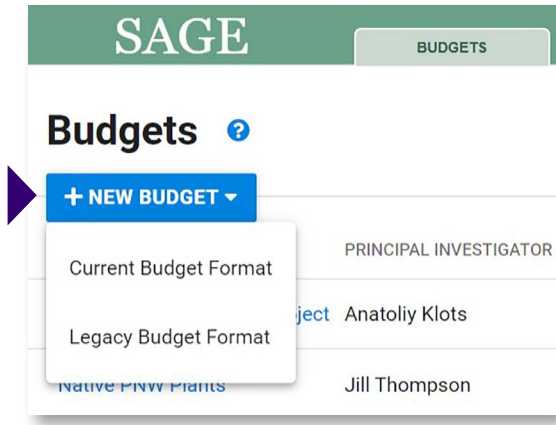- Customizable benefit rates

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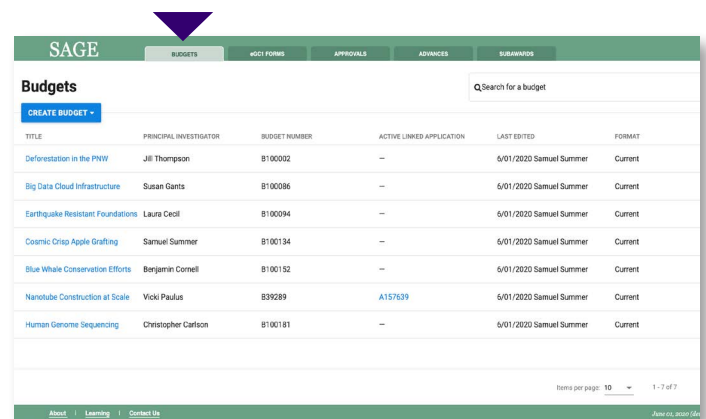
To access SAGE Budget, log in to SAGE as you normally would at http://sage.washington.edu and navigate to **BUDGETS** in the top menu.

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

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 number and data will remain the same)

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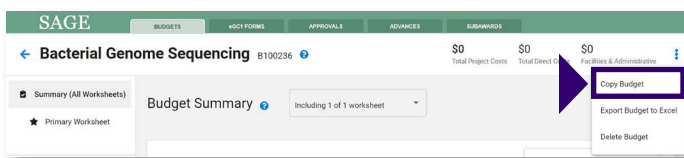
You can also create a new budget by making a copy of an existing budget. To do this, within the budget you want to copy, select the **more options menu icon** in the top right corner of the Budget Header and select **Copy Budget**.

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

CURRENT FORMAT BUDGET

BUDGET HEADER

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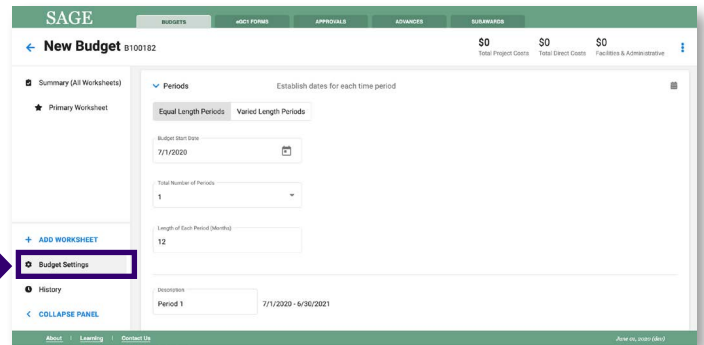
When you create a new budget, by default the Budget Settings page will display with the Periods section open. You must select the budget period start date before adding costs. By default there will be one period listed, however you can update this to reflect your budget. Budget Settings affect your budget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

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

> Periods

> General Information

> Spending Targets

> Salary Cap

> Data & Calculation

> 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.

BUDGET WORKSHEETS

THE PRIMARY WORKSHEET
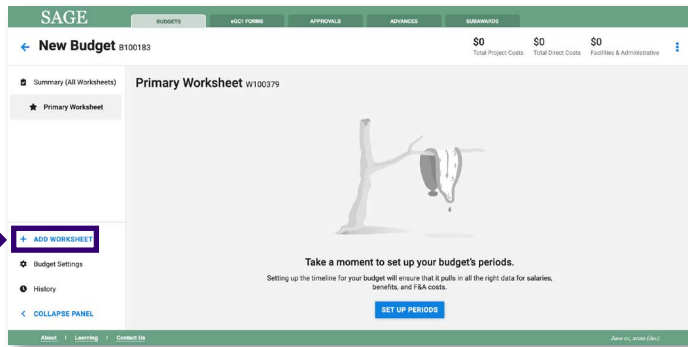
A budget will consist of a collection of editable "worksheets." The costs in this collection of worksheets roll up to the Budget Summary. By default, each budget will contain a Primary Worksheet which cannot be deleted. The F&A rate applied in the Primary Worksheet will be applied to any applicable subaward costs. You can add more worksheets for any sub-budgets 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
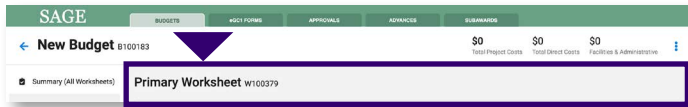
Every worksheet will have a header that displays a title and worksheet number (e.g. Primary Worksheet W111234).

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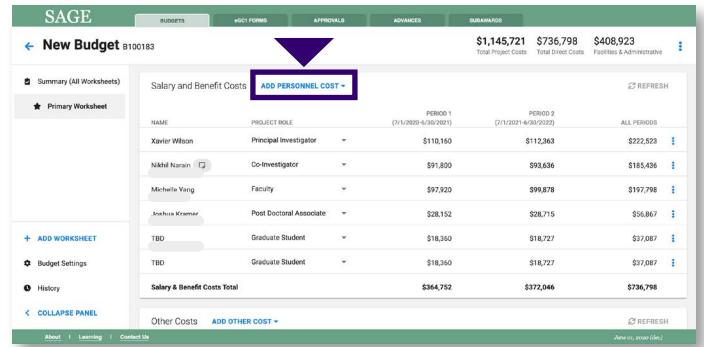
To add personnel costs, select the blue **ADD PERSONNEL COST** drop-down menu and select either UW Personnel or Placeholder personnel.

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:
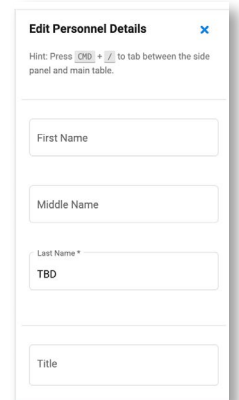

> First Name (for placeholder only)

> 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: http://www.washington.edu/research/tools/sage/guide/sage-budget
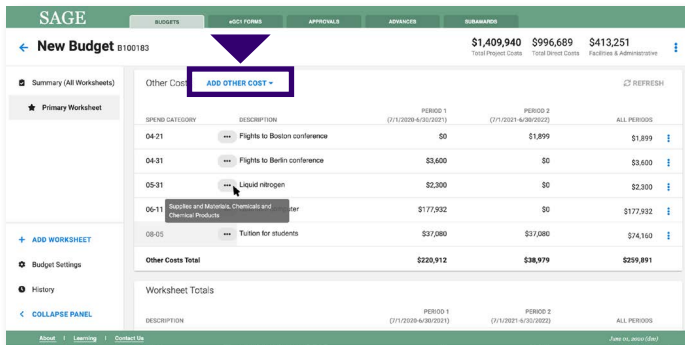
OTHER COSTS

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/sub-object 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

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)

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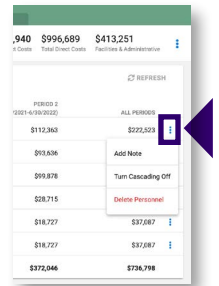
DELETE A WORKSHEET
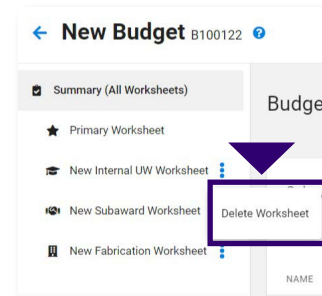
To delete a worksheet, select the **more options menu icon** following the worksheet name on the left navigation menu. Then click **Delete Worksheet**.

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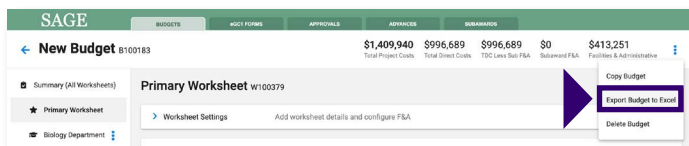
The redesigned SAGE Budget expands the selection of export options and presents the data in an easy-to-read Excel file containing budget roll up information as well as by-period views in distinct tabs.

From the Budget header, select the **more options menu icon** in the right corner and select **Export Budget to Excel**.
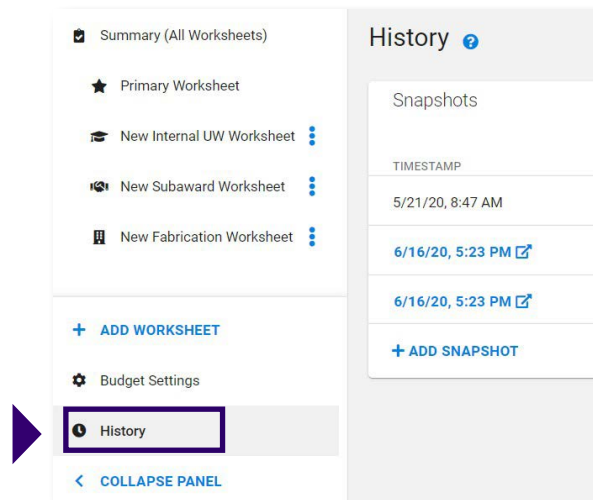
Select the budget information you want to export.
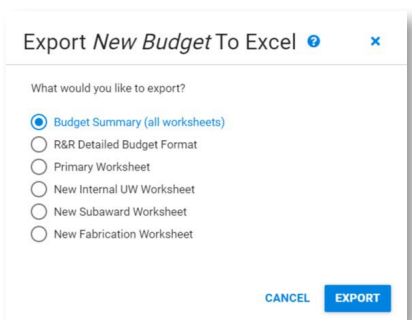
BUDGET HISTORY

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.

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.

☑	Budget Summary
🕐	History
⭐	Primary Worksheet
🎓	Internal UW Worksheet
🤝	Subaward Worksheet
🏢	Fabrication Worksheet
⋮	More Options Menu
🔄	Sort
<>	Expand/Collapse
❓	Help Link
🗒	Note on Line Item
•••	Object/Sub-Object Description for Other Cost
ⓘ	Budget Setting - General Information
📅	Budget Setting - Periods
📈	Budget Setting - Spending Target
$	Budget Setting - Salary Cap
🧮	Budget Setting - Calculation Preferences
👤⚙	Budget Setting - Access & Roles

RESOURCES

SAGE BUDGET USER GUIDE

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

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 oris@uw.edu.

SAGE BUDGET CLASS

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