



**Guide**

**Budget Overview**

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**Contents**

Budget Basics..... 2

Understanding Budget Versions ..... 2

    Creating a Budget Version ..... 2

    Editing a Budget Version ..... 2

    Quick Budget ..... 3

    Viewing & Printing your Budget ..... 5

Final Budget Steps ..... 5

    Selecting a Budget for Submission ..... 5

    Checking Your Final Budget for Errors ..... 6

Overview of the Budget Quick Menu ..... 7



## Budget Basics

Good news! If you are creating your budget via Research.gov or another sponsor portal/website, you do not need to recreate your budget in Streamlyne. You should enter only a Quick Budget comprising the budget terms, periods and totals. You will also need to upload a copy of your budget worksheet, budget justification, and/or any budget related items (e.g. subawards, cost share documentation) in the **Internal Attachments** section of Streamlyne.

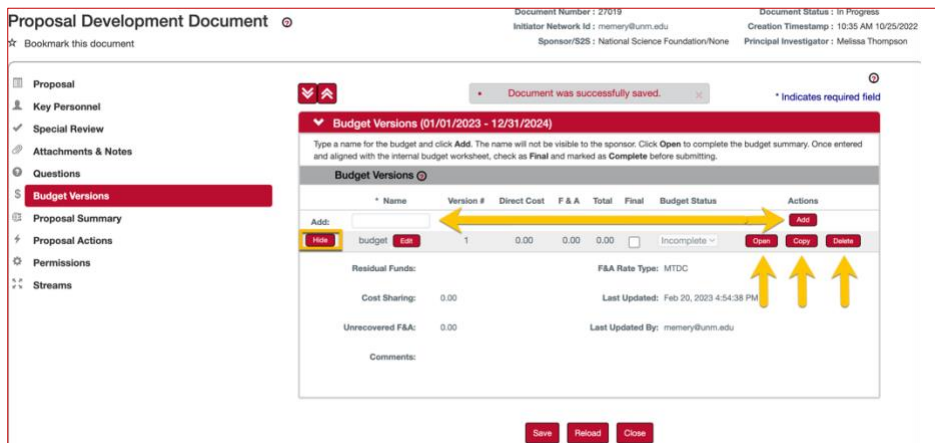
## Understanding Budget Versions

Budget creation is found by choosing the **Budget Versions** section from the Proposal Development Quick Menu on the left side of your screen.

Streamlyne allows users to create multiple draft versions of a project budget, but only one may be selected as the **Final** budget.

### CREATING A BUDGET VERSION

To create a new draft budget, find the section at the top of the **Budget Versions** pane that begins with **Add:** and provide a **Name** for the budget. This name is for internal use only and will not be transmitted to the sponsor. Click the red **Add** button to save the new budget.



You should now see a section appear below with the title of the new budget. Any previously- created budget versions will also be shown.

### EDITING A BUDGET VERSION

After one or more draft budgets have been created, they will appear in the **Budget Versions** panel.

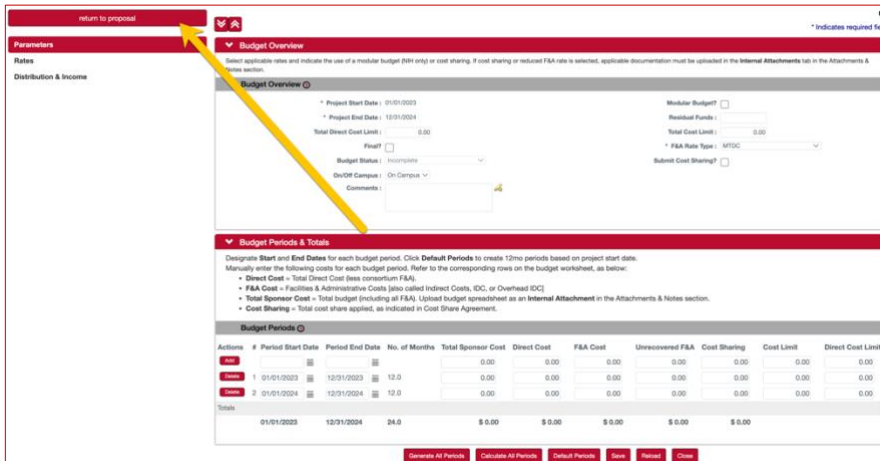
Action buttons:

- Click the **Open** button to work on a budget or view budget details
- Click the **Copy** button to work on a new copy of your draft budget without replacing the original (works as a "Save As" function)
- Click the **Delete** button to remove a budget

Click the **Show** or **Hide** buttons for details of these versions, such as when they were last updated.



Once you have opened the budget, you will see the Budget Quick menu at the left side of the screen. Click **return to proposal** to access the other proposal development sections.



The screenshot shows the 'Budget Overview' section of a web application. At the top left, there is a button labeled 'return to proposal'. Below it, there are several input fields and checkboxes for 'Project Start Date', 'Project End Date', 'Total Direct Cost Limit', 'F&A Rate Type', 'Budget Status', and 'On/Off Campus'. A table titled 'Budget Periods & Totals' is visible, with columns for 'Period Start Date', 'Period End Date', 'No. of Months', 'Total Sponsor Cost', 'Direct Cost', 'F&A Cost', 'Unrecovered F&A', 'Cost Sharing', 'Cost Limit', and 'Direct Cost Limit'. The table shows two budget periods, both with zero values. At the bottom of the table, there are buttons for 'Generate All Periods', 'Calculate All Periods', 'Default Periods', 'Save', 'Refresh', and 'Close'.

## QUICK BUDGET

The budget template is designed to avoid the burden of entering budgets in multiple places. However, OSP must have all budget information to process any proposal.

- The PI must provide a budget worksheet and budget justification in the **Attachments & Notes** section in Streamlyne.
  - The PI is responsible for providing the approved budget to the sponsor in the format required by the Sponsor (e.g., in Research.gov).
1. Refer to the OSP website (<https://osp.unm.edu/forms/index.html>) to access the Budget Template and Budget Justification Template. These tools will help ensure that your proposal budget is calculated correctly.
  2. Once one or more budget versions have been created (see above), click the **Open** button next to a version to enter the budget **Parameters**.
  3. The **Budget Overview** panel collects important information which will be used to determine the project budget requirements.
    - a. Ensure that the **Project Start Date** and **Project End Date** are correct. If not, return to the **Proposal** section and edit the dates under **Required Fields for Saving Document**.
    - b. Indicate whether the project effort will be **On/Off Campus**. This field will be used to determine the applicable F&A Rate.

*On-Campus is selected by default. Off-Campus Rates require prior approval. Please consult the [“On-Off Campus Rate Determination”](#) memo and attach a signed [F&A Reduction Request Form](#) in the **Attachments & Notes** tab of Streamlyne.*
    - c. Enter the applicable **F&A Rate Type** (cost basis).

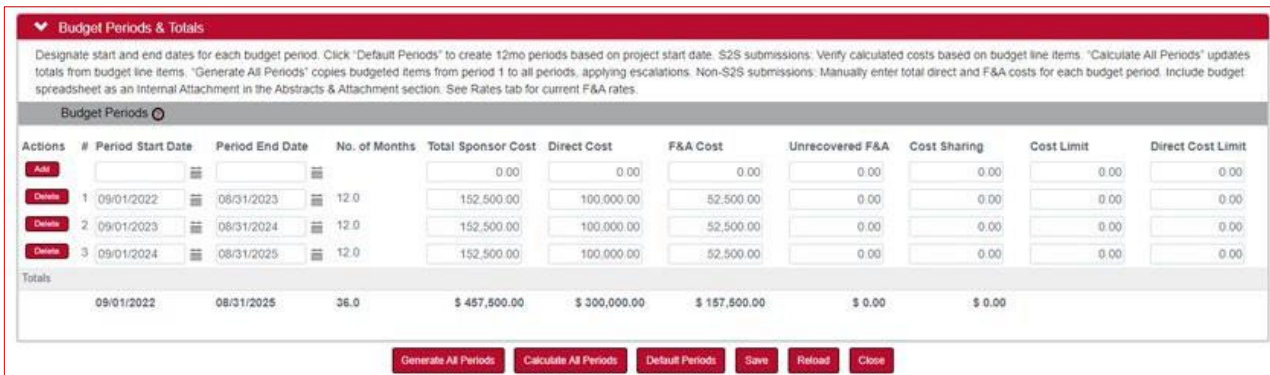
MTDC: modified total direct costs (default). Should apply to most projects.

MTDC-DoD: for Department of Defense projects.

TDC: total direct costs. Applicable only if specified in sponsor solicitation.



- d. Other fields are optional. Please indicate whether **Cost Limits** or **Cost Sharing** apply to the proposal. Use **Comments** to indicate anything else OSP will need to know about your budget (e.g., use of non-standard F&A rate).
- 4. Enter the summary budget information in the **Budget Periods & Totals** panel.
  - a. Verify or edit the **Period Start Date** and **Period End Date** for each budget period. Use **Add** and **Delete** as necessary to adjust the number of budget periods. Click **Default Periods** to create 12mo periods based on project start date.



Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
<b>Add</b>					0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Delete</b>	1	09/01/2022	08/31/2023	12.0	152,500.00	100,000.00	52,500.00	0.00	0.00	0.00	0.00
<b>Delete</b>	2	09/01/2023	08/31/2024	12.0	152,500.00	100,000.00	52,500.00	0.00	0.00	0.00	0.00
<b>Delete</b>	3	09/01/2024	08/31/2025	12.0	152,500.00	100,000.00	52,500.00	0.00	0.00	0.00	0.00
<b>Totals</b>											
		09/01/2022	08/31/2025	36.0	\$ 457,500.00	\$ 300,000.00	\$ 157,500.00	\$ 0.00	\$ 0.00		

- b. Enter the summary budget information for each budget period, as below:

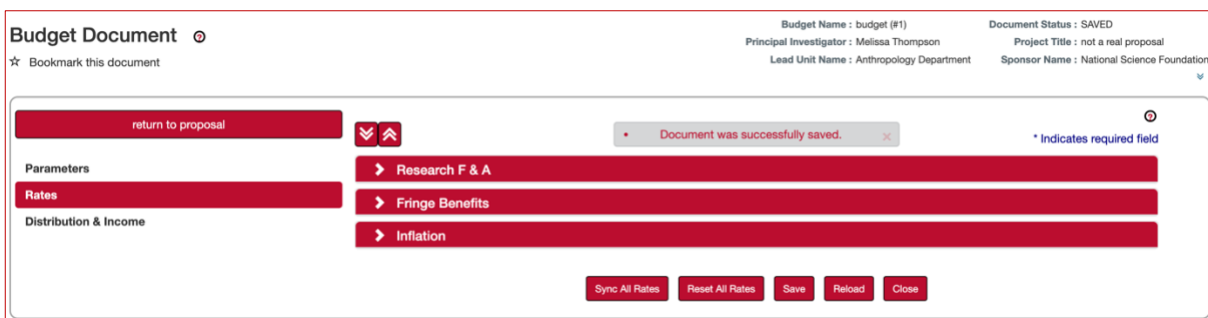
**Total Sponsor Cost** = Total Budget = Total PROJECT plus all F&A

**Direct Cost** = Total Direct Cost (not including consortium F&A)

**F&A Cost** = Facilities & Administrative costs

**Cost Sharing** = total cost share, as applicable and approved

The **Rates** tab provides current F&A and Fringe Benefits rates and may be used as a reference in calculating your budget.

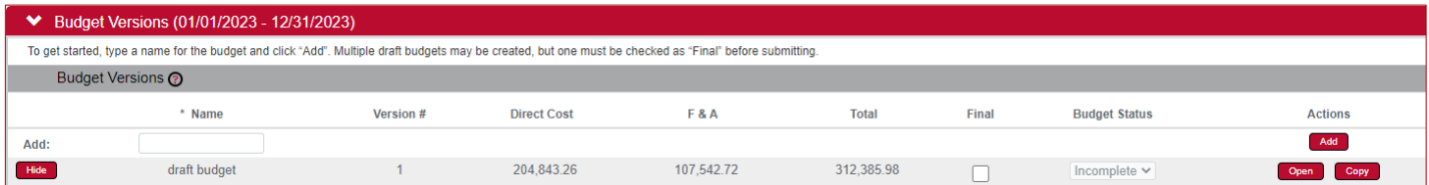


- c. You must provide OSP with your detailed budget calculations. Upload the UNM budget template (<https://osp.unm.edu/forms/index.html>) or sponsor- specific budget worksheet as an Internal Attachment in the **Attachments & Notes** tab.



## VIEWING YOUR BUDGET

Once you have constructed your budget, the totals will appear next to the respective budget name in the **Budget Versions** panel.

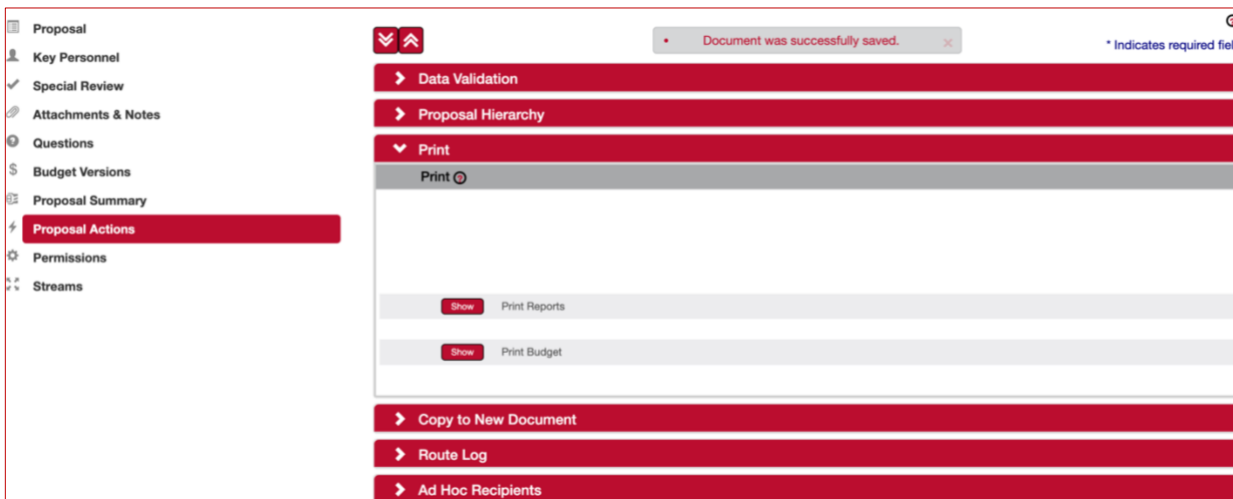


Name	Version #	Direct Cost	F & A	Total	Final	Budget Status	Actions
draft budget	1	204,843.26	107,542.72	312,385.98	<input type="checkbox"/>	Incomplete	Open Copy

To view the totals by project period, open the corresponding budget and scroll down to the Budget Periods & Totals panel. If you do not see this, select Parameters from the Quick Menu.

## PRINTING YOUR BUDGET

You may *download and print* out your budget by selecting the **Proposal Actions** tab from the Proposal Menu. Select the **Print** panel, and click the **Show** button next to "Print Budget." Select the budget to print and click the corresponding **Print** button.



The screenshot shows a sidebar menu with 'Proposal Actions' selected. The main content area displays a 'Print' panel with two options: 'Print Reports' and 'Print Budget', each with a 'Show' button. A notification at the top indicates 'Document was successfully saved.' and a note states '\* Indicates required field'.

## Final Budget Steps

### SELECTING A BUDGET FOR SUBMISSION

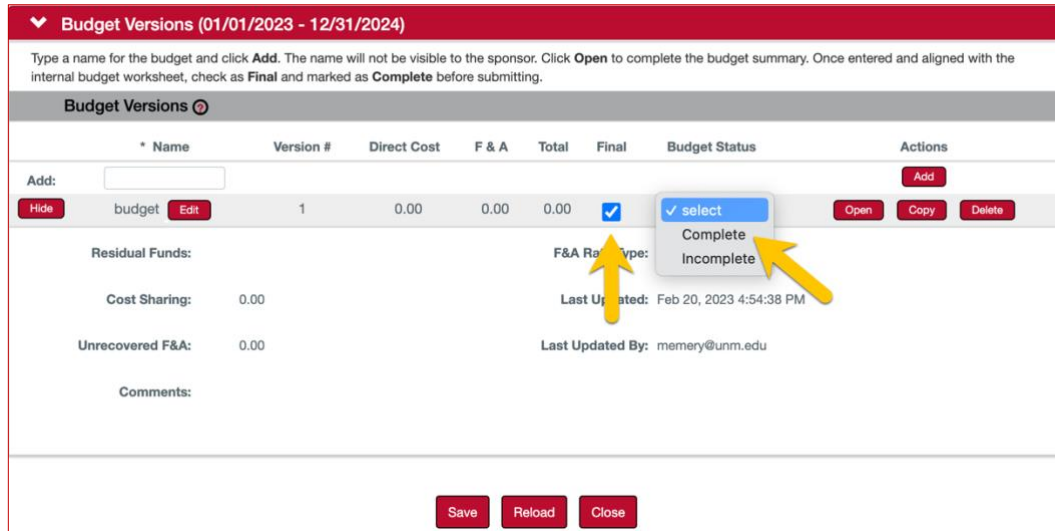
In order to validate your budget and submit the proposal package for routing, you must confirm that the final budget is complete.

1. Select **Budget Versions** from the Proposal Quick Menu or the Budget Quick Menu to view all available budgets.
2. Find the correct budget version and select the box marked **Final**. Only one budget can be identified as the final budget.

*Hint: You can still edit a budget marked as Final. This selection is only used to identify which budget is the correct one for submission.*



- Find the correct budget version and change the **Budget Status** field from *Incomplete* to *Complete*. Once you have done so, the budget will be locked for editing unless there are errors to correct. You can change the status back to *Incomplete* at any time prior to routing to continue editing.



**Budget Versions (01/01/2023 - 12/31/2024)**

Type a name for the budget and click **Add**. The name will not be visible to the sponsor. Click **Open** to complete the budget summary. Once entered and aligned with the internal budget worksheet, check as **Final** and marked as **Complete** before submitting.

* Name	Version #	Direct Cost	F & A	Total	Final	Budget Status	Actions
budget	1	0.00	0.00	0.00	<input checked="" type="checkbox"/>	<div style="border: 1px solid gray; padding: 2px;"> <input checked="" type="button" value="select"/> </div> Complete Incomplete	<input type="button" value="Open"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>

Residual Funds: F&A Rate Type: Last Updated: Feb 20, 2023 4:54:38 PM

Cost Sharing: 0.00

Unrecovered F&A: 0.00

Last Updated By: memery@unm.edu

Comments:

### CHECKING YOUR FINAL BUDGET FOR ERRORS

Validation is performed automatically before a proposal is routed. Streamlyne includes a data validation tool which checks the budget for errors.

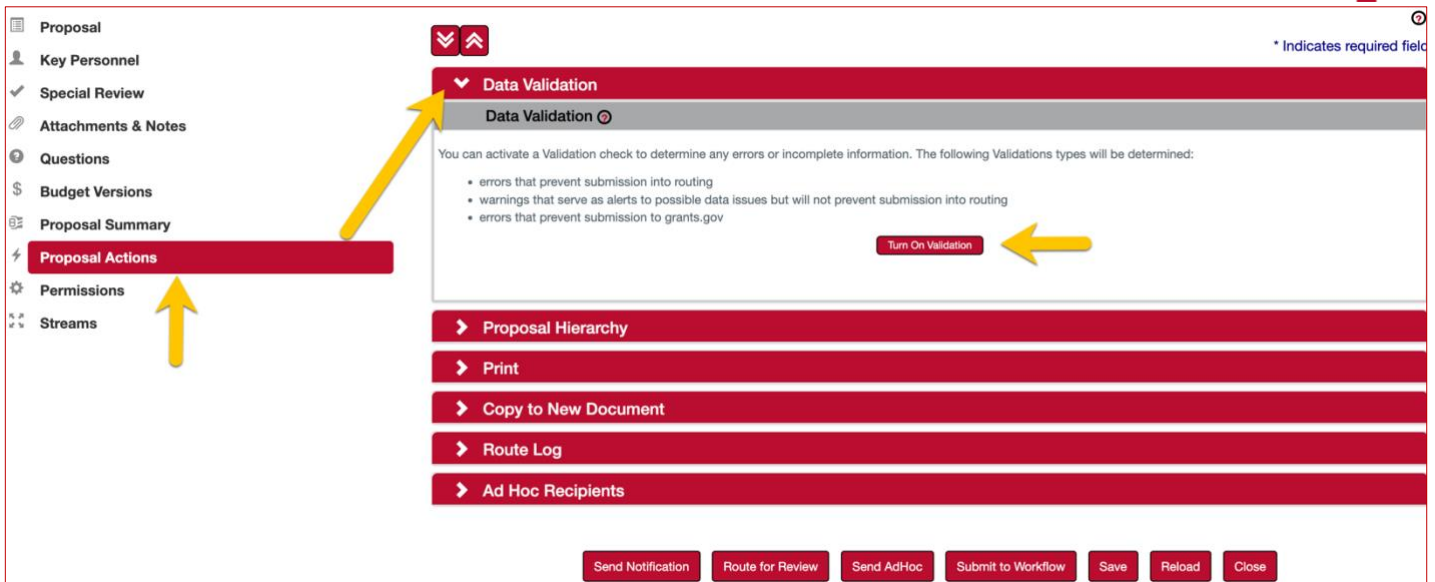
To check the full proposal including the budget, select **Proposal Actions** from the Proposal Development Quick Menu.

Expand the **Data Validation** pane and click the red button to **Turn On Validation**.

- When error checking is complete, a list of **Errors** and **Warnings** will appear in this section. Errors must be fixed prior to submitting the proposal for routing. Warnings usually require attention, but the proposal may still be routed for approval.
- To fix an error, select the red **Show** button next to the error. This will provide more information and reveal a red **Fix** button that will link you to the area where the error occurred.

*Hint: Data validation only checks for 'structural' errors in your budget/proposal. It cannot determine if you have miscalculated while entering budget line items.*

*Hint: Leaving Data Validation turned on will cause significant lag times as you navigate your proposal document. We recommend turning it on only as needed to check for errors. Turn it off again as you resume editing.*



Common errors include:

- No budget is selected as **Final**, or the budget has not been identified as *Complete*
- Required fields are blank
- Start and end dates are illogical
- Cost sharing is indicated but costs are not allocated to an index

## Overview of the Budget Quick Menu

**Return to Proposal:** Used to exit the budget tool and return to the main Proposal Development module.

**Budget Versions:** Create new draft budgets. View existing budget versions and select one for editing. Select the final budget for submission.

**Parameters:** This screen opens first when a budget version is selected for editing. Edit the basic parameters that apply to the entire project budget, including indirect cost (F&A) rate types, sponsor cost limits, and the use of cost sharing. Define start/end of budget periods and view active tally of cost totals budgeted to date.

**Rates:** Defines the applicable F&A, fringe benefit, and salary inflation rates to be applied in budget calculations. Custom rates may be used, but this should not be changed without sponsor requirement or UNM administrative approval.

**Distribution & Income:** Allocate cost-sharing and project income, where applicable.

**Budget Actions:** Download/print budget summary reports. Perform data validation to check budget for errors.