	Entering a Detailed Budget Using the Budget Tool
1.	Work on one Project/Budget period at a time.
2.	Select the FA Rate type and FA Base (per project). The Rate Effdt and FA Rate percent will automatically populate based on the Rate type and Base selected.
3.	Click the 'Detail Budget Entry' hyperlink next to the Budget Category. Once the hyperlink is clicked, you will be taken to the individual Budget Detail page for each Budget Category.
4.	All Budget Categories will have a Budget Detail page except ANIMAL. All Budget Detail pages will be the same except for Salary.
5.	Once 'Enter Budget Detail' hyperlink has been clicked for the Budget Category 'Salary', you will be taken to the Budget Detail-Salary page.
6.	Click the lookup icon 🔍 to select the resource to build salary detail for the budget.
7.	Note: You will not be able to pull in anyone that has not been entered as a Resource on the Projects page.
8.	Once the resource has been selected, the Name and Project Role will populate the page.
9.	Select the dates the resource will be working during the designated budget period. Note: The dates will default to the Budget Period Begin and End date, usually 12 months.
10.	Enter the Salary Effort Percent. Note: The Salary Effort Percent will default to 100%.
11.	Cost of Living and Merit Increase percents can be entered for each resource and the corresponding date the Increases will occur.
12.	Manually enter salary for every resource (will need to call each department to get correct salary)
13.	Select the Fringe Amount from a lookup table. The Fringe Rate and Amount will populate on this page depending on the selected Fringe Rate. Note: Sponsor Direct (Salar+Fringe) will calculate automatically based on all the selections input.
14.	The Total Sponsor Budget will be automatically calculated based on all the resources added to the Budget Detail – Salary page.
15.	Click the 'OK' button to save the changes. The amounts will populate the corresponding Line # for the Salary Budget Category.
16.	Select the 'Detail Budget Entry' hyperlink for all other Budget Categories. With the

	exception of Salary and ANIMAL, the generic Budget Detail page will load.
17.	The Budget Tool will add a row # for each detail line item selected. A unique Description for each row # will be required. Note: The option exists to either enter an amount directly in the Sponsor Direct field, or to be more specific by entering the Unit Cost and Quantity amounts that will then calculate the Sponsor Direct.
18.	The 'Sponsor Direct' field will automatically populate once items are entered on this page. Once the 'OK' button is selected, the changes will be saved and will return to the Emory Budget Entry page
19.	If 'OK' is selected, the amounts will populate the 'Emory Budget Entry' page corresponding to the applicable Line # and Budget Category.
20.	Continue to add Lines and Budget Categories until finished.
21.	Once done, click the 'Save' button and the Sponsor Direct, Sponsor FA and Total Sponsor Budget fields will be updated.
22.	Click the 'Take me back to Budget Tool' hyperlink to continue entering detailed budget information for other periods.
23.	Once taken back to the Emory Budget Tool Summary page, the amounts are displayed in the Overall Proposal Budget section as well as the Period line just completed.
24.	Continue to enter budgets for each budget period until the budget for each project is completed.
	Copying a Budget Period
1.	Copy a Previous Budget Period by clicking the 'Copy' button with or without adding an Escalation percent.
2.	Note: The 'Copy a Previous Budget Period' button will only copy the budget period above the current budget period. Note: At least one period with a dollar amount must have been entered before this option can be used.

Copying a Budget from Another Project	
1.	If multiple projects exist, the option of copying a budget from another project is possible.
2.	Note: Budget information for at least one project has to have been entered before this option can be used.
3.	Click 'Copy Projects Budget' to complete this task. Note: Only Non-Salary items will be copied because some projects will not contain the same resources.
4.	If the project budget copied used escalation %'s, the same escalations will be copied.

Reviewing the Budget	
1.	Once all the budget information for all budget periods and for all projects has been entered, you can preview the budgets by clicking the 'Review Pre-Award Budget' hyperlink.
2.	A new window will open to the delivered Review Pre-Award Budget page.
3.	Select the 'Refresh Inquiry' button to obtain the correct budget information.
4.	Once done reviewing the budget information, close the window to return to the Budget Tool.

Completing the Budget	
1.	When satisfied with the budgets, click the 'Save' button at the bottom of the Emory Budget Tool Summary page.
2.	Click the 'Return to Proposal Express' hyperlink.
3.	The Total Sponsor Budget can be seen on the EPEX header page.

Budget Tool Tips	
1.	Budget periods can be added and deleted (+/-)
2.	Period dates can be changed
3.	Budget period dates cannot overlap among different periods.
4.	Budget periods cannot have gaps between periods.
5.	Periods cannot be deleted when there are budgets associated with them (must delete the

	$$ first).
6.	The Copy Budget Period button is available if the next budget period has no budgets associated with it.
7.	A detailed or summary budget can be entered for all categories except ANIMAL. Only summary budgets can be entered for the ANIMAL budget category.