

Spending Award Budget

Before making purchases or requests for spending from an award budget, a principal investigator must review their budget for availability of funds. This will prevent delays in processing of allowable expenses.

To Review Budget

NOTE: There are several ways to review an award budget. It may be advantageous to first familiarize yourself with the award's budget categories.

- A. In Workday, type "**View Award**" in search bar and:
 - a. Select the award you wish to review
 - b. Click on **Plan** (tab)
 - i. The total budget will be displayed by **Ledger Account(s)** or expense category and associated **Worktags** for each award period or year
 - c. Click on **Overview** (tab)
 - i. To review the real time budget balance, click on **Award Budgetary Balance** (tab); budget details will be displayed by grant
 - 1. Make sure to expand the **Grant** to view the ledger accounts or expense categories included in the budget
 - a. The ledger account can also be expanded to view the **UL Object Class Mapping**; this value correlates to the detail on the budget amendment form and the expenses
 - 2. The **Balance** column will show the funding available for each expense category. This total will include pre-encumbered and encumbered amounts. This is the true amount available in the expense category.
 - a. If this amount is in **red**, there is an overage in the expense category. Please contact your college/dept assigned accountant in our office to resolve.
 - 3. You may click on the hyperlink totals to see the journal entries associated with the amount

Grant	Budget	Actuals	Pre-Encumbrance	Encumbrance	Balance
Grant	2,470.00	2,470.00	0.00	0.00	\$0.00
GRT0001	2,470.00	2,470.00	0.00	0.00	\$0.00
5011:Other Compensation	450.00	0	0	0	\$450.00
UL Object Class Mapping: Salary - Student Pay	450.00	0	0	0	\$450.00
5015:Supplies	1,242.00	1,639.65	0.00	0.00	(\$397.65)
UL Object Class Mapping: Supplies	1,242.00	1,639.65	0.00	0.00	(\$397.65)
5016:Transfers	0	52.35	0	0	(\$52.35)
(Blank)	0	52.35	0	0	(\$52.35)
5050:F&A Expense	778.00	778.00	0	0	\$0.00
UL Object Class Mapping: Facilities and Administrative Cost	778.00	754.24	0	0	\$23.76
(Blank)	0	23.76	0	0	(\$23.76)
Total	2,470.00	2,470.00	0.00	0.00	\$0.00

- B. You may also run the **CR Award Budgetary Balance UNO – Expansion by Grant >Ledger account** report from the Workday search bar. For instructions on how to run the report, visit Office of Research, Resource Library, at: <https://www.uno.edu/research/funding/forms>, **CR Award Budgetary Balance UNO QRC**.
- a. When running the report from the *Search* bar in Workday, repeat steps 1-3 above

Budget Not Available for Desired Purchase

1. After reviewing your budget, if you identify there is no funding (or not enough) available for the expense or purchase you would like to make, you may be able to request a **Budget Amendment**. For certain sponsors, prior approval may be required before our office can move the funds. For instructions on how to process a budget amendment, visit, Office of Research, Resource Library, at: <https://www.uno.edu/research/funding/forms>, see **Budget Amendment Request (Single Grant) Form** or **Budget Amendment Requests (Multi-Grant) Form**.
2. If a budget amendment is needed, the form must be approved and processed by our office prior to spending. If not, you will receive budget errors.

Budget Available for Desired Purchase

If the funds are available, you may proceed with submitting the necessary forms in Workday for your purchases.

Note: Funding must be available in the budget category before requesting a **Spend Authorization**, submitting an **Expense Report**, or generating **other expenses** in Workday for grant related purchases. Remember, you will need the **Grant ID** to expense the item(s); the Grant ID can be found on the NOGA or in the award budgetary report. One award may have multiple grants; be careful to charge to the correct grant on your award.

- For instructions on how to submit a Spend Authorization Request and Expense Report for travel related expenses, (for example, conferences, hotel/lodging, airfare) please visit the Workday Education site at: <https://myuno.sharepoint.com/sites/WorkdayTrainingLMS/SitePages/SpendAuthorizationsandTravelReimbursement.aspx>
- For instructions on how to submit Purchasing requisition requests in Workday, please visit the Workday Education site at: <https://myuno.sharepoint.com/sites/WorkdayTrainingLMS/SitePages/Purchasing.aspx>