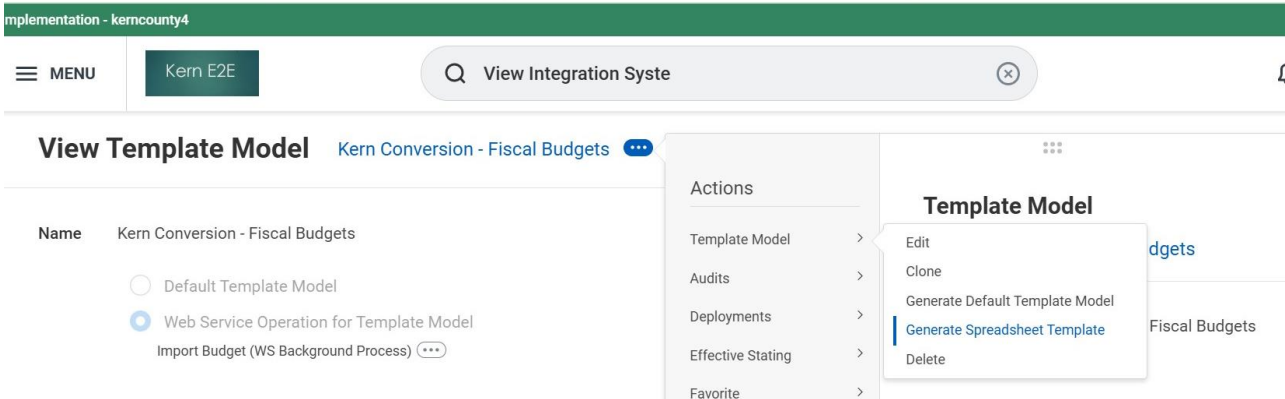
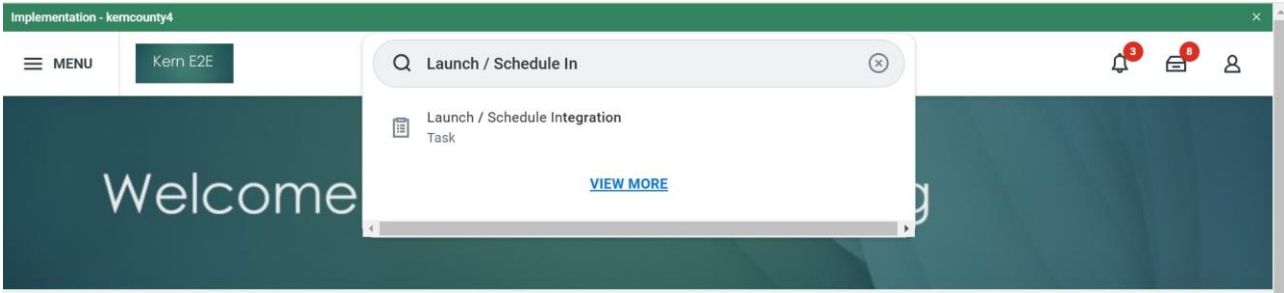
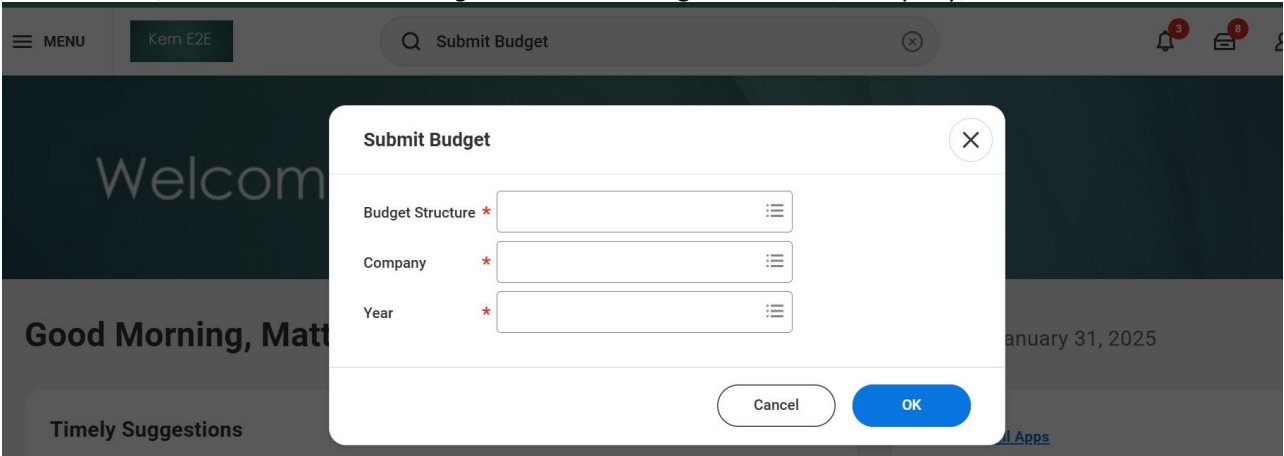


Audience / Role	Award Contract Specialist Budget Analyst Budget Manager Budget Unbalanced Amendment Manager Initiator Project Manager Project Specialist
Description	This job aid provides instructions to create a budget directly in Workday. Check policies to see if the Budget should be created first in Sherpa.

Create Budget

	To create a Budget Template for a Fiscal Budget search Create Budget Template, and select the: • Budget Structure: Adopted Budget Structure or Award Budget • Company: Kern • Budget Name: [Text Field] • Default Entry Type: Adopted • Default Reporting Currency: USD • Default Balanced Amendments: Yes • Summary Period: Year To create a Budget Template for a Project or Fixed Asset Budget search Create Project Budget Template and select: • Budget Structure: Fiscal Year Fixed Assets, Project Operating Total Expense, or Project Capital or Major Maintenance Total Expense • Name: [Text Field] • Leger Account/Summary:
1	Search View Integration System, and select the following based on the type of Budget you want to submit: • Fiscal Budget: Kern Conversion – Fiscal Budget • Project Budget: Project Budget_Kern EIB • Award Budget: FIN Convert Award Budgets
2	From the Related Actions of the Integration System selected above, click the related actions and select Template Model. From the Template Model page select the related actions and chose Template Model > Generate Spreadsheet Template. 

3	Populate the Spreadsheet with the information needed.
4	Search <i>Launch/Schedule Integration</i> 
5	Attach the file and submit the EIB.
6	Search <i>View Budget</i> and confirm it looks correct.
7	If it is correct, then search <i>Submit Budget</i>. Put in the Budget Structure, Company, and Year. 
8	Submit the Budget.

What Happens Next?

- The financial budget routes for review and approval by the Budget Manager. If the Budget Manager initiated the financial budget, they are restricted from approving and another Budget Manager is required to review and approve.
- Once approved, changes to the budget can only be processed by processing a budget amendment.

Related Reports

- View Budget
- Budget to Actuals – CC>LA>RCSC
- Budget to Actuals – Award
- Budget to Actuals – Project