

# Reviewing Budgets in InfoEd

## Finding the budget

As InfoEd budgeting functionality is implemented, some budgets will be developed in InfoEd and some will be developed in Excel.

Budgets developed using Excel will be attached to the proposal review dashboard in the Internal Review Package or as a separate attachment. Open the attachment to review these budgets.

Budgets developed in InfoEd are in the Budget section of the InfoEd Proposal Development record. To find and review these budgets:

1. Click on the Proposal Development (PD) Record link in the reviewer dashboard. This will open the separate PD record window.
2. In the PD record window, click Budget (in the navigation menu). This will open the budget in a new window.

## Finding information in an InfoEd budget

### General guidance and tips

- Navigate the budget sections by clicking the items in the navigation menu.
- Click the Detail button next to any item to see additional information about that item.
- Click the “Show” and “Hide” links to expand sections and columns of the budget to see more information or close a section or column to reduce the space it is taking.
- Click the “Source View” drop-down menu in the summary budget window to view sponsor requested costs, institutional costs (i.e., cost share), total project costs (i.e., requested and cost shared), or subrecipient budgets.

### Personnel effort information

In the Personnel section of the summary budget page, click the Detail button next to the individual’s name / roll. This will open a separate “Budget Detail” window. The window will open showing the Detail tab. This tab shows effort, salary, and fringe benefit columns for the individual for each budget period.

- To toggle between person months and percentage of effort, click the “Person Months/Effort” drop-down item and select the desired display. InfoEd will display the type of effort information chosen.
- To see the period for which salary is budgeted (academic, summer, calendar), select the Person Months option from the drop-down. The window will display Calendar, Academic, and Summer effort columns with data for each budget period.
- *Note that InfoEd calculates/displays percentage of effort on a full calendar year basis, regardless of an individual’s NIU appointment.*

If additional pay is budgeted during an academic or calendar period, the Justifications tab of the budget detail window will specify the amount of additional pay budgeted.

### Cost Share

There are several ways to find cost share information in the InfoEd budget:

### On the summary budget page:

This is the default budget landing page upon opening the budget. Click the Budget item in the navigation menu to access it.

- The Cost Share Detail subsection of the F&A and Cost Share Detail section lists assignments of cost share totals to NIU units or external sources.
- The Cost Sharing column(s) in the Budget Summary section provides the total cost sharing for each budget period. Click the “Show” link to find direct and indirect cost share totals.
- Click the Source View drop-down menu and select “Institution” to view the total cost sharing per line item for each budget period.
- Click the Detail button next to a particular line item to open the budget Detail window. Within that window, click the Cost Sharing tab to see a breakdown of sponsor requested and institutional (i.e., cost share) costs by dollar amount and percentage for each budget period.

### Cost Sharing section of the budget:

- Click the Cost Sharing item in the navigation menu to see the breakdown of sponsor-requested and institutional (i.e., cost share) dollar amounts.
- Line items are rows; budget periods are columns
- This view shows totals per line item including direct and indirect costs for the entire proposed project period, and totals per budget period.
- Click the Detail button next to each line item to see details for that item.

### On each budget period page:

- In the navigation menu, click the plus sign next to “Budget” to show budget periods if they are not already expanded.
- Then click the item in the navigation menu corresponding to the budget period you want to view.
- Each line item shown in the budget period will have a Cost Sharing button.
- Click the Cost Sharing button for that item to see the sponsor-requested and institutional (i.e., cost share) costs for that line for the chosen budget period.

### Indirect Costs

There are two places to find indirect cost rates and dollar amounts: The Summary Budget and the F&A budget page.

### On the summary budget page:

- Indirect cost amounts appear in the budget totals.
- The indirect cost rate appears in the F&A Rate Applied text box in the F&A and Cost Share Detail section of the page.

### On the F&A page:

- Click F&A in the navigation menu to access the F&A page of the budget.
- This page provides a detailed breakdown of the indirect costs budgeted for each line item by budget period.
- This page contains a Source View drop-down; click it to view F&A budgeted in the sponsor request, as cost share, total project cost, and for each subrecipient budget.