![Minnesota State logo]

Facilities
Budget Amendment for Projects

Introduction

This document will guide you through entering a funding source for your campus and/or capital project that will integrate with eBuilder.

NOTE: check you have the proper security roles to complete tasks listed in this guide.

- » Budget Manager (recommended)
- » Project Manager

1 | Create Budget Amendment

Step 1. From the Workday homepage, type **Create Budget Amendment** and select the *Task*.
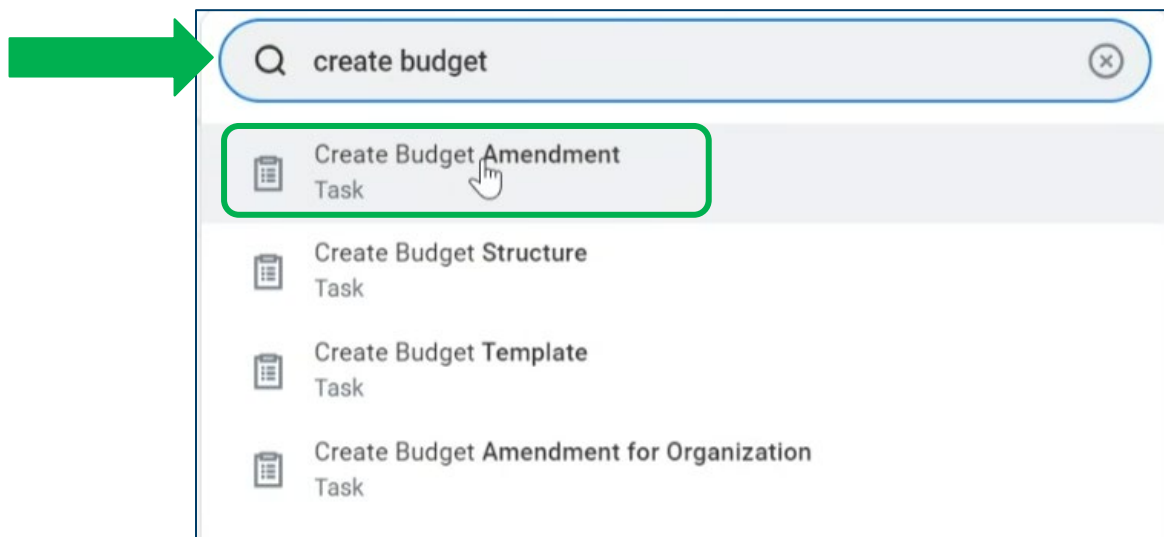
Step 2. In the Create Budget Amendment window, enter:

- » **Budget Structure:** Annual Operating – Child-New
- » **Company:** Your Institution
- » **Budget Name:** FYXX Operating Budget

Then click **OK**.

Create Budget Amendment

Link to Job Aid here -> Grants
Hosted on Minnesota State Connect

Budget Structure * ✕ Annual Operating - Child ...

Company * ✕ CU0000 Minnesota State System Office

Budget Name * ✕ FY25 SYSO Operating Budget

Populate Existing Budget Lines

Ledger Account/Summary

Worktags

Budget Period

Cancel   OK

Step 3. Now a detailed view of the budget amendment is visible. Enter the following:

» **Description:** Enter a description for your budget that will inform you of the funding source when looking in eBuilder. For example, 2023 HEAPR.

» **Amendment Type:** One Time

In the **Budget Amendment Lines** section towards the bottom of the screen, you will enter specific information to tie the appropriate funds to the project.

Step 4. Carefully enter the information below as it pertains to your institution.

» **Period:** FYXX Operating Budget

» **Ledger Account/Summary:** select where the funds are coming from. If HEAPR or General Obligation Bonds, select *80020 Capital Expenditures*. If campus funded, select *60140 Other Expense*.

» Next, select the **Project** by selecting *Projects* then the specific project name.

o **Note:** you can customize this table and make the columns wider, so it is easier to see. You can also configure the order in which the columns appear by selecting the 🔲 icon.

» **Amount Change:** Enter the budget amount.

» **Fund:** Choose the fund that is applicable for your project (i.e. campus funded, HEAPR, GO, etc.).

o FD0171 for 2023 HEAPR

o FD0118 for 2020 HEAPR

o For GO projects, each institution will have different funding codes

When you have entered this information, click **Submit.**

Workday will integrate with eBuilder within ten minutes.

2 | Editing a Budget Amendment

Budget Amendments are editable if in Draft form. Once submitted, they are not. Follow the instructions in this section for guidance.

Step 1. Find the budget amendment by entering the budget amendment number (if known) in the search box. Or entering Find Budget Amendment in the search box for the report.

Step 2. If in draft form, the budget amendment will allow you to change fields.

3 | Copy and Reverse

Once a Budget Amendment is submitted, the only way to delete or amend it is to Copy and Reverse the transaction.

Step 1. Find the budget amendment by entering the budget amendment number (if known) in the search box. Or entering Find Budget Amendment in the search box for the report.

Step 2. Next to the header, click the ellipsis (3 dots) and select **Copy and Reverse** which creates a duplicate entry and flips the debits and credits.

Step 3: Review and submit.

Copy and reverse restores budget to where it was before the original budget amendment was done. The amendment type must match that of the one you are reversing. You can now create a new budget amendment with the correct information.