Introduction to the Budget Tool

The Budget tool, located in the Duke@WORK web site, works with Duke’s SAP system to support the following processes and related functions:

- **Budget Development** - to develop the annual budget and multi-year plans at Duke.
- **Budget Modifications** - to modify the budget during a certain window of time.
- **Projections** - for board reporting.
- **Workflow** – to pull the budget up from one stage to another in the workflow process. This function is only available and displayed to those who have the security access to perform this function.
- **Reports** - to generate and analyze reports related to Budget Development, Budget Modifications, and Projections.

Within each of these functions are layouts that can be used to enter information for the budget development, budget modifications, and projections. The navigation and customization of these layouts are similar across the various functions. So for example, once you know the general steps for selecting and loading budget data in a layout or how to use the additional data filters in a layout, those general steps are similar in all other layouts.

This guide outlines the general navigation and customization options that are similar across all the Budget tool layouts. There are also individual guides for Budget Development, Budget Modifications, Projections, Workflow, and Reporting for more specific details on performing those functions.