

Euna Grants – Budget Versions Feature FAQ

1. Question: What are Budget Versions?

Answer: It allows funders and recipients with editing permissions to create and submit editable draft budget versions. It provides a side-by-side comparison between any draft or archived versions against the active budget, a version history log that captures all changes from creation to activation, and maintained access to all previously active budgets through the archive section of the versions dropdown.

2. Question: What happens to expenses when the budget is modified?

Answer: There should not be any changes to existing expenses when a budget is modified through Budget Versions. Expenses can also be added after a version has been submitted.

3. Question: What reporting options are available with Budget Versions?

Answer: A new Budget Versions reporting category is available that includes Budget Version ID, Budget Version Name, Version Status, and Version Created Date, among others. These fields can be used for custom reporting.

4. Question: If you plan to also use the amendment process, how does that work? Do recipients still use the spreadsheet for amendments?

Answer: The amendment process has not changed. Recipients can still export the budget template, make changes in the spreadsheet, and re-import it into the system for funder review. Budget Versions and amendments are separate processes and do not work in sync with each other.

5. Question: Does approving an amendment create a new version or affect drafts?

Answer: If a budget amendment is approved, it will update the active budget but will not create a new budget version. It also does not impact any draft budget versions that are currently outstanding. Amendments will not update the Budget Version history — only actions taken within the Budget Versions feature are recorded there.

6. Question: What roles have the functionality to submit a version, and on the grantor side, to view and approve the budget?

Answer: Editor access is required to submit or approve budget versions. This can be either an Admin or an Editor role on either the funder or recipient side.

7. Question: Is Budget Versioning an easier method to update match and other non-funded budget line items?

Answer: The line item editing experience within Budget Versions is consistent with how it currently works in the system. The main addition is the side-by-side visualization and the approval workflow for draft budgets. The underlying behavior of fields within a line item window has not changed.

8. Question: Is Budget Versioning something that can be turned on or off in settings?

Answer: No, there are no on/off settings for Budget Versions.

9. Question: If you go through the Budget Version process first, when submitting an amendment, can you just download and upload the current budget with no changes for the amendment — giving you both the version history and the amendment?

Answer: You can export the current budget just as you would for an amendment. However, using the amendment process will not update the Budget Version history.

10. Question: Can a grant manager edit budget line items without going through the formal amendment process?

Answer: Yes. A grant manager can edit budget line items directly without initiating a formal amendment. Funders can also use Budget Versions — create a draft version, make the desired changes, and activate it directly without a submission workflow between parties, since there is no back-and-forth submission required when the funder is making the edits themselves.

11. Question: Does the budget revert to a previous version if a grantee submits a draft version after a formal amendment has been completed?

Answer: No. When an amendment is approved, it updates the active budget. Any draft budget version that exists was created based on what the active budget was at that time. You are not required to activate a submitted draft — you can choose to leave it without activating it.

12. Question: Can a grant manager (funder) delete a version they created if they no longer need it?

Answer: At this time, there is no option to delete or withdraw a draft version.

13. Question: When processing a payment request, can you view the budget submitted on the application side by side with the budget on the payment request?

Answer: This capability is not currently available.

14. Question: Who receives Budget Version notifications?

Answer: For recipients, notifications are sent to the Recipient Manager and cc'd to any Recipient Additional Users. For funders, notifications are sent to the Funder Manager and cc'd to any Funder Additional Users. Email notifications are generated when a budget version is submitted, withdrawn, sent back, or activated. These can also be viewed in the Email Manager within the award.

15. Question: For Grant Seekers, do Budget Versions need to be approved like amendments do?

Answer: No, Budget Versions do not go through the same formal approval process as amendments. As long as you have admin or editor access, you can edit and activate a budget version directly. It does not go through the standard amendments approval workflow.