



Budget Report for Grants

This How-To Guide covers how to run a **budget report for grants** in Workday.

Start Here

1. Open **Google Chrome**.
2. Navigate to **Workday**.
3. If prompted, login with your **College email** and **password**.
4. On the **Menu** on the left-hand side, select the **Customize** button, which looks like a gear.
5. Scroll down to the **Saved** section and select **+Add Shortcuts**.
6. Search for **BMC - Grant Budget vs Actuals by Object Class**. Select the **plus button**, **Add Shortcut**, and then **Save Changes** to save the report to your **Shortcuts** for easy access. The report will now always be accessible under **Saved** in your Menu.
7. Once added, go back to the **Saved** button and select **BMC - Grant Budget vs Actuals by Object Class**.
8. Type in the grant name into the **Grant/Grant Hierarchy** box:

The screenshot shows the configuration interface for the 'BMC - Grant Budget vs Actuals by Object Class' report. It features several filter categories: 'Grant / Grant Hierarchy' with a search box containing 'grant name here', 'Grant Hierarchy' with options 'All Grant Hierarchies', 'All Proposal Grants', and 'All Grants', and 'Period' with options 'Grants by Sponsor' and 'All Grants'. Below these is a 'Filter Name' input field, a 'Manage Filters' section showing '1 Saved Filters', and a 'Save' button. At the bottom, there are 'Cancel' and 'OK' buttons.



- Most grant names start with the last name of the PI.
 - You can save your filters for future use as well.
9. Select your reporting **period**. It is recommended to either pick the most recent fiscal period or May of the current FY (like below):

The screenshot shows the 'BMC - Grant Budget vs Actuals by Object Class' interface. It features three filter fields: 'Grant / Grant Hierarchy', 'Grant Hierarchy', and 'Period'. The 'Period' field is currently set to 'FY2026 - 12-MAY' and is open to a dropdown menu. The dropdown menu lists fiscal years from 'FY2026 - 01-JUN' to 'FY2026 - 12-MAY'. The 'FY2026 - 12-MAY' option is selected. To the left of the dropdown, there is a 'Filter Name' field, a 'Manage Filters' button, and a '1 Saved Filters' dropdown. An 'OK' button is visible at the bottom right of the dropdown menu.

- Then you can see your budget and actuals for FY26.
- Transactions for Fiscal Years prior to FY26 are **not** being added to Workday. If you need them (for multiyear grants), please pull those reports soon for your files.

Have Questions? For assistance, please contact help@brynmawr.edu or 610-526-7440.