Adding/Deleting Supporting Details

This function allows you to add calculations or aggregate lines to your budget cells. For example Travel and Training, you can add the airfare cost, lodge, meals etc. to the cell as supporting details.

Supporting Details are "calculating" explanations you can add to specific cells if desired.

- Supporting details allows you to add in specifics of a cell's entry. For example, if travel expenses are expected to be higher than normal, you can use Supporting Details to explain everything that goes into that value.

Supporting details can only be added to "0" level cells, not to the roll up level. If you get the following error message, you are on a roll up level.

1. In this example, Out of State Travel is higher than last year and you feel you need to explain why.
2. **Right-click** in the cell to which you wish to add supporting details.
3. Click the **Supporting Detail** option.
4. Enter the desired information into the Description field (For example, “California Conference”).

In this example, we are going to add sub-category descriptions (children) to the California Conference category. We need to add ‘Child’ and ‘Siblings’ to itemize the expenditures.

- **Children** are sub-categories of the main described category (i.e., California Conference).
- **Siblings** are additional categories/sub-categories added at the same level.

5. Click the **Add Child** button.

6. Enter a valid value e.g. "Flight" into the first sub-category (child) field.

7. Enter "2000" as the value of the flight into the Amount field.

There were more items that made up the cost of this conference, so we will add additional siblings to the Flight sub-category.

8. Click the **Add Sibling** button.

9. Enter a valid value e.g. "Hotel".
10. Enter a valid value e.g. "3000".

11. Click the **Add Sibling** button again.
   
   - Notice how the sub-categories (children) are totaling up for the total costs of the California Conference in the FY17 BegBalance budget Working column.

We will now enter the last item to be calculated for the California Conference.

12. Enter a valid value e.g. "Conference Registration".

13. Enter a valid value e.g. "2000".

14. Click the **Add Sibling** button.
15. Enter a valid value e.g. "New York Expo".

16. Enter a valid value e.g. the total cost of this event as "3038".

This event has nothing to do with the California Conference so it will not remain a "child" of the California Conference, but will be "promoted" to a "sibling" of the California Conference.

We need to promote this entry to the status of "sibling" of the California Conference.

17. Click the **Promote** button.

- Notice the New York Expo has been promoted to its own category and is considered the sibling of the California Conference.
- The final total of all entries appears at the bottom.
18. When finished adding all needed supporting details, you will save the data and return to the Budget Worksheet.

19. Click the **Save** button.
   
   - Remember you will need to scroll back down to the area of the worksheet in which you were working after saving your supporting details.

20. **Scroll** to the desired area of the worksheet.

21. The cell that contains supporting details will turn aqua blue/green.

   ![Image](image1.png)

   If you decide the supporting details are no longer needed, deleting them is very similar to adding them.

22. Right-click the cell that contains the supporting details you wish to delete.

23. Click the **Supporting Detail** option from the pop-up menu.

   ![Image](image2.png)

   You can choose to delete any one supporting detail or delete all of them.

In this example, we are going to delete all of them.
24. Click the **Delete All** button.

25. Click the **Save** button.

26. After clicking the Save button, you will have the option to decide whether you want to delete the supporting details along with the cell data, or leave the cell data and just delete the supporting details.

   In this example, we will leave the cell data and delete the supporting details.

   27. Click the **No, leave the value as is** button.

28. Verify the supporting details were deleted as intended.
   
   - Notice the aqua blue/green cell color is gone indicating there are no supporting details for this cell. Please note that you don’t need to scroll down to see the changes in the newer version.

If you need help with...

- Technical issues, contact the UF Help Desk:
  - 392-HELP(4357)
  - helpdesk@ufl.edu

- Policies and Directives, contact the UF Budget Office:
  - 392-2402
  - http://cfo.ufl.edu/administrative-units/budget/