Populating Accounts

You may find for certain fiscal years that you need to budget for an account that you have not used for the previous 3 years.

In this situation, you can manually add the account you wish to budget for. Assume you are at the All Funds Budget cycle.

1. Navigate to My Task List > All Funds Budget > Budget Worksheet form

2. Right-click on the form and select Populate Account rule.

3. From the pop-up window, you will indicate which account you wish to add.

   **NOTE:** Do NOT change any of the other fields in this window.

4. Click the Select Account(s) to add: dropdown icon. A new window will pop up.
In this example, we are going to add an additional Travel account.

5. Click **Total Accounts > Net Revenue and Expense > Total Expense > Operating Expenditures > Other Operating Expenses > Travel and Training**.

   In the new popup window, within the left-side Account column, you will drill-down until you locate the account you wish to add. Scroll down at any time if you need to.

6. Click the desired account object.

7. Once you have selected the desired account, move it to the right side Member Name column by clicking the **Move Over Arrow**.

   **Note:** Only the accounts listed on the right side will appear in your worksheet.

8. Confirm the correct account appears on the right side.

9. Click the **OK** button.
You can add multiple accounts to the “Select Account(s) to add:” box. If you know the account numbers, type them into the box and separate each account by using commas.

10. Click the **Launch** button.

11. After launching the rule, you will receive a confirmation message.

12. Click the **OK** button.

13. Scroll down to verify the new account has appeared in your worksheet.

14. Notice the new account now appears in the Travel and Training section.

15. **Click** within the cell.

16. Enter the amount you wish to budget for into the cell.
   
   - This account will remain in your worksheet as long as you budget for it—by placing a value in the cell.
   
   - If you decide you don't need/want to budget for this account, you can clear the cell of all data and save the worksheet. The account will no longer appear.
Or, if you enter a "0" into the cell the account will remain visible (as long as you did not suppress zeros in your user preferences) for the current fiscal year.

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/