



You can make changes on this downloaded file. However, at this point, we don't recommend you import directly from this updated file to UF Budget Planner. Please download a template (see option 1 of import data for more instructions on downloading the template). Copy the changes you made in this file to the template and import back to UF Budget Planner.

## IMPORT DATA

There are two ways to import the data into the sheet.

**Option 1:** you can download a template from the Import Data Menu or download the pre-formatted template in Adaptive (Reports-Shared-101 Pre-Formatted Import Template), add data in the template or copy the data you made in excel, then import the data to the sheet through Import Data Menu.

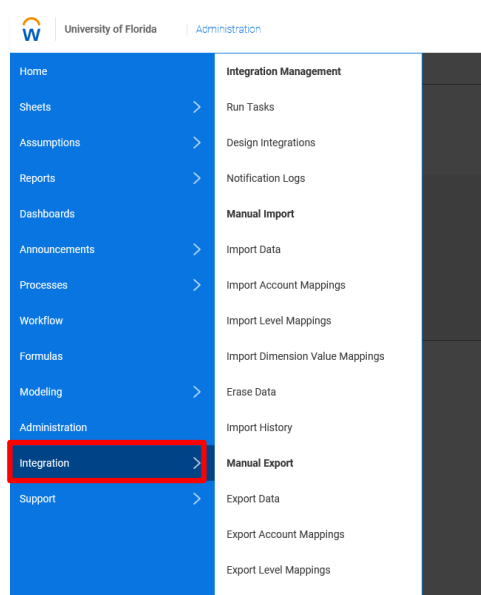
**Option 2:** Use Copy and Paste

Before we dive into the details, let's review the import data menu selections and options.

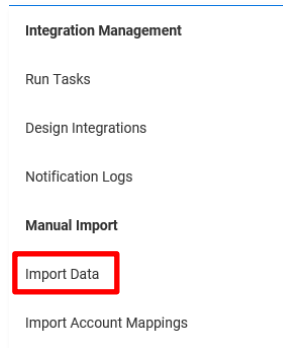
### Introduction to Import Data Menu

Click the Blue **W** icon in the upper left corner of your home screen.

You will see a navigation menu that includes multiple access areas within UF Budget Planner. Click the **arrow** next to Integration to open the Integration Management submenu.

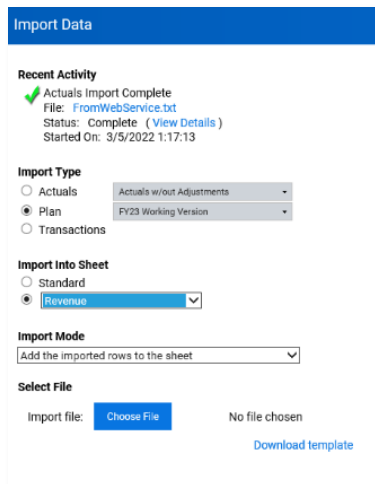


Click the **Import Data** menu item.



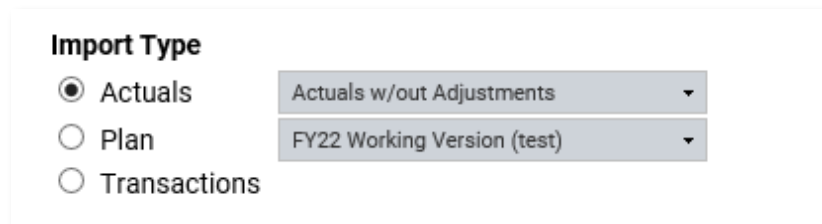
The Import Data interface lets you select import type, destination, and source.

- **Import Type** is determined by the version the data imports into: actuals, plan, or transactions.
- **Import Into Sheet** is determined by the type of sheet.
- **Import Mode** is not available for a standard sheet.



A screenshot of the 'Import Data' interface. It features a blue header bar with the title 'Import Data'. Below the header, there is a 'Recent Activity' section showing a successful import of 'Actuals' from a web service. The main section contains three groups of controls: 'Import Type' with radio buttons for 'Actuals', 'Plan' (selected), and 'Transactions', and dropdown menus for 'Actuals w/out Adjustments' and 'FY23 Working Version'; 'Import Into Sheet' with radio buttons for 'Standard' and 'Revenue' (selected), and a dropdown menu; and 'Import Mode' with a dropdown menu set to 'Add the imported rows to the sheet'. At the bottom, there is a 'Select File' section with an 'Import file:' label, a 'Choose File' button, and a 'Download template' link.

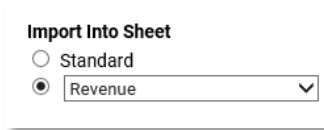
In the Import Type section, the options are: Actuals, Plan, or Transactions.



A close-up screenshot of the 'Import Type' section. It shows three radio button options: 'Actuals', 'Plan', and 'Transactions'. The 'Plan' option is selected. To the right of the radio buttons are two dropdown menus. The first dropdown menu is set to 'Actuals w/out Adjustments' and the second is set to 'FY22 Working Version (test)'.

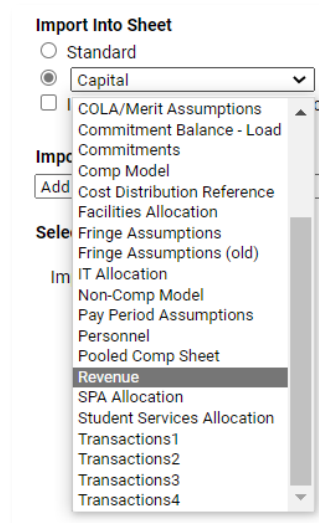
For updating budgeting data, select "Plan". Then select the correct version on the right. This is the version you plan to import data to. For FY23 all funds budget cycle, select FY23 Original Budget.

In the Import Into Sheet section, select the type of sheet you are importing into, which is either Standard, or a specific sheet from the drop-down menu. The available sheets are determined by the users' security roles.



**Import Into Sheet**  
☐ Standard  
☒ Revenue

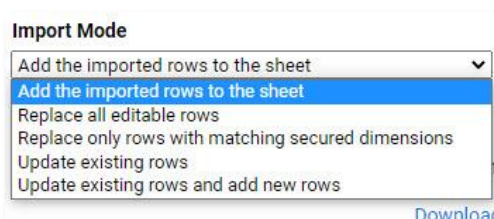
For all funds budget cycle, click on the second radio button, select the proper sheet you plan to import data to. In the screenshot below, Revenue sheet is selected. You can find Comp model for comp sheet, Pooled Comp Sheet and Non-Comp Model in the dropdown.



**Import Into Sheet**  
☐ Standard  
☒ Capital  
☐ COLA/Merit Assumptions  
☐ Commitment Balance - Load  
☐ Commitments  
☐ Comp Model  
☐ Cost Distribution Reference  
☐ Facilities Allocation  
☐ Fringe Assumptions  
☐ Fringe Assumptions (old)  
☐ IT Allocation  
☐ Non-Comp Model  
☐ Pay Period Assumptions  
☐ Personnel  
☐ Pooled Comp Sheet  
☒ Revenue  
☐ SPA Allocation  
☐ Student Services Allocation  
☐ Transactions1  
☐ Transactions2  
☐ Transactions3  
☐ Transactions4

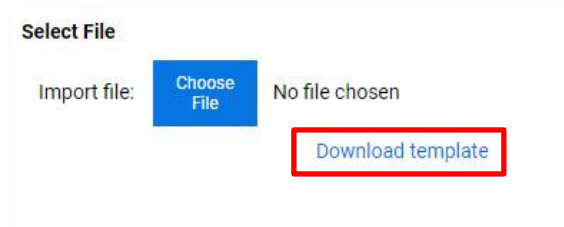
In the Import Mode dropdown, the following options are available:

- *Add the imported rows to the sheet:* Adds imported rows and leaves existing rows untouched. **We recommend that you use this option.**
- *Replace only rows with matching secured dimensions:* Replaces all existing rows that match the level or any secured custom dimension. If matches aren't found, add rows. **This is not recommend.**
- *Update existing rows:* Updates specific data in existing rows that match the Import Key. Not available for sheets with Allow Splits selected. **This option is not designed for All Funds Budget process.**
- *Update existing rows and add new rows:* Updates specific data in existing rows that match the Import Key. If matches aren't found, rows are added. Not available for sheets with Allow Splits selected. **This option is not designed for the All Funds Budget process.**



**Import Mode**  
 Add the imported rows to the sheet  
 Add the imported rows to the sheet  
 Replace all editable rows  
 Replace only rows with matching secured dimensions  
 Update existing rows  
 Update existing rows and add new rows

When you click the [Download template](#) link, a blank template will be downloaded to your computer for the import type and sheet you selected.



## OPTIONS TO IMPORT DATA

### Option 1: Download Template from Import Data or Use pre-formatted Template

You will use a new, blank template when importing new data, *or* go to Adaptive( Reports-Shared-101 Pre-Formatted Import Template) and download a pre-formatted template

Below is an example that we will Import Revenue data into the Revenue Sheet by using template downloaded from Import Data.

Select FY23 Original Budget from Plan drop-down menu for Import Type (The screen shot is taken during the time that FY23 Original Budget is locked. Select FY23 Original Budget UAT instead of it);

Select Revenue for Import Into Sheet;

Select Add the imported rows to the sheet;

Click Download Template

**Import Type**

☐ Actuals
 

Actuals w/out Adjustments

☒ Plan
 

FY23 Original Budget UAT

☐ Transactions

**Import Into Sheet**

☐ Standard

☒ Revenue

☐ Import without Code and Name columns for display names.

**Import Mode**

Add the imported rows to the sheet

**Select File**

Import file:
 

Choose File

No file chosen

Download template

Your Import Into Sheet choice generates an import template spreadsheet. The columns you need to fill out in a spreadsheet template vary based on the sheet type you are importing. Read the instructions on the first tab of the download template for details. We are going to import data for Revenue. The downloaded template is structured for revenue. Click the [Revenue tab](#).

	A	B	C
1			
2	Instructions for using model import template :		
3			
4	Required fields will vary depending on model definition		
5			
6	Column Descriptions:		
7			
8	<b>Template Column</b>	<b>Possible Values</b>	<b>Description</b>
9	Text	Any string value	
10	Number	Any numeric value	
11	Date	Any date representing a day within the target month, or	
12	Text Selector	String value of corresponding text selector option	
13	Initial Value	Any numeric value	
14	Time Span	Any numeric value	All the time span columns should be provided. The
15			Time span columns are represented by codes of time
16			
17	Dimension Name	String value of corresponding Dimension name	
18	Dimension Code	String value of corresponding Dimension code	
19			
20	Is Split Child Row	"Yes" or "No"	This column is present if the model allows splits, and if
21	Level Code	A level code from your organization structure.	This column will be used to assign the imported model
22			

Instructions

Revenue

The importing process is based on Codes, not Names, so in the Revenue tab, delete all Name columns, leaving only the Code columns so that the template looks more condensed. (Please note that the screenshot below does not include all Name columns because the sheet is wider than the screenshot is.) You can leave the Name columns in the template but you don't have to input data there.

Required													Op			
Dept ID Code	Funds Name	Funds Code	Accounts Name	Accounts Code	Program Name	Program Code	Dept Flex Name	Dept Flex Code	Source of Funds Name	Source of Funds Code	Budget Reference Name	Budget Reference Code	06/2022	07/2022	08/2022	09/2022

After cleaning up, the template would look like this (only Code columns):

Required														
Dept ID Code	Funds Code	Accounts Code	Program Code	Dept Flex Code	Source of Funds Code	Budget Reference Code	Project Code	CRIS Code	Business Unit Code	Tuition – State Type Code	Tuition – Student Type Code	Notes	07/2021	08/2021

Enter your data in the template. Dept ID, Funds, Accounts and Program are required fields.

Required												
Dept ID Code	Funds Code	Accounts Code	Program Code	Dept Flex Code	Source of Funds Code	Budget Reference Code	04/2022	05/2022	06/2022	07/2022	08/2022	09/2022
21020100	171	420000	6100		UF Foundation	CRRNT				1000		

In the UF Budget Planner's Import Data page, click **Choose File** and import the spreadsheet.

Select File

Import file: Choose File No file chosen

Make sure the other selections are the same as the ones you made when you download the template (Please select FY23 Original Budget instead of FY23 Original Budget UAT).

**Import Type**

☐ Actuals

Actuals w/out Adjustments

☒ Plan

FY23 Original Budget UAT

☐ Transactions

**Import Into Sheet**

☐ Standard

☒ Revenue

☐ Import without Code and Name columns for display names.

**Import Mode**

Add the imported rows to the sheet

**Select File**

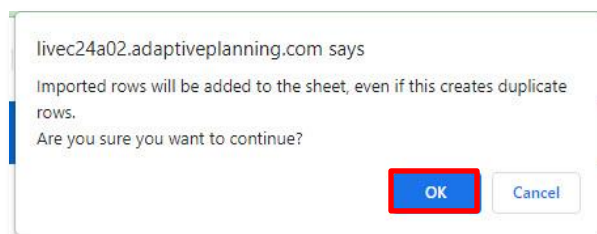
Import file:

Choose File

No file chosen

Download template

The import process requires a mapping match for all dimensions, accounts, and levels. First, UF Budget Planner attempts to match dimension values. Click **Ok**.



Next, UF Budget Planner attempts to match accounts. Click **Continue**.

**Dimension Value Mapping**

Dimension: Accounts

Import dimension value	Mapped dimension value	Delete
600000	600000	<input type="checkbox"/>
700000	700000	<input type="checkbox"/>

[Add Mapping](#) [Printable View](#)

**Mapping Details**

Dimension: Accounts

Import dimension value:

Mapped dimension value:

[Dimensions](#) [Search](#)

**Dimension Values**

- Accounts
  - 111000 - CASH ON HAND
  - 112000 - CASH CLEARING
  - 112100 - CASH IN BANK-CONCENTRAT
  - 112200 - CASH IN BANK-DISBURSEME
  - 112300 - CASH IN BANK-CASHIERS FUI
  - 112400 - CASH IN BANK-CREDIT CARD
  - 112500 - CASH IN BANK (ACH/EFT)

[Accept](#) [Delete](#) [Cancel](#)

[Continue](#) [Cancel](#)

Last, UF Budget Planner attempts to match level. Click [Import Plan Data](#).

**Level Mapping**

Delete	Import Level	Mapped Level
<input type="checkbox"/>	21020100	21020100

[Add Mapping](#) [Printable View](#)

**Mapping Details**

Import level:

Mapped level: None

[Levels](#) [Search](#)


**Name**

- Total UF
  - BEBR
  - BUS & ECO Development
  - Business Administration
  - CATTLE Enhancement Foundation
  - Center for Latin American Studies
  - Chief Diversity Office
  - CREFN Citrus Research/Education Four

[Accept](#) [Delete](#) [Cancel](#)

[Import Plan Data](#) [Cancel](#)

A page will appear alerting you to a successful or failed import. If successful, the following page will display:


University of Florida
Integration / Import Data

### Results of Import

The import has been completed.  
[Click here to return to the Main Import Page](#)

Revenue import successful. Rows imported: 2  
Existing rows are unchanged.

Navigate to **Sheets/Revenue** and the newly imported data shows on the sheet.

#	DEPT ID	FUNDS	ACCOUNTS	PROGRAM	DEPT FLEX	SOURCE OF FUN	BUDGET REFERENCE	PROJECT	CRIS	BUSINESS UNIT	TUITION - STATE	TST	NOTES	JUL 2021
1	21010000 CFO-VP OFFICE	158 SUPPORT UNIT SERVICES FUNDS	571800 - Transfers Within Fund	7700 - ALL		OTHER	CRRNT			UFOR				200,000
2	2101 University Budget Office	158 ACM SUPPORT UNIT FUND	400000 - REVENUE (A) - BUDGET ONLY	7700 - ALL			CRRNT			UFOR				4,166,667
3	21010000 CFO-VP OFFICE	158 SUPPORT UNIT SERVICES FUNDS	571800 - Transfers Within Fund	7700 - ALL		OTHER	CRRNT			UFOR				200,000
4	2101 University Budget Office	158 ACM SUPPORT UNIT FUND	400000 - REVENUE (A) - BUDGET ONLY	7700 - ALL			CRRNT			UFOR				4,166,667
5	21010000 CFO-VP OFFICE	158 SUPPORT UNIT SERVICES FUNDS	571800 - Transfers Within Fund	7700 - ALL		OTHER	CRRNT			UFOR				200,000

Please be aware that the records are added to the sheet. The existing records remain in the sheet. If there are duplications, you need to manually delete them.

Note: Since we are importing data into the FY23 Revenue sheet, make sure the amount is entered in the time range of FY23 in the template, otherwise you will get an error message.

This is an example of the error message you will receive if data is entered in the FY22 period:

Results of Import

Import failed due to errors in import file.  
[Click here to return to the Main Import Page](#)  
[View Errors in Excel](#)

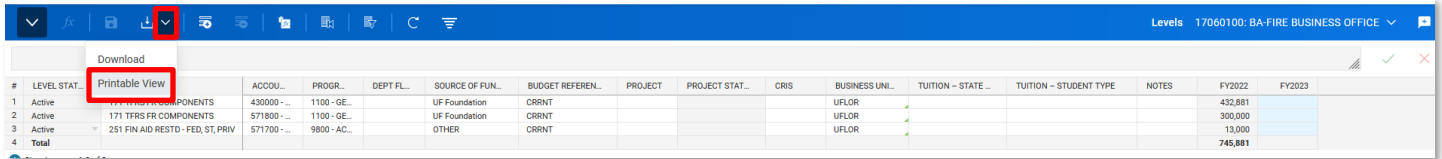
The Revenue import has failed.  
Import Failed with the following error: 1 Error(s) Occurred.  
Additional information:  
Cannot import into locked time period row 5 column Y. Context: 21020100,171,420000,6100,,UF Foundation,CRRNT,,,,,,,,,,,,,1000,

Clicking the **View Error in Excel** link will show you the details:

Required														
Dept ID Code	Funds Code	Accounts Code	Program Code	Dept Flex Code	Source of Funds Code	Budget Reference Co	04/2022	05/2022	06/2022	07/2022	08/2022			
21020100	171	420000	6100		UF Foundation	CRRNT			Cannot import into locked time periods.					

## Option 2: Use Copy and Paste

Go to the Revenue sheet, click the **Download** icon, then select **Printable View** option in the dropdown. A copy of the sheet will be downloaded to your computer as an Excel spreadsheet.



The screenshot shows the top toolbar of the application. The 'Download' icon (a downward arrow) is highlighted with a red box. Below it, a dropdown menu is open, showing 'Printable View' as the selected option, also highlighted with a red box. The background shows a table with columns for Level, Status, Funds, Accounts, Program, Dept Flex, Source of Funds, Budget Reference, Project, Project Status, CRIS, Business Unit, Tuition - State, Tuition - Student Type, Notes, FY2022, and FY2023.

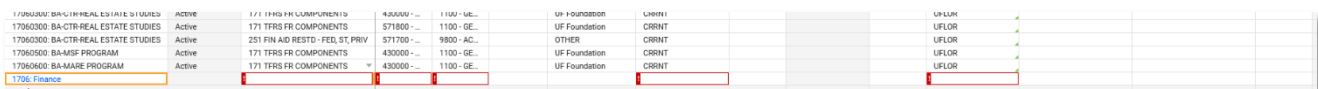
The downloaded copy will show exactly what will see in the sheet. You will not see the columns in the downloaded file if these columns have been hidden from the sheet.

Dept ID	Level Status	Funds	Accounts	Program	Dept Flex	Source of Funds	Budget Reference	Project	Project Status	CRIS	Business Unit	Tuition - State Type	Tuition - Student Type	Notes	FY2022	FY2023
17060100: BA-FIRE BUSINESS OFFICE	Active	171 TFRS FR COMPONENTS	430000 - ...	1100 - GE...		UF Foundation	CRNT				UFLOR				432,881	
17060100: BA-FIRE BUSINESS OFFICE	Active	171 TFRS FR COMPONENTS	571800 - ...	1100 - GE...		UF Foundation	CRNT				UFLOR				300,000	
17060100: BA-FIRE BUSINESS OFFICE	Active	251 FIN AID RESTD - FED, ST, PRIV	571700 - ...	9800 - AC...		OTHER	CRNT				UFLOR				13,000	
<b>Total</b>															<b>745,881</b>	

Update any fields that you need to change and enter the amount in column of FY2023. In this example, fund, accounts, and program code are changed for the first line. Notes are added to all the lines. Amounts are entered in column FY2023.

Dept ID	Level Status	Funds	Accounts	Program	Dept Flex	Source of Funds	Budget Reference	Project	Project Status	CRIS	Business Unit	Tuition - State Type	Tuition - Student Type	Notes	FY2022	FY2023
17060100: BA-FIRE BUSINESS OFFICE	Active	143 AUX - DOCE FUND	440500 - SALES & SERVICE	7800 - CONTINUING EDUCATION		UF Foundation	CRNT				UFLOR			Mian's Test	432,881	1,000
17060100: BA-FIRE BUSINESS OFFICE	Active	171 TFRS FR COMPONENTS	571800 - ...	1100 - GE...		UF Foundation	CRNT				UFLOR			Mian's Test	300,000	1,000
17060100: BA-FIRE BUSINESS OFFICE	Active	251 FIN AID RESTD - FED, ST, PRIV	571700 - Transfers Within	1100 - GENERAL ACADEMIC INSTRU		UF Foundation	CRNT				UFLOR			Mian's Test	13,000	1,000

Go back to the Revenue sheet, add a new row.



The screenshot shows the Revenue sheet with a new row added at the bottom, highlighted in orange. The new row contains the following data: 17060500: BA-MSF PROGRAM, Active, 171 TFRS FR COMPONENTS, 430000 - ..., 1100 - GE..., UF Foundation, CRNT, UFLOR. The existing rows are the same as in the previous table.

Select all the fields except amount columns for FY2022 and FY2023 from the template, then copy the data into the row that just added. **You only need to add one row to the sheet even though you are importing multiple rows of data. All the data will be copied to the sheet.**

17060500: BA-MSF PROGRAM	Active	171 TFRS FR COMPONENTS	430000 - ...	1100 - GE...		UF Foundation	CRNT				UFLOR					
17060600: BA-MARE PROGRAM	Active	171 TFRS FR COMPONENTS	430000 - ...	1100 - GE...		UF Foundation	CRNT				UFLOR					
17060100: BA-FIRE BUSINESS OFFICE	Active	143 AUX - DOCE FUND	440500 - ...	7800 - CO...		UF Foundation	CRNT				UFLOR			Mian's Test		
17060100: BA-FIRE BUSINESS OFFICE	Active	171 TFRS FR COMPONENTS	571800 - ...	1100 - GE...		UF Foundation	CRNT				UFLOR			Mian's Test		
17060100: BA-FIRE BUSINESS OFFICE	Active	251 FIN AID RESTD - FED, ST, PRIV	571700 - ...	9800 - AC...		OTHER	CRNT				UFLOR			Mian's Test		

Then copy the amount to the sheet for FY2023. Click Save.

Note: If you copy all the data in the template including the amount columns to the Revenue sheet, the amount will not be pasted over. Therefore, we recommend that the users copy other data first, then copy the amount again.

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## BEST PRACTICE:

- Make sure you select the right version when you select Plan as Import Type.
- Make sure you select the right sheets for Import Into Sheet because it affects the template you will download.
- Make sure the data is in the right columns when you copy data from the other source to the template because the template has all of the required fields at the beginning.

## FOR ADDITIONAL ASSISTANCE

### Technical Issues

The UF Computing Help Desk  
352-392-HELP  
[helpdesk.ufl.edu](http://helpdesk.ufl.edu)

### Policies and Directives

The University Budget Office  
352-392-2402  
[University Budget Office](#)