

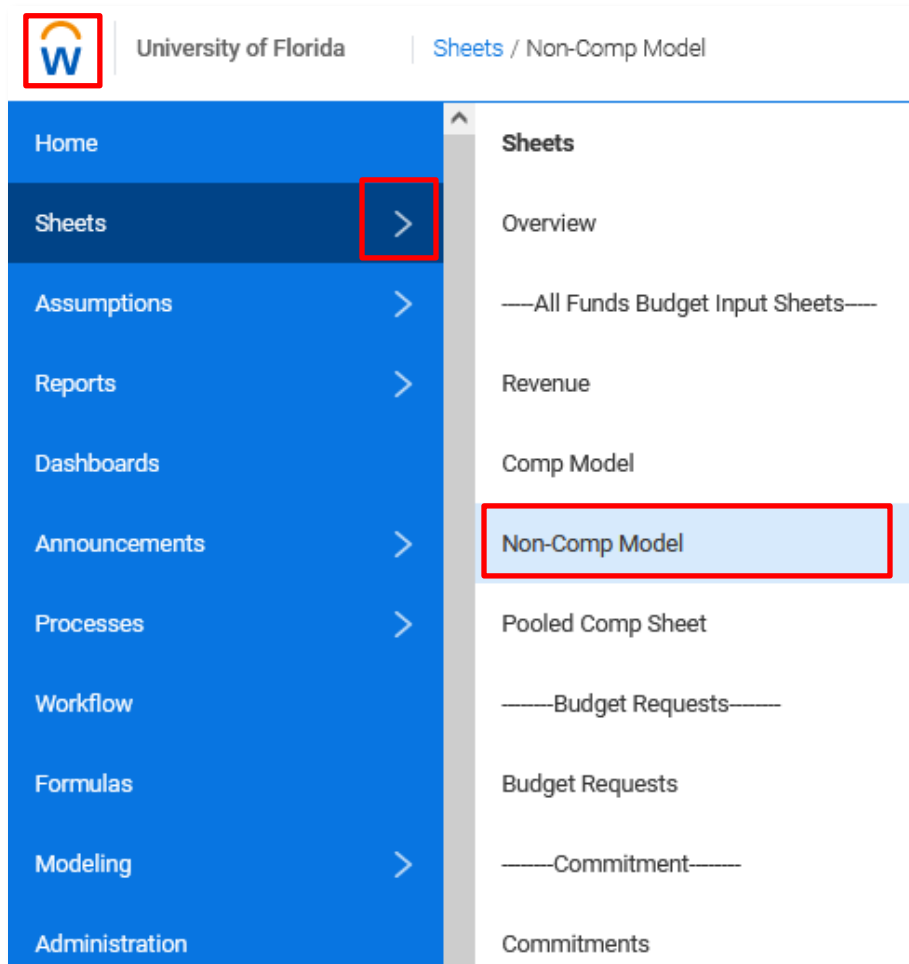
UF BUDGET PLANNER – NON-COMPENSATION SHEET

This guide will cover:

- Enter/update non-comp expense data.
- Save non-comp data.
- Delete non-comp data.


NAVIGATION

Click the **W** icon to open the Navigation menu. Then click the **arrow** next to Sheets. Click **Non-Comp Model**.



DATA ENTRY

Click **Add Row** on the toolbar.



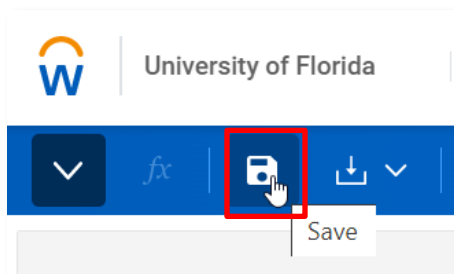
#	DEPT ID	FUNDS *	ACCOUNTS *	PROGRAM *
1	16980100: LS-BEBR ADMINIST	201 C&G - FEDERAL RE	712100 - SUBCONTRACT <=25k (C&G Only)	2200 - INDIVIDUAL OR PROJECT R...
2	16980100: LS-BEBR ADMINIST	201 C&G - FEDERAL RE	754000 - WAIVERS	2200 - INDIVIDUAL OR PROJECT R...
3	16980100: LS-BEBR ADMINIST	201 C&G - FEDERAL RE	812000 - FACILITIES & ADMIN (C&G ONLY)	2200 - INDIVIDUAL OR PROJECT R...
4	16980100: LS-BEBR ADMINIST	211 C&G - RETURNED	717000 - LABORATORY SERVICES	2200 - INDIVIDUAL OR PROJECT R...
5	16980100: LS-BEBR ADMINIST	211 C&G - RETURNED	791000 - MEMBERSHIPS & DUES	2200 - INDIVIDUAL OR PROJECT R...
6	16980100: LS-BEBR ADMINIST	212 C&G - RESIDUAL F	719300 - OTHER SERVICES - NON EMPLOYEES	2200 - INDIVIDUAL OR PROJECT R...
7	16980100: LS-BEBR ADMINIST	212 C&G - RESIDUAL F	733000 - BUILDING SUPPLIES	2200 - INDIVIDUAL OR PROJECT R...
8	16980100: LS-BEBR ADMINIST	212 C&G - RESIDUAL F	793900 - PUBLISHING FEES	2200 - INDIVIDUAL OR PROJECT R...
9	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	711700 - DATA PROCESSING SERVICES	9100 - OTHER AUXILIARY ENTERP...
10	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	734200 - COMP SOFTWARE GENERAL	9100 - OTHER AUXILIARY ENTERP...
11	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	734250 - COMP SOFTWARE SPECIALIZED	9100 - OTHER AUXILIARY ENTERP...
12	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	734800 - COMPUTER EQUIPMENT <5000	9100 - OTHER AUXILIARY ENTERP...
13	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	734900 - COMPUTER PERIPHERALS <5000	9100 - OTHER AUXILIARY ENTERP...
14	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	794000 - POSTAGE	9100 - OTHER AUXILIARY ENTERP...
15	16980200: LS-BEBR INFO/PUB	149 AUX - OTHER FUNI	813000 - ADMINISTRATIVE OVERHEAD	9100 - OTHER AUXILIARY ENTERP...

A row will be added at the bottom of the sheet. Dept ID, Funds, Program, and Accounts are required fields. Make sure that the SOF is selected when budgeting expenses for fund 158, 171, 175, 201, 209, 213, 214, 275, and 920.

10000	60770000: AG-NFREC-QUINCY	209 C&G - OTHER RES	799400 - FOOD & BEVERAGES HUMAN CONSUMP	2200 - INDIVIDUAL OR PROJECT R...
+ Total UF				

Warning! You will NOT get error messages when you leave some unrequired fields blank.

After entering all the relevant data, remember to click **Save**.



Warning! You MUST click Save to keep the edited data. There is no auto-save functionality.

Once you save, the Budget Reference and the Business Unit fields will automatically populate.

#	FUNDS *	ACCOUNTS *	PROGRAM *	DEPT FL..	SOURCE OF FUN..	BUDGET REFEREN..	PROJECT	CRIS	BUSINESS UNIT	TUITION - STATE TYPE	TUITIO
1	171 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GENERAL ACADEMIC INSTRUCTION		UF Foundation	CRRNT			UFOR		
2	171 TFRS FR COMPONENTS	571700 - Transfers In Financial Aid	8600 - STUDENT FINANCIAL AID		UF Foundation	CRRNT			UFOR		
3	Total										

SAVING

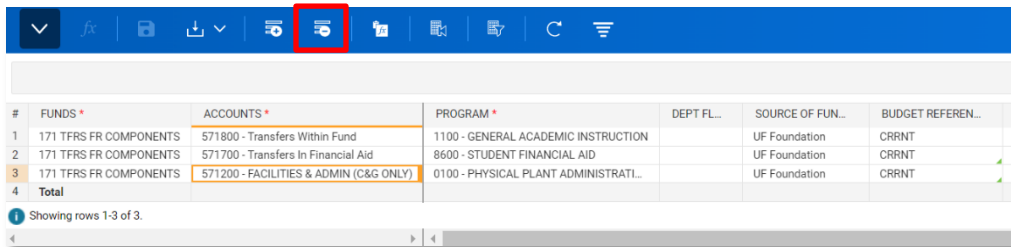
We cannot emphasize enough the importance of saving your work. If you leave a sheet without saving – your work will NOT be saved. Notice from the image below, when changes are made – they are noted by the blue font. These changes have not been saved. If the font color is black, the data changes have been saved.

#	FUNDS *	ACCOUNTS *	PROGRAM *	DEPT FL..	SOURCE OF FUN..	BUDGET REFEREN..	PROJECT	CRIS	BUSINESS UNIT	TUITION - STATE TYPE	TUITIO
1	171 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GENERAL ACADEMIC INSTRUCTION		UF Foundation	CRRNT			UFOR		
2	171 TFRS FR COMPONENTS	571700 - Transfers In Financial Aid	8600 - STUDENT FINANCIAL AID		UF Foundation	CRRNT			UFOR		
3	171 TFRS FR COMPONENTS	571200 - FACILITIES & ADMIN (C&G	0100 - PHYSICAL PLANT ADMINISTRATL..		UF Foundation						
4	Total										

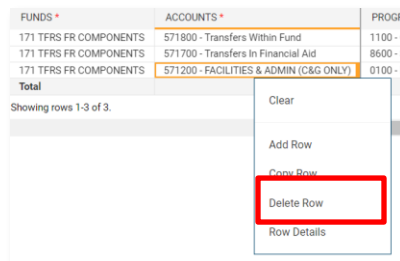
DELETING ROWS FROM THE SHEET

There are two ways to delete rows from the sheet:

1. Select any cell in the row you wish to delete
2. Select **Delete Row icon** – click the icon and a dialog box will appear
3. Click the **Delete** button



1. Right click – right click on any cell,
2. Select **“Delete Row”**.





Warning! There is no un-delete function in UF Budget Planner. After you have saved the sheet, there is no way to bring deleted data back.

If you delete data and change sheets without saving, the sheet will remain in its previously saved state. (In other words, the data will remain.)

EDITING A ROW

There are two ways to edit rows:

1. Select the **cell**.
2. Type in the value directly.

To find the row you need to edit, please review Filter, Sorting and Display Option Instruction Guide

#	FUNDS *	ACCOUNTS *	PROGRAM *	DEPT FL...	SOURCE OF FUN...	BUDGET REFEREN...	PROJECT	CF
1	171 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GENERAL ACADEMIC INSTRUCTION		UF Foundation	CRRNT		
2	171 TFRS FR COMPONENTS	571700 - Transfers In Financial Aid	1100 - GENERAL ACADEMIC INSTRUCTION		UF Foundation	CRRNT		
3	171 TFRS FR COMPONENTS	571200 - FACILITIES & ADMIN (C&G ONLY)	0100 - PHYSICAL PLANT ADMINISTRATI	0100	UF Foundation	CRRNT		
4	Total							

When typing in values, after entering a number of unique characters, pressing Tab will fully fill in the cell. For example, the Program field after entering 0100 and pressing Tab, the rest of the Program data will fill in. If entering non-unique characters, pressing tab will display the dropdown menu for you to select the correct value. For example, in the Project field if I type in 00046 and press Tab, the dropdown menu will appear for me to make the correct choice.

1. Select the **dropdown arrow** in the cell.
2. Select the **correct value** from the list.

Dimension Values	Description
(None)	
All	
0100 - PHYSICAL PLANT A	
0200 - UTILITIES	
0300 - BUILDING MAINTEN	
0500 - CUSTODIAL SERVIC	



BEST PRACTICES

- Make sure the budget is at 8-digit level.
- Make sure SOF is added for required funds.
- You can open non-comp sheet and Operating Budget Detail report at the same time to review the financial impact in real time.
- For importing/exporting data, please review the Import/Export guide

FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Policies and Directives

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