

UF BUDGET PLANNER ORIENTATION

This guide will cover:

- Logging in
- Settings
- Orientation to the User Interface
- Defining new terms
- Security roles & permissions

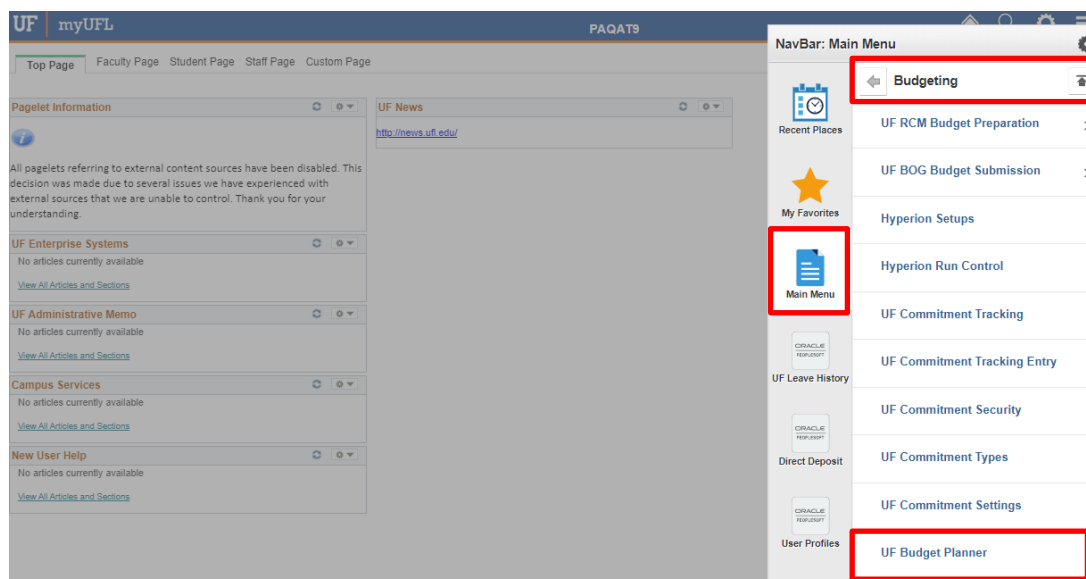
Technology Requirements: FireFox and Chrome are the preferred browsers.

Browser and Platform Support

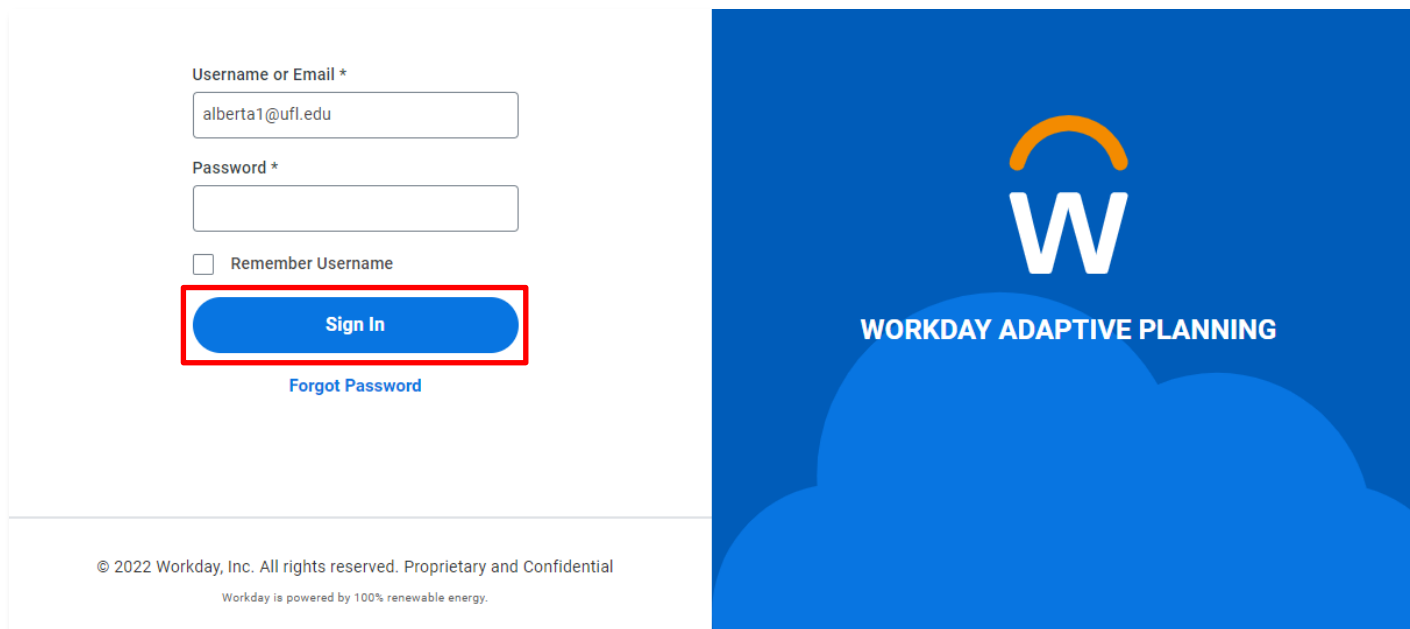
	Windows	Mac	Mobile
	Windows 8, 8.1, 10	OS X 10.11 and higher	
Internet Explorer	11	n/a	Microsoft Surface Pro 4
Edge	Latest Version	n/a	Microsoft Surface Pro 4
FireFox	Latest Version Latest ESR*	Latest Version Latest ESR*	n/a
Chrome	Latest Version	Latest Version	Samsung Galaxy S2
Safari	n/a	Latest Version	iPad Pro


LOGGING IN

1. Go to myufi.edu. Navigate to **Main Menu > Budgeting > UF Budget Planner**




2. To login, enter your Gatorlink username with @ufl.edu after it and leave the password field blank. Then click the **Sign In** button.



 **PLEASE NOTE:** If you are logging into the sandbox, login with your **GatorLink username** followed by @ufl2.edu. For example, if your GatorLink username is alberta1, you would type in **alberta1@ufl2.edu**. The password for your sandbox is the password that you use to login to UF Budget Planner. (This is either something you set when you logged in to UF Budget Planner for the first time, or it was set for you. The first time you login to the sandbox, the system requires you to change your password. More information about the sandbox will be coming soon.

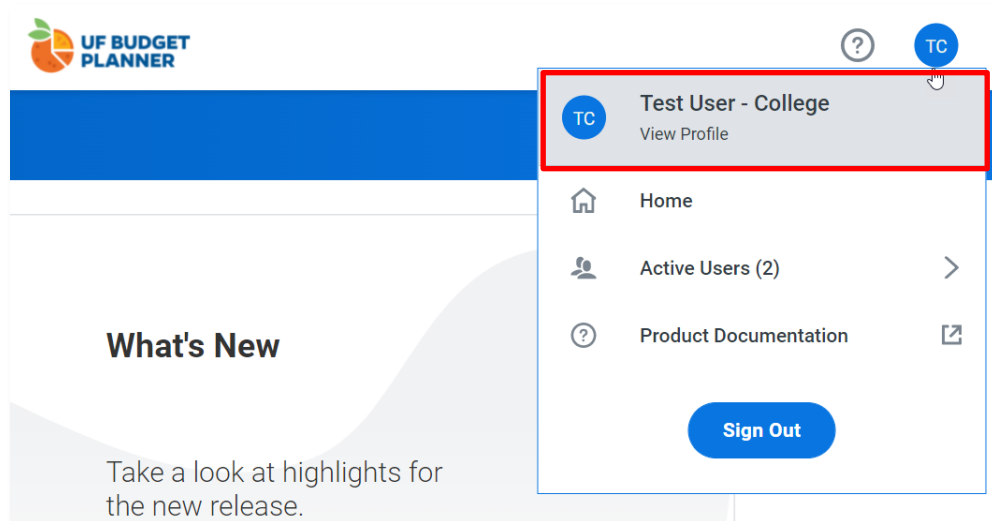
SETTINGS

Once logged in, you can get help or change your settings to customize your view of UF Budget Planner



1. Click the  icon for context-specific help in the UF Budget Planner Knowledge Base.
2. Click the **settings icon (initials)** in the upper right corner of your screen to change your profile settings.



3. In the dropdown menu, click **View Profile** option to adjust your profile settings.



The My Profile file screen will allow you to change your name, email, your defaulted welcome page, and your password if needed (without SSO). In addition, you can select what image to use as your profile avatar.

 University of Florida
 
? TC

My Profile

Name:

Position:

Username:

Email: ☒ Use username as email

Home page:

Time zone:

Country:

State:

Password * Required

Old password:

New password:

Verify new password:


The password length must be greater than or equal to 8.
The password must contain at least 1 numeric characters.
The password must contain at least 1 non-alphanumeric character.

My avatar

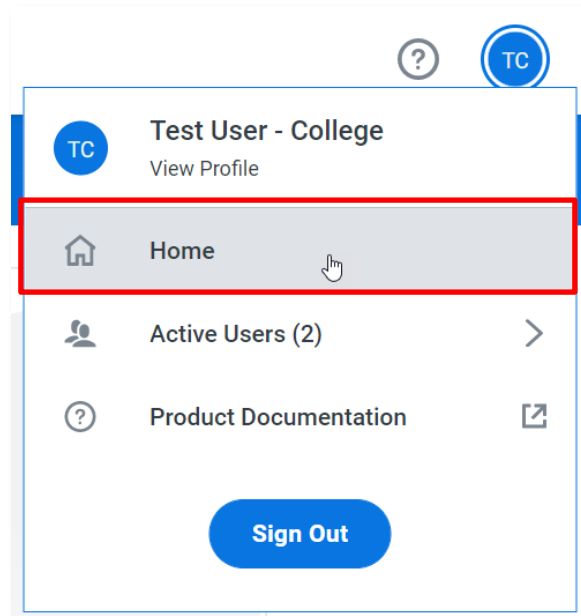
☒ TC Default avatar

☐ TC No file chosen
(Image requirements: JPG, PNG. Your avatar will be resized to 50x50 pixels)

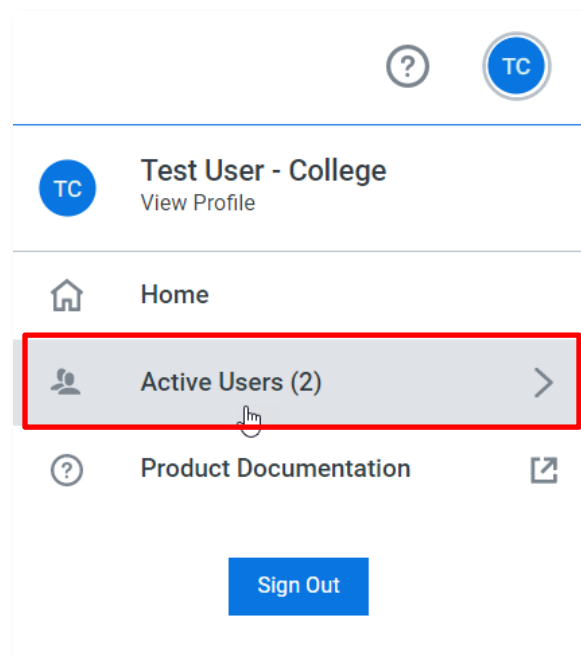
4. Click **Save** to confirm any changes.

 **IMPORTANT!** You must click to Save any time you want to save data. Your edits will not be saved without clicking the Save button.

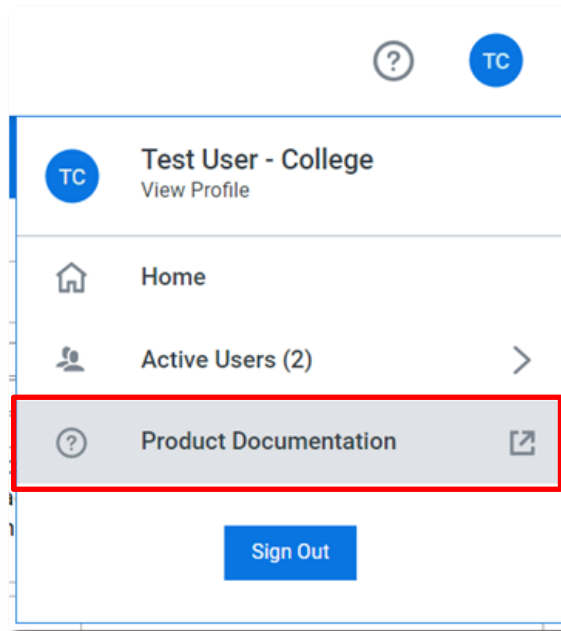
In the dropdown menu, **Home** allows you to navigate to your profile welcome page.



Active Users shows the number of people in the system at the same time.



Product Documentation allows access to the UF Budget Planner Knowledge Center



USER INTERFACE

To access the sheets and other areas within UF Budget Planner needed for budgeting purposes, click the Blue **W** icon in the upper left corner of your home screen.

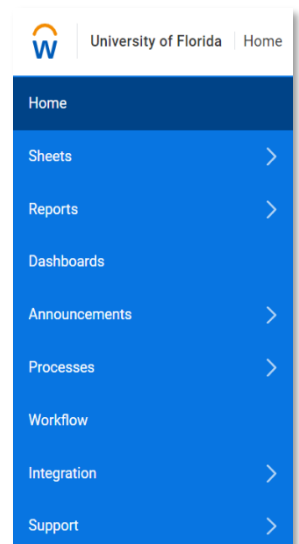



You will see a navigation menu that includes multiple access areas within UF Budget Planner.

The list of options includes Sheets, Reports, Dashboards, Announcements, Processes, Workflow, Integration, and Support.

Typically, the most accessed area is Sheets. Sheets provide access to multiple spreadsheets that you will use for budgeting purposes.

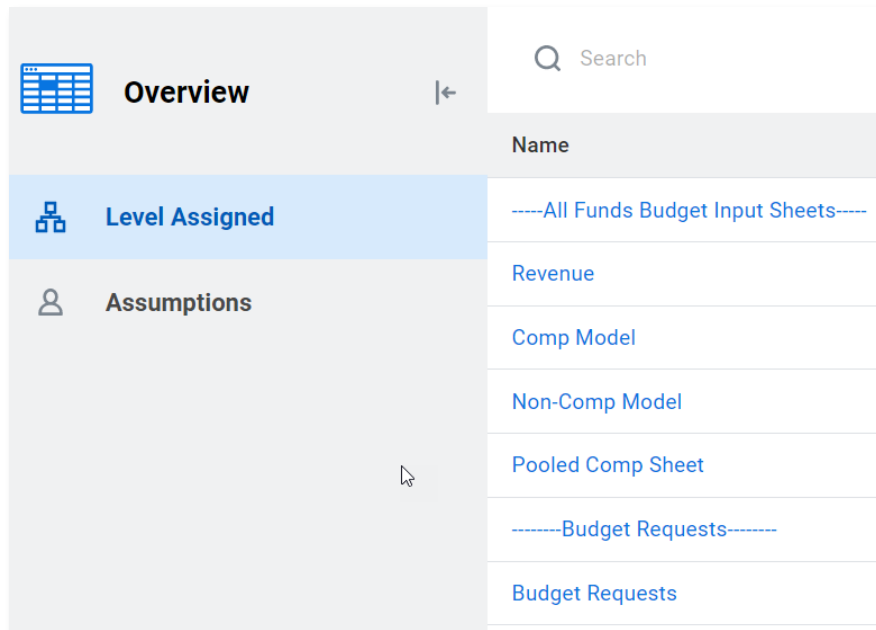
You can always return to this navigation menu by clicking the blue W icon.



 **The number of access areas you will see in the navigation menu is dictated by your security role.**

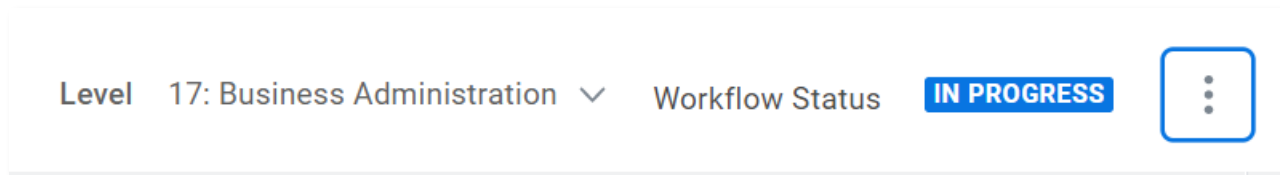
SHEETS

Click on the word **Sheets** to see an overview of the sheets you have access to.



The list of sheets appears in the right column.

Also, on this page you can see what Level you are defaulting to and your current workflow status. In the example below, you are at the college level for the College of Business Administration. The Workflow Status “IN PROGRESS” shows you are still working on your budget.



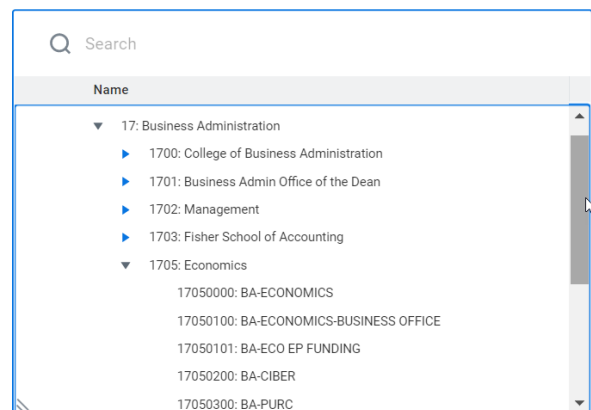
Remember from UBP100, levels are equivalent to departments in myUFL.

8-digit Dept Code = unit (i.e., 17050200 BA-Ciber)

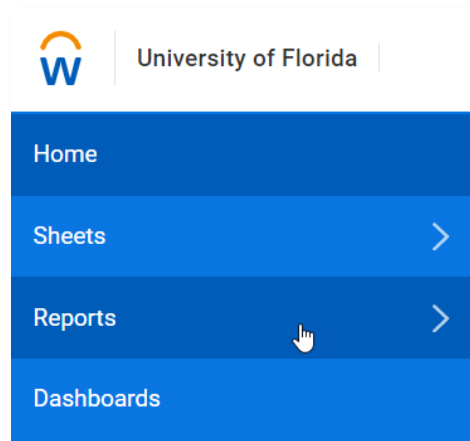
4-digit Dept Code = department (i.e., 1705 Economics)

2-digit Dept Code = college (i.e., 17 Business Administration)

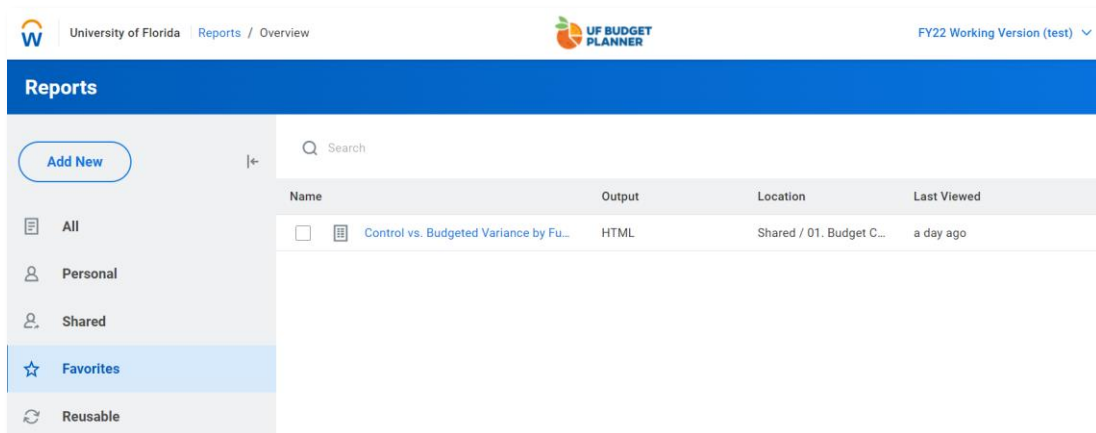
Accessibility to a level is determined by your security role.



REPORTS



By default, the Favorites folder is displayed as shown below.

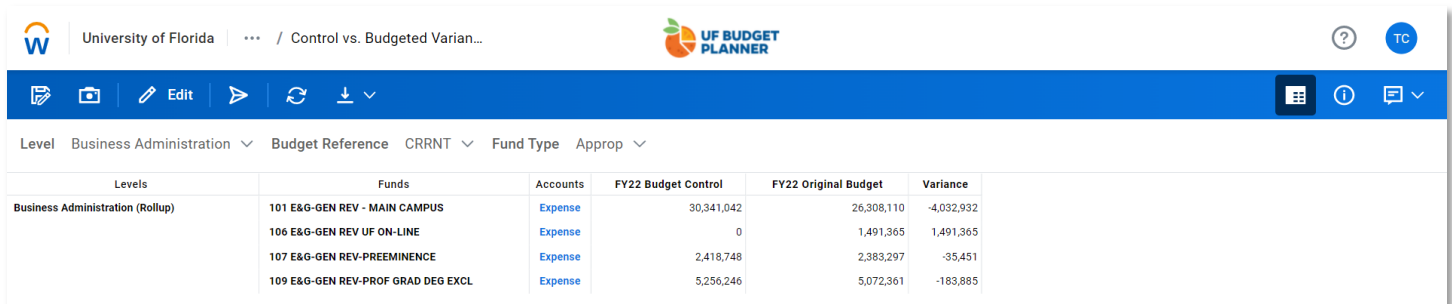


Report Categories

The Report Categories are:

- All – shows all of the personal, shared and favorite reports.
- Personal – these reports are those that strictly belong to you.
- Shared – these reports are those that have been shared with other UF Budget Planner users.
- Favorites – where you can store reports that you use the most.
- Reusable – Reports that contain elements you can reuse when creating a new report.

The image below shows the Control vs. Budgeted Variance by Fund report.



Level	Business Administration	Budget Reference	CRRNT	Fund Type	Approp
Levels	Funds	Accounts	FY22 Budget Control	FY22 Original Budget	Variance
Business Administration (Rollup)	101 E&G-GEN REV - MAIN CAMPUS	Expense	30,341,042	26,308,110	-4,032,932
	106 E&G-GEN REV UF ON-LINE	Expense	0	1,491,365	1,491,365
	107 E&G-GEN REV-PREEMINENCE	Expense	2,418,748	2,383,297	-35,451
	109 E&G-GEN REV-PROF GRAD DEG EXCL	Expense	5,256,246	5,072,361	-183,885

The Report Menu bar contains multiple actions.



- Save As – allows you to save the report to other folders, such as personal.
- Snapshot – A snapshot is a static image of a report that records information for a specific moment in time.
- Edit – allows you to change parameters that built the report.
- Send Notification – allows you to send a notification to other groups, users, or levels and supplies the URL to access the report.
- Refresh – refreshes the report if/when parameters have changed.
- Download – you can download the report either as an Excel file or a PDF file.

Report Security

Reports allow users to navigate and run various reports and validate sheet data.

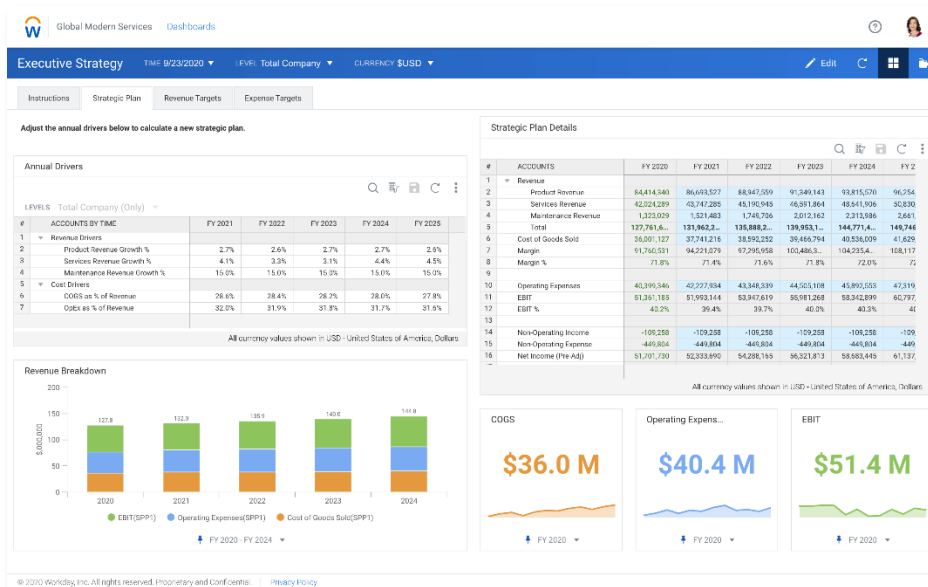
The Reports folder structure offers two levels of security – personal and shared reports. When building and viewing reports, users can only see data for their assigned levels.

Users can create a report, save the report to their personal folder or their dedicated shared folder. They can share the report with others.

Users can run reports from the Shared folder. However, they can't modify the report in that folder. They can copy the shared report to their personal folder then modify as needed.

DASHBOARDS

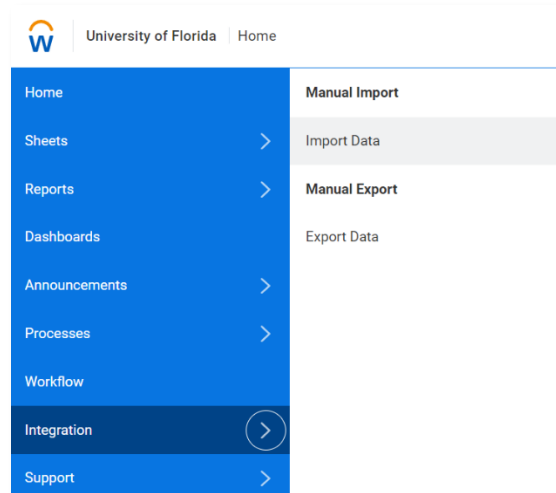
Dashboards provide self-service visualizations with charts and sheets, can be used to analyze live data over differing time periods, and can be used to compare Actuals vs. Budgeted data. Below sample (Non-UF) shows the tables, charts, KPI etc you can build in dashboard.



IMPORT/EXPORT

✓ **Best Practice:** For large units (budget at the college/VP level), you can use the import/export function. For smaller units, you can input/edit directly in a sheet.

- Import Data – allows you to manually import the edited Excel file into UF Budget Planner.
- Export Data – allows you to manually export the sheet to an Excel file for large edits.



SECURITY ROLES & PERMISSIONS

There are 5 security roles established to work in UF Budget Planner. You must have one of these 5 to gain access.

Role	Title	Association
UF_N_UBP_SYS_ADMIN	Administrative	Those who are system administrators for UF Budget Planner.
UF_N_UBP_CORE_OFFICE	University Budget Office	Those who work at the University Budget Office responsible for handling budgeting in UF Budget Planner for all of UF.
UF_N_UBP_COLLEGE	College Level Budget Officer	Those who work at the college level or SVP/VP level responsible for handling budgeting in UF Budget Planner for their college/SVP/VP.
UF_N_UBP_DEPT	Department Level Budget Officer	Those who work at the departmental or unit level within a college responsible for handling budgeting in UF Budget Planner for their department/unit.
UF_N_UBP_VIEW	Read Only	Those who have read only access to the sheets, reports and dashboard.

The summary of the permission for each role is listed below:

	admin	college level	dept level	report only
all funds budget sheets	yes	yes	yes	no
budget request sheets	yes	yes	yes	no
commitment tracking sheet	yes	yes	yes	no
budget control sheet	yes	yes	yes	no
budget transfer sheet	yes	yes	yes	no
long range planning sheet	yes	yes	yes	no
capital planning sheets	yes	yes	yes	no
pay periods setup sheet	yes	no	no	no
cola/merit setup sheet	yes	no	no	no
reports	yes	yes	yes	yes
dashboards	yes	yes	yes	yes
announcements	yes	yes	yes	yes
processes	yes	yes	yes	no
workflow	yes	yes	yes	no
modeling	yes	no	no	no
administration	yes	no	no	no
integration	yes	yes	yes	no
support	yes	yes	yes	yes
Level Access	Total UF	College/VP/SVP	Depts	As needed

FOR ADDITIONAL ASSISTANCE

Technical Issues

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

Policies and Directives

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