UF Budget Planner – Revenue Sheet

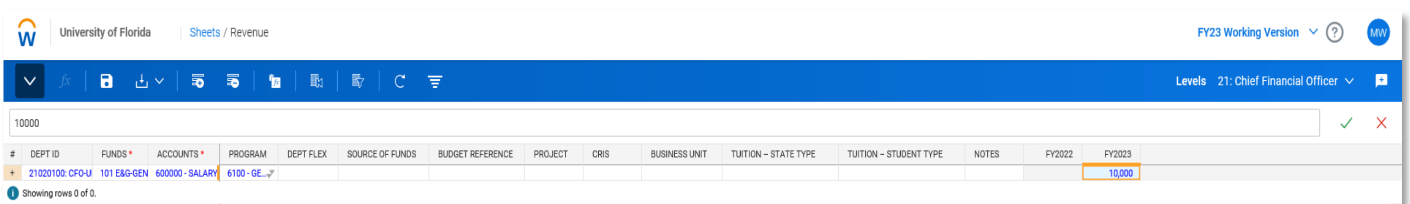
This guide will cover:

- Revenue Sheet Overview
- Versions and Levels
- Editing the Revenue Sheet
- Best Practices

Revenue Sheet Overview

The Revenue sheet is where you enter estimated revenue for the period of performance. You should be able to enter all of your ChartField string combinations for revenue in this single sheet, including Fund, Program Code, Source of Funds (SOF), Deptflex, Project, CRIS, Account, etc.

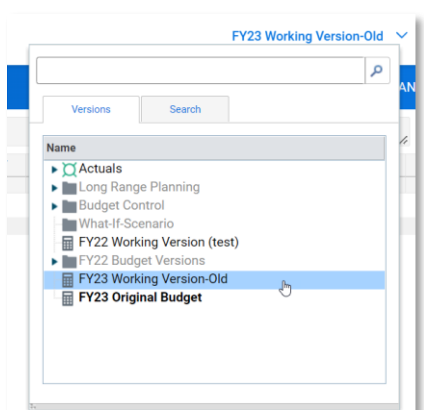
The level of access is dependent on the security roles that are assigned. Individuals will only be able to budget to their respective assigned levels. For example, if you are a college level budget officer for College of the Arts, you should only be able to budget for all departments starting with 13. If you are a department level budget officer for Department of Music, you should be able and only able to budget for department starting with 1303.



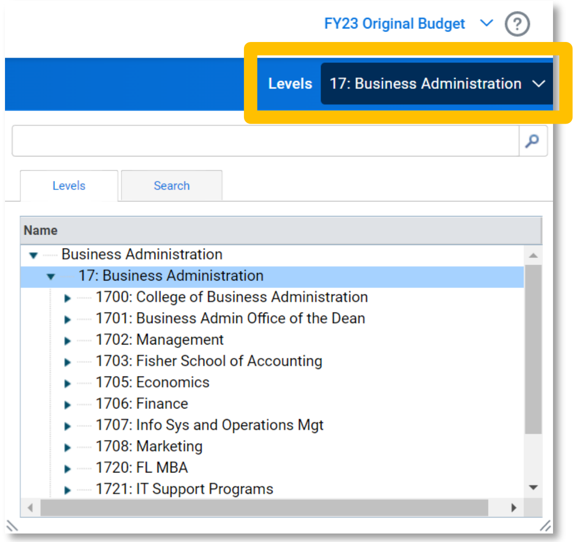
Versions and Levels

The first thing you need to do is check your **Version** and **Level** and change them if needed.

1. In the top right corner, confirm or select **FY23 Original Version**.

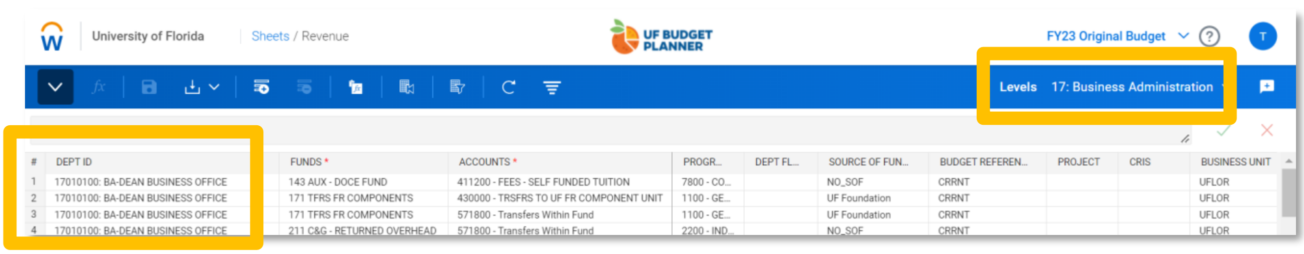


2. Right beneath the Version choice, confirm or select the appropriate **Level**.

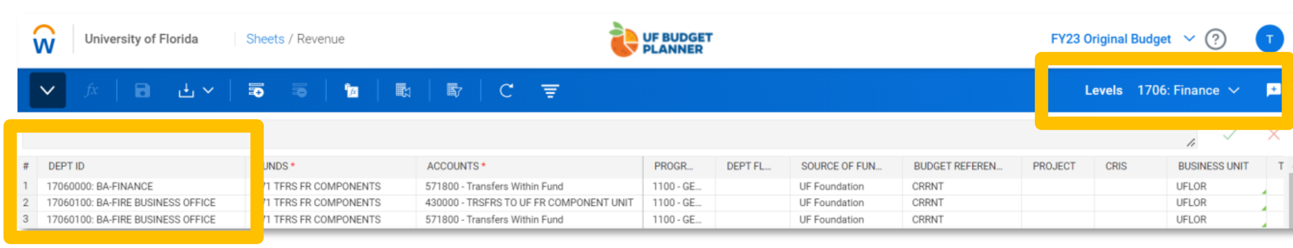


Note: If you are a College Budget Officer, you can budget at any level (top, 2-digit, 4-digit or 8-digit). If you are a Department Budget Officer, you will budget at the 4-digit or 8-digit level.

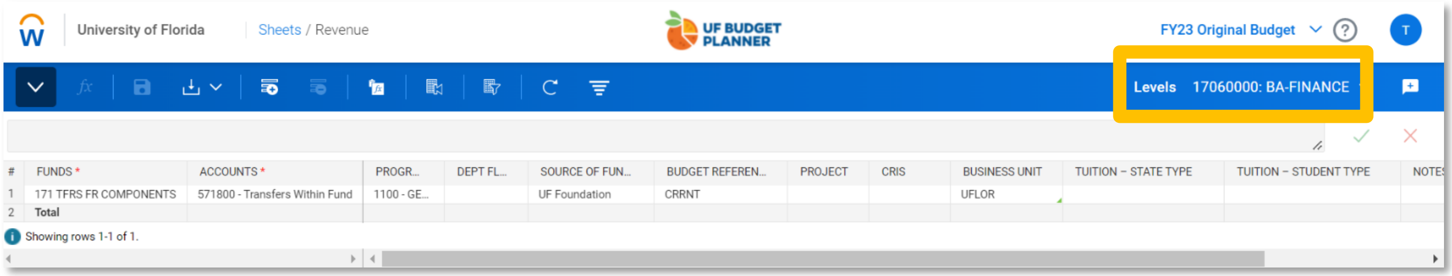
When budgeting at a top level such as 2 – digit or 4 – digit level, the DeptID field will appear on the sheet. If budgeting at the 8-digit level, which is the lowest level, the DeptID field is not needed and will not appear as a field on the sheet.



College Level, 2-digit



Department Level, 4-digit

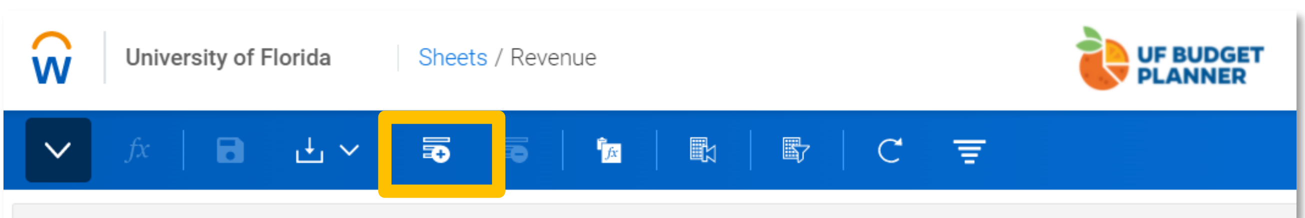


Department Level, 8-digit level

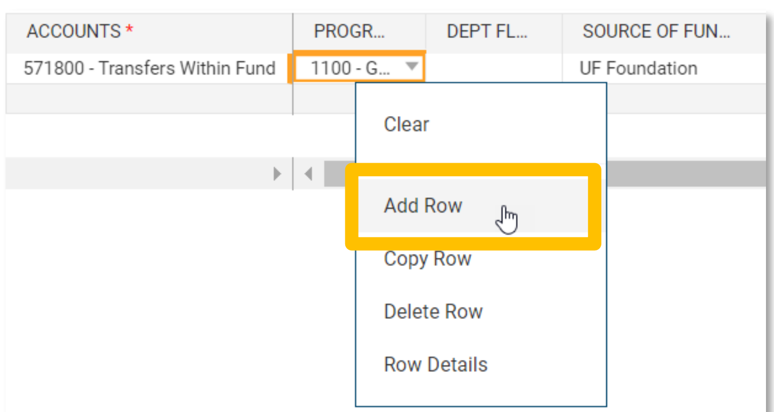
Adding Rows to the Sheet

There are two ways to add new rows to the sheet:

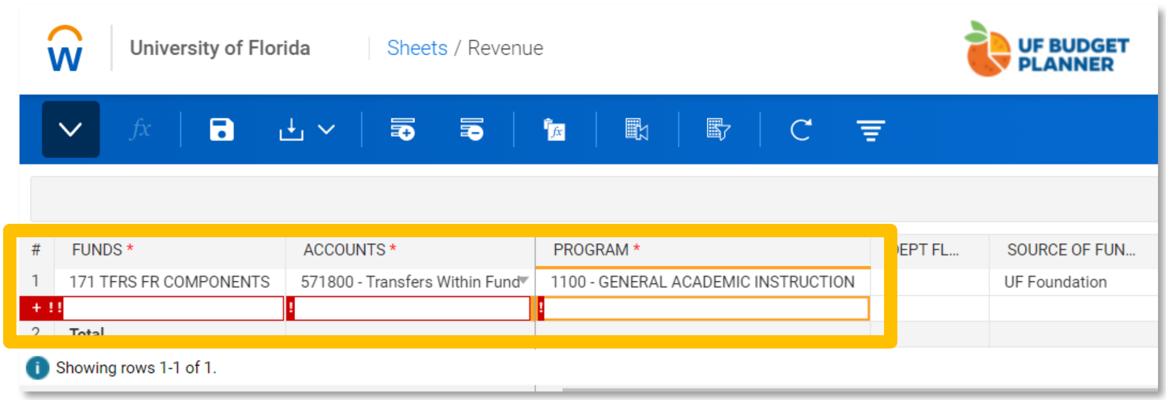
1. Add Row icon – click the **Add Row icon** and the new row will appear at the bottom of the sheet.



2. Right click – right click on any cell, select "**Add Row**".

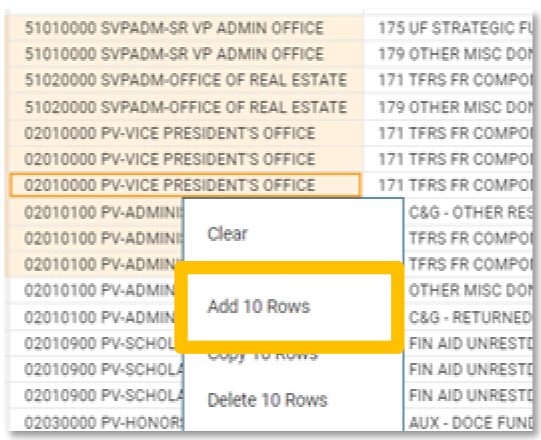


The new row will indicate the fields that are required in red.

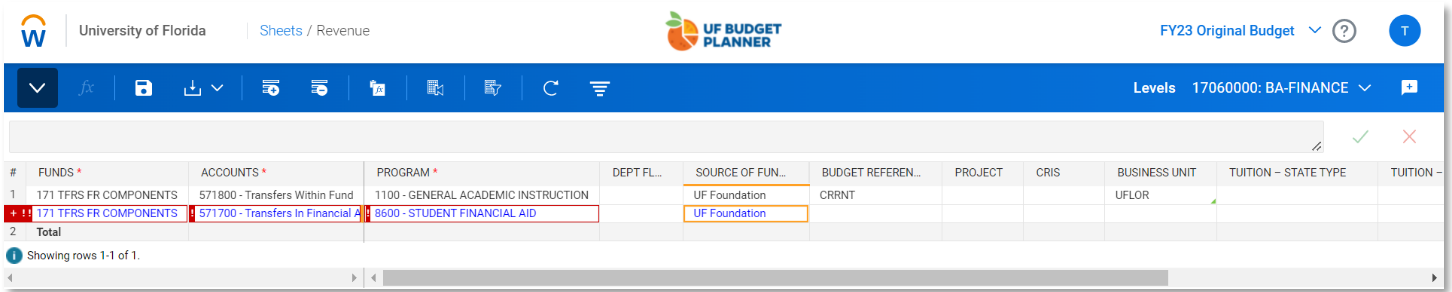


To add multiple rows:

1. Select multiple cells
2. Right click
3. Select **Add the number of Rows**



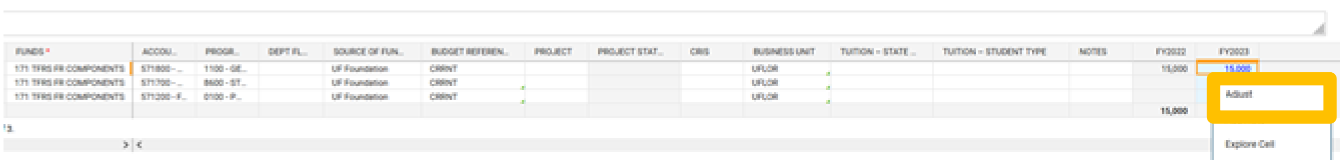
In the Revenue sheet, the Dept ID, Funds, Accounts, and Program fields are required.



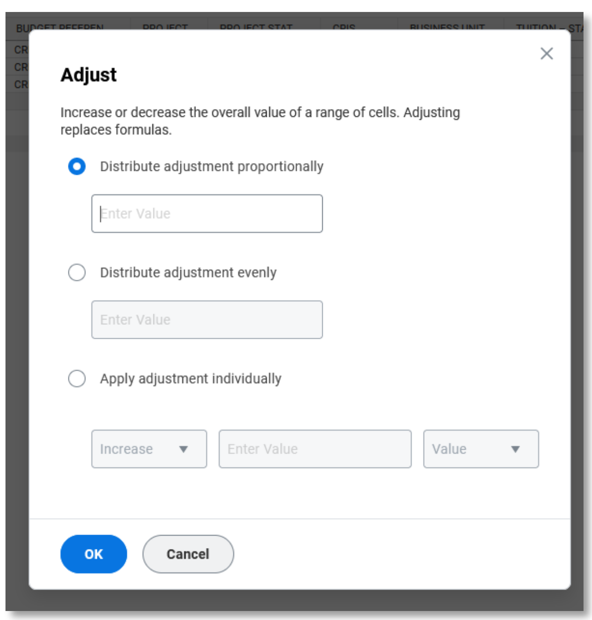
Updating Budget Amount

Users can update the dollar amount directly in a cell. Another method is the following.

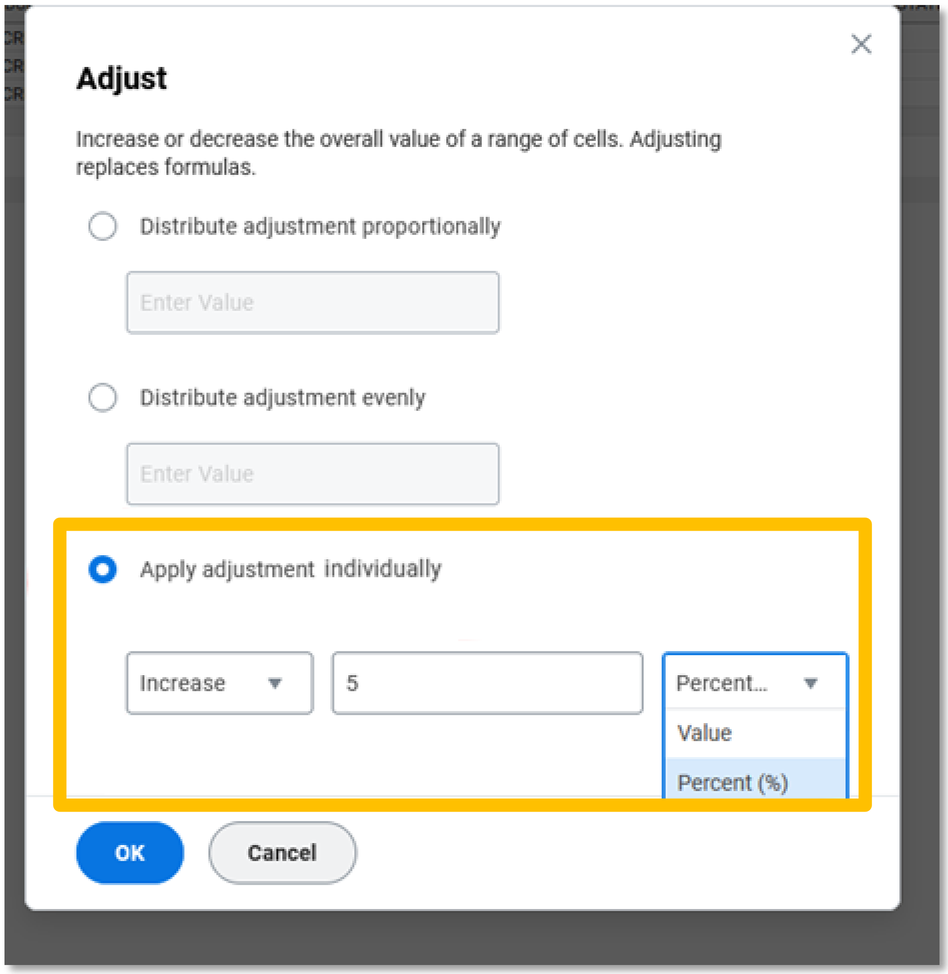
Copy the total from FY2022 to FY2023. Then right click the cell in column FY2023. Select **Adjust**.



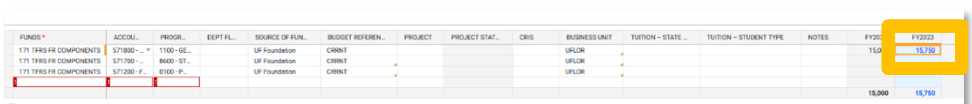
The Adjust window will appear. You can select the option that fits your needs.



For example, if the revenue is going to increase 5% from FY2022, you can select the option **Apply adjustment individually**. You can select Percent or Value. Click **OK**.



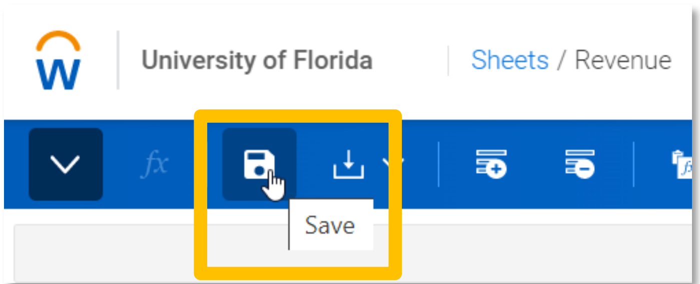
The total in FY2023 is updated.



A row will not be saved if any required fields are left blank. For some of the optional fields such as Source of Fund, fill them as needed. For example, if you are budgeting for fund 158, 175, 201, 209, 213, 214, or 275, make sure to include SOF.

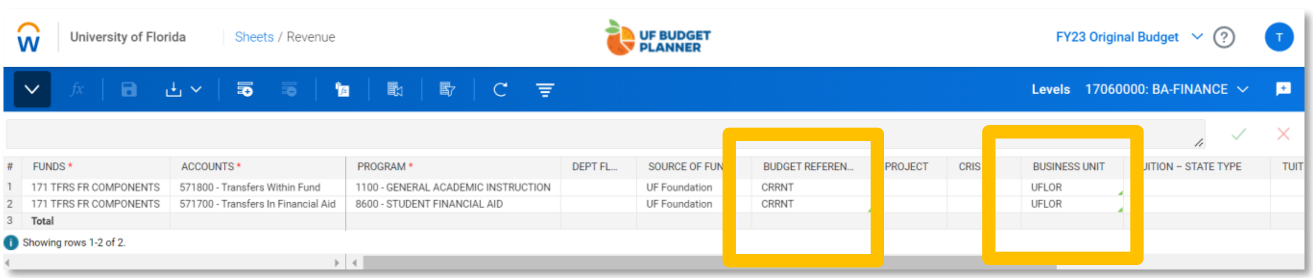
Warning! You will NOT get error messages when you leave some unrequired fields blank.

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



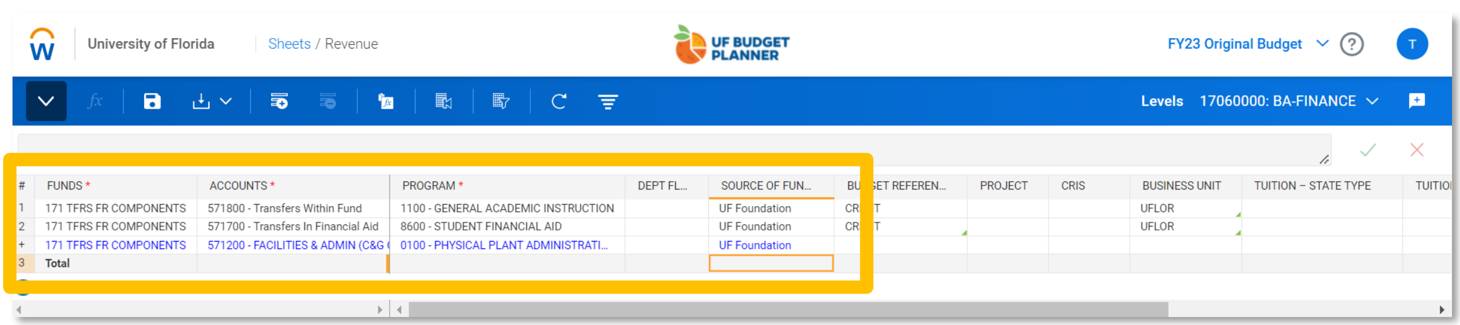
Warning! You MUST click Save to keep the edited data. There is no auto-save functionality.

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



Saving

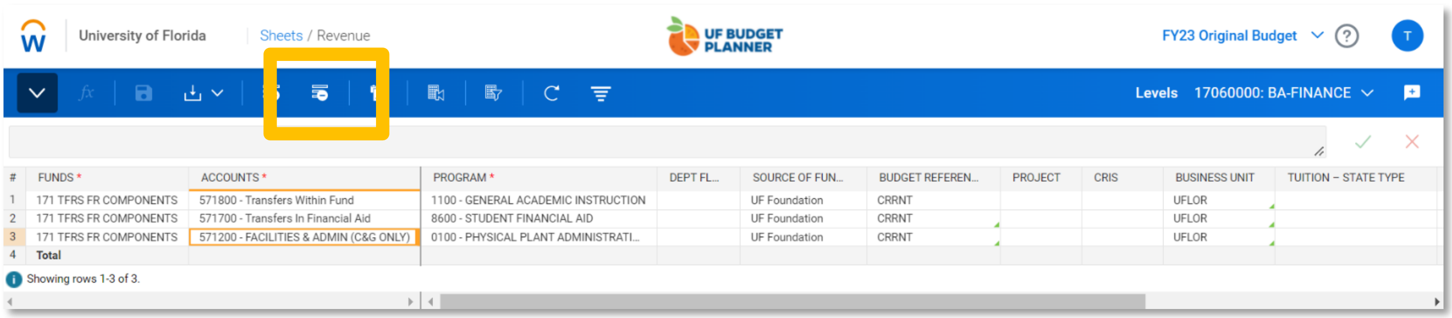
We cannot emphasize enough the importance of saving your work. If you leave a sheet without saving – your work will NOT be saved. Notice from the image below, when changes are made – they are noted by the blue font. These changes have not been saved. If the font color is black, the data changes have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



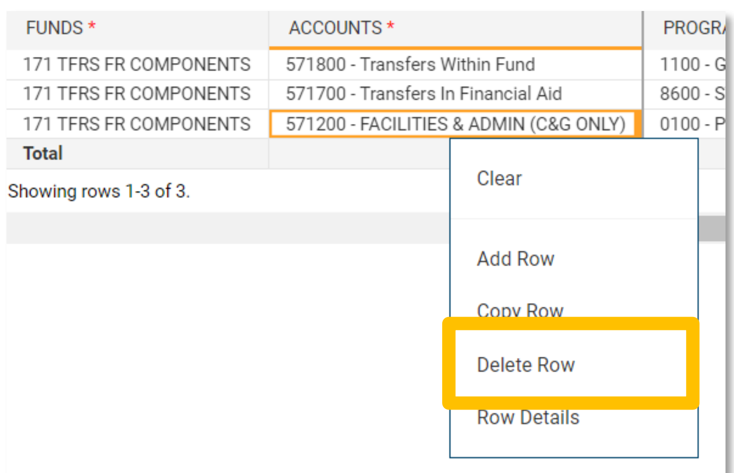
DELETING ROWS FROM THE SHEET

There are two ways to delete rows from the sheet:

1. Select any cell in the row you wish to delete
2. 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.

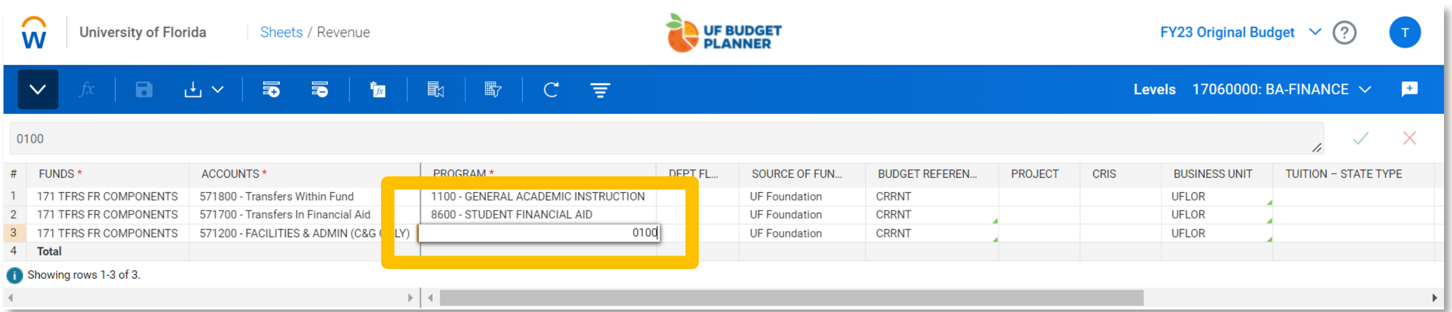
If you delete data and change sheets without saving, the sheet will remain in its previously saved state. In other words, the data will remain when you refresh the screen or sheet.

EDITING A ROW

There are two ways to edit rows:

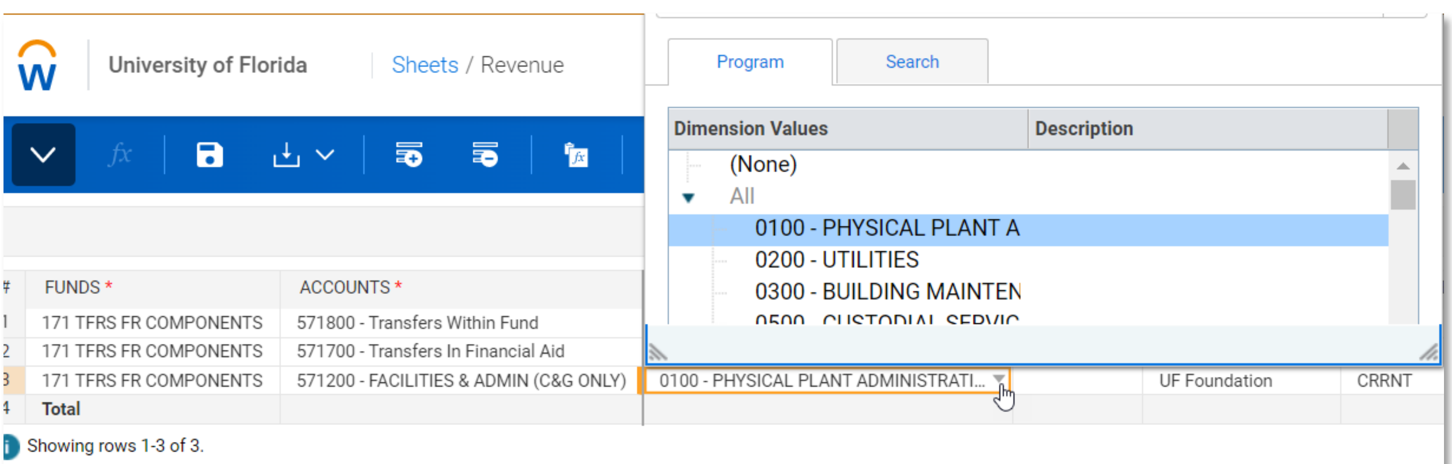
1. Select the cell.
2. Type in the value directly.

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



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.



BEST PRACTICES

- Always check the version you are in before beginning any edits.
- Use the Original Budget version during the All Funds Budget cycle.
- Use the working version as your mid-year ongoing budget.
- Download a copy of the original data if you want to compare the changes (or serve as a reference just in case)
- Always check the level you are in before beginning any edits.
- Make sure the budget is at 8-digit level.
- Make sure SOF is added for required fund.
- Review the reports in the 02. AFB – Operating Budget Reports folder to complete the Revenue budget.
- 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