

UF BUDGET PLANNER – REVENUE SHEET

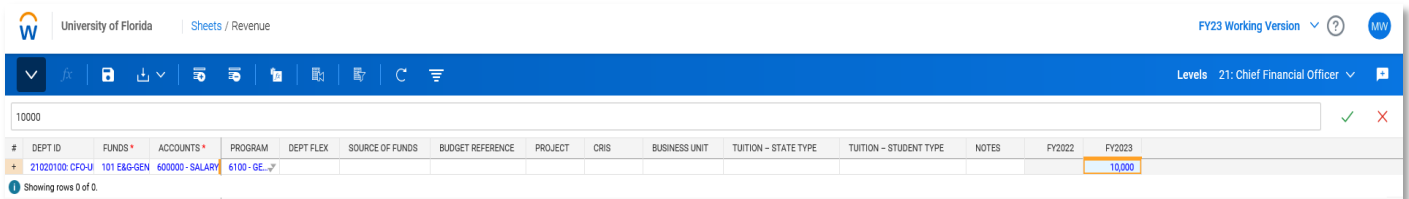
This guide will cover:

- 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.

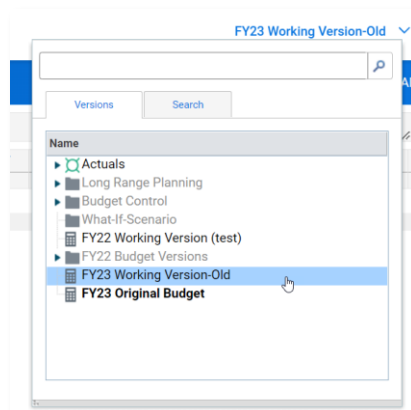


#	DEPT ID	FUNDS	ACCOUNTS	PROGRAM	DEPT FLEX	SOURCE OF FUNDS	BUDGET REFERENCE	PROJECT	CRIS	BUSINESS UNIT	TUITION - STATE TYPE	TUITION - STUDENT TYPE	NOTES	FY2022	FY2023
+	21020100	CFO-U	101 E&G-GEN	600000 - SALARY	6100 - GE										10,000

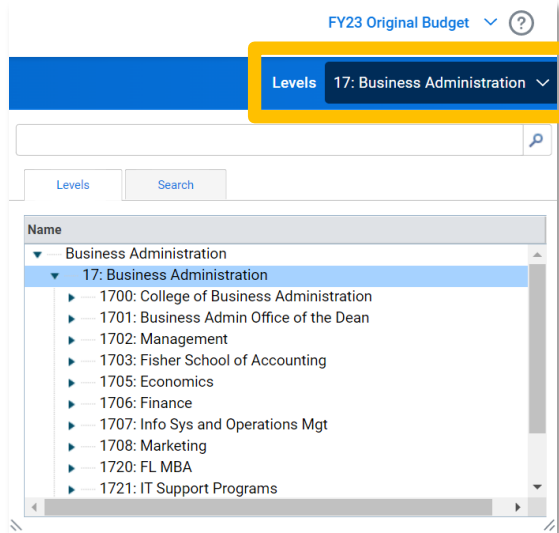
VERSIONS AND LEVELS

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**.



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



FY23 Original Budget

Levels 17: Business Administration

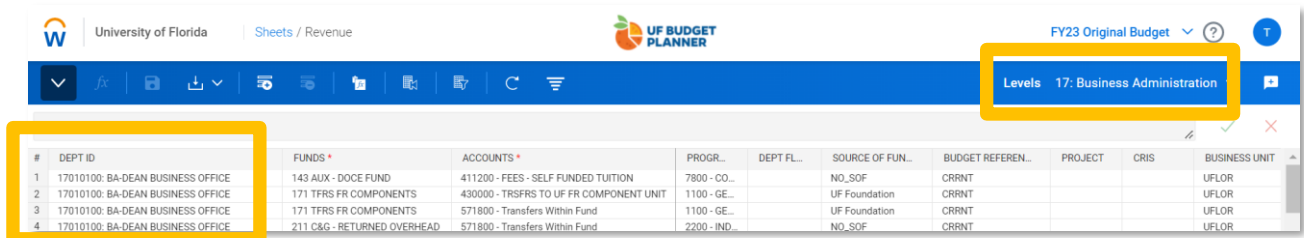
Search

Name

- Business Administration
 - 17: Business Administration
 - 1700: College of Business Administration
 - 1701: Business Admin Office of the Dean
 - 1702: Management
 - 1703: Fisher School of Accounting
 - 1705: Economics
 - 1706: Finance
 - 1707: Info Sys and Operations Mgt
 - 1708: Marketing
 - 1720: FL MBA
 - 1721: IT Support Programs

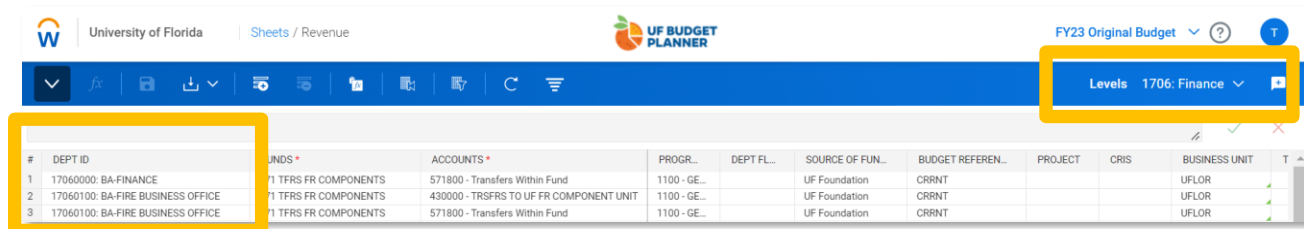
Note: If you are a College Budget Officer, you can budget at any level (top, 2-digit, 4-digit or 8-digit). If you are a Department Budget Officer, you will budget at the 4-digit or 8-digit level.

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.



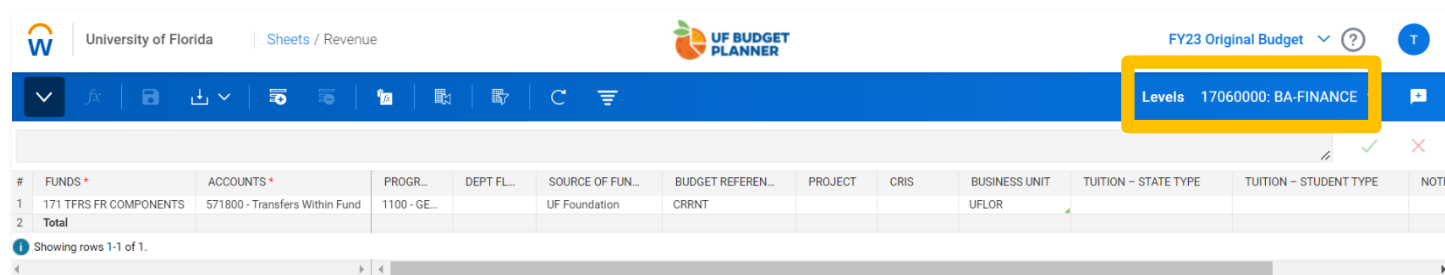
#	DEPT ID	FUNDS *	ACCOUNTS *	PROGR...	DEPT FL...	SOURCE OF FUN...	BUDGET REFER...	PROJECT	CRIS	BUSINESS UNIT
1	17010100: BA-DEAN BUSINESS OFFICE	143 AUX - DOCE FUND	411200 - FEES - SELF FUNDED TUITION	7800 - CO...		NO_SOF	CRNT			UFLOR
2	17010100: BA-DEAN BUSINESS OFFICE	171 TFRS FR COMPONENTS	430000 - TRSFRS TO UF FR COMPONENT UNIT	1100 - GE...		UF Foundation	CRNT			UFLOR
3	17010100: BA-DEAN BUSINESS OFFICE	171 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GE...		UF Foundation	CRNT			UFLOR
4	17010100: BA-DEAN BUSINESS OFFICE	211 C&G - RETURNED OVERHEAD	571800 - Transfers Within Fund	2200 - IND...		NO_SOF	CRNT			UFLOR

College Level, 2-digit



#	DEPT ID	FUNDS *	ACCOUNTS *	PROGR...	DEPT FL...	SOURCE OF FUN...	BUDGET REFER...	PROJECT	CRIS	BUSINESS UNIT
1	17060000: BA-FINANCE	1 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GE...		UF Foundation	CRNT			UFLOR
2	17060100: BA-FIRE BUSINESS OFFICE	1 TFRS FR COMPONENTS	430000 - TRSFRS TO UF FR COMPONENT UNIT	1100 - GE...		UF Foundation	CRNT			UFLOR
3	17060100: BA-FIRE BUSINESS OFFICE	1 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GE...		UF Foundation	CRNT			UFLOR

Department Level, 4-digit



The screenshot shows the top navigation bar of the UF Budget Planner. The 'Levels' dropdown menu is highlighted with a yellow box, showing the selected level '17060000: BA-FINANCE'. Below the navigation bar, a table displays budget data with columns for FUNDS, ACCOUNTS, PROGR..., DEPT FL..., SOURCE OF FUN..., BUDGET REFEREN..., PROJECT, CRIS, BUSINESS UNIT, TUITION - STATE TYPE, TUITION - STUDENT TYPE, and NOTES.

#	FUNDS *	ACCOUNTS *	PROGR...	DEPT FL...	SOURCE OF FUN...	BUDGET REFEREN...	PROJECT	CRIS	BUSINESS UNIT	TUITION - STATE TYPE	TUITION - STUDENT TYPE	NOTES
1	171 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GE...		UF Foundation	CRRNT			UFLOR			
2	Total											

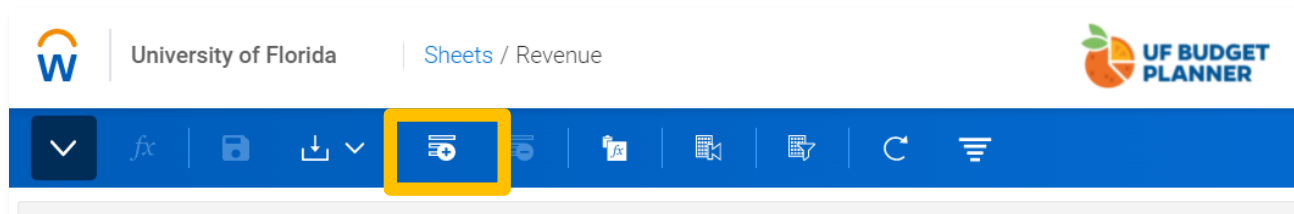
Showing rows 1-1 of 1.

Department Level, 8-digit level

ADDING ROWS TO THE SHEET

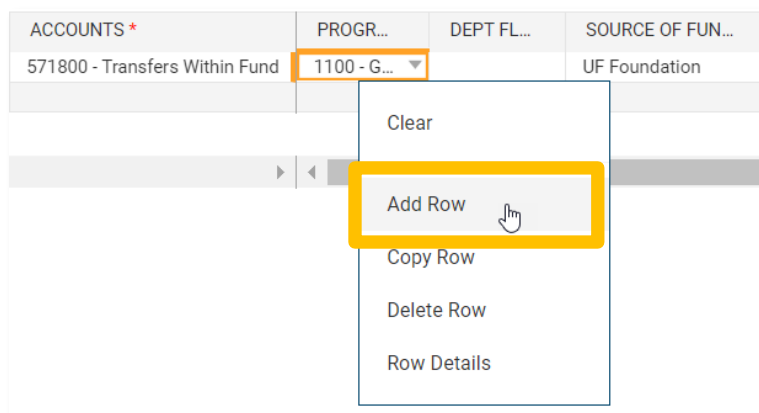
There are two ways to add new rows to the sheet:

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



The screenshot shows the top navigation bar of the UF Budget Planner. The 'Add Row' icon, represented by a plus sign inside a square, is highlighted with a yellow box in the toolbar.

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

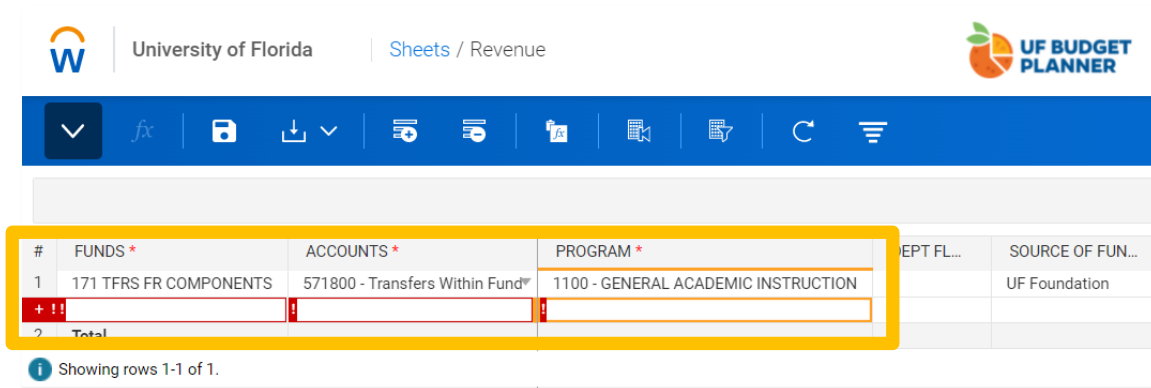


The screenshot shows a right-click context menu over a table. The 'Add Row' option is highlighted with a yellow box. The table has columns for ACCOUNTS, PROGR..., DEPT FL..., and SOURCE OF FUN....

ACCOUNTS *	PROGR...	DEPT FL...	SOURCE OF FUN...
571800 - Transfers Within Fund	1100 - G...		UF Foundation

Context menu options: Clear, Add Row, Copy Row, Delete Row, Row Details.

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

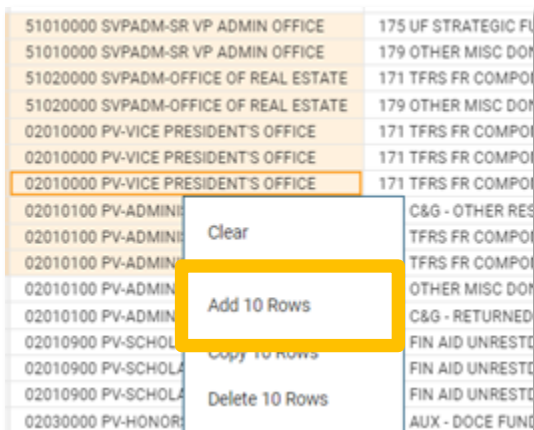


#	FUNDS *	ACCOUNTS *	PROGRAM *	DEPT FL...	SOURCE OF FUN...
1	171 TFRS FR COMPONENTS	571800 - Transfers Within Fund	1100 - GENERAL ACADEMIC INSTRUCTION		UF Foundation
2	Total				

Showing rows 1-1 of 1.

To add multiple rows:

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



51010000 SVPADM-SR VP ADMIN OFFICE	175 UF STRATEGIC FU
51010000 SVPADM-SR VP ADMIN OFFICE	179 OTHER MISC DON
51020000 SVPADM-OFFICE OF REAL ESTATE	171 TFRS FR COMPO
51020000 SVPADM-OFFICE OF REAL ESTATE	179 OTHER MISC DON
02010000 PV-VICE PRESIDENT'S OFFICE	171 TFRS FR COMPO
02010000 PV-VICE PRESIDENT'S OFFICE	171 TFRS FR COMPO
02010000 PV-VICE PRESIDENT'S OFFICE	171 TFRS FR COMPO
02010100 PV-ADMINI	C&G - OTHER RES
02010100 PV-ADMINI	TFRS FR COMPO
02010100 PV-ADMINI	TFRS FR COMPO
02010100 PV-ADMINI	OTHER MISC DON
02010100 PV-ADMINI	C&G - RETURNED
02010900 PV-SCHOL	FIN AID UNRESTO
02010900 PV-SCHOL	FIN AID UNRESTO
02010900 PV-SCHOL	FIN AID UNRESTO
02030000 PV-HONOR	AUX - DOCE FUND

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

University of Florida | Sheets / Revenue

UF BUDGET PLANNER

FY23 Original Budget

Levels 17060000: BA-FINANCE

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

Showing rows 1-1 of 1.

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**.

FUNDS *	ACCOU...	PROGR...	DEPT FL...	SOURCE OF FUN...	BUDGET REFEREN...	PROJECT	PROJECT STAT...	CRIS	BUSINESS UNIT	TUITION - STATE...	TUITION - STUDENT TYPE	NOTES	FY2022	FY2023
171 TFRS FR COMPONENTS	571800 -	1100 - GE...		UF Foundation	CRRNT				UFLOR				15,000	15,000
171 TFRS FR COMPONENTS	571700 -	8600 - ST...		UF Foundation	CRRNT				UFLOR					
171 TFRS FR COMPONENTS	571200 - F...	0100 - P...		UF Foundation	CRRNT				UFLOR				15,000	

Adjust

Explore Cell

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

BUDGET DECISION

BUDGET UNIT

BUDGET STAT

FUND

BUSINESS UNIT

TUITION - ST

CR

CR

CR

Adjust

Increase or decrease the overall value of a range of cells. Adjusting replaces formulas.

☒ Distribute adjustment proportionally

Enter Value

☐ Distribute adjustment evenly

Enter Value

☐ Apply adjustment individually

Increase

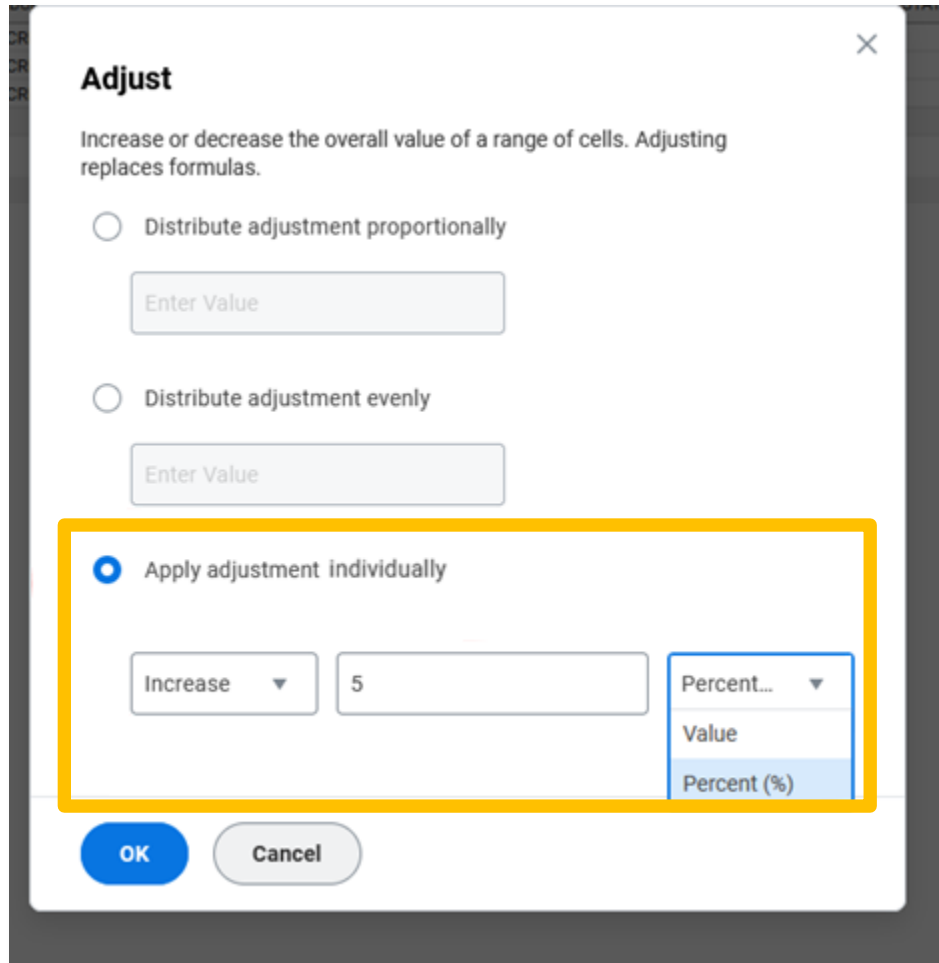
Enter Value

Value

OK

Cancel

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**.



Adjust

Increase or decrease the overall value of a range of cells. Adjusting replaces formulas.

☐ Distribute adjustment proportionally

Enter Value

☐ Distribute adjustment evenly

Enter Value

☒ **Apply adjustment individually**

Increase ▼ 5

Percent... ▼
Value
Percent (%)

OK Cancel

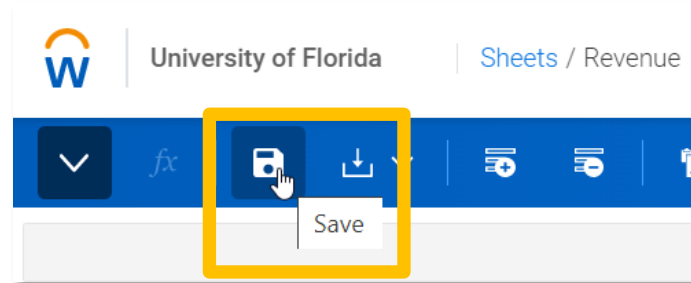
The total in FY2023 is updated.

FUND#	ACCT#	PROG#	DEPT FL	SOURCE OF FUN.	BUDGET REFEREN.	PROJECT	PROJECT STAT.	CRS	BUSINESS UNIT	TUITION - STATE	TUITION - STUDENT TYPE	NOTES	FY2022	FY2023
171 1945 FR COMPONENTS	571800	1100-GE		UF Foundation	CREDIT				UPLDR				15,000	15,750
171 1945 FR COMPONENTS	571700	8000-ST		UF Foundation	CREDIT				UPLDR					
171 1945 FR COMPONENTS	571200	0100-IP		UF Foundation	CREDIT				UPLDR					
													15,000	15,750

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.

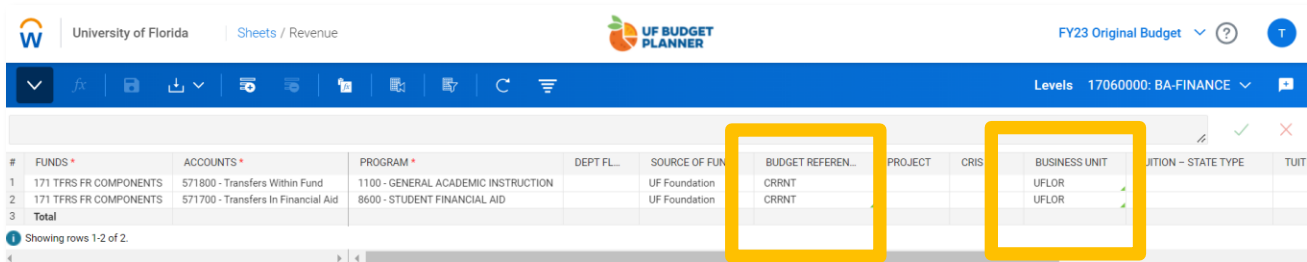
Warning! You will NOT get error messages when you leave some unrequired fields blank.

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.

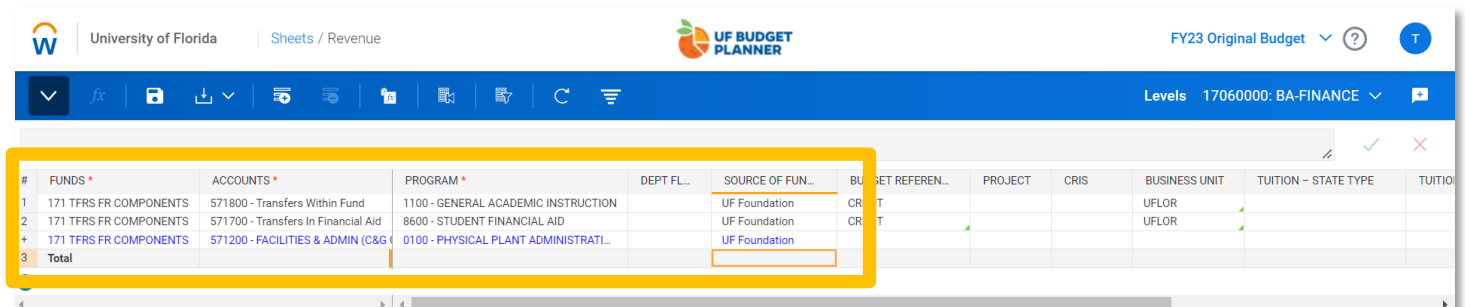


The screenshot shows the main data entry table of the UF Budget Planner. The table has columns for #, FUNDS, ACCOUNTS, PROGRAM, DEPT FL, SOURCE OF FUN, BUDGET REFEREN, PROJECT, CRIS, BUSINESS UNIT, TUITION - STATE TYPE, and TUITION. The 'BUDGET REFEREN' and 'BUSINESS UNIT' columns are highlighted with yellow boxes. The 'BUDGET REFEREN' column contains 'CRNT' and 'CRNT'. The 'BUSINESS UNIT' column contains 'UFLOR' and 'UFLOR'.

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



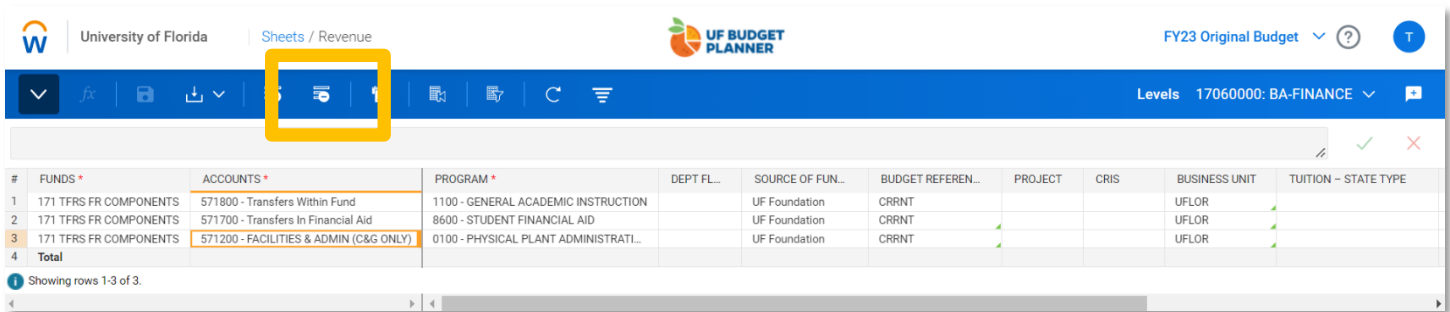
The screenshot shows the main data entry table of the UF Budget Planner. The table has columns for #, FUNDS, ACCOUNTS, PROGRAM, DEPT FL, SOURCE OF FUN, BUDGET REFEREN, PROJECT, CRIS, BUSINESS UNIT, TUITION - STATE TYPE, and TUITION. The 'BUDGET REFEREN' and 'BUSINESS UNIT' columns are highlighted with yellow boxes. The 'BUDGET REFEREN' column contains 'CRNT' and 'CRNT'. The 'BUSINESS UNIT' column contains 'UFLOR' and 'UFLOR'.

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

DELETING ROWS FROM THE SHEET

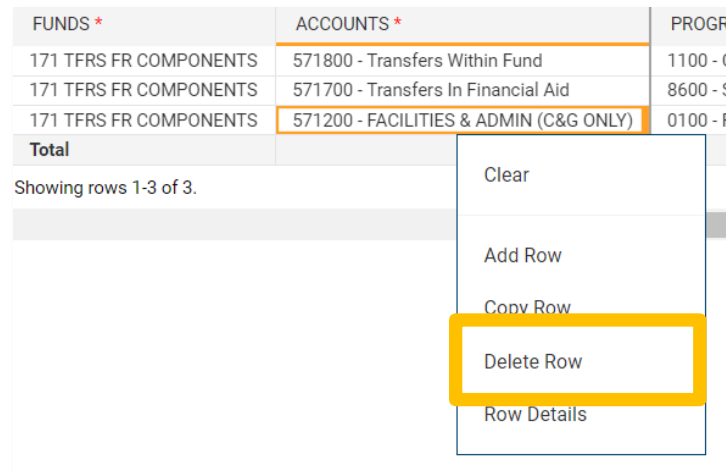
There are two ways to delete rows from the sheet:

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



The screenshot shows the UF Budget Planner interface. The top navigation bar includes the University of Florida logo, the 'UF BUDGET PLANNER' title, and a 'FY23 Original Budget' dropdown. Below the navigation bar is a toolbar with various icons. The 'Delete Row' icon, which is a trash can, is highlighted with a yellow box. Below the toolbar is a table with columns: FUNDS *, ACCOUNTS *, PROGRAM *, DEPT FL..., SOURCE OF FUN..., BUDGET REFEREN..., PROJECT, CRIS, BUSINESS UNIT, and TUITION - STATE TYPE. The table contains three rows of data, with the third row highlighted in orange. The status bar at the bottom indicates 'Showing rows 1-3 of 3'.

1. Right click – right click on any cell
2. Select **"Delete Row"**.



The screenshot shows a right-click context menu over the table data. The menu options are: Clear, Add Row, Copy Row, Delete Row, and Row Details. The 'Delete Row' option is highlighted with a yellow box. The table data is visible in the background, showing columns: FUNDS *, ACCOUNTS *, and PROGRAM *. The status bar at the bottom indicates 'Showing rows 1-3 of 3'.

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.

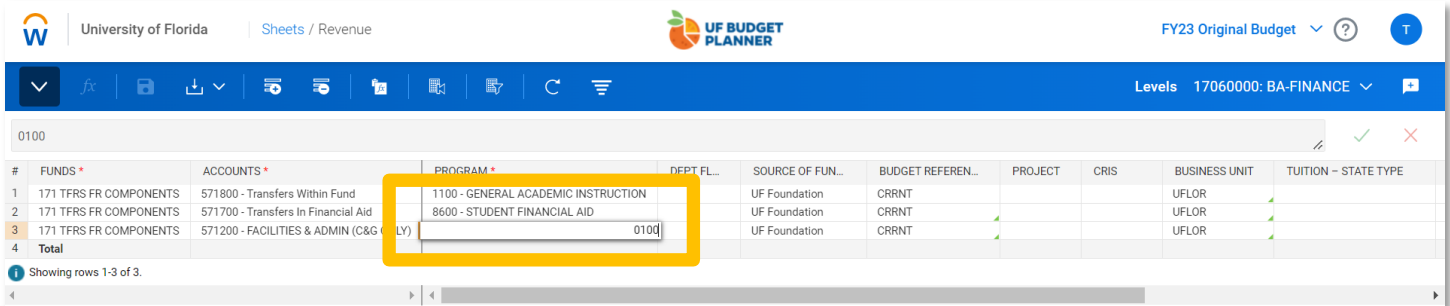
If you delete data and change sheets without saving, the sheet will remain in its previously saved state. In other words, the data will remain when you refresh the screen or sheet.

EDITING A ROW


There are two ways to edit rows:

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

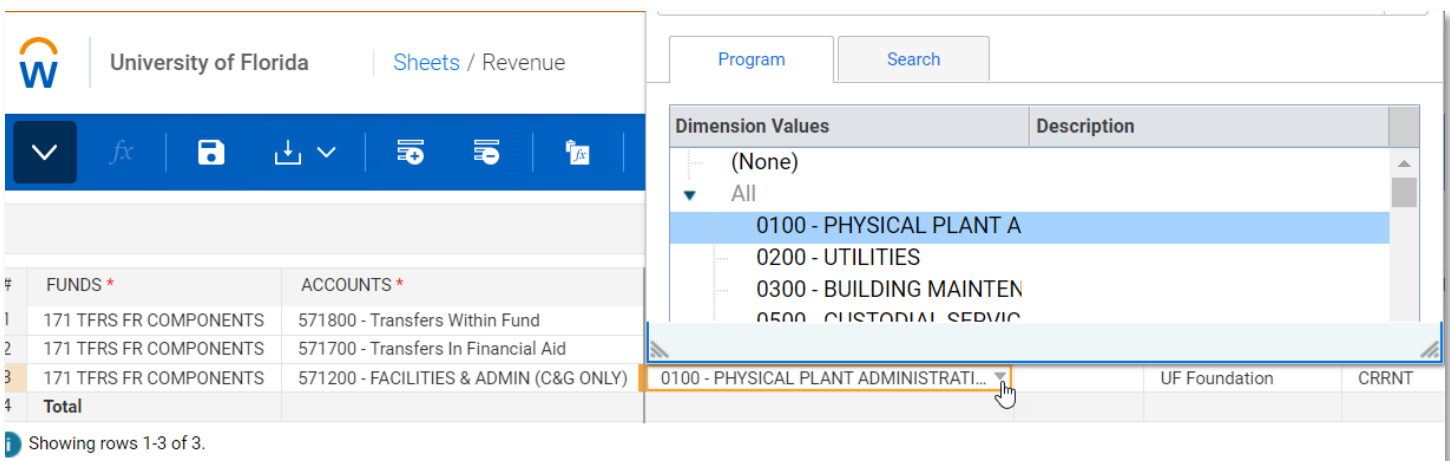
To find the row you need to edit, please review Filter, Sorting and Display Option Instruction Guide.



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



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

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](#)