

Budget Construction Import Guide

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Overview

Account budgets can be imported into budget construction. The import file must contain either annual request or monthly request amounts.

Key Information

- Update access is based on the Budget Construction security model
- No compensation related object lines (includes benefits, tax, retirement, etc) can be loaded
- Process inserts new or overwrites existing, primary key-matching lines (any monthly budgets for existing lines are deleted when importing annual budget amounts)
- Each line must be unique (based on primary key of chart, account, sub-account, object, sub-object)
- A budget construction document must exist for the account/sub-account
- Account/sub-account may not be expired
- Object/sub-objects must exist in the chart for the budget fiscal year
- Object/sub-objects must be active

Creating a BC Import File

1. If using the BC Import Template https://fms.iu.edu/index.php/download_file/view/457/391/ to establish monthly budgets, complete each monthly column.

Important Note: All cells in the import file need to be saved as text even if the fields contain only numbers. To ensure fields are stored as text in Excel, select all fields, and in the right-click context menu, choose **Format Cells...** and in the “Number” tab, ensure that the “**Text**” option is selected. Then click **OK**.

2. When you have completed the spreadsheet, **Delete** the top two rows.
3. Save as file type **CSV (Comma Delimited, *.csv)**

	A	B	C	D	E	F	G	H	I
1	Delete the first two rows of text before saving your document to import in csv format.								
2	Chart*	Account Number*	Sub-Account	Object Code*	Sub-Object	Month1 Request Amount*	Month2 Request Amount*	Month3 Request Amount*	Month4 Request Amount*
3	UA	1912201		4166		333	333	333	333
4									
5									
6									

Importing BC Import File

1. After your file has been saved, click **Budget Construction Selection** in the “Budget Construction” module within KFS.



▼ Budget Construction



Other Links

- [Budget Construction Selection](#)

- Click the **Request Import** button.

Budget Construction Selection

BC Fiscal Year:	2015
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Budget Construction Document Open				
<input type="button" value="my accounts"/> <input type="button" value="my organization"/>				
	* Chart	* Account	Sub Account	Action
		<input type="text"/> 	<input type="text"/> 	<input type="button" value="refresh"/> <input type="button" value="load document"/>
Sub-Fund Group:				
Current Year Org:				
Rpts To:				
Next Year Org:				

Budget Construction Organization Salary Setting/Report/Control				
<input type="button" value="org salary settings"/>	<input type="button" value="org report/dump"/>	<input type="button" value="request import"/>	<input type="button" value="lock monitor"/>	<input type="button" value="org pull up"/> <input type="button" value="org push down"/>
<input type="button" value="close"/>				

- On the Budget Construction Request Import tool screen, click **Browse...** to browse for your file.

Budget Construction Request Import Tool

Import File:	<input type="button" value="Browse..."/> No file selected.
Import File Type:	<input checked="" type="radio"/> ANNUAL <input type="radio"/> MONTHLY
Fields Separated By:	<input checked="" type="radio"/> COMMA <input type="radio"/> TAB <input type="radio"/> OTHER <input type="checkbox"/>
Text Fields Delimited By:	<input checked="" type="radio"/> QUOTE <input type="radio"/> NOTHING <input type="radio"/> OTHER <input type="checkbox"/>
<input type="button" value="submit"/> <input type="button" value="close"/>	

- You are setting monthly budgets so click the **Monthly** radio button.
- You saved your file as a .CSV (Comma Separated Value) value so choose the **Comma** radio button.
- On “Text Fields Delimited By,” select **Nothing** radio button and then click .

Budget Construction Request Import Tool

Import File:	<input type="button" value="Browse..."/> UA 1912201 2015 budget upload.csv
Import File Type:	<input type="radio"/> ANNUAL <input checked="" type="radio"/> MONTHLY
Fields Separated By:	<input checked="" type="radio"/> COMMA <input type="radio"/> TAB <input type="radio"/> OTHER <input type="checkbox"/>
Text Fields Delimited By:	<input type="radio"/> QUOTE <input checked="" type="radio"/> NOTHING <input type="radio"/> OTHER <input type="checkbox"/>
<input type="button" value="submit"/> <input type="button" value="close"/>	

- Confirmation that the import is complete will be returned.



Create ▾

Tools Comment Share

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Import run started 04-Feb-2013 16:18:22

Text file load phase - parsing
Text file load complete

Validate data phase
Validate data complete

Update budget phase
Update budget complete

Import run finished at 04-Feb-2013 16:18:22

8. Go into the account and view your request and monthly budgets.

BC Monthly

Backdoor Id **alirober** is in use

expand all collapse all

Monthly Budget Construction hide

Monthly Amounts hide detail

* FY	* Chart	* Account	* SubAccount	* Object	SubObject	* Requested
2014	UA UNIV ADMIN	1912201 UNIVERSITY BUDGET OFFICE	----	4166 PRINT/DUP	---	8,000

Period	Amount
* Month 1	666
* Month 2	666
* Month 3	666
* Month 4	666
* Month 5	666
* Month 6	666
* Month 7	666
* Month 8	666
* Month 9	666
* Month 10	666
* Month 11	666
* Month 12	674

month spread clear month delete

save close

9. The same process can be followed for annual budgets.

