

Budget Construction Import Guide

Overview

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

Key Information

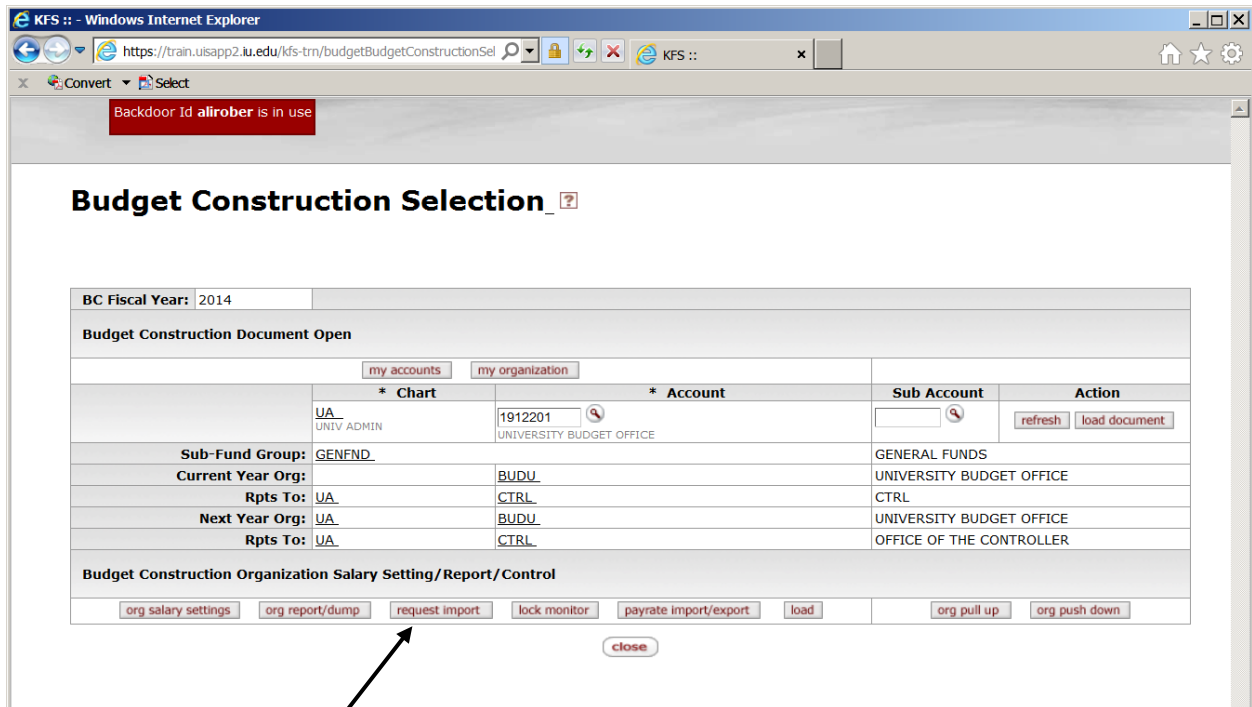
- Update access is based on the Budget Construction security model
- No compensation related object lines (includes benefits, tax, retirement, etc) can be loaded
- Process inserts new or overwrites existing, primary key-matching lines (any monthly budgets for existing lines are deleted when importing 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

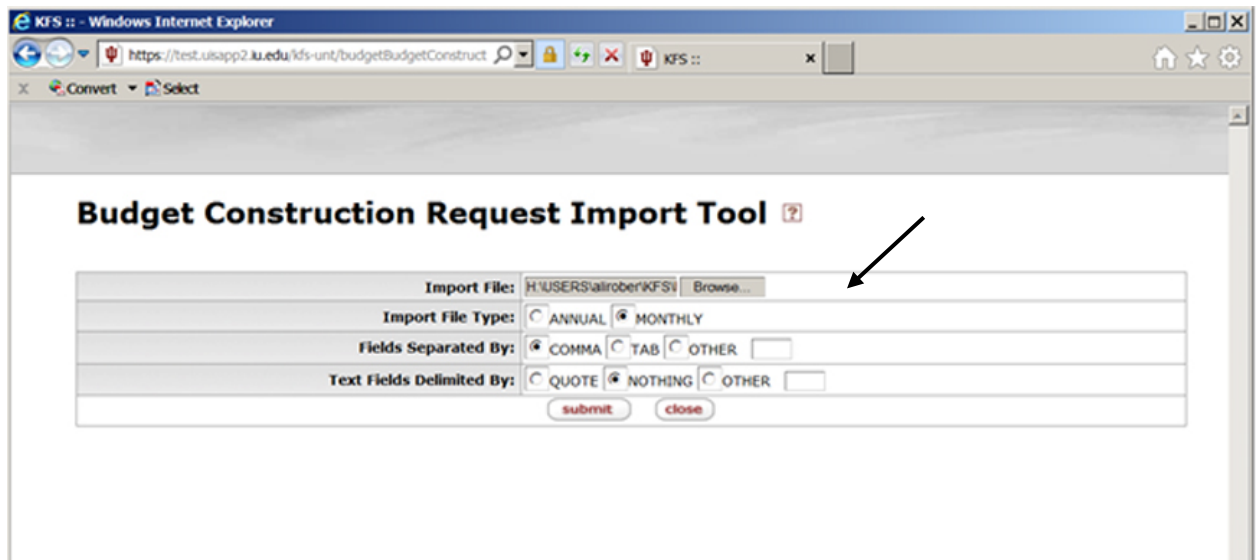
1. If using the BC Import Template <http://www.fms.indiana.edu/kfs/kfs-support-upload-templates.asp> to establish monthly budgets, complete each monthly column.
2. When you have completed the spreadsheet **Delete** the top two rows.
3. Save as file type **CSV (Comma Delimited)(*.csv)**

Chart*	Account Number*	Sub-Account	Object	Sub-Object	Month1 Req	Month2 Req	Month3 Req	Month4 Req
UA	1912201		4166		333	333	333	333

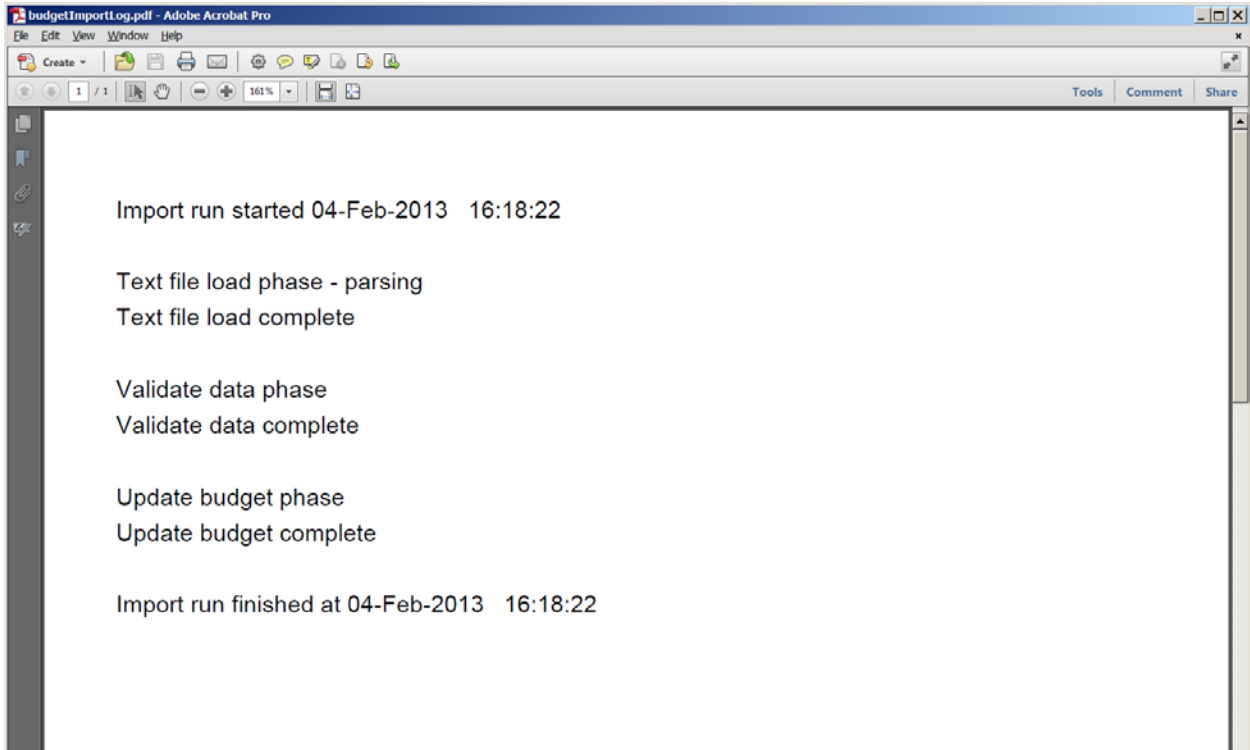
- After your file has been saved go to the Budget Construction Selection screen and click the **request import** button.



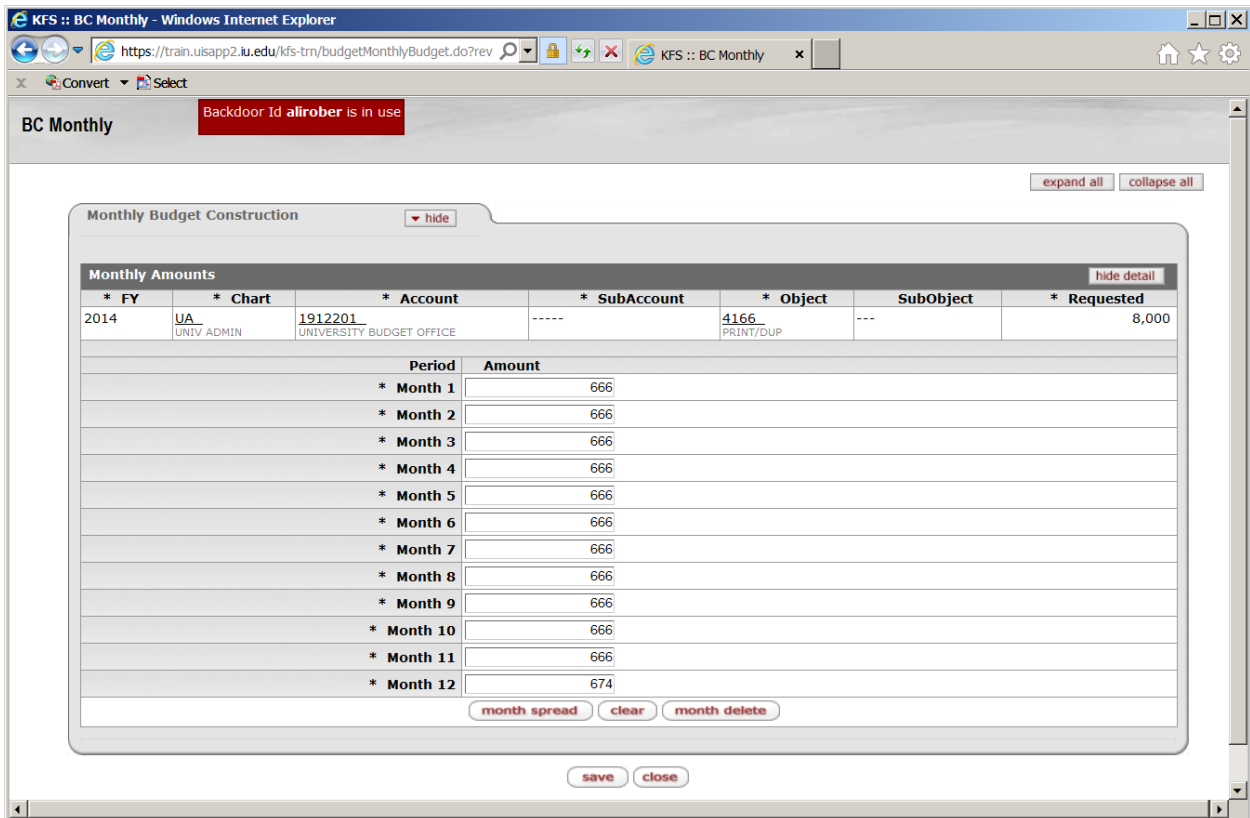
- On the Budget Construction Request Import tool screen browse for your file.
- You are setting monthly budgets so click monthly.
- You saved as Comma Separated.
- On Text fields delimited by, select Nothing and then click **submit**.



- Confirmation that the import is complete will be returned.



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



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