

## Funded Position Upload (cont.)

### Using a Template to Enter Budget Data

The screenshot shows a web application interface for uploading budget data. On the left, a sidebar titled "Funded Position Upload" contains instructions and a link to a sample template. On the right, the main content area is titled "PBF: Excel File Upload" and contains a table for selecting upload criteria. A callout box with the number "1" points to the instructions in the sidebar. Another callout box with the number "2" points to the link for the sample template at the bottom of the sidebar.

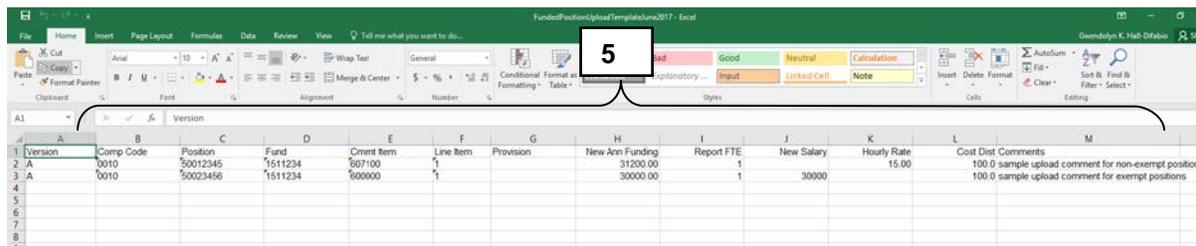
**1**

**2**

1. Once on the **Funded Position Upload** screen, review the instructions on the left hand side for accessing the sample Excel Template.
2. Click on the link to download the sample template (for example, FundedPositionUploadTemplateJune2017.xlsx).
3. Download the sample template. The process for downloading the template will vary based upon the browser and browser version being used. Contact your local IT support for assistance with downloading the sample template.

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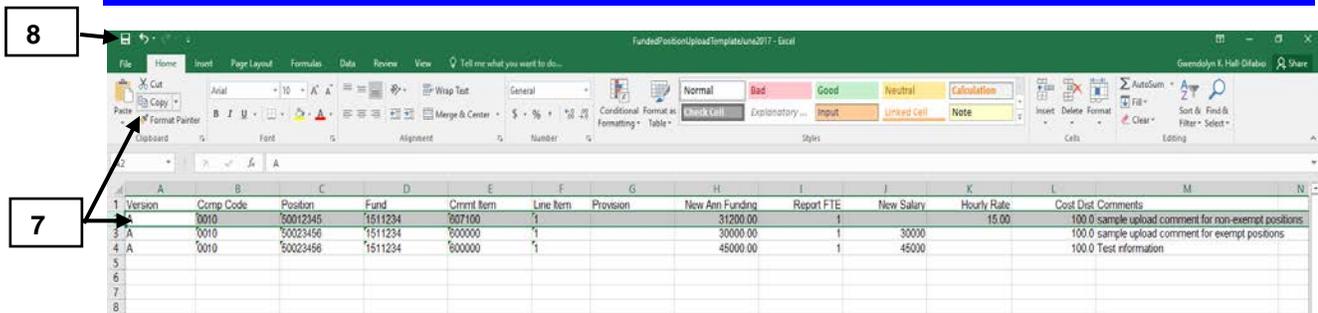


4. Before entering any data, leave the template tabs as they are, even if they are not lined up with the column headings. The system will only read the numbers.
5. Review the columns, labels and explanation of each column located in the **Funded Position** Template Excel spreadsheet:

Column	Column Label	Explanation
A	Layout Version	Layout where the upload will be applied.
B	Company Code	Usually company 0010, infrequently 0014 and 0015
C	Position	Use eight digit "5" number. If row is a provision and not assigned to any single position, leave blank.
D	Fund	Seven digit cost object in company 0010, nine digit cost object in company codes 0014 and 0015
E	Cmmnt Item	Use G/L accounts from 600000 – 609999, fringe benefits will automatically calculate upon upload.
F	Line Item	Identifies the item number for the Commitment Item/GL Account. This is useful especially if adding more lines for a single G/L account.
G	Provision	Use an "X" to indicate those line items that should be marked as provision or supplement. Do not combine with other line items for the same position.
H	New Annual Funding	For <u>standard line items</u> , use <u>included formula</u> to calculate amount which is generated from FTE, New Salary, Hourly Rate and Cost Distribution For <u>provisions</u> , <u>overwrite formula</u> with flat dollar amount
I	Report FTE	Calculated based on 2080 hours per year
J	New Salary	Populate for exempt employees only
K	Hourly Rate	Populate for non-exempt employees only
L	Cost Dist	Cost Distribution for each position, fund and commitment item combination – do not use percent sign
M	Comments	For use of Text attached to row. Each comment can be viewed in the Base and Multi-Package Layouts using the indicators in the "Comments" Column. Avoid special characters, use letters and numbers.

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6. Enter data in the template (be sure to leave in the headers for each column).
7. Optional: To ensure the formatting is correct throughout the template, highlight the example text in the first row of the spreadsheet.

Click on the  **Format Painter** button in the upper left hand corner of the spreadsheet. The pointer changes to a paintbrush icon. This is helpful to use when you've copied in text from another excel spreadsheet and want to ensure the formatting is correct.

Use your mouse to apply the copied format to the entire layout. Click **ESC** to stop formatting.

8. Use the **Excel Save** button frequently to save the data.