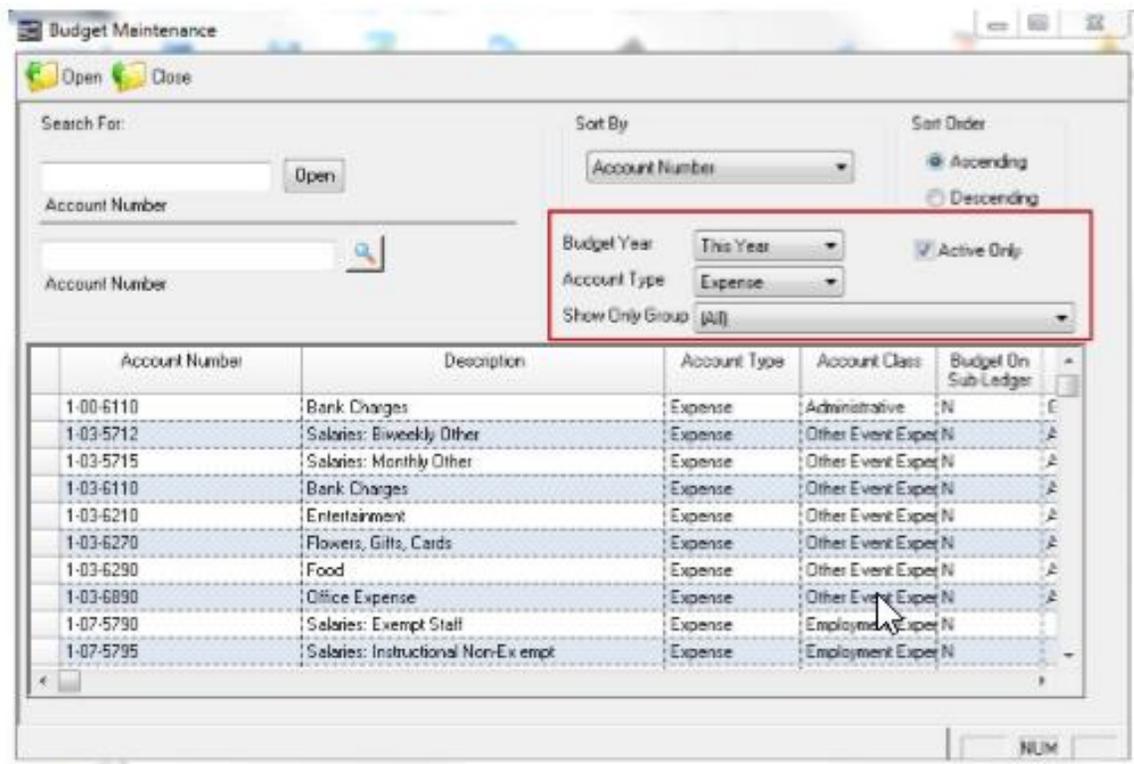


## How do I import my budget?

### First, Export Budget to Excel:

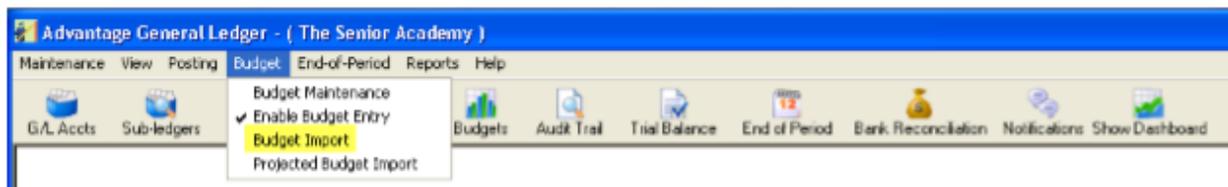
Select the Budget information you want to export by using the filtering fields found on the landing page in Budget Maintenance. **Ascendance General Ledger** > Budget > *Budget Maintenance*, and perform your search.



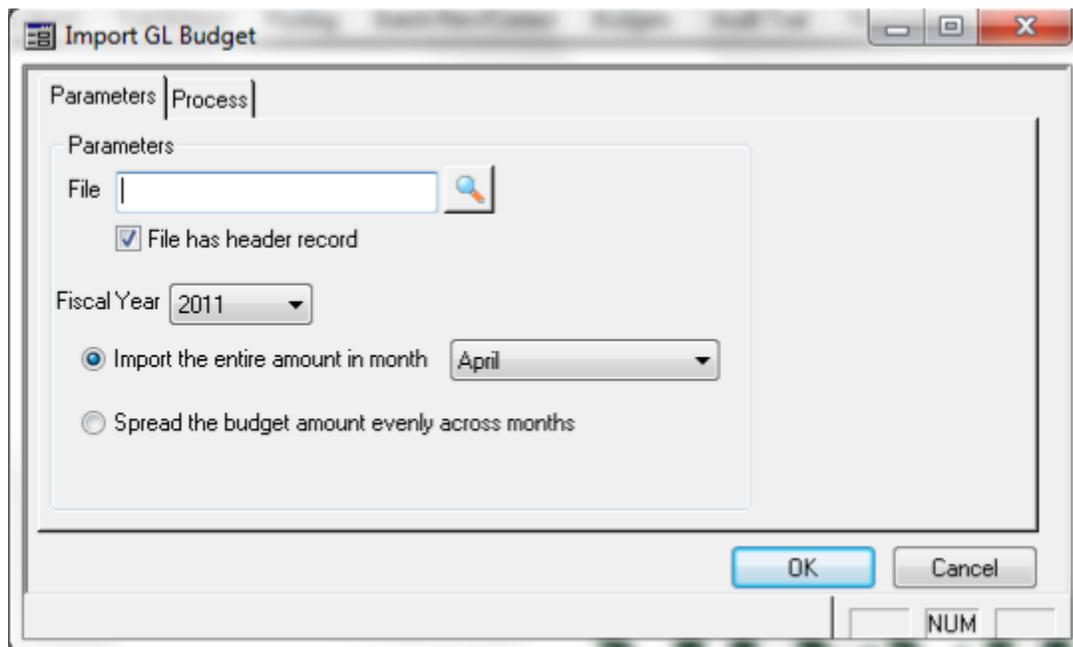
Right click your mouse anywhere in the grid and export the data to Excel. You are now ready to make your adjustments to the budget data and prepare the New Budget Import.

## New Budget Import:

*Budget Import* is located in **Ascendance General Ledger** > Budget > *Budget Import*.



Select *Budget Import* to bring up the following screen:



- **File.** Use the Search button to locate the budget file you have created in Excel. This spreadsheet must be formatted in a particular way.
  - The **first column** in the spreadsheet must contain your school's GL account numbers.

- The **second column** must contain the GL account number descriptions.
  - The **third column** must contain the annual budget amount for the account.
  - Your spreadsheet can contain 1 row for column headings. ***There should be no formulas in the spreadsheet and no blank lines between account numbers.***
  - **The spreadsheet must be saved in Text (Tab Delimited \*.txt) format** and can be placed in any directory you choose.
- **File has header record.** If there is no record header, uncheck, otherwise the first row of your import will not come over. If there is a header record, keep it checked.
  - **Fiscal Year.** The import will place the annual budget amount for each account into the fiscal year and fiscal month that you choose. This field will default to the current fiscal year.
  - **Import the entire amount in month.** The import will place the annual budget amount for each account into the fiscal month that you choose. This field will default to the current fiscal month but can be changed. The import will place the entire budget amount for the account into the month selected.
  - **Spread the budget amount evenly across months.** The import will take the annual budget amount for each account and distribute the amounts evenly across all 12 months.
  - **OK/Cancel.** Click OK to proceed with the import. Click Cancel to exit the program.

**Upon clicking OK the conversion will process. Budgets for the accounts contained in the spreadsheet will be updated. If an account is not in the spreadsheet, it's budget will not be modified. You can**

run this process as many times as you need, using different spreadsheets. You cannot import a negative budget.

For those wanting to import different amounts to specific months you can accomplish this by importing 1 month at a time using multiple spreadsheets and selecting the *Import the entire amount in month* option for each of the months that you're budgeting for. You can also use this process when entering the budget for a period shorter than 12 months.