UNC

UNIVERSITY OF NORTHERN COLORADO

Office of Finance and Budget

Xtender Budget Entry Process
10 lines or less

(You may request a training session with the Budget Office for any of the processes covered in this documentation)

Process:

You may submit any one-time (BD04) or permanent (BD02) entry that is 10 lines or less to the Budget Office through Xtender.

Forms are located in SharePoint at https://share.unco.edu/sites/finadmin/budget/default.aspx or on our website at http://www.unco.edu/budget.

A copy of the FIN002 report for the appropriate Fund and Org, as well as any other relevant documentation, is required.

Please convert your Excel spreadsheet to pdf prior to uploading.

🐻	1. Log into Web Xtender

🐻	2. Import Document

🐻	3. Index and Save

1. **Log into Web Xtender**
   a. Access through URSA, Employee Tab, Employee Tools, General Information or
      https://webxtender.unco.edu/AppXtender/Login.aspx

Employee Tools

General Information

- Self Service Banner (SSB)
- Human Resources
- The Center for Enhancement of Teaching & Learning (CETL)
- Banner Security Forms
- WebXtender Login
- New Student Orientation Resources
- About Insight
- Automated Waitlisting Information
- Important Dates

   b. For detailed help with Xtender, please visit
      http://www.unco.edu/aboutxtender/index.html

2. Import Document

a. Right click on the Application B-F-DOCS and choose New Document or Batch Import.
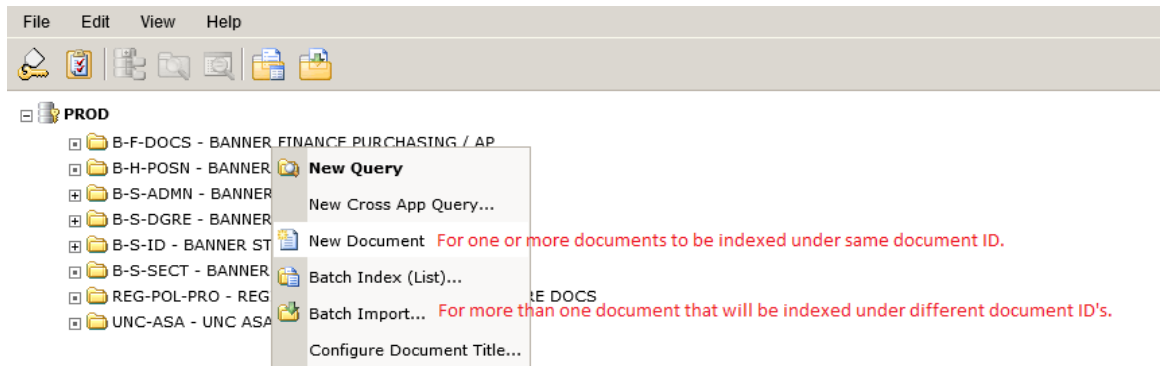
➢ Use *New Document* when you are bringing in only one page or multiple pages that will all be put in the same file under the same Document ID. Xtender will treat all pages in the file as one document.

Import via scanner:
Click on the Scanner Icon and scan your documents

Import document from file
i. Click on the down arrow next to the book icon. Choose "Next Page, Import File, Append" to bring in an already existing file.
ii. Find your file and click on it. You can hold down your Control key to select multiple files. Click "Open" and the files will be brought into Xtender.
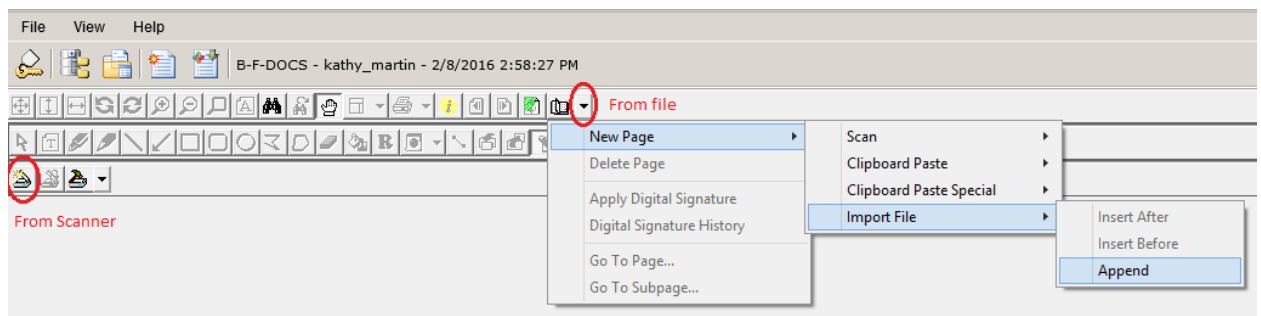
➢ Use **Batch Import** to bring multiple documents into Xtender that will be indexed under different document ID's. Xtender treats each page as a separate document.
      i. Give your Batch a name for your reference and click "Next".

New Batch Document

Application	B-F-DOCS
Batch Name*	
Memo	Batch created at 2016-02-08 21:39:06

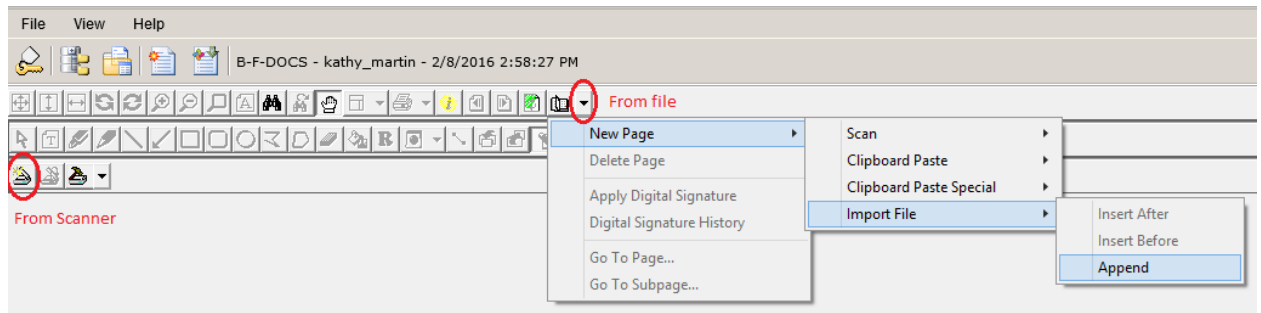*Required Fields   ☐ Thin client upload

     Next   Cancel   Help

Import via scanner:
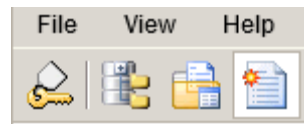   Click on the Scanner Icon and scan your documents

Import document from file
    i. Click on the down arrow next to the book icon. Choose "Next Page, Import File, Append" to bring in an already existing file.
    ii. Find your file and click on it. You can hold down your Control key to select multiple files. Click "Open" and the files will be brought into Xtender.

File   View   Help

B-F-DOCS - kathy_martin - 2/8/2016 2:58:27 PM

From file

New Page	▶	Scan	▶
Delete Page		Clipboard Paste	▶
		Clipboard Paste Special	▶
Apply Digital Signature		Import File	▶
Digital Signature History			Insert After
Go To Page...			Insert Before
Go To Subpage...			**Append**

From Scanner

File   View   Help

3. Index and Save
a. Click on the new document icon
b. Enter the following information into the Index form

i. **Document ID -** Can only be 8 characters long. Use the following coding for Budget Entries:

        Org Level 4 Department ID and number

        Example: Finance would be 510FIN01. If you are submitting multiple entries at one time, number them consecutively (eg. 01, 02, etc.) The Org Level 4 Department ID's are listed at the end of this document.

ii. **Document Type** – Select "Budget Entry"
iii. **Transaction Date** – Enter the current date
iv. **Routing Status** – BUD – INITIAL – This will route it to the Budget Office for processing.
(all other BUD routing Statuses are for Budget Office Use Only)
v. **Save.**

ORG Level 4	Department Description
100PRS	President's Office
200BOT	Board of Trustees
300PRV	Provost Office
310UGR	University College
315SEN	Dean of Students/Student Engagement
320ENR	Enrollment Management/Student Access
340GRE	Graduate School
342GFA	Graduate School Student Support
344OES	Office of Extended Campus
380LIB	University Libraries
400EBS	College of Education and Behavioral Sciences
420HSS	College of Humanities and Social Sciences
440MCB	Monfort College of Business
460NHS	College of Natural and Health Sciences
480PVA	College of Performing and Visual Arts
500VPA	Vice President and Administration
510FIN	General Accounting/Bursar/Budget Office
513PUR	Purchasing/Accounts Payable
520FAC	Facilities
530INF	Information Technology
540HRM	Human Resources
560POL	University Police/Parking
600AUX	Other Auxiliary Services
650AUX	Auxiliary Services
700VPU	Vice President University Relations
760VPD	Vice President Alumni and Development
800ATH	Athletics