



Cornell University
Division of Budget and Planning



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Longview Budget Data Extract Guide

[Document subtitle]

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Longview Budget Data Extract

The Longview Budget Data Extract app provides many options for extracting budget data out of Longview. Options include the level of account detail you wish to extract as well as options for extracting one or many different time periods. The following sections describe how to go about extracting Budget data from Longview.

Extract Budget Data

1. Select the Extract Budget Data App.

To extract budget information, select the app from the Budget Reporting Applications panel:

The screenshot displays the Longview Budget Data Extract application interface. It features three main panels on the left and a larger panel on the right. The left panels are titled 'Report Templates', 'Documentation', and 'Longview Documentation'. The right panel is titled 'UBO Applications' and contains a list of options. The 'Budget Reporting Applications' section at the bottom of the right panel is expanded, showing a list of options where 'Export Budget Data' is selected and highlighted with a red box.

Report Templates

- Administrative Reports
- Capital Planning
- Data Validation Reports
- Endowed & Contract Reporting
- May Book Templates
- Position Reporting
- Revenue and Expense Reports
- Transfer Reporting
- Trustee Budget Format Standard Reports
- Variance Reports
- Uncategorized Templates

Documentation

- About the Longview Data Model.pptx
- Training Document
- Longview for Excel Guide
- Longview Analysis and Reporting Guide
- Annual Planning Import Template & Instructions
- Monthly Planning Import Template & Instructions
- Division of Budget and Planning site

Longview Documentation

- Longview Analysis and Reporting Guide
- Longview Applications Administrator Guide

UBO Applications

- Annual Revenue and Expense Planning
- Annual Revenue and Expense Planning with History
- Monthly Revenue and Expense Planning
- Position Planning
- Update Cost Allocations
- Report Cost Allocations
- SIP Input
- SIP Apply
- SIP Executive Input
- SIP UBO Maintenance
- Copy Version
- Copy to Trustee Budget
- GL Upload
- Benefit Rates
- Time Period Rollover
- Query Test
- Budget Initialize
- User Maintenance
- Export Budget Data

Budget Reporting Applications

- Report Cost Allocations
- **Export Budget Data**



2. Select the Extract Parameters.

The extract parameter window will appear. Here you will select the parameters (filters) you wish to use to obtain the level of detail budget information you wish to extract.

Select Parameters

Account – enter the Org level you wish to extract. You can do so by drilling on hierarchy via the magnifying glass or by typing your Unit or Account directly in the selector box. Account or Unit selections in this hierarchy are based on your security access from which you can select the account level you wish to extract.

Select File and Location

Output File – A default file type extension “.csv”, default file name “ExportBudgetData” as well as a default file output path location

[C:\Users\“YOUR NETID”\Documents\Longview\Data\ExportBudgetData.csv] on your machine is provided . To change the file name or file folder within the Documents\Longview folder, simply enter the new name in the selector box or browse button.

Select Time Periods

Select Time Periods allows you to select the time periods you wish to extract. You can select none, one or many time periods to extract. The default time period, New Budget Amount (the budget year that you are planning), will always be extracted along with any of the other time periods you select. Selecting none of the time periods listed will give you the New Budget Amount default only.

Export Period:

None – This will extract the New Base Budget Amount default only.

Current Year Base Budget – This will extract this year’s Base Budget (the base budget loaded to the GL last year with adjustments).

New Monthly Budget – This will extract New Base Budget Monthly amounts.

Current Year Actuals – This will extract Current YTD Actual (actual amount as of the last month’s close of business) amounts.

Prior Year Actuals – This will extract Prior Year Actual amounts.



Prior (-2) Year Actuals – This will extract Actual amounts from 2 years ago.

Current Year Trustee Budget – This will extract the Current Trustee Budget amounts.

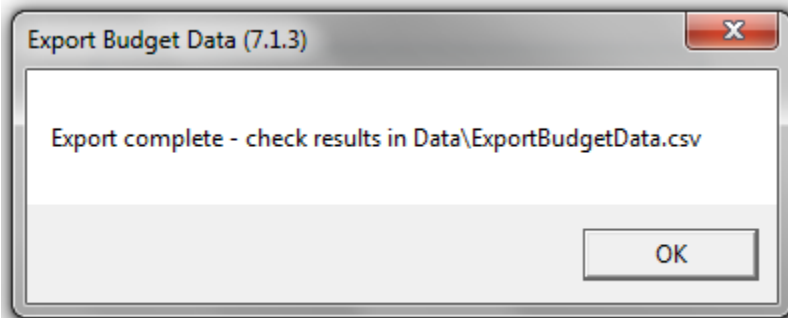
New Year Trustee Budget – This will extract the New Trustee Budget Amounts.

Note: The New Budget Amount default time period is always extracted, no matter what other time periods you may select.

When selecting one or more time periods, the amounts will appear in the extract file in the order selected, with the New Budget Amount appearing first. No placeholder exists in the output file for time periods not selected.

After you've finished selecting parameters for the extract, click the **Next** button in the lower right corner of the screen to run the process.

When the extract is complete, a message will appear indicating that the process has finished and the extract file has been created:



Note: The default path above shows Data\ExportBudgetData.csv; however, the full path name is Documents\Longview\Data\ExportBudgetData.csv. Check this location to find your extract file.



3. Below is the layout of the Budget Data extract file:

.csv column header (Excel)	Sample Data	column description	Notes
Organization	UNIV_000 P_0001 E_8000 C_3800 G_38AD D_3802 S_3834 R513841	Organization / Account String (will include sub account if aub account exists).	
Org	S_3834	The Org the account belongs to.	
Account	R513841	Account number	
Account Name	CUSTOM DEVELOPMENT	Account Name	
Sub Account	-----	Sub Account Number (----- if none exists)	
Sub Account Name	CUSTOM DEVELOPMENT	Sub Account Name (Account Name if none exists)	
Object Level	Salaries Exempt Staff	Object Level	
Object	5200	Object Code	
Object Name	Exempt - Other Professional	Object Code Name	
SubObj	---	Sub Object Code (--- if none exists)	
Subobj Name	None	Sub Object Code Name (will be NONE if none exists)	
Fund Grp	GN	Fund Group Code	
Group Name	General Funds	Fund Group Name	
Sub Fund Grp	GNDEPT	Sub Fund Group Code	
Sub Fund Grp Name	Designated	Sub Fund Group Name	
ENCC	EN	Endowed or Contract	
Notes	FY15 LTIP Budget Load	Notes text	
New Base Budget	BBYR2015	New Base Budget - Time Period for the upcoming Planning Year.	You always get the New Budget even if no other time period is selected.
Current Year Base Base Budget	BBYR2014	Base Budget planned last year with adjustments in the GL.	Note: This column will only appear in the extract file if it is selected on the selection screen.
Jul FY15 Bud	B201501MTH	New Budget Monthly Budgeted Amount - Month 1	Note: This column will only appear in the extract file if it is selected on the selection screen.
Aug FY15 Bud	B201502MTH	New Budget Monthly Budgeted Amount - Month 2	Note: This column will only appear in the extract file if it is selected on the selection screen.



.csv column header (Excel)	Sample Data	column description	Notes
Sep FY15 Bud	B201503MTH	New Budget Monthly Budgeted Amount - Month 3	Note: This column will only appear in the extract file if it is selected on the selection screen.
Oct FY15Bud	B201504MTH	New Budget Monthly Budgeted Amount - Month 4	Note: This column will only appear in the extract file if it is selected on the selection screen.
Nov FY15 Bud	B201505MTH	New Budget Monthly Budgeted Amount - Month 5	Note: This column will only appear in the extract file if it is selected on the selection screen.
Dec FY15 Bud	B201506MTH	New Budget Monthly Budgeted Amount - Month 6	Note: This column will only appear in the extract file if it is selected on the selection screen.
Jan FY15 Bud	B201507MTH	New Budget Monthly Budgeted Amount - Month 7	Note: This column will only appear in the extract file if it is selected on the selection screen.
Feb FY15 Bud	B201508MTH	New Budget Monthly Budgeted Amount - Month 8	Note: This column will only appear in the extract file if it is selected on the selection screen.
Mar FY15 Bud	B201509MTH	New Budget Monthly Budgeted Amount - Month 9	Note: This column will only appear in the extract file if it is selected on the selection screen.
Apr FY15 Bud	B201510MTH	New Budget Monthly Budgeted Amount - Month 10	Note: This column will only appear in the extract file if it is selected on the selection screen.
May FY15 Bud	B201511MTH	New Budget Monthly Budgeted Amount - Month 11	Note: This column will only appear in the extract file if it is selected on the selection screen.
Jun FY15 Bud	B201512MTH	New Budget Monthly Budgeted Amount - Month 12	Note: This column will only appear in the extract file if it is selected on the selection screen.
Jan FY14 Act YTD	AYR2014*	During the month of February 2014, the system will produce this data - YTD Actuals (Total at close of last month)	Note: This column will only appear in the extract file if it is selected on the selection screen.
Tot Mth FY13 Act	AYR2013	Actuals Last Year	Note: This column will only appear in the extract file if it is selected on the selection screen.
Tot Mth FY12 Act	AYR2012	Actuals Two Years ago	Note: This column will only appear in the extract file if it is selected on the selection screen.
Trustee Budget 2014	TBYR2014	Current Year Trustee Budget	Note: This column will only appear in the extract file if it is selected on the selection screen.
Trustee Budget 2015	TBYR2015	New Trustee Budget	Note: This column will only appear in the extract file if it is selected on the selection screen.