Import Detail Lines for AD/ND/CR/CCR eDocs
(Last updated: 11/1/2018)

To increase efficiency in initiating Advance Deposit, Non-Check Disbursement, Cash Receipt, and Credit Card Receipt eDocs in the finance system, an Import Lines feature is being added within the detail tabs. This new feature is similar to the existing import functionality available for accounting lines.

Advance Deposit Example:

The new “Import Lines” feature can be found in the detail tabs as shown in the “Advance Deposits” tab below. To obtain the properly formatted import template, and for additional help information to complete the template, please click on the question mark icon in the Advance Deposits tab.

The question mark icon will flow to the Data Import Templates where the new templates reside.
Clicking on the desired import template link will open the basic template information for guidance on completing the template.

*Note that these new templates only require the first line to be removed (before saving to .csv) in order to be imported successfully to the eDoc. The field header row should remain.

Please contact the Office of Financial Analysis and Reporting at 517-355-5029 with questions.