The budgeting dashboard is used to review and/or update the status for lock, edit, last updated by, approval, comments & attachments for budget accounts.

The budgeting dashboard is also used for entering and viewing budgets. There are two tabs: Dashboard and Account details.

Other budget entry and viewing screen options are the Basic Budget Entry and the Custom Budget Entry. The Dashboard tab functionality differs between these options. All options have the Account Detail tab functionality. Please see What is the Difference Between the Budget Data Entry Screens? for more information.

Capital expenditures are entered through the Manage Capex screen.

Dashboard tab
On this screen, budget data is entered on the Account Details tab. The Total column on this screen is read-only.

At the top of the screen are the Search criteria.

Please note that if you are in the Account Details tab, searching will take you back to the Dashboard tab.

The Search criteria are:
a) CompanyDB-this is a required field;
b) BudgetID-this is a required field. In order for a BudgetID to be available for budgeting the "IsBudgeted" box needs to be checked in Manage Budgets.
c) OrgUnit-in order for an OrgUnit to be available for budgeting the "IsBudgeted" box needs to be checked in Manage OrgUnits;
d) OrgUnit Rollup-these are defined in Manage OrgUnits;
e) Object-in order for an Object to be available for budgeting the "IsBudgeted" box needs to be checked in Manage Objects; and
f) Object Rollup-these are defined in Manage Objects.

In addition to the non-checking of the "IsBudgeted" box, fields may be unavailable to budget because the Chart of Accounts synchronization and related processes need to be completed (Synchronize Chart of Accounts).

Standard functionality is available including Advanced search, Account Lock, Edit Status and Account Approval, Filter, Print, Export to Excel, Print to PDF, Autofit Columns, Expand/Reduce Column Widths, Attachments, Column Data Sort - Ascending/Descending, Confirm not Saved Popup and Select All. Items that are underlined in blue are accessed through Drilldown.

The format of the on screen data can be customized by using the Display Level, Row Format, Show Rollup Sub-Total and Expand/Collapse Rows functionality.

Below is a sample Dashboard screen. Please note that the color of the comment row cell changes from white to a beige after a comment has been entered. Comments can either be entered when updating the ApprovalStatus or by Drilldown into the underline blue "Comments".

Select		AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
▶	☐	000-4100-00	Sales	000	4100-00	5,017,085		SUBMITTED	· · · · Feb 2 2016 11:59AM	PLEASE_REVISE	Comments	Attachments
	☐	000-4110-01	US Sales - Retail/Parts	000	4110-01	1,023,455.38			· Jan 22 2016 9:27AM		Comments	Attachments
	☐	000-4110-02	US Sales - Finished Goods	000	4110-02	25		UNUSED	· Jan 13 2016 9:32AM		Comments	Attachments
	☐	000-4111-01	Canadian Sales - Retail/Parts	000	4111-01	1,032,455.38			· Feb 1 2016 1:23PM		Comments	Attachments

The Account Details tab is accessed by Drilling down into the required AccountNum on the Dashboard screen. Budget numbers are entered on the Accounts Details tab.

The following "Right-Click" menu functionality is available:

Select All	Ctrl+A
Copy..	Ctrl+C
Copy with headers..	Ctrl+H
Paste..	
Check All	
Uncheck All	Ctrl+U
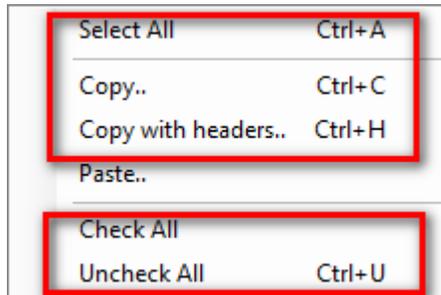
The following setting are available on the App Config/Menu Editor. For additional setting options, please see Attachments and Lock/Unlocking Accounts.

BudDash_ApprStatus_Approved	1	0=hidden, 1=visible
BudDash_ApprStatus_Denied	1	0=hidden, 1=visible
BudDash_ApprStatus_PleaseRevise	0	0=hidden, 1=visible
BudDash_ApprStatus_UnderReview	1	0=hidden, 1=visible
BudDash_EditStatus_InProcess	1	0=hidden, 1=visible
BudDash_EditStatus_ReSubmitted	1	0=hidden, 1=visible
BudDash_EditStatus_Submitted	1	0=hidden, 1=visible
BudDash_EditStatus_Unused	1	0=hidden, 1=visible
BudgetPreviewMode	2	Set as 1 for simple grid, 2 for advanced grid view
HideApprovalFunction	0	1 = Hide, 0 = Don't Hide
HideEditStatusFunction	1	1 = Hide, 0 = Don't Hide
ShowNativeTotal	0	Set as 1 to show native budget totals from ERP

The Accounts Details tab

This screen only displays the data related to a single AccountNum.

The screen has two sections. The top half is the Assumptions tab and the bottom half is the Budget Summary section.

A) Assumptions tab

The standard Save, Expand/Reduce Column Width, Edit Status and Account Approval, Attachments, Confirm not Saved Popup and Print to PDF functionality is available.

Data can be copied to/from Excel using the Copy and Paste feature.

The below "Next" and "Prev" buttons as outlined in red, provides the ability to sequentially navigate from one account to another, provided a default has not been setup in Define Row Formats . For example, by clicking on "Next" the Account No. in our example will change from 000-4100-00 to 000-4110-01.

Comments and Spread can be viewed on clicking on the below button outlined in red.

This is what the screen will look like when the above "View Comment" and "Show Spread" buttons are clicked. Comments can be typed into the "Comments" box and saved by clicking the "Submit" button. The "View comments" button will change color from white to light beige to indicate that a comment has been saved.

Data can be entered using the Show Spread Calculation (Expanded Spread Method), Simple Spread Method, Row to Row Calculations, Cell Math Functions, Lookup, Copy and Paste, Apply Number Formatting and Exclude Row Function. In addition data can be entered using the Import Budget Assumptions, Import Budget Assumptions Multi-Company, and Copy Bulk Assumptions functionality.

When Lookup data is changed, the Refresh Lookup Syn Status functionality together with the Budget Summary - Lookup Sync Status can be used to view the change against the original Lookup data. The Refresh Spread Method Source Values functionality is available.

The following "Right-Click" functionality is available:

B) Budget Summary section.

There are five tabs which provide the following information:
1) Acct History;
2) Monthly Variances;
3) Lookup Sync Status;
4) Main Acct History; and
5) View Save History.

Please note that appropriate data from the above tabs can be Copy and Pasted. If example, information on a View Save History row could be copied to replace the newest version of the same data in Accounts Details.

Also, please see related article: How Do I Add/Delete BudgetIDs Displayed on the Budget Summary?

Per below the view of the Budget Summary section: 1) Can be made larger/smaller by dragging the solid black line; and 2) Be hidden or revealed by clicking on these arrows.
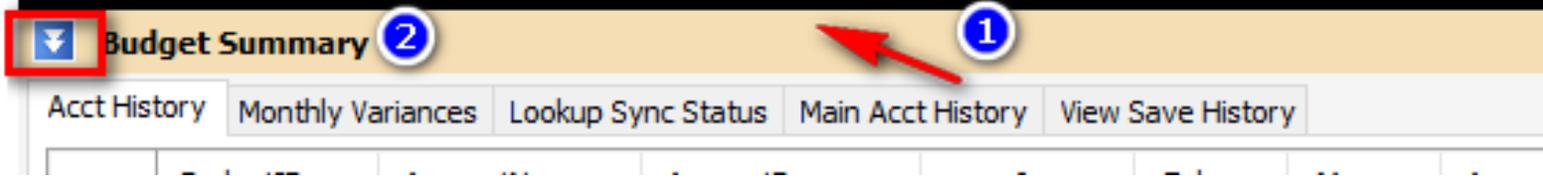
The following "Right-Click" menu functionality is available:

Copy..	Ctrl+C
Copy (include headers)..	Ctrl+K
Paste..	Ctrl+V
AutoStyle Columns	