

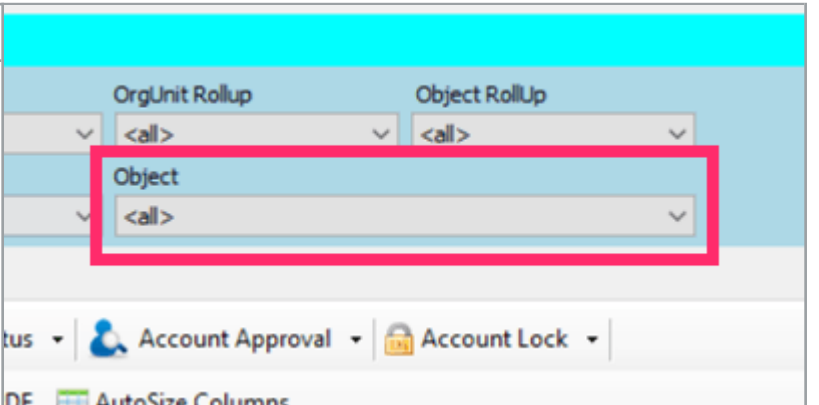
<p> Dynamic Budgets User Guide for Budgeting Dashboard</p>	<p>1</p>
<p> We are going to review how to review the budgeting process status screen.</p> <p>Let's get started. Click on Budgets.</p>	<p>2</p>
<p> Click on Budgeting Dashboard.</p> <p>Note: This button can be renamed, if necessary.</p>	<p>3</p>
<p> Note: <i>As a reminder, this path shows you how to get to this screen again.</i></p> <p>In this example, you would go to the Budgets menu, then Budgeting Dashboard.</p>	<p>4</p>

<p>5</p> <p> Click on the CompanyDB dropdown list. Make your selection.</p> <p>In this example, select DB3147_two18.</p>	<p>The screenshot shows the 'Budgeting Dashboard' with the 'CompanyDB*' dropdown menu open and 'DB3147_two18' selected. Other dropdowns for 'BudgetID*' and 'OrgUnit Rollup' are visible but not yet selected.</p>
<p>6</p> <p> Click on the BudgetID dropdown list. Make your selection.</p> <p>In this example, select 2023 Budget.</p>	<p>The screenshot shows the 'Budgeting Dashboard' with the 'BudgetID*' dropdown menu open and '2023 Budget' selected. The 'CompanyDB*' dropdown remains at 'DB3147_two18'.</p>
<p>7</p> <p> Click on the OrgUnit & Object Rollup dropdown lists. Make your selection.</p> <p>In this example, select all for both.</p>	<p>The screenshot shows the 'Budgeting Dashboard' with both the 'OrgUnit Rollup' and 'Object RollUp' dropdown menus open and set to '<all>'. The previous selections for CompanyDB and BudgetID are still visible.</p>
<p>8</p> <p> Click on the OrgUnit dropdown list. Make your selection.</p> <p>In this example, we will select 100-Administration.</p>	<p>The screenshot shows the 'Budgeting Dashboard' with the 'OrgUnit' dropdown menu open and '100 - Administration' selected. The other dropdowns remain as previously selected.</p>

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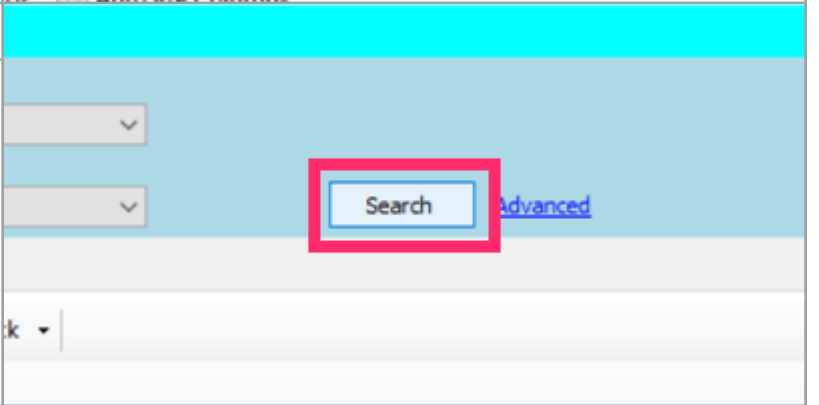
Click on the **Object dropdown list**. Make your selection.

In this example, select all.



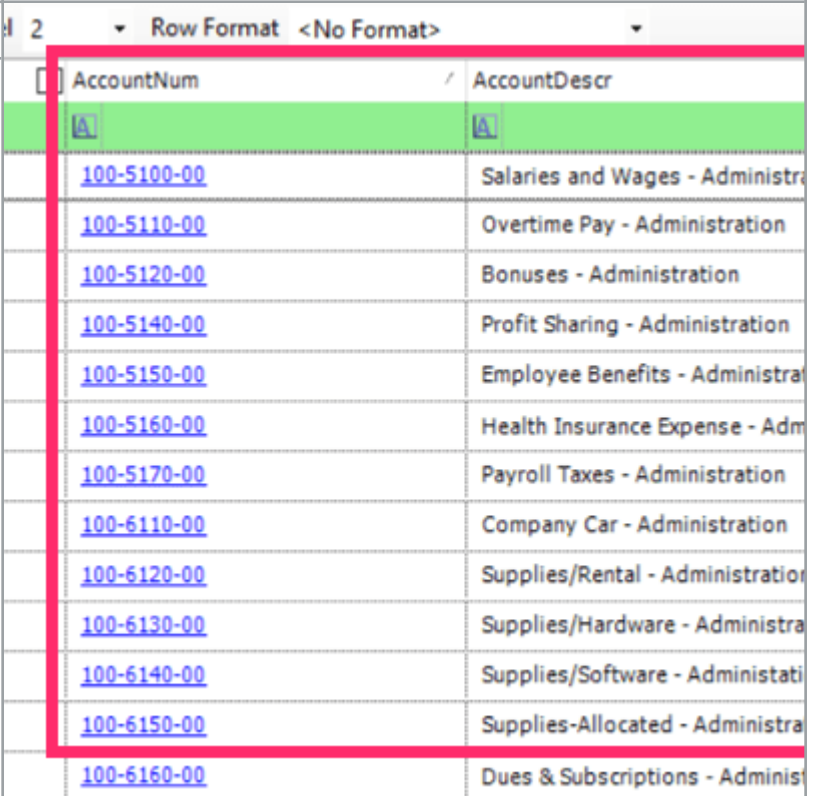
10

Click on **Search**.



11

Now you see the **budgeting dashboard**. Here is where you can review and/or update the status for lock, edit, last updated by, approval, comments & attachments for your budget accounts.



AccountNum	AccountDescr
100-5100-00	Salaries and Wages - Administration
100-5110-00	Overtime Pay - Administration
100-5120-00	Bonuses - Administration
100-5140-00	Profit Sharing - Administration
100-5150-00	Employee Benefits - Administration
100-5160-00	Health Insurance Expense - Administration
100-5170-00	Payroll Taxes - Administration
100-6110-00	Company Car - Administration
100-6120-00	Supplies/Rental - Administration
100-6130-00	Supplies/Hardware - Administration
100-6140-00	Supplies/Software - Administration
100-6150-00	Supplies-Allocated - Administration
100-6160-00	Dues & Subscriptions - Administration

<p>12</p> <p>Let's look at account 100-6130-00.</p>	
<p>13</p> <p>After reviewing and making any necessary changes to this budget account in the assumptions screen, click on save assumptions, then click on Dashboard.</p>	
<p>14</p> <p>Now we are going to update the EditStatus column for this account.</p> <p>Check the box or boxes next to the account(s) you want in the Select column.</p>	
<p>15</p> <p>Click on the Edit Status button. You can select unused, In-Process, Submitted, or Re-Submitted depending on where you are in the budget process.</p> <p>In this example, we will select Submitted.</p>	

<p>16</p> <p> Now you see the EditStatus column updated (SUBMITTED) for account 100-6130-00.</p>	<table border="1"> <tr><td>6,867.58</td><td></td><td></td><td></td></tr> <tr><td>161.98</td><td></td><td></td><td>PHUBERT\P. Hubert - Jun 12 2</td></tr> <tr><td>12,400</td><td></td><td></td><td>PHUBERT\P. Hubert - Jul 31 2</td></tr> <tr><td>13,500</td><td></td><td>SUBMITTED</td><td>SUBMITTED - PHUBERT\P. HU</td></tr> <tr><td>19,000</td><td></td><td></td><td>PHUBERT\P. Hubert - Jul 31 2</td></tr> <tr><td>17,350</td><td></td><td></td><td>PHUBERT\P. Hubert - Jul 31 2</td></tr> <tr><td>100</td><td></td><td></td><td>PHUBERT\P. Hubert - Jun 12 2</td></tr> <tr><td>2,500</td><td></td><td></td><td>PHUBERT\P. Hubert - Jun 12 2</td></tr> </table>	6,867.58				161.98			PHUBERT\P. Hubert - Jun 12 2	12,400			PHUBERT\P. Hubert - Jul 31 2	13,500		SUBMITTED	SUBMITTED - PHUBERT\P. HU	19,000			PHUBERT\P. Hubert - Jul 31 2	17,350			PHUBERT\P. Hubert - Jul 31 2	100			PHUBERT\P. Hubert - Jun 12 2	2,500			PHUBERT\P. Hubert - Jun 12 2
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<p>17</p> <p> Now we are going to update the Account Lock column for this budget account.</p> <p>Check the box or boxes next to the budget account(s) you want in the Select column.</p>	<table border="1"> <tr><td><input type="checkbox"/></td><td>100-5170-00</td><td>Payroll Taxes - Administration</td></tr> <tr><td><input type="checkbox"/></td><td>100-6110-00</td><td>Company Car - Administration</td></tr> <tr><td><input type="checkbox"/></td><td>100-6120-00</td><td>Supplies/Rental - Administration</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>100-6130-00</td><td>Supplies/Hardware - Administration</td></tr> <tr><td><input type="checkbox"/></td><td>100-6140-00</td><td>Supplies/Software - Administration</td></tr> <tr><td><input type="checkbox"/></td><td>100-6150-00</td><td>Supplies-Allocated - Administration</td></tr> <tr><td><input type="checkbox"/></td><td>100-6160-00</td><td>Dues & Subscriptions - Administration</td></tr> <tr><td><input type="checkbox"/></td><td>100-6170-00</td><td>Repairs & Maintenance - Administration</td></tr> </table>	<input type="checkbox"/>	100-5170-00	Payroll Taxes - Administration	<input type="checkbox"/>	100-6110-00	Company Car - Administration	<input type="checkbox"/>	100-6120-00	Supplies/Rental - Administration	<input checked="" type="checkbox"/>	100-6130-00	Supplies/Hardware - Administration	<input type="checkbox"/>	100-6140-00	Supplies/Software - Administration	<input type="checkbox"/>	100-6150-00	Supplies-Allocated - Administration	<input type="checkbox"/>	100-6160-00	Dues & Subscriptions - Administration	<input type="checkbox"/>	100-6170-00	Repairs & Maintenance - Administration								
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<p>18</p> <p> Click on the Account Lock Status button. You can select Lock or Unlock depending on where you are in the budget process.</p> <p>In this example, we will select Lock.</p>																																	
<p>19</p> <p> Now you see the Locked column updated (Locked) for account 100-6130-00.</p> <p>A message will appear that reads, a number of accounts locked successfully.</p>	<table border="1"> <tr><td>5170</td><td>6,867.58</td><td></td><td></td></tr> <tr><td>6110</td><td>161.98</td><td></td><td>PHUBERT\P. H</td></tr> <tr><td>6120</td><td>12,400</td><td></td><td>PHUBERT\P. H</td></tr> <tr><td>6130</td><td>13,500</td><td>Locked</td><td>SUBMITTED SUBMITTED -</td></tr> <tr><td>6140</td><td>19,000</td><td></td><td>PHUBERT\P. H</td></tr> <tr><td>6150</td><td>17,350</td><td></td><td>PHUBERT\P. H</td></tr> <tr><td>6160</td><td>100</td><td></td><td>PHUBERT\P. H</td></tr> <tr><td>6170</td><td>2,500</td><td></td><td>PHUBERT\P. H</td></tr> </table>	5170	6,867.58			6110	161.98		PHUBERT\P. H	6120	12,400		PHUBERT\P. H	6130	13,500	Locked	SUBMITTED SUBMITTED -	6140	19,000		PHUBERT\P. H	6150	17,350		PHUBERT\P. H	6160	100		PHUBERT\P. H	6170	2,500		PHUBERT\P. H
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6170	2,500		PHUBERT\P. H																														

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Now we are going to update the **Account Approval column** for this budget account.

Check the box or boxes next to the budget account(s) you want in the Select column.

<input type="checkbox"/>	100-5170-00	Payroll Taxes - Administration
<input type="checkbox"/>	100-6110-00	Company Car - Administration
<input type="checkbox"/>	100-6120-00	Supplies/Rental - Administration
<input checked="" type="checkbox"/>	100-6130-00	Supplies/Hardware - Administration
<input type="checkbox"/>	100-6140-00	Supplies/Software - Administration
<input type="checkbox"/>	100-6150-00	Supplies-Allocated - Administration
<input type="checkbox"/>	100-6160-00	Dues & Subscriptions - Administration
<input type="checkbox"/>	100-6170-00	Repairs & Maintenance - Administration

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Click on the **Account Approval Status** button. You can select Under Review, Please Revise, or Denied depending on where you are in the budget process.

In this example, we will select **Approved**.

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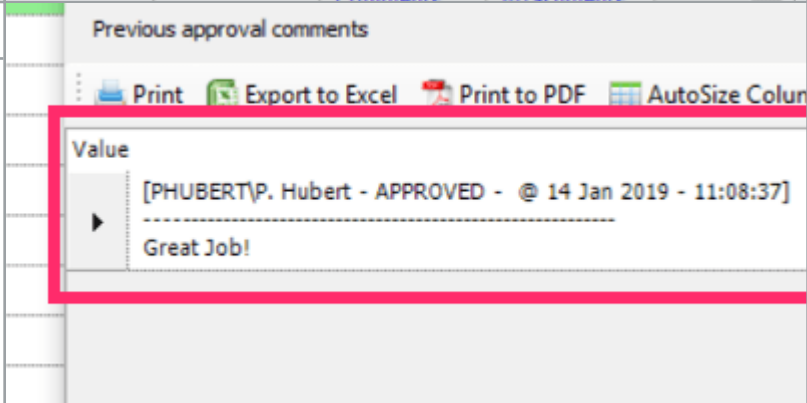

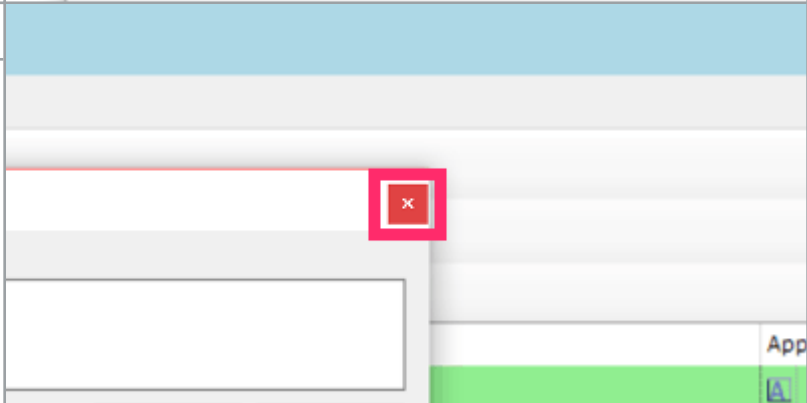


Type in the **comments box** and click on Submit.

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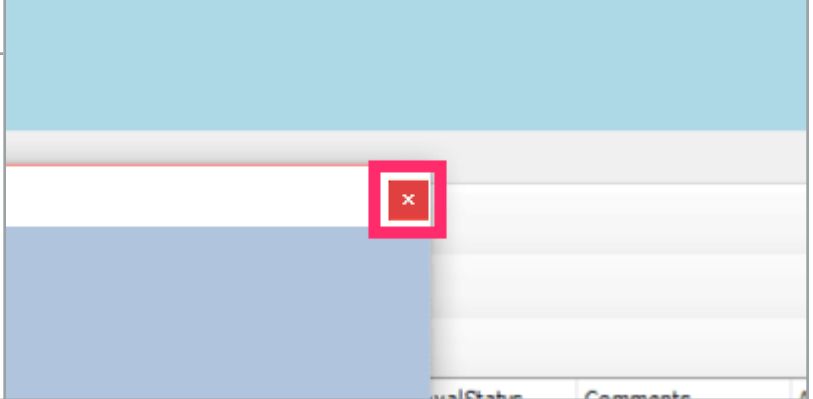



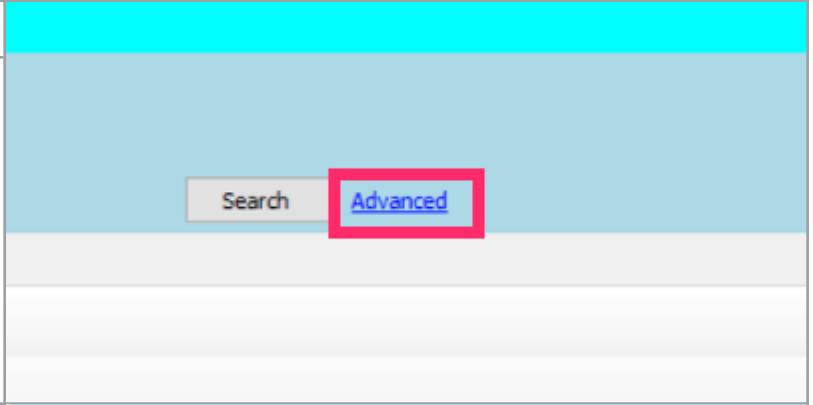

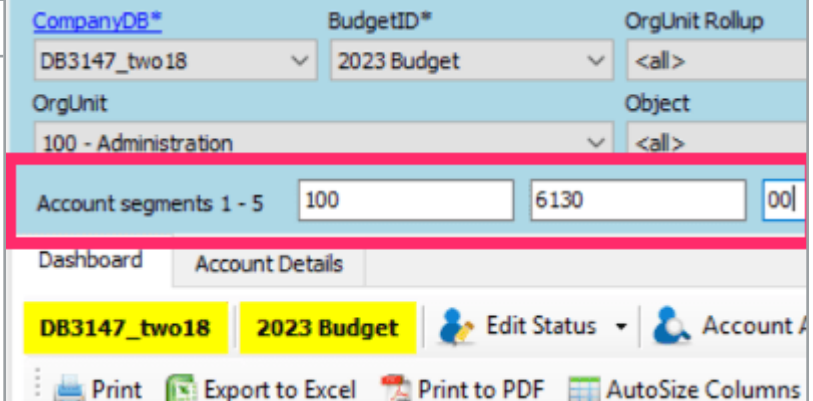
Now you see the **Approval Status column** updated (Approved) for account 100-6130-00.

A message will appear, approval status updated successfully.

		Comments	Attachments
018 10:44AM		Comments	Attachments
18 3:35PM		Comments	Attachments
BERT - 14Jan2019 12:07:54	APPROVED	Comments	Attachments
18 3:35PM		Comments	Attachments
18 3:35PM		Comments	Attachments
018 10:55AM		Comments	Attachments
018 1:36PM		Comments	Attachments

<p> When comments are present for any budget account, the Comments box will be yellow.</p>	24	
<p> Click on the comments button to review the comments for this budget account.</p>	25	
<p> Click on the Red X to close this window.</p>	26	
<p> If you want to attach supporting details for a budget entry, you can attach the document(s) for this account (on this screen). Click on Attachments.</p>	27	

<p>28</p> <p> Click on Browse and select a file to attach.</p>	
<p>29</p> <p> Enter a description in the white box.</p>	
<p>30</p> <p> Click on Upload.</p> <p>A message will appear that reads, added successfully.</p>	
<p>31</p> <p> Now you see the attachment listed.</p> <p>If you uploaded the wrong file or made changes to the file, click on delete & start this process over.</p>	

<p> Click on the Red X to close this window.</p>	32																									
<p> When attachments are present for any budget account, the Attachments box will be yellow.</p>	33	 <table border="1"><thead><tr><th></th><th>Comments</th><th>Attachments</th></tr></thead><tbody><tr><td></td><td>Comments</td><td>Attachments</td></tr><tr><td></td><td>Comments</td><td>Attachments</td></tr><tr><td></td><td>Comments</td><td>Attachments</td></tr><tr><td>APPROVED</td><td>Comments</td><td>Attachments</td></tr><tr><td></td><td>Comments</td><td>Attachments</td></tr><tr><td></td><td>Comments</td><td>Attachments</td></tr><tr><td></td><td>Comments</td><td>Attachments</td></tr></tbody></table>		Comments	Attachments		Comments	Attachments		Comments	Attachments		Comments	Attachments	APPROVED	Comments	Attachments		Comments	Attachments		Comments	Attachments		Comments	Attachments
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<p> Now let's review how to look at budget accounts by segment.</p> <p>Click on Advanced.</p>	34	 <p>Search Advanced</p>																								
<p> Enter the account segments you want to review. In this example, we will select 100-6130-00.</p> <p>Also, you can clear the segments entered & start over.</p>	35	 <p>CompanyDB* BudgetID* OrgUnit Rollup DB3147_two18 2023 Budget <all> OrgUnit Object 100 - Administration <all></p> <p>Account segments 1 - 5 100 6130 00</p> <p>Dashboard Account Details</p> <p>DB3147_two18 2023 Budget Edit Status Account A</p> <p>Print Export to Excel Print to PDF AutoSize Columns</p>																								

<p>36</p> <p> Click on Search.</p>	
<p>37</p> <p> Now you see only the account segments entered in the advanced boxes along with all of the statuses for the budget process.</p>	
<p>38</p> <p> You can also print, export to excel, print to PDF and AutoSize Columns.</p>	
<p>39</p> <p> Click on A- to minimize or decrease the magnification of the screen.</p>	

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Click on A+ to maximize or increase the magnification of the screen.

ApprovalStatus	Comments	Attachments
A	A	A

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That's It. You're Done.

DYNAMIC
BUDGETS

That's It. You're Done.