Dynamic Budgets User Guide for Budgeting Dashboard

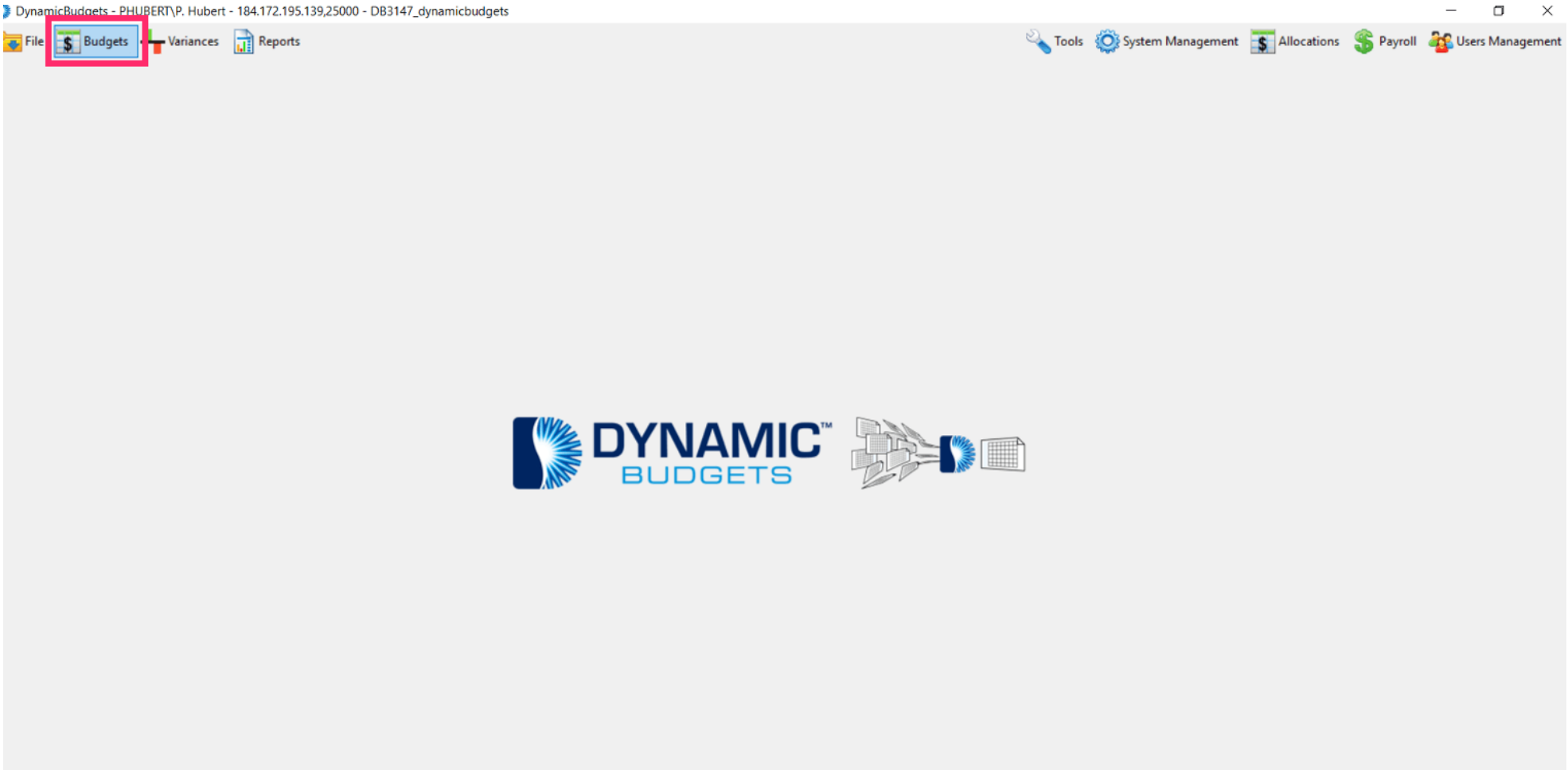
DYNAMIC™ BUDGETS

User Guide

for

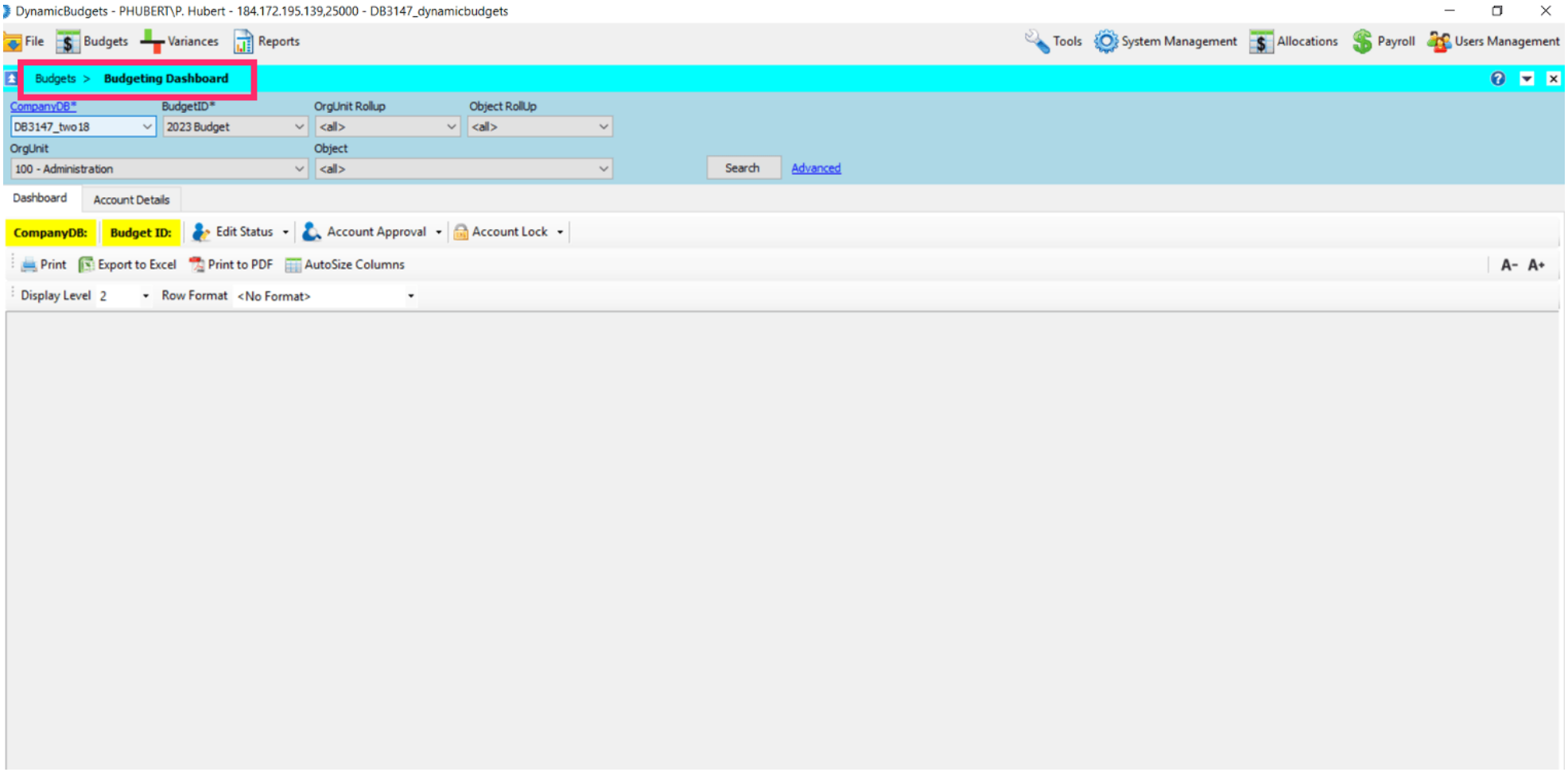
Budgeting Dashboard

We are going to review how to review the budgeting process status screen. Let's get started. Click on Budgets.

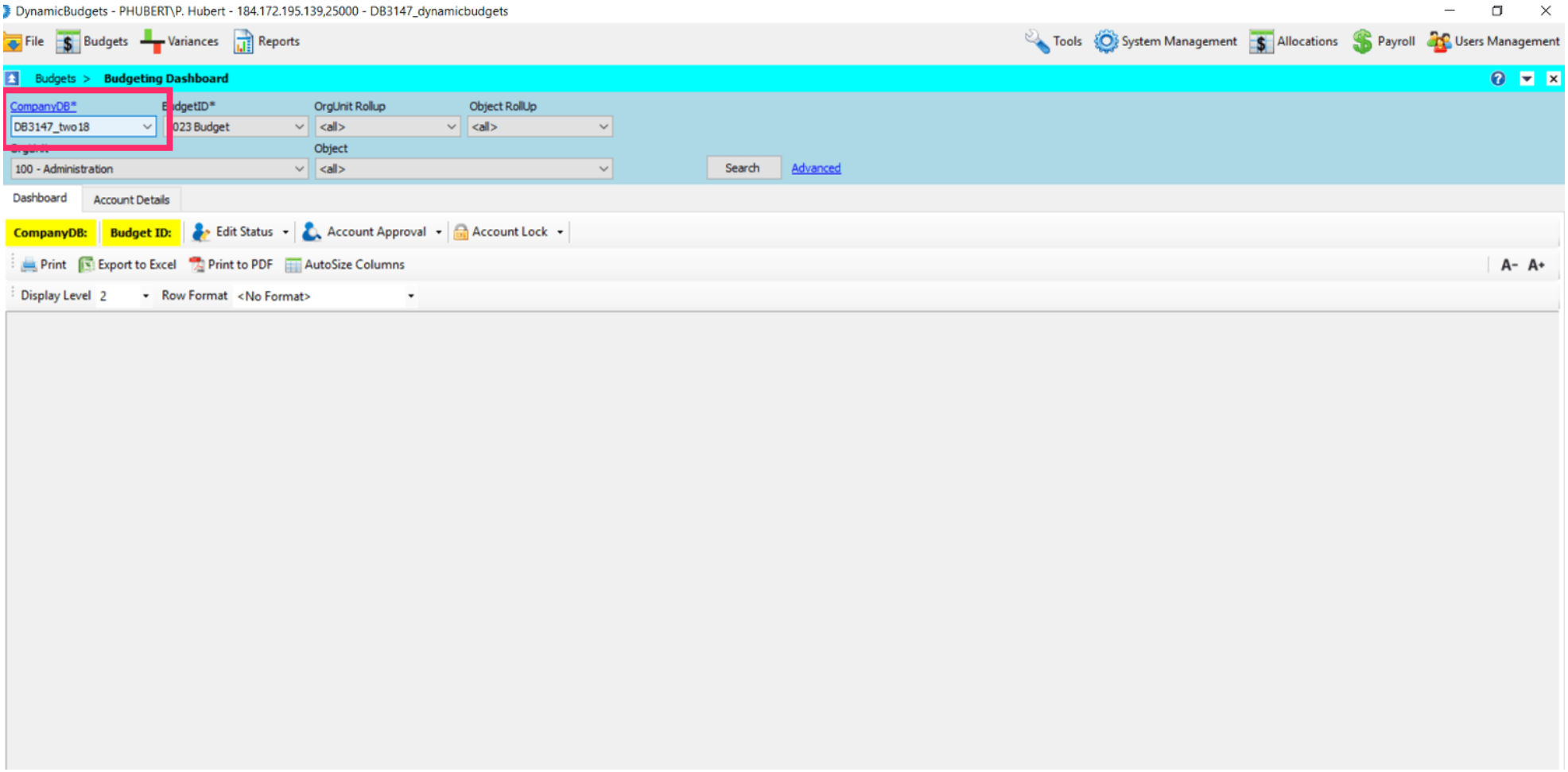


Click on Budgeting Dashboard. Note: This button can be renamed, if necessary.

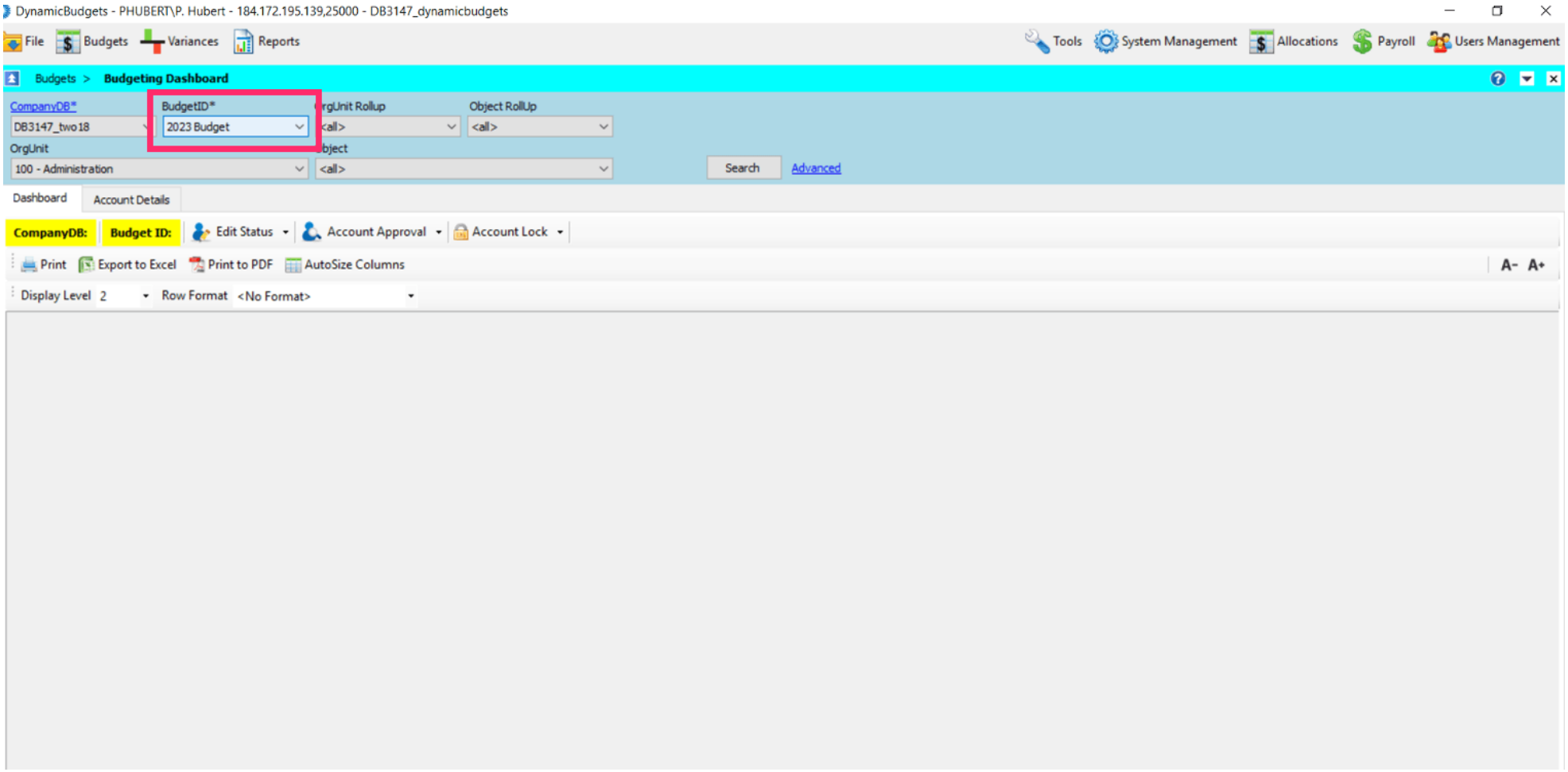
Note: As a reminder, this path shows you how to get to this screen again. In this example, you would go to the Budgets menu, then Budgeting Dashboard.



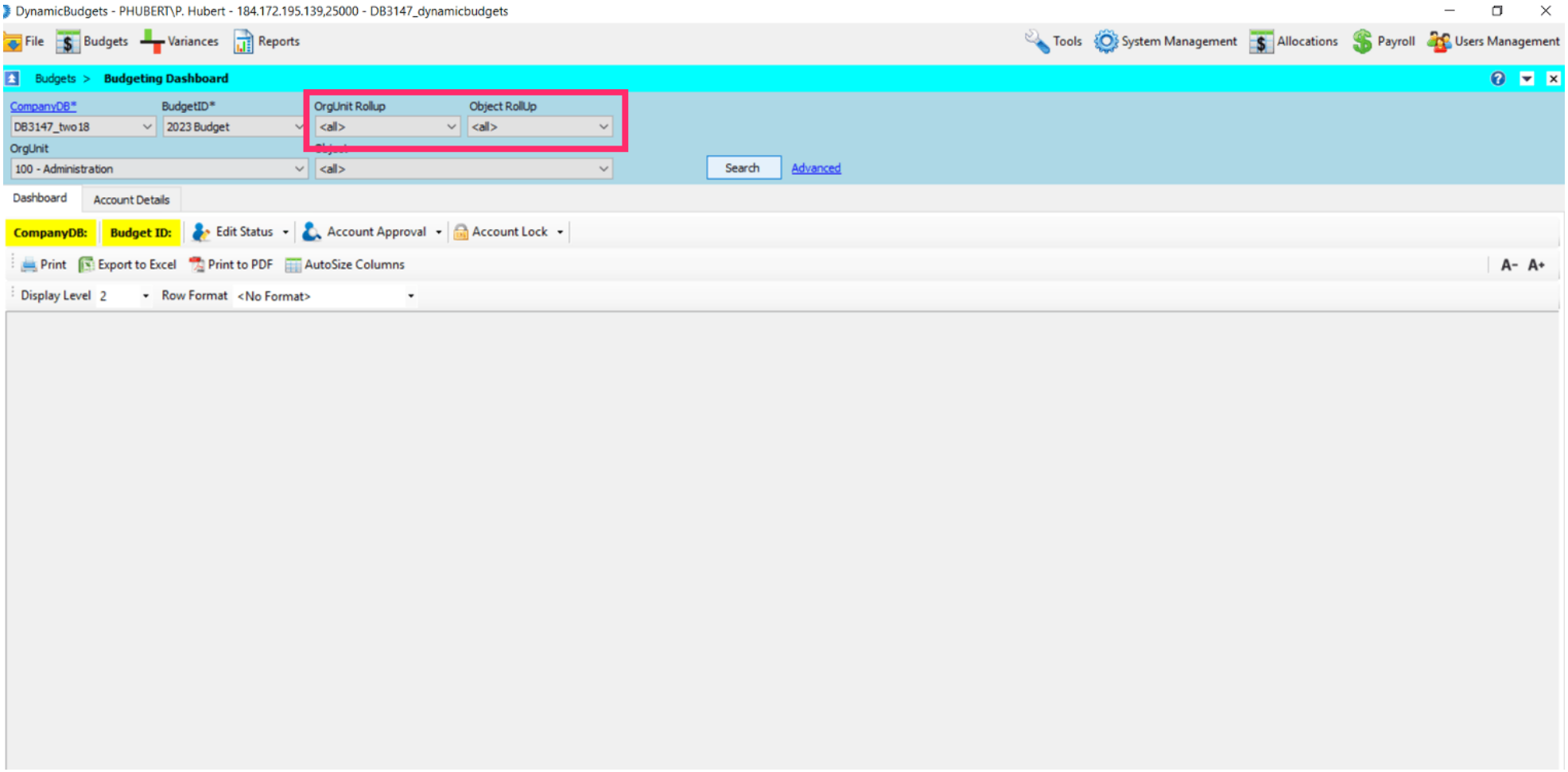
Click on the CompanyDB dropdown list. Make your selection. In this example, select DB3147_two18.



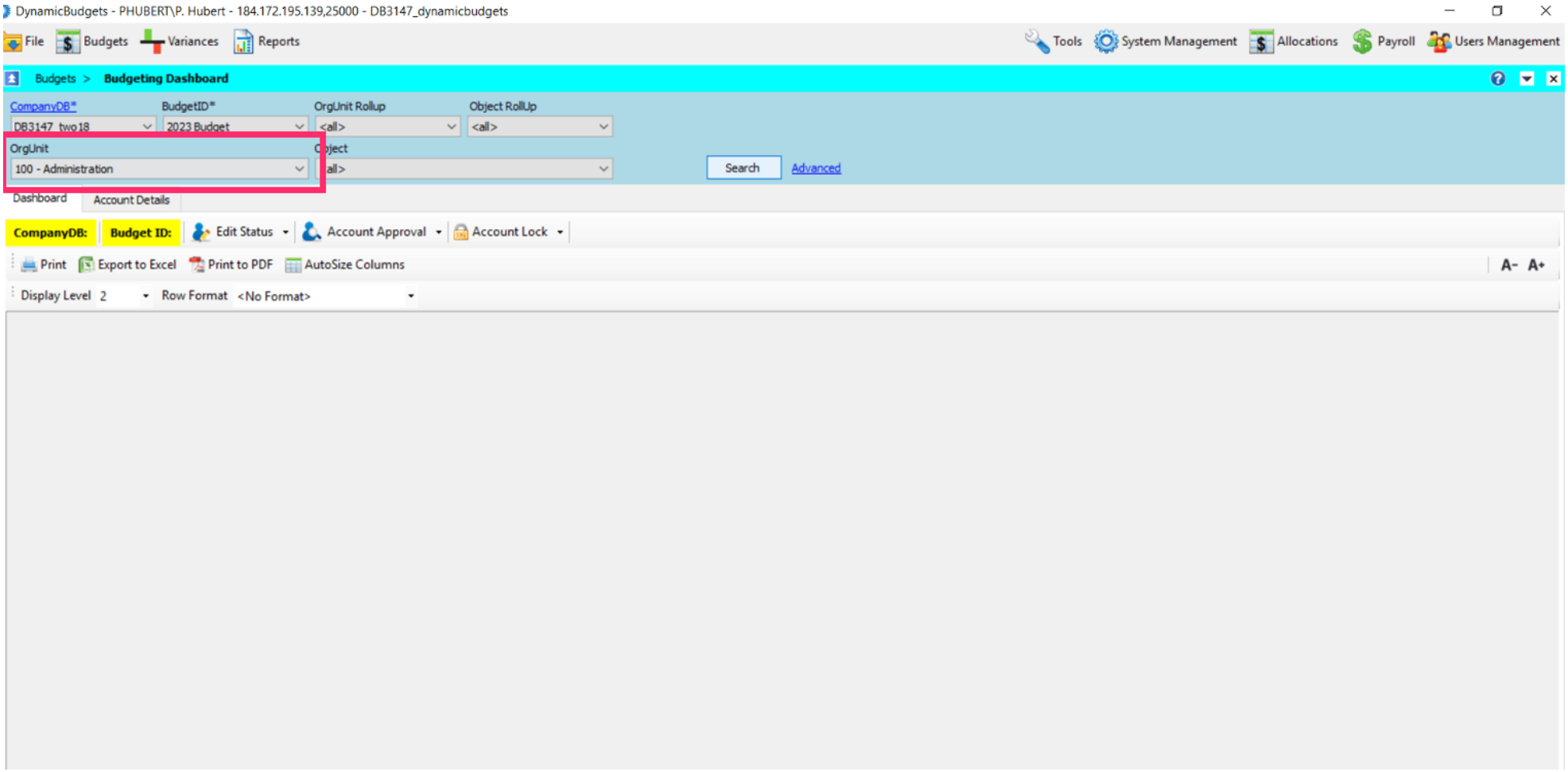
Click on the BudgetID dropdown list. Make your selection. In this example, select 2023 Budget.



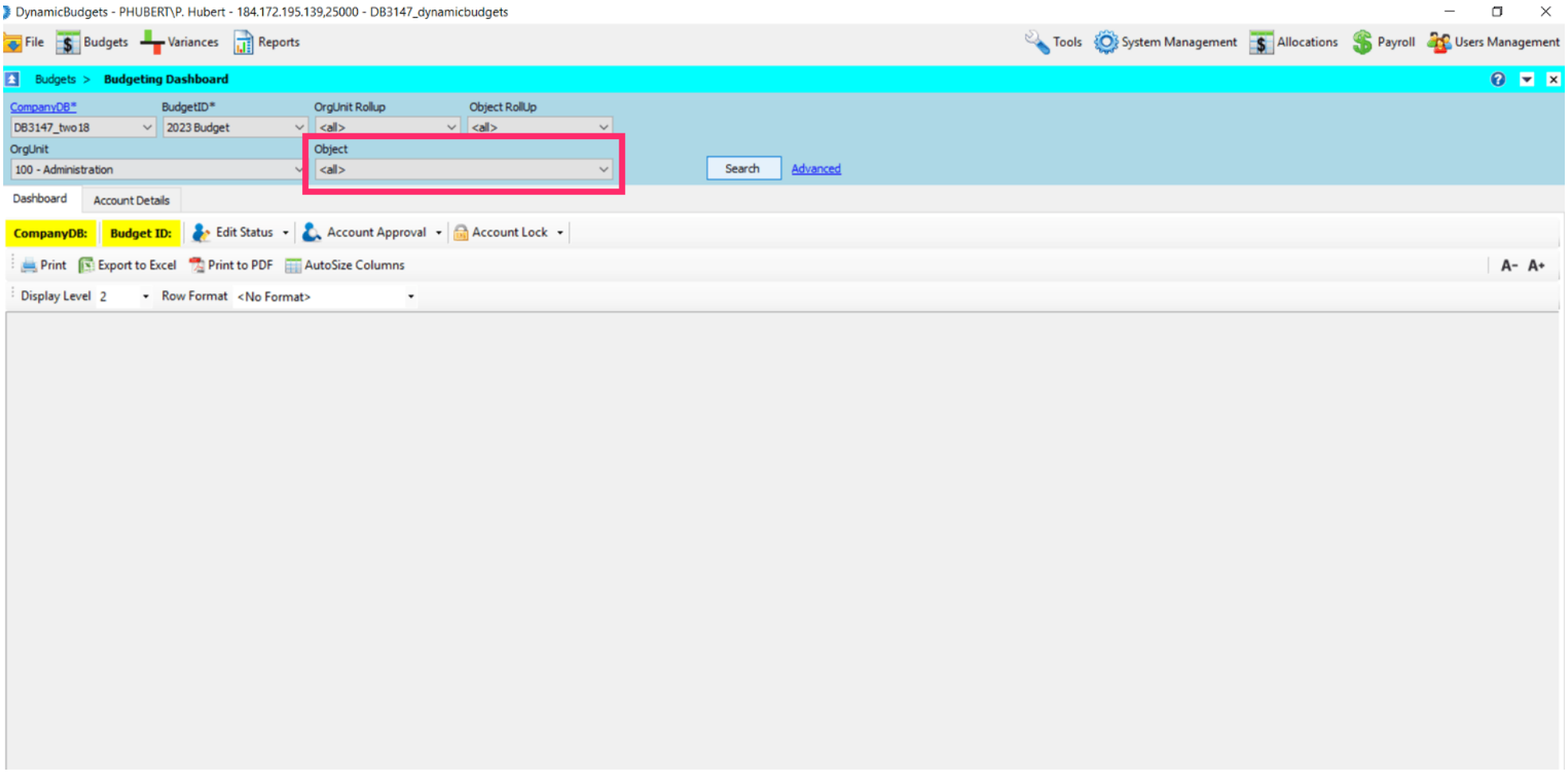
Click on the OrgUnit & Object Rollup dropdown lists. Make your selection. In this example, select all for both.



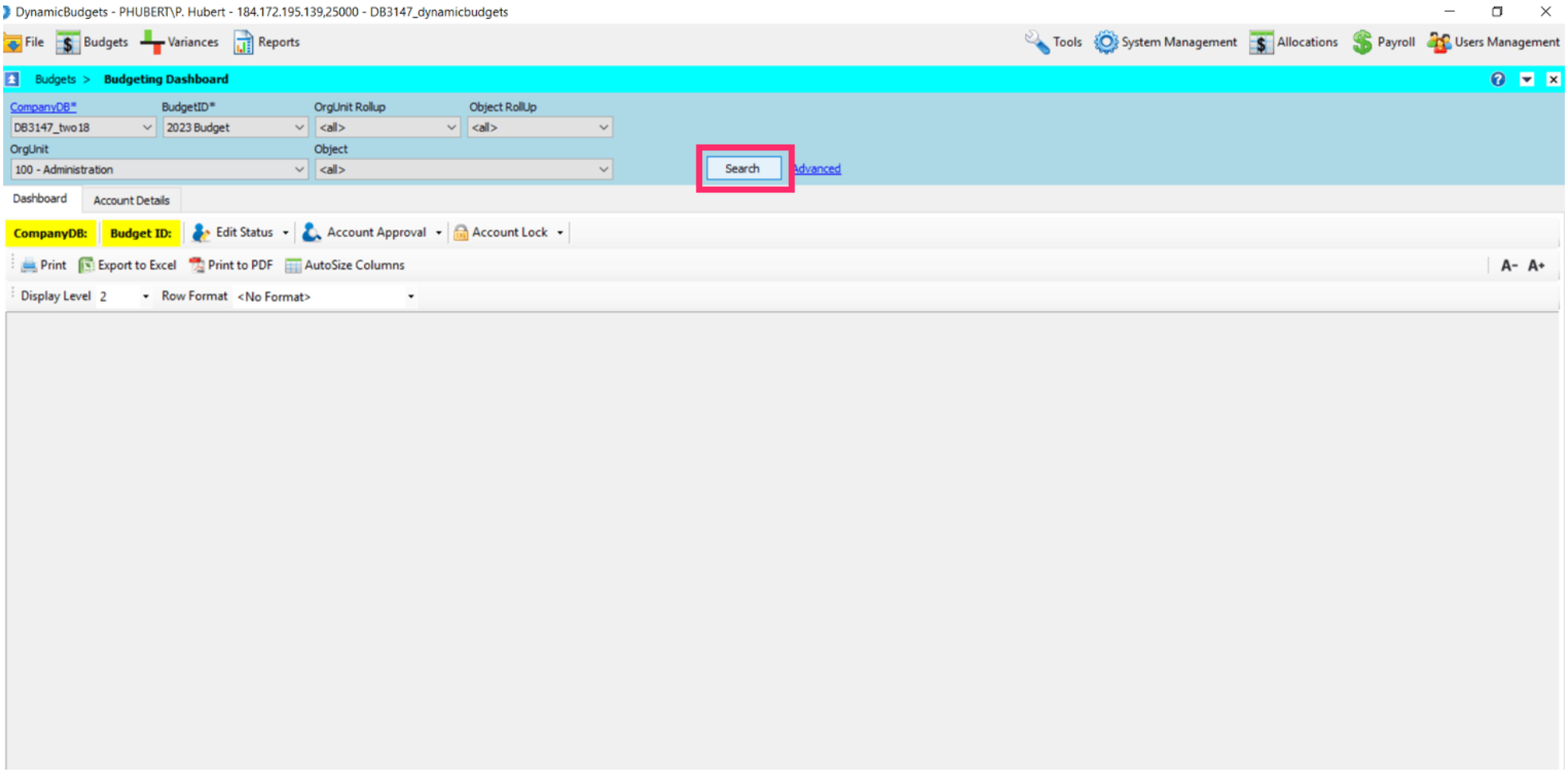
Click on the OrgUnit dropdown list. Make your selection. In this example, we will select 100-Administration.



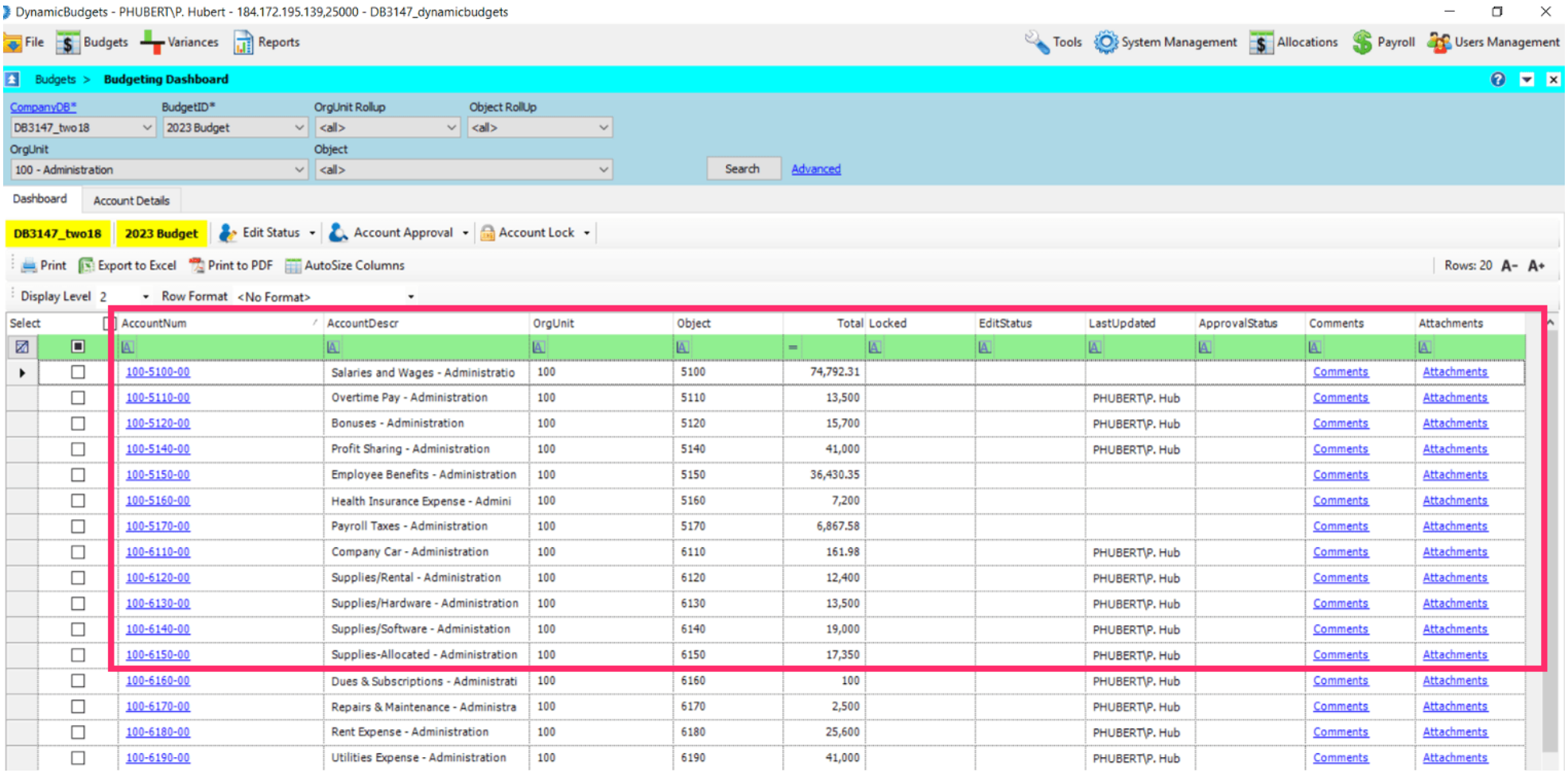
Click on the Object dropdown list. Make your selection. In this example, select all.



Click on Search.



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.



Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administratio	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hub		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hub		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hub		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Admini	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hub		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hub		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500			PHUBERT\P. Hub		Comments	Attachments
	100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hub		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hub		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administrati	100	6160	100			PHUBERT\P. Hub		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administra	100	6170	2,500			PHUBERT\P. Hub		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hub		Comments	Attachments
	100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hub		Comments	Attachments

Let's look at account 100-6130-00.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File | Budgets | Variances | Reports | Tools | System Management | Allocations | Payroll | Users Management

Budgets > **Budgeting Dashboard**

CompanyDB* DB3147_two18 | BudgetID* 2023 Budget | OrgUnit Rollup <all> | Object RollUp <all>

OrgUnit 100 - Administration | Object <all> | Search | Advanced

Dashboard | Account Details

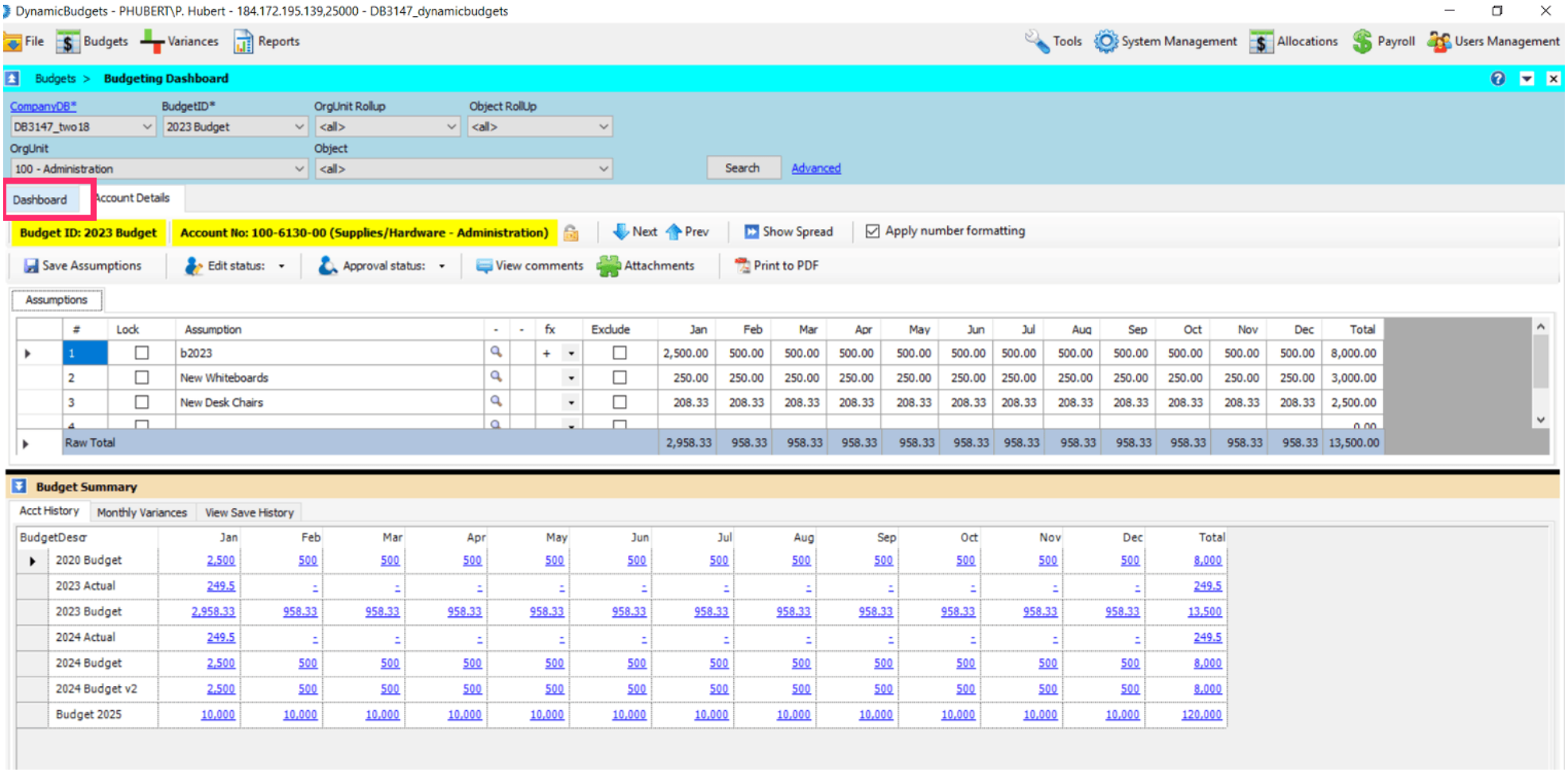
DB3147_two18 | 2023 Budget | Edit Status | Account Approval | Account Lock

Print | Export to Excel | Print to PDF | AutoSize Columns | Rows: 20 A- A+

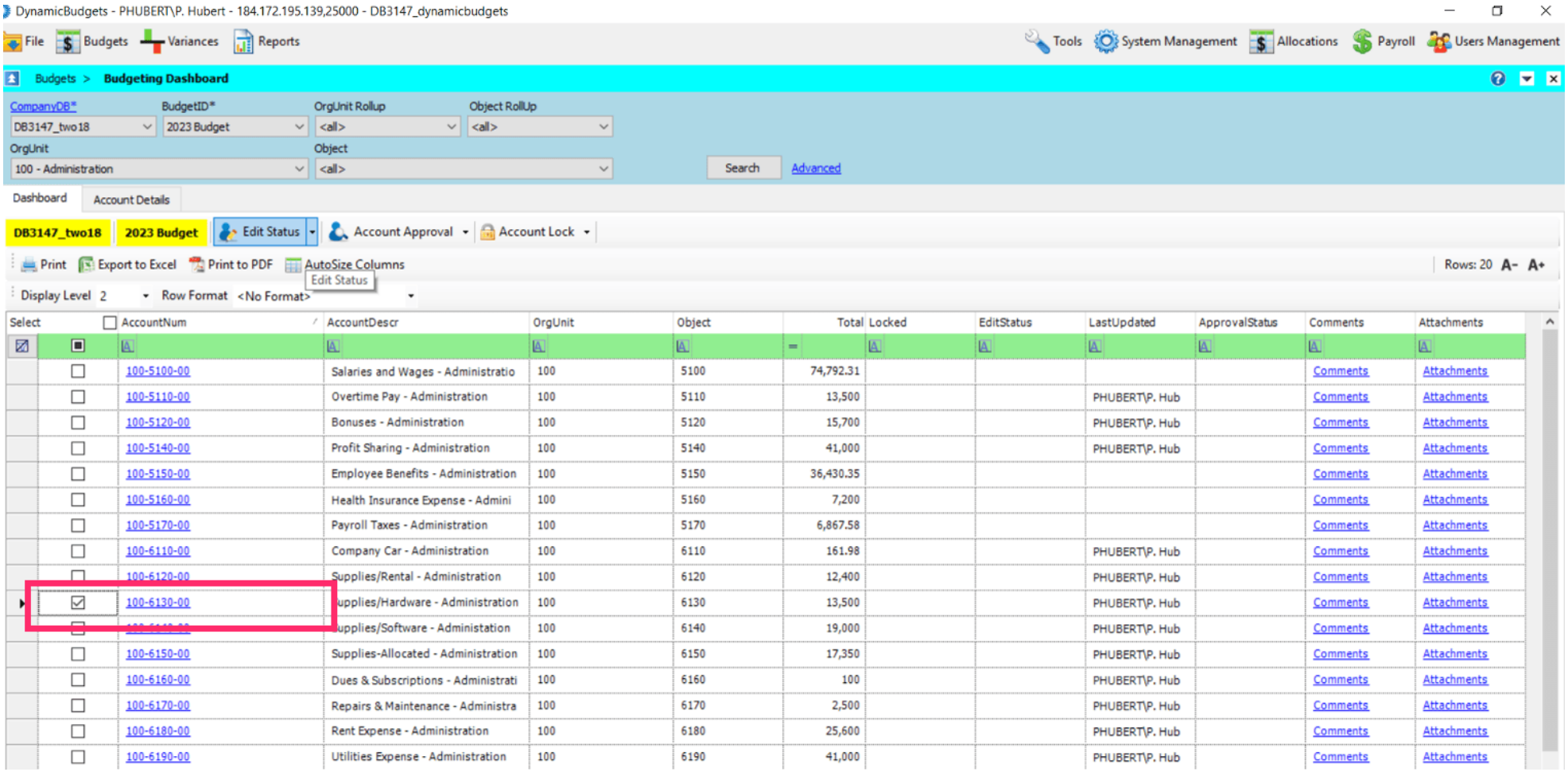
Display Level 2 | Row Format <No Format>

Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administratio	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hub		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hub		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hub		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Admini	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hub		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hub		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500			PHUBERT\P. Hub		Comments	Attachments
	100-6140-00	Supplies/Software - Administration	100	6140	19,000			PHUBERT\P. Hub		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hub		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administrati	100	6160	100			PHUBERT\P. Hub		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administra	100	6170	2,500			PHUBERT\P. Hub		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hub		Comments	Attachments
	100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hub		Comments	Attachments

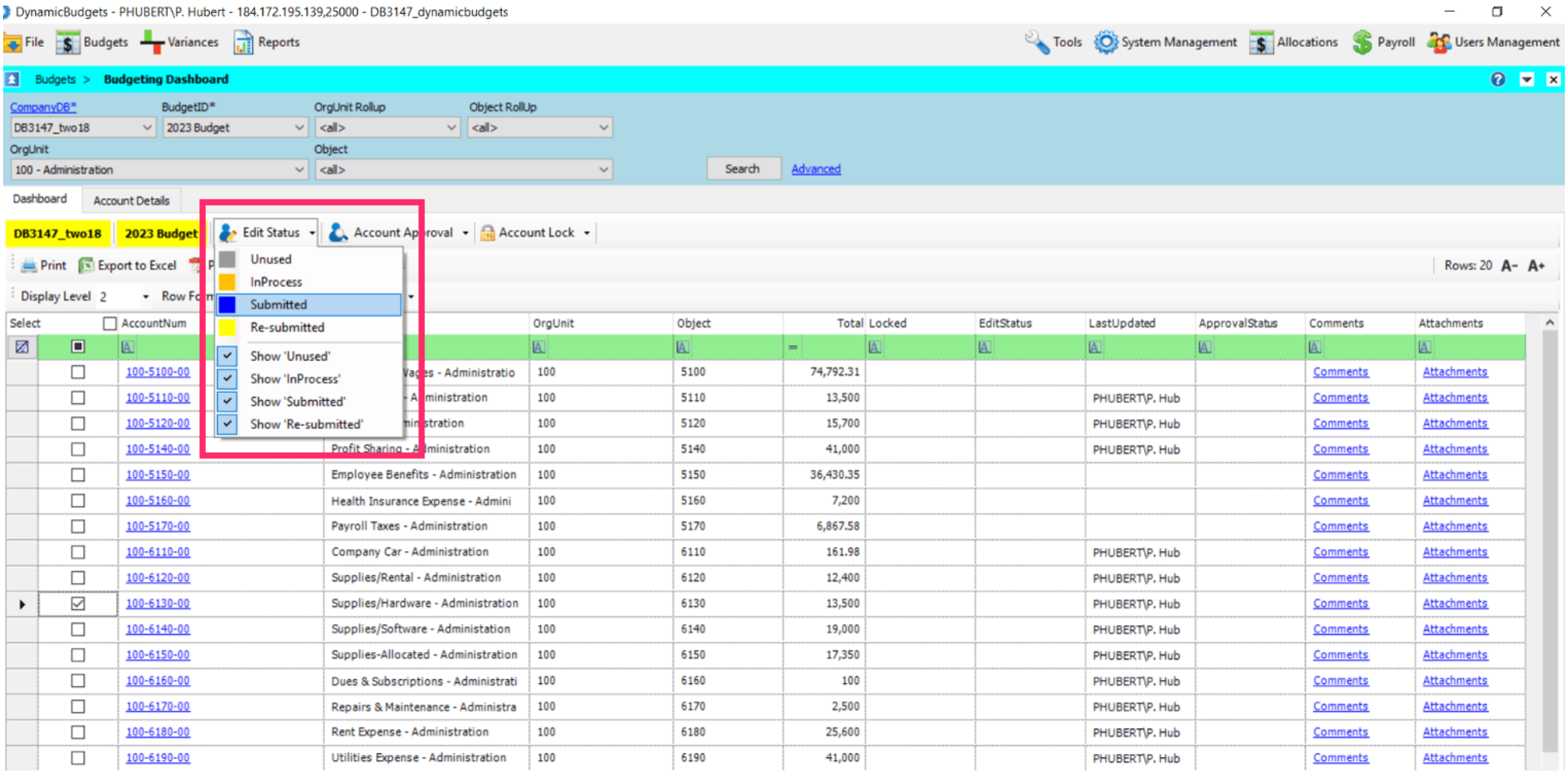
After reviewing and making any necessary changes to this budget account in the assumptions screen, click on save assumptions, then click on Dashboard.



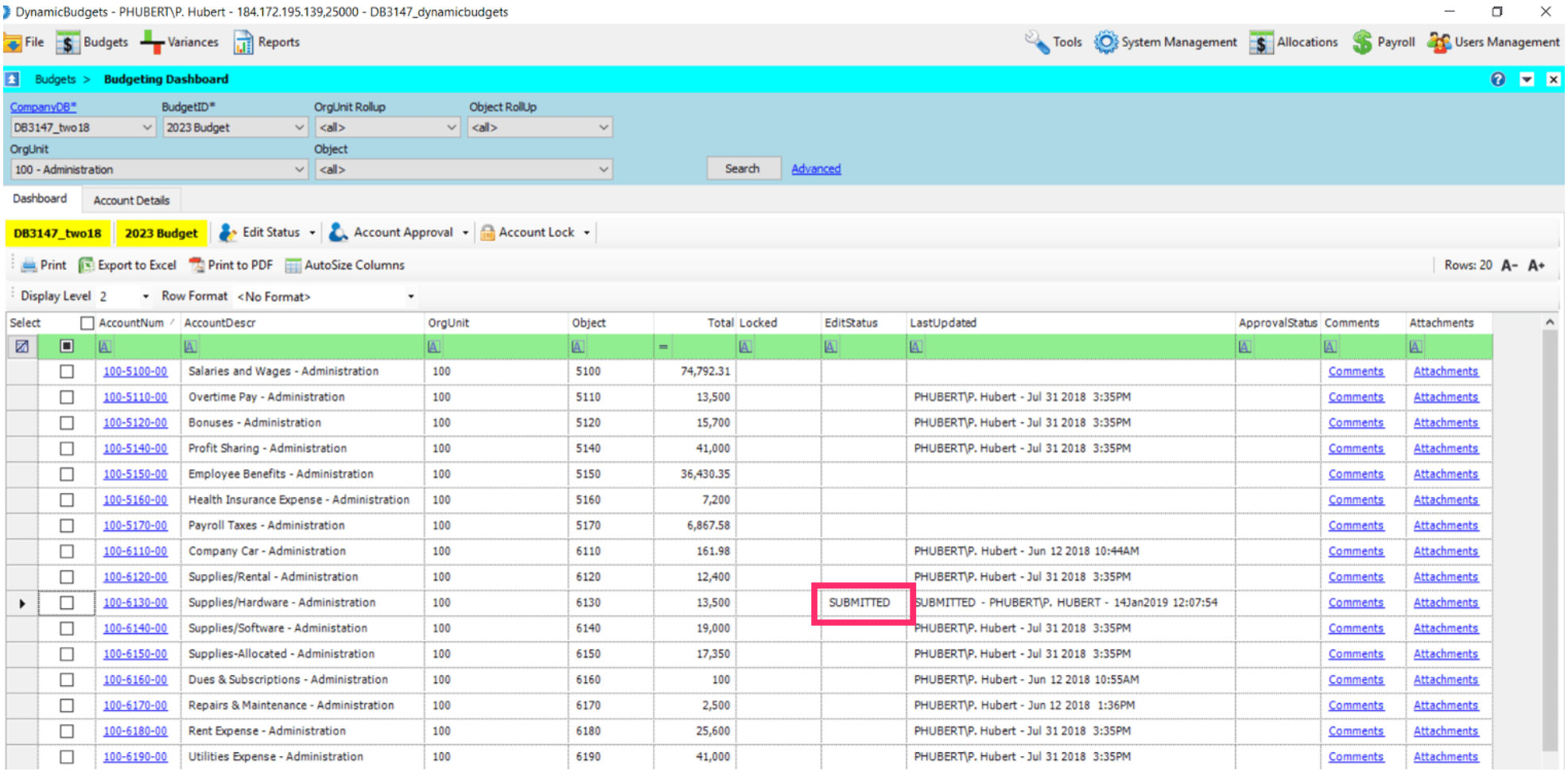
Now we are going to update the EditStatus column for this account. Check the box or boxes next to the account(s) you want in the Select column.



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. In this example, we will select Submitted.

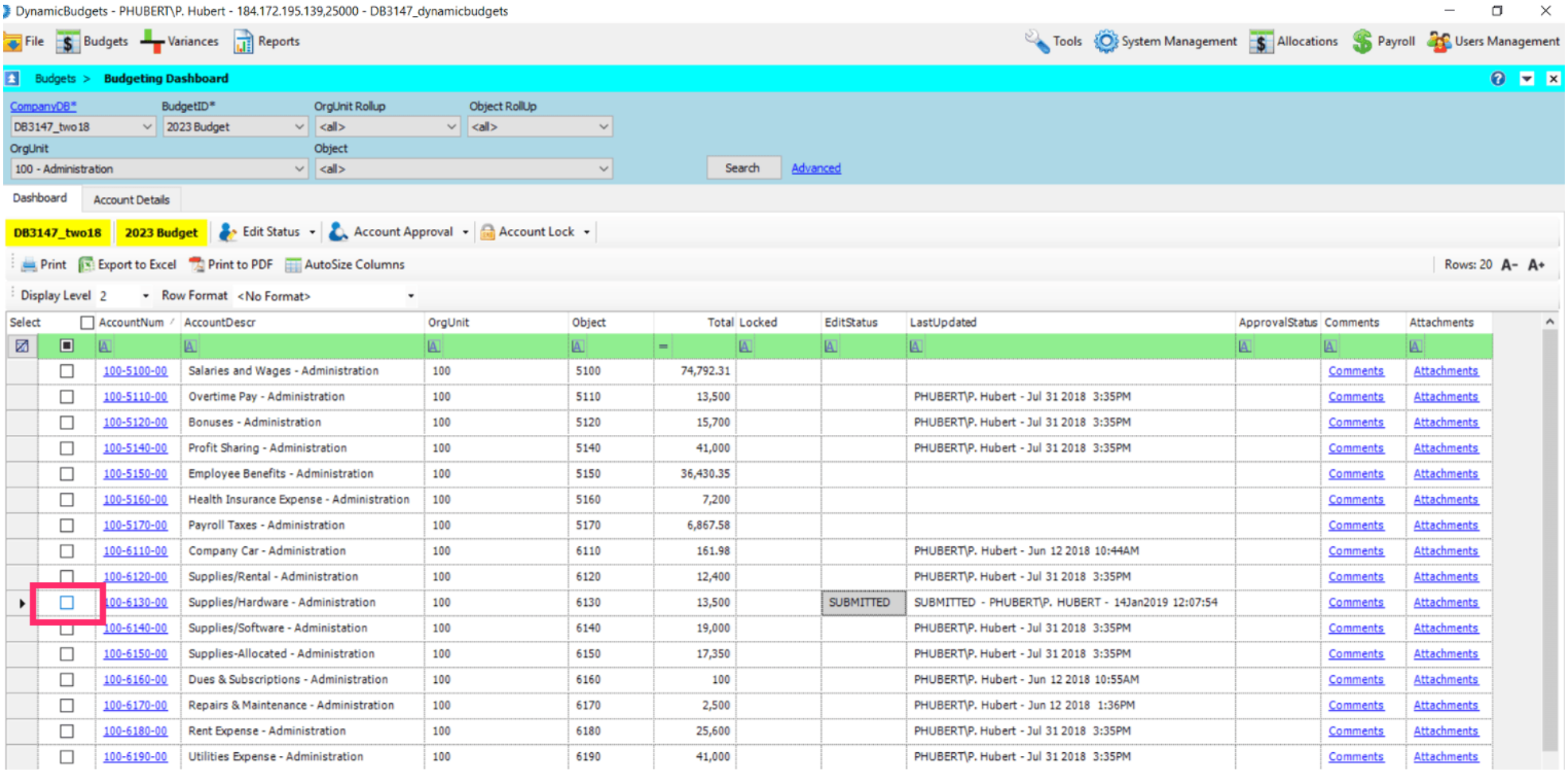


Now you see the EditStatus column updated (SUBMITTED) for account 100-6130-00.

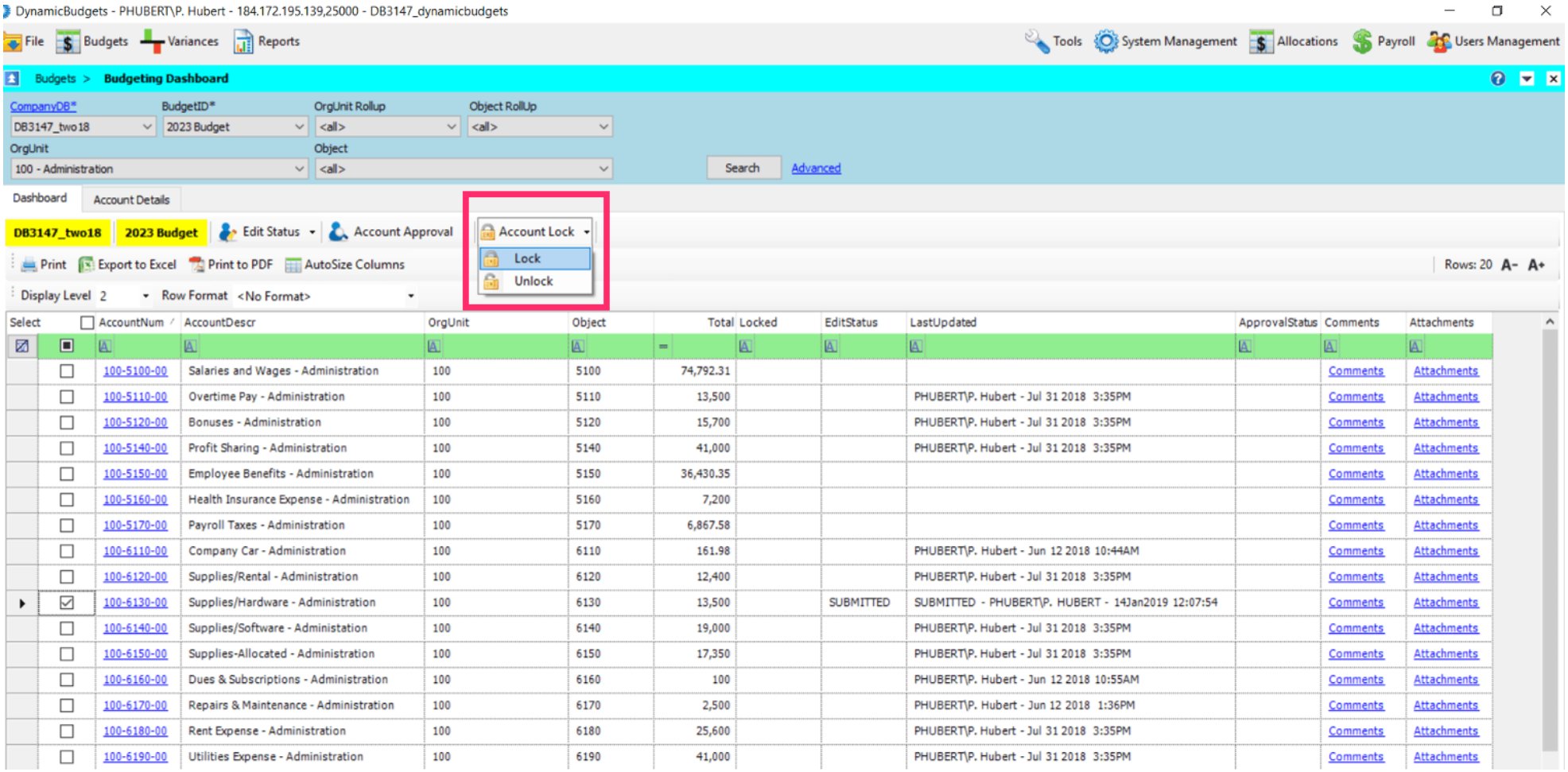


Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500		SUBMITTED	SUBMITTED - PHUBERT\P. HUBERT - 14Jan2019 12:07:54		Comments	Attachments
	100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments

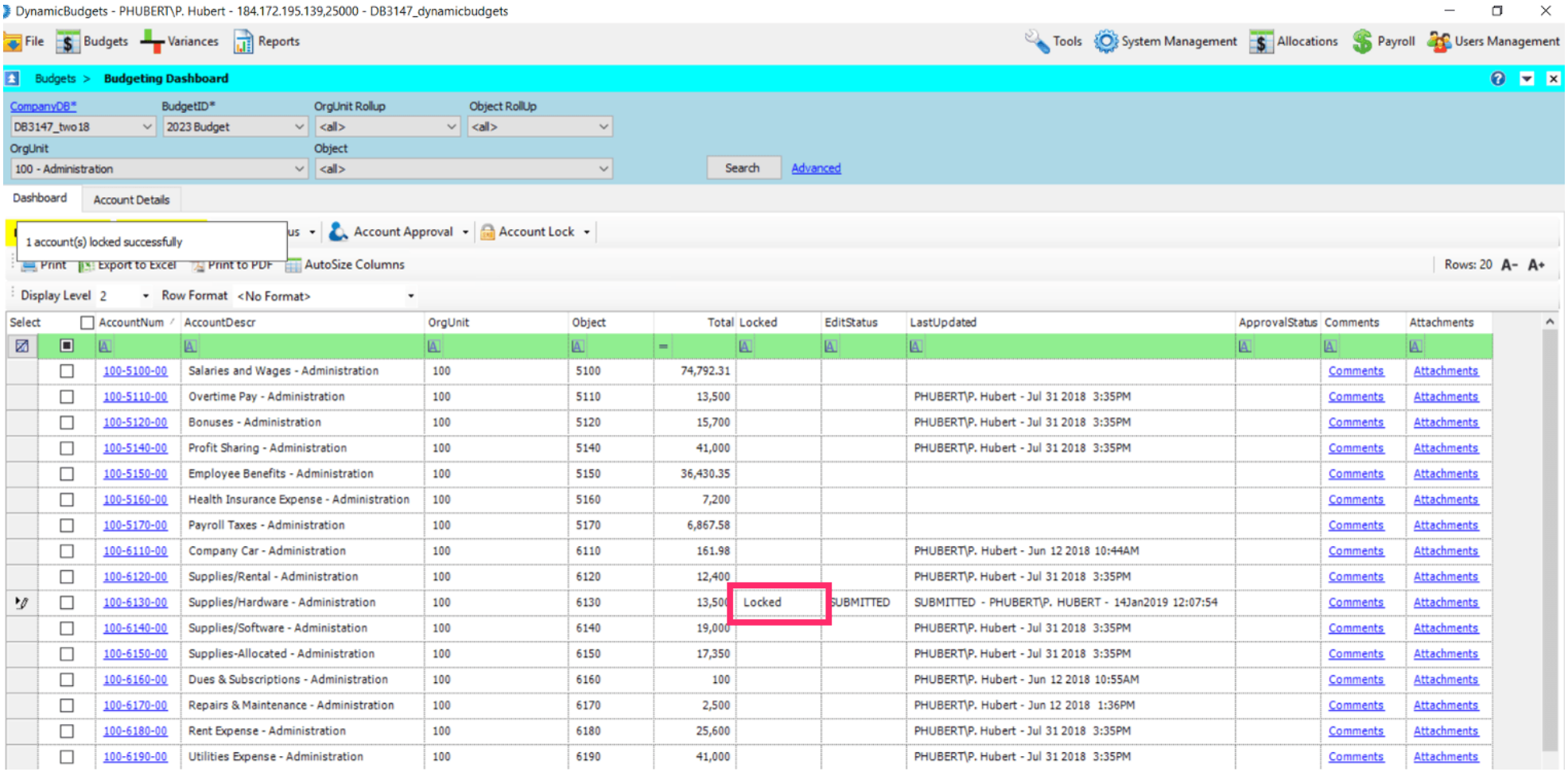
Now we are going to update the Account Lock column for this budget account. Check the box or boxes next to the budget account(s) you want in the Select column.



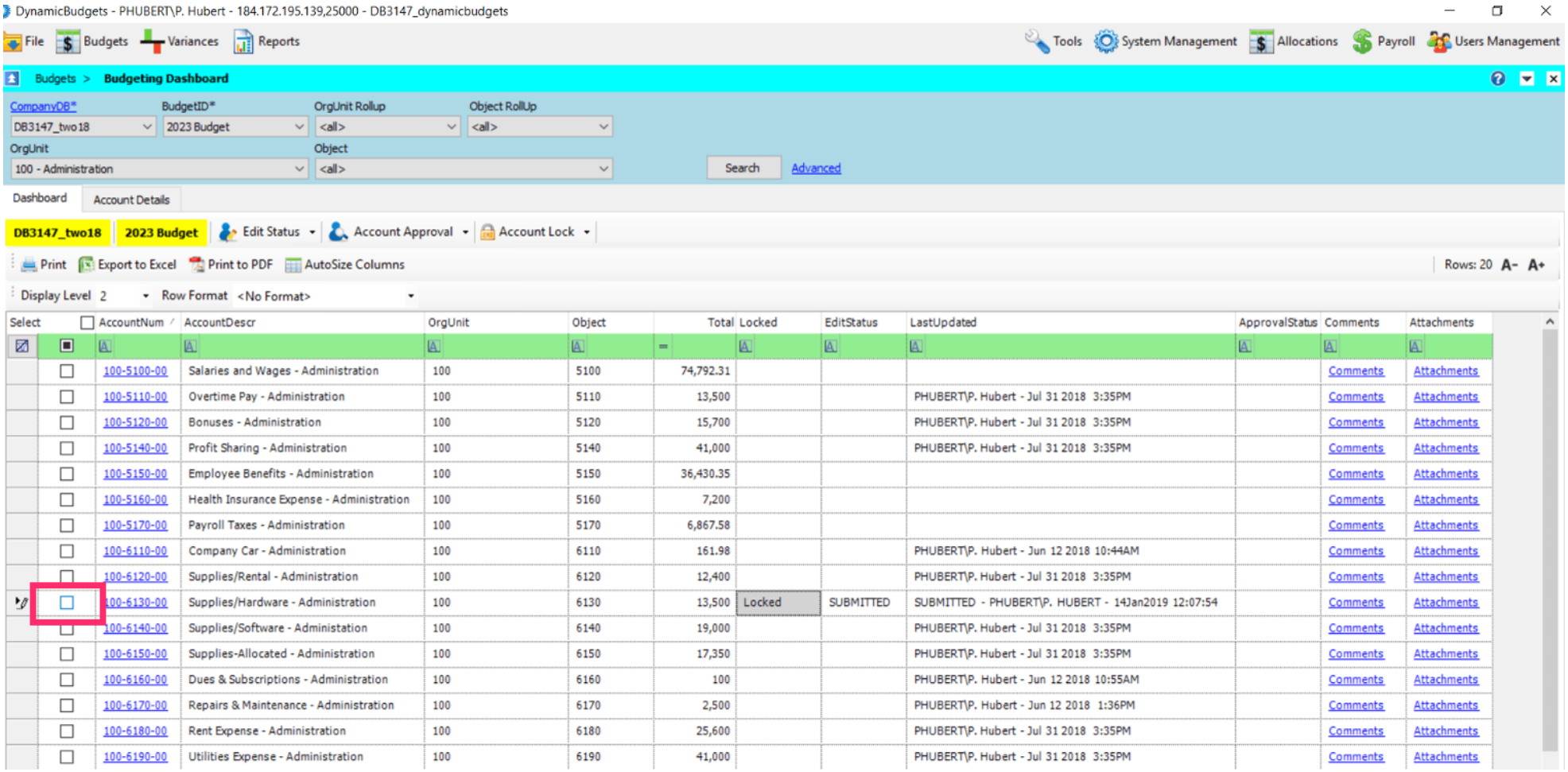
Click on the Account Lock Status button. You can select Lock or Unlock depending on where you are in the budget process. In this example, we will select Lock.



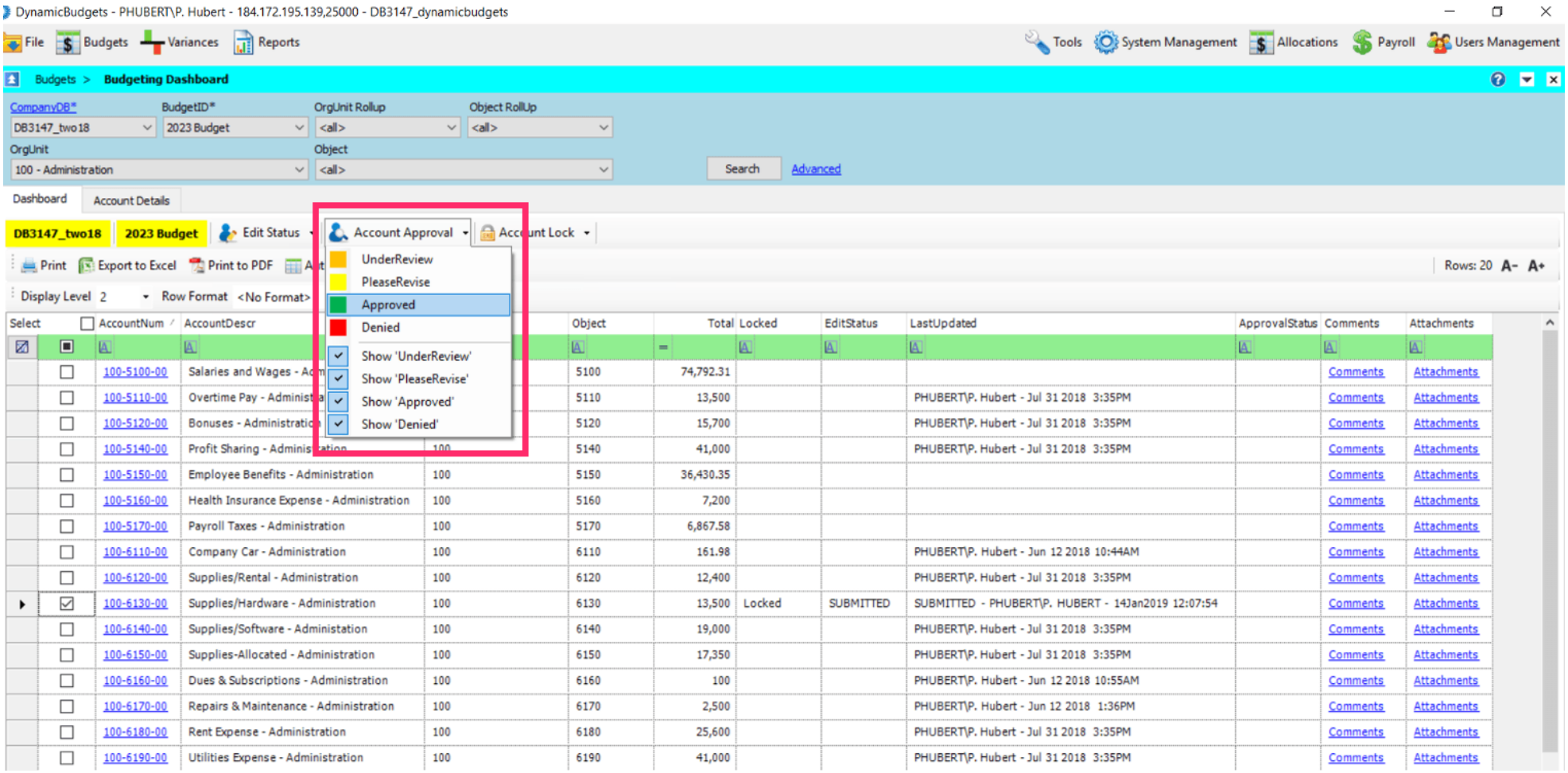
Now you see the Locked column updated (Locked) for account 100-6130-00. A message will appear that reads, a number of accounts locked successfully.



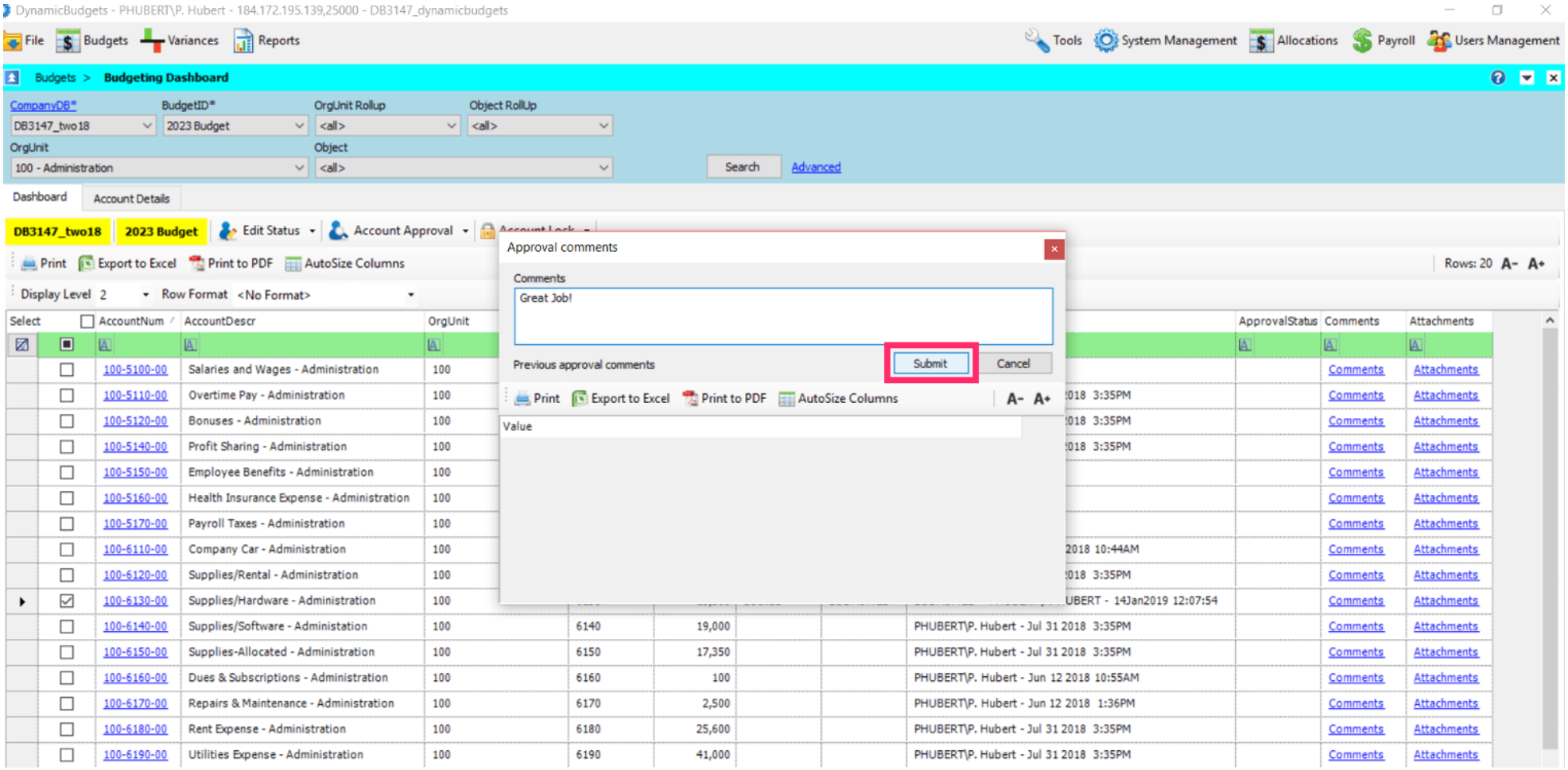
Now we are going to update the Account Approval column for this budget account. Check the box or boxes next to the budget account(s) you want in the Select column.



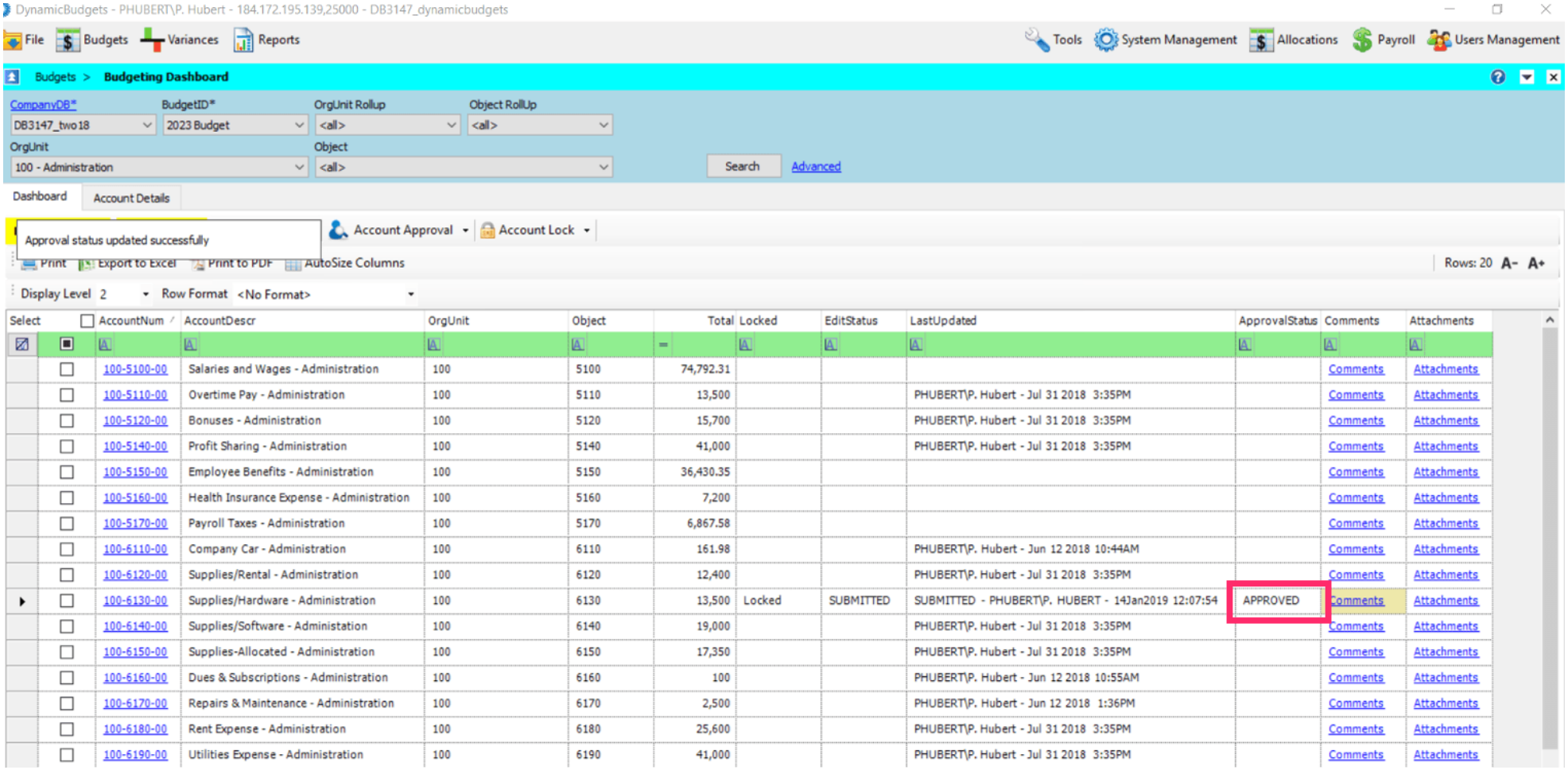
Click on the Account Approval Status button. You can select Under Review, Please Revise, or Denied depending on where you are in the budget process. In this example, we will select Approved.



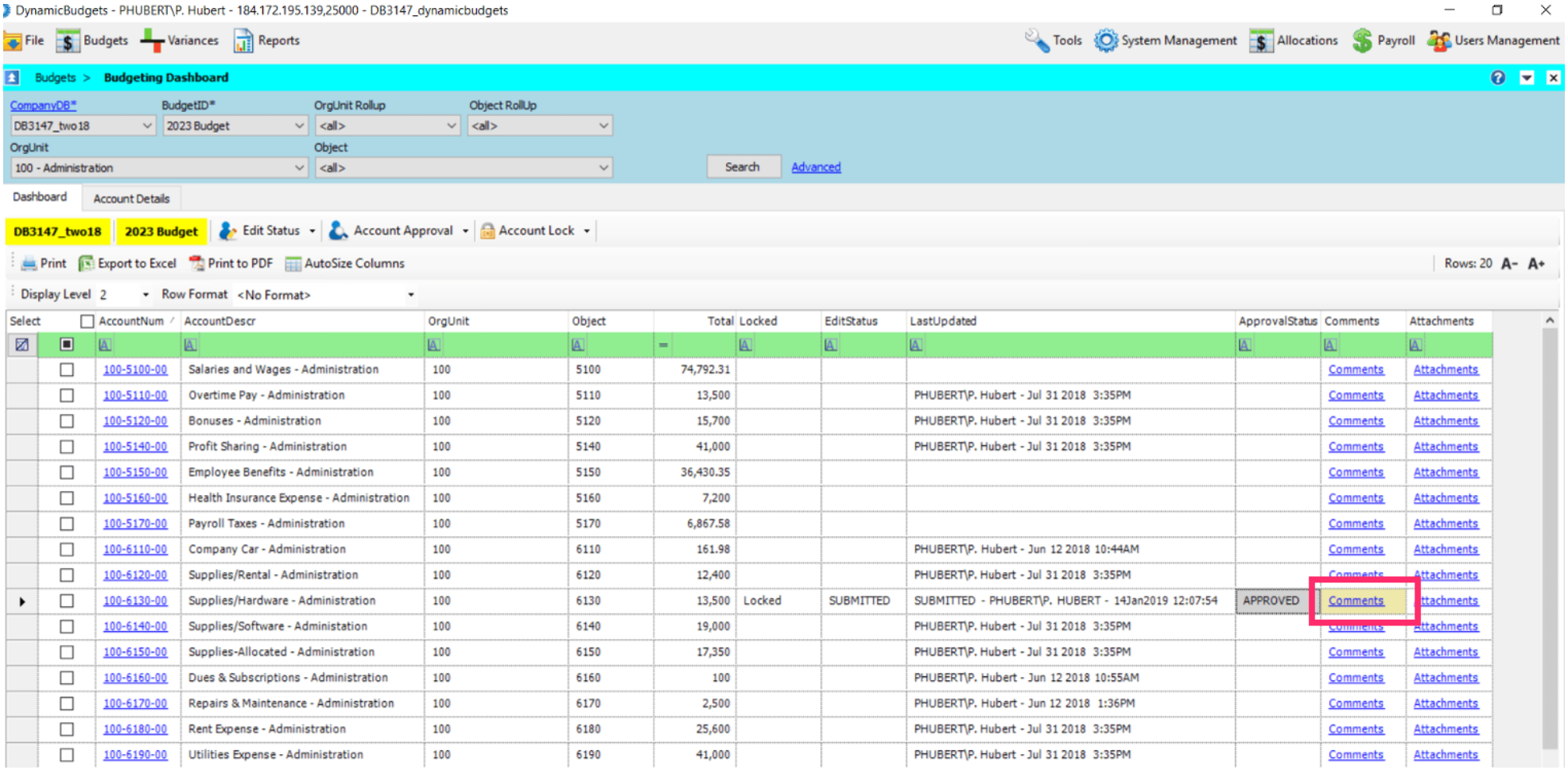
Type in the comments box and click on Submit.



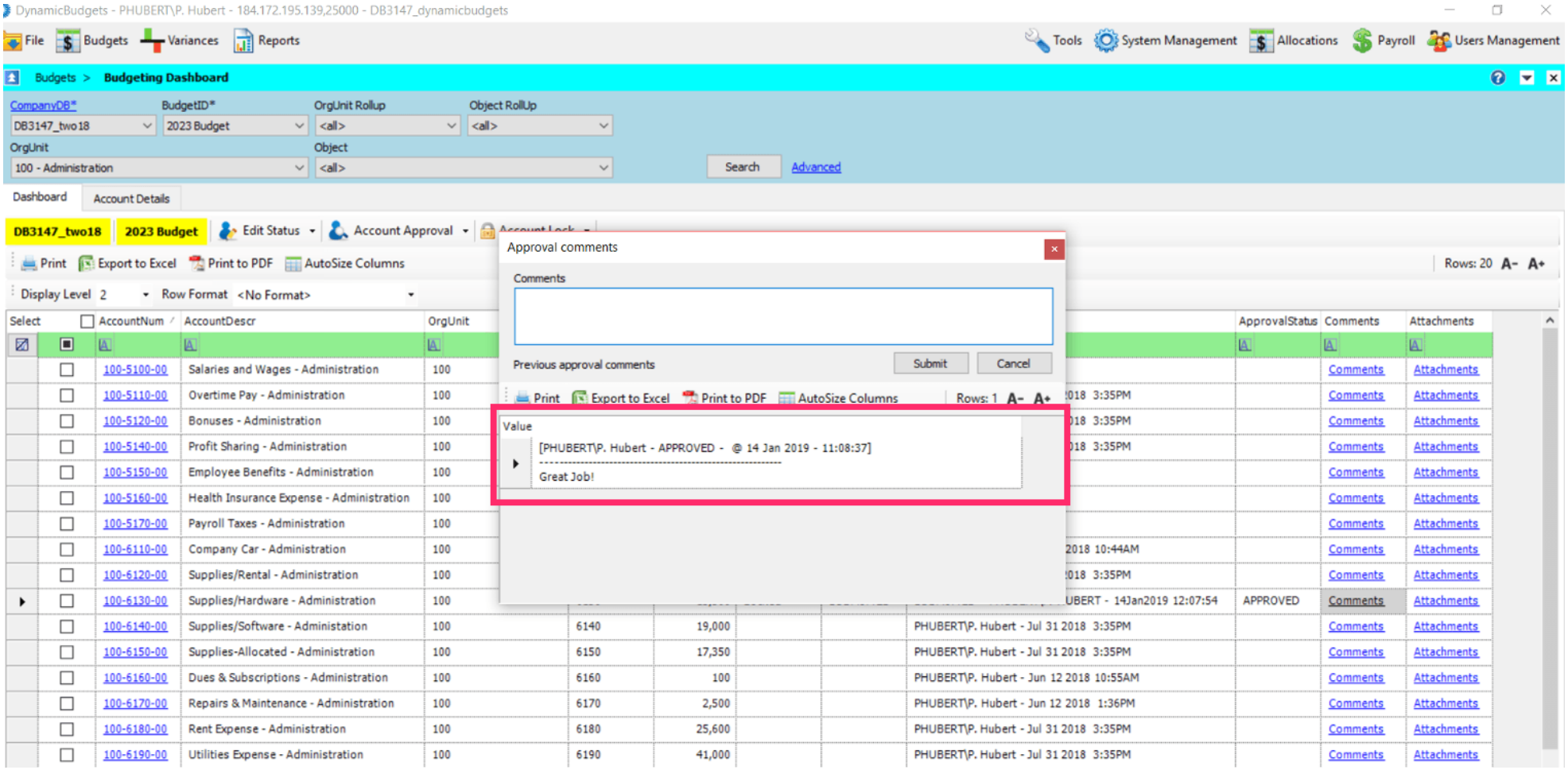
Now you see the Approval Status column updated (Approved) for account 100-6130-00. A message will appear, approval status updated successfully.



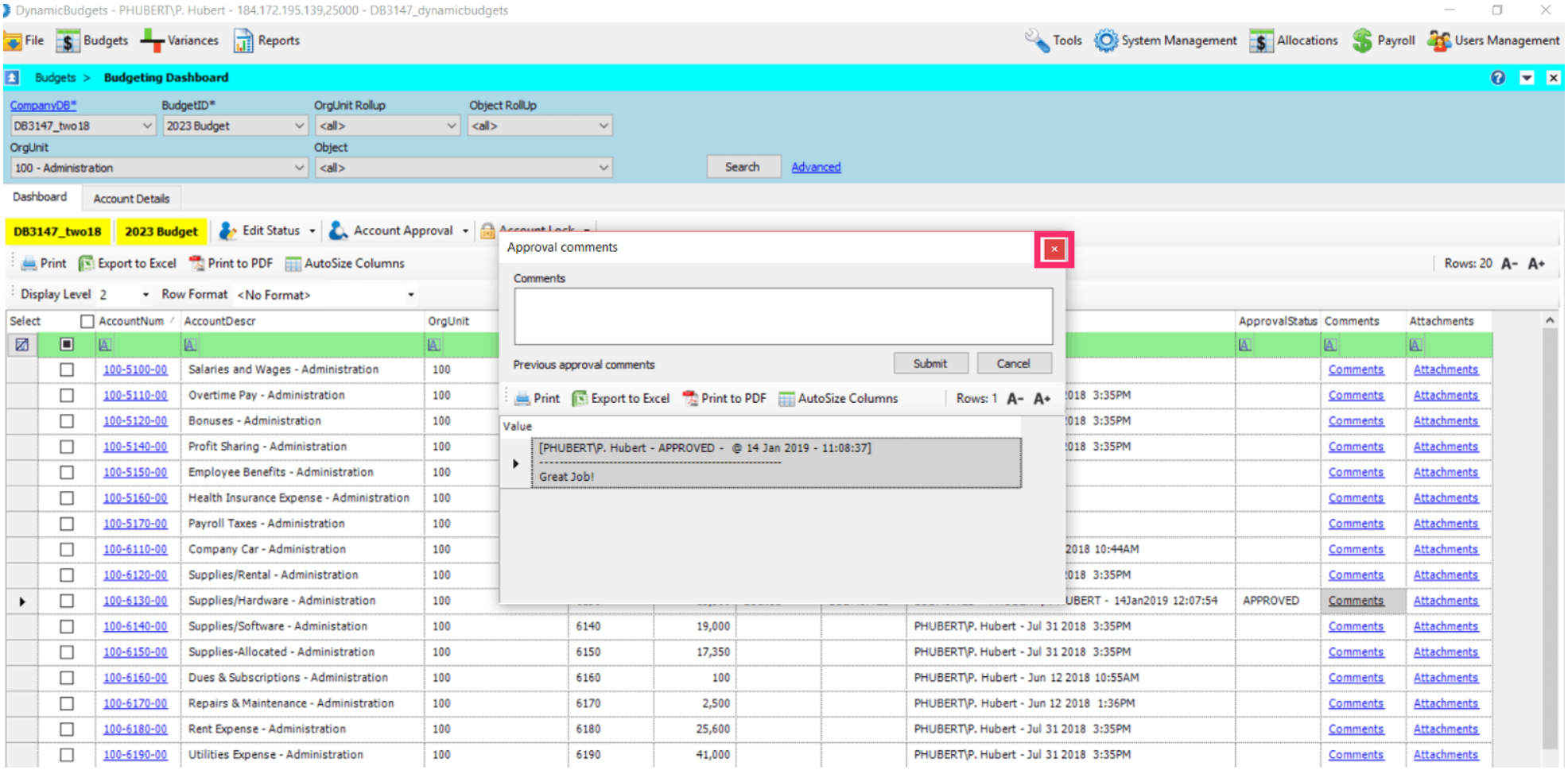
When comments are present for any budget account, the Comments box will be yellow.



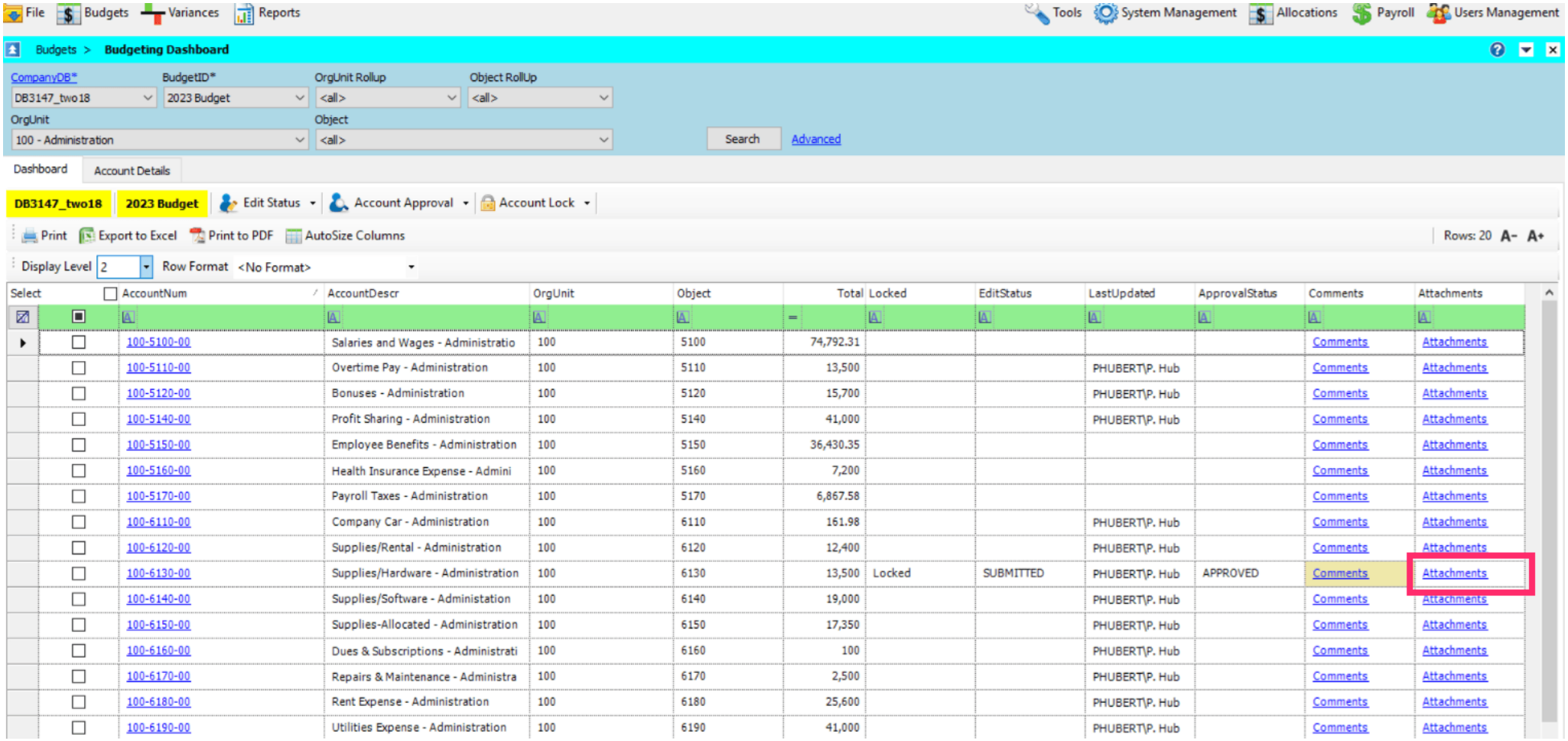
Click on the comments button to review the comments for this budget account.



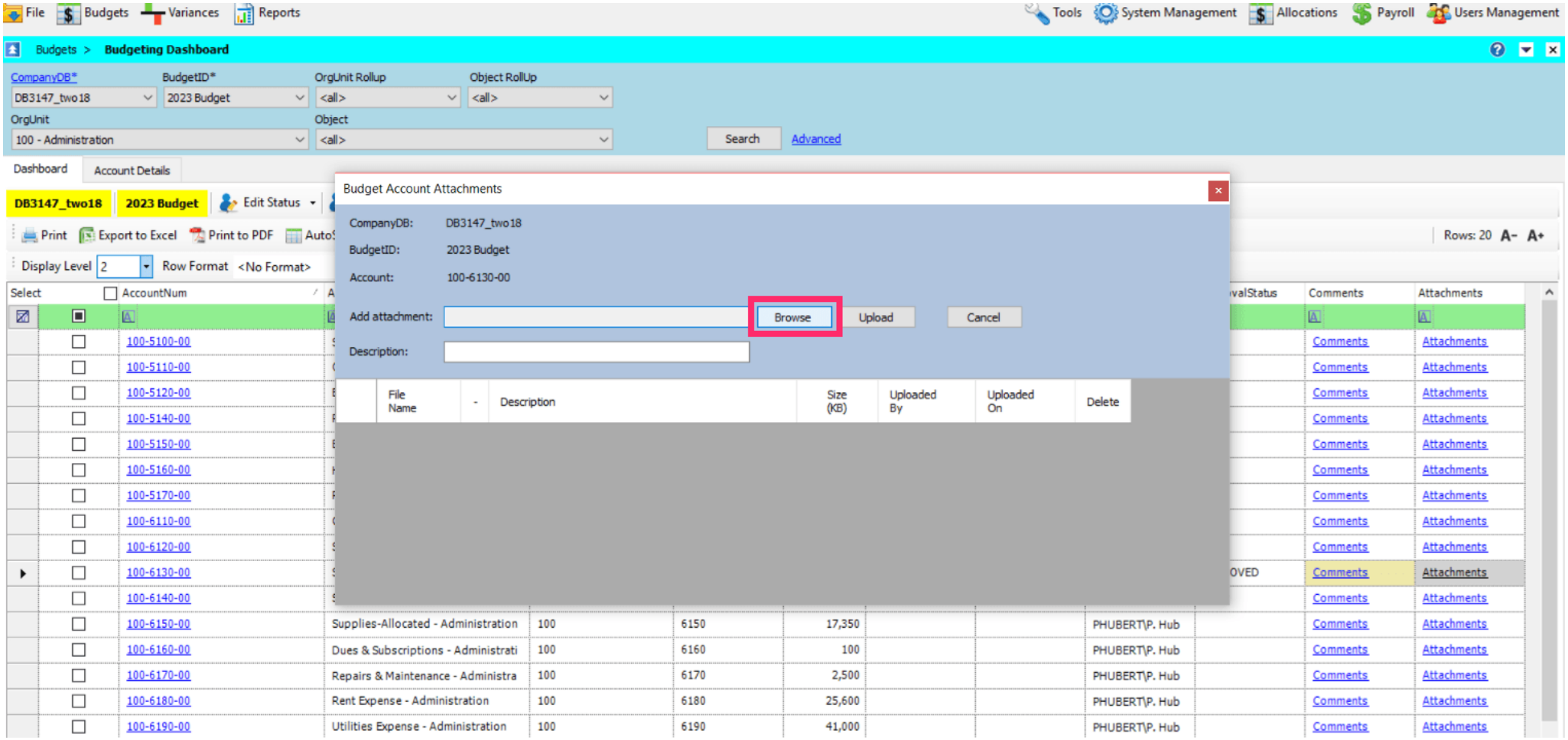
Click on the Red X to close this window.



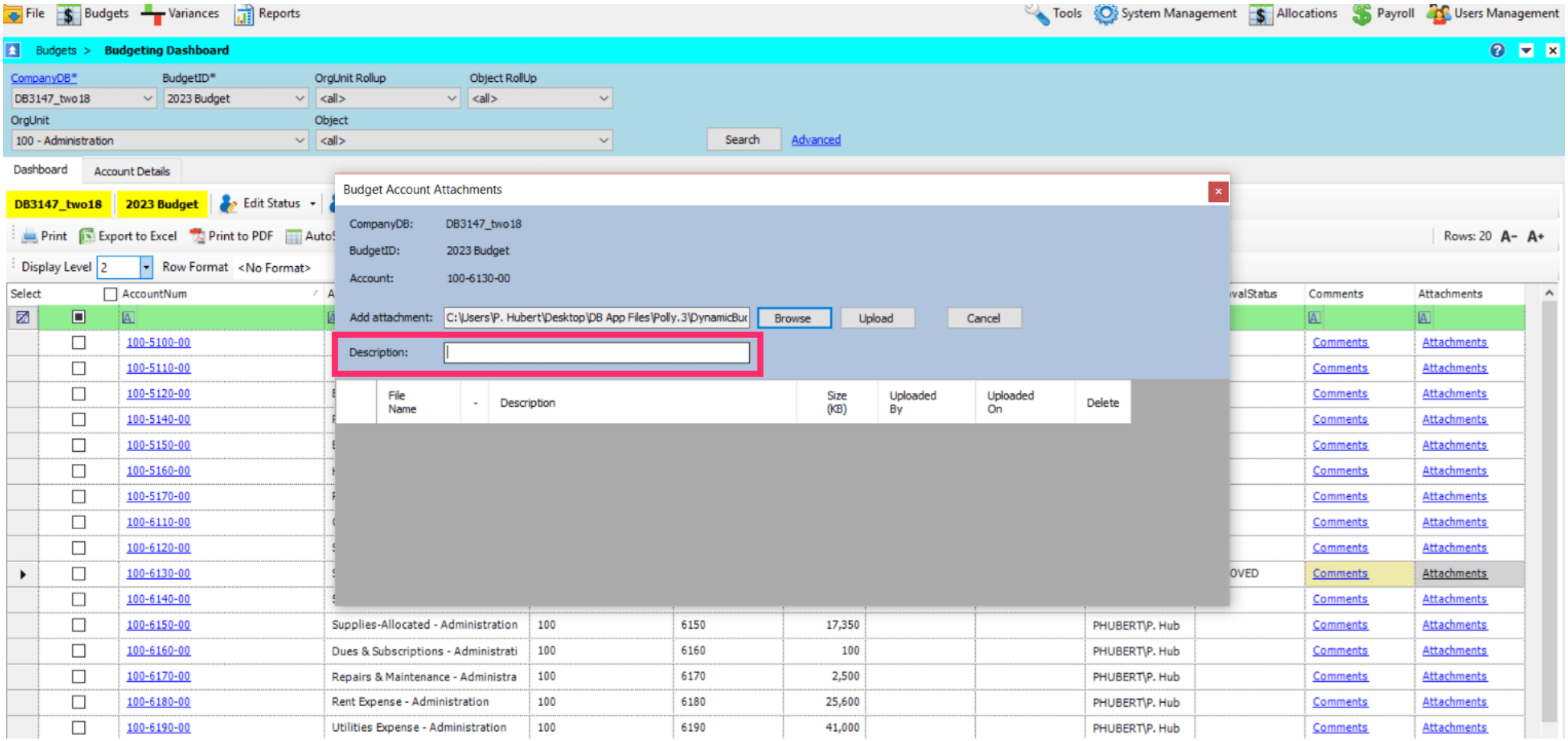
If you want to attach supporting details for a budget entry, you can attach the document(s) for this account (on this screen). Click on Attachments.



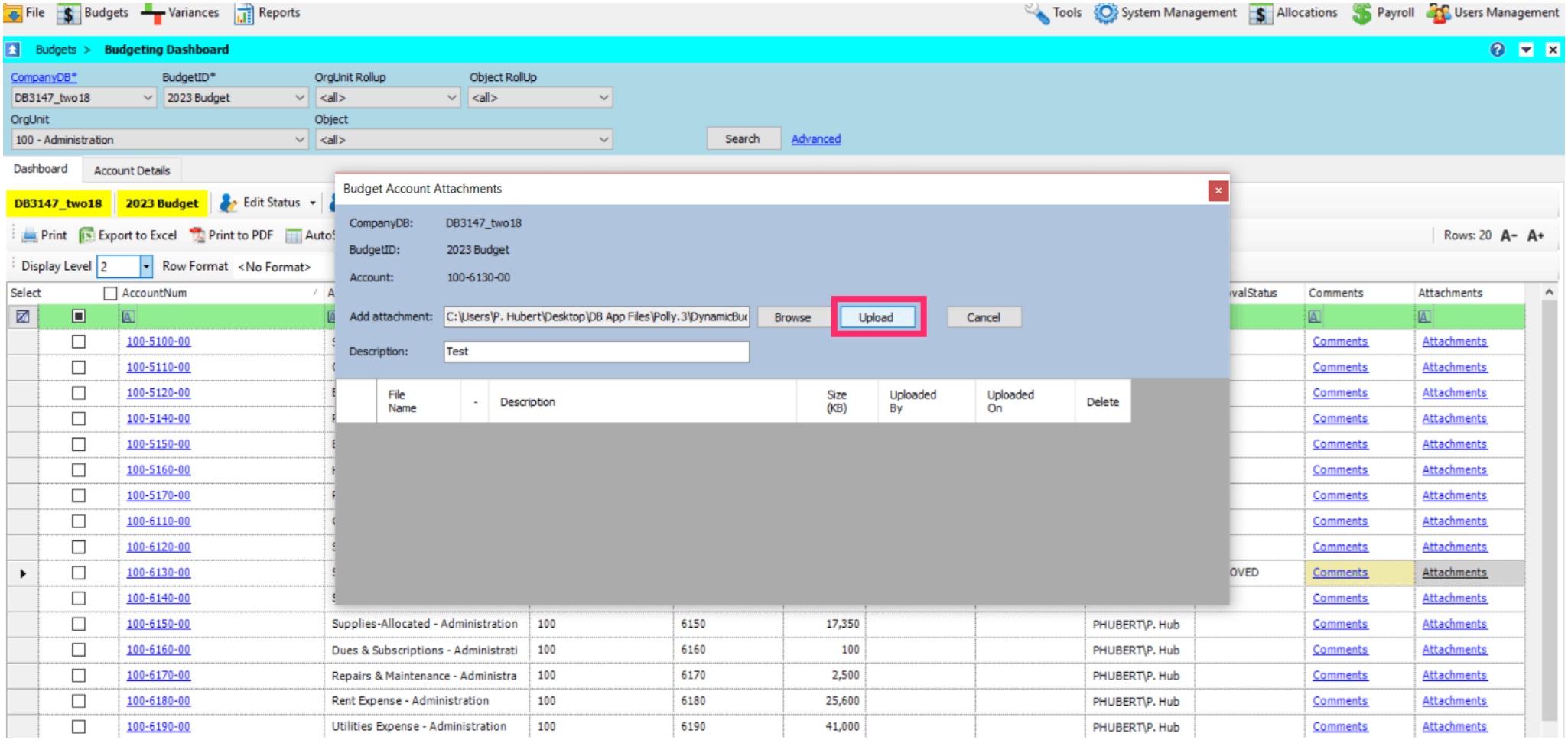
Click on Browse and select a file to attach.



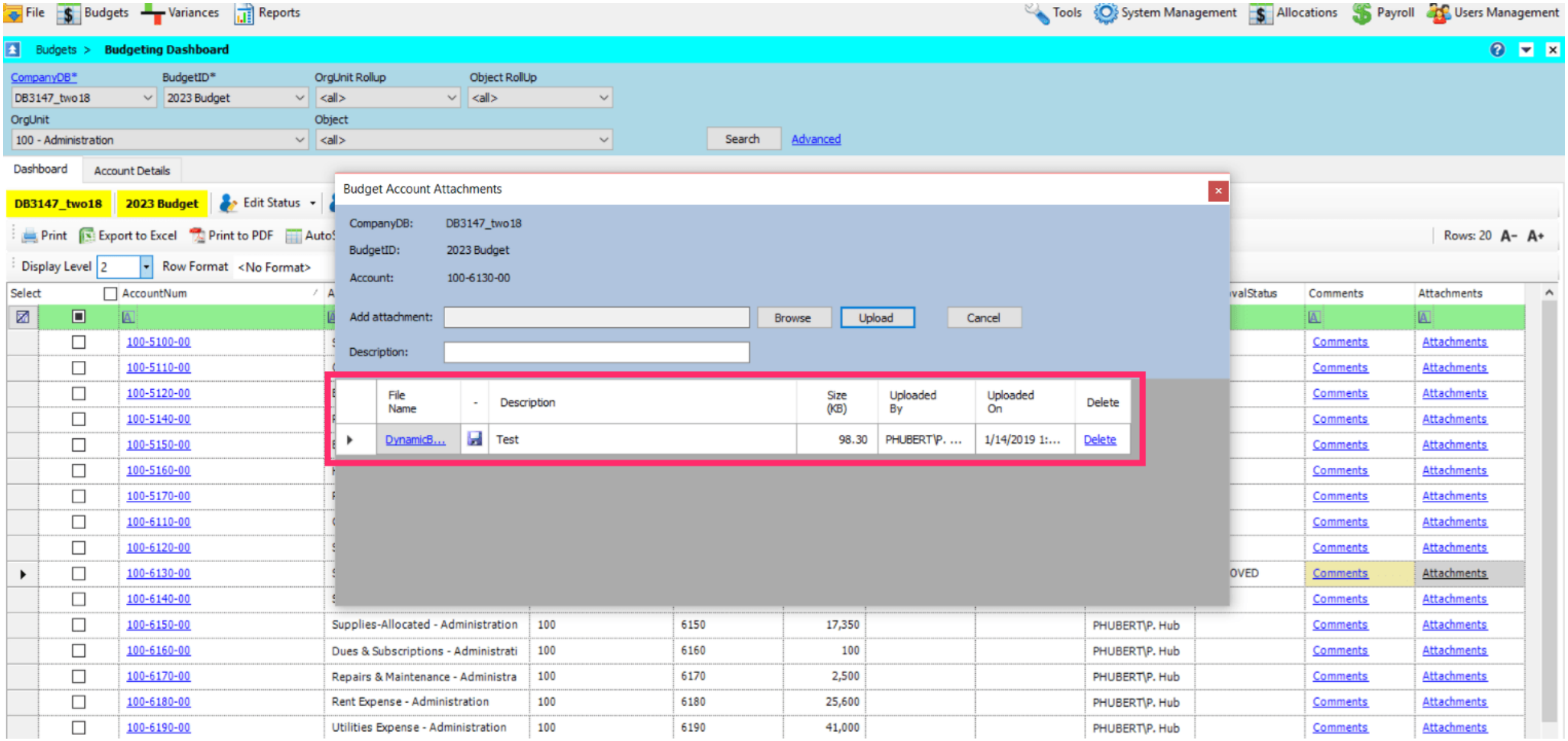
Enter a description in the white box.



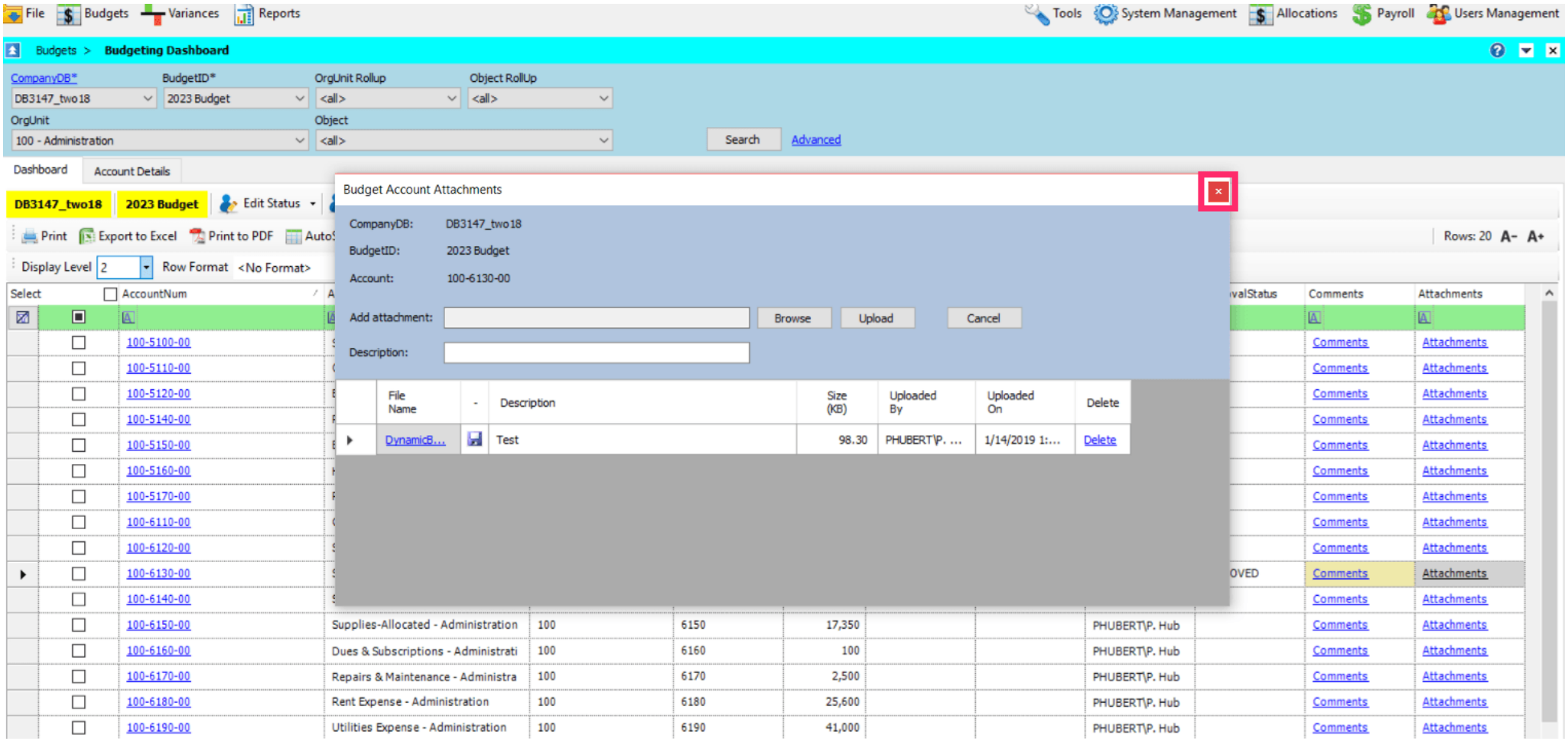
Click on Upload. A message will appear that reads, added successfully.



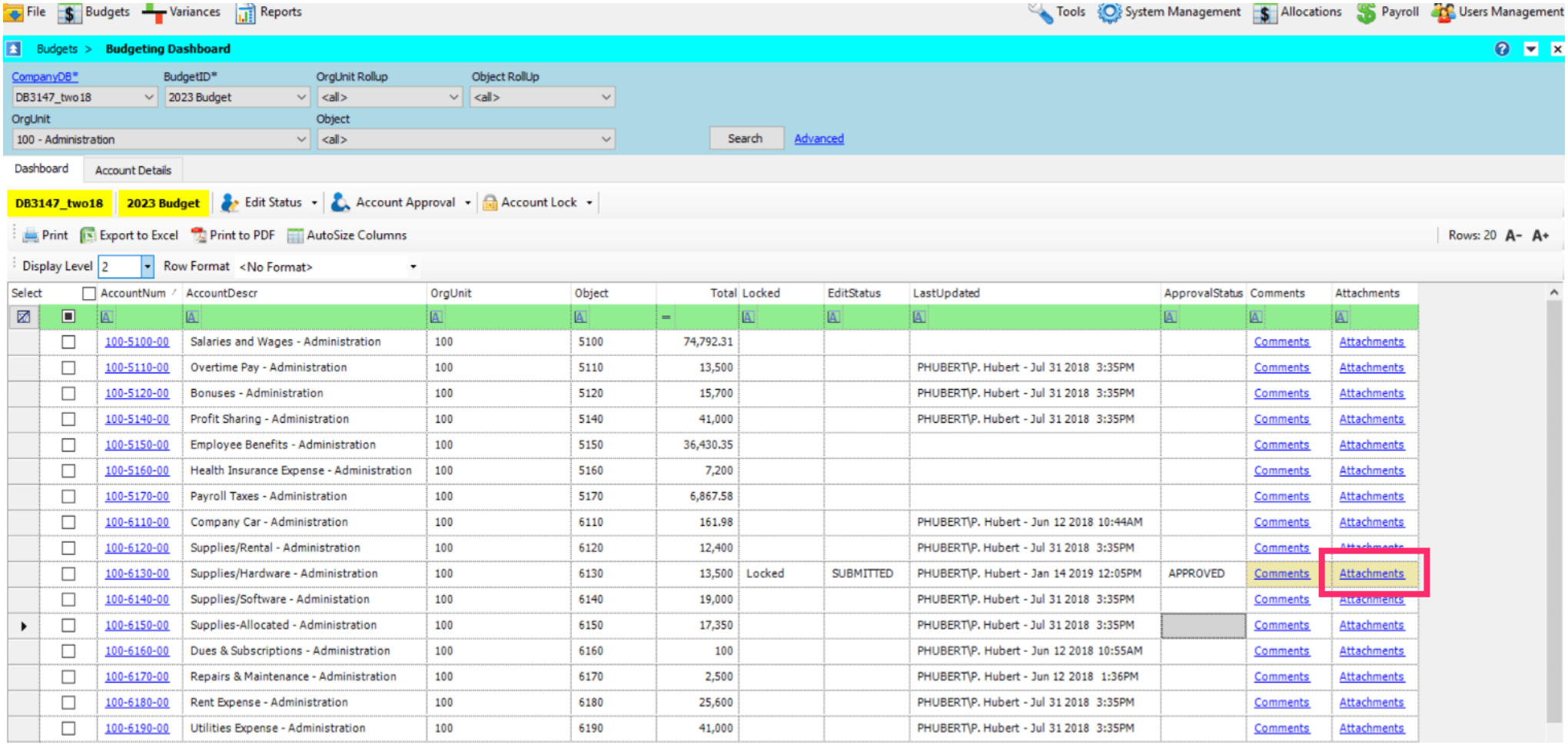
Now you see the attachment listed. If you uploaded the wrong file or made changes to the file, click on delete & start this process over.



Click on the Red X to close this window.

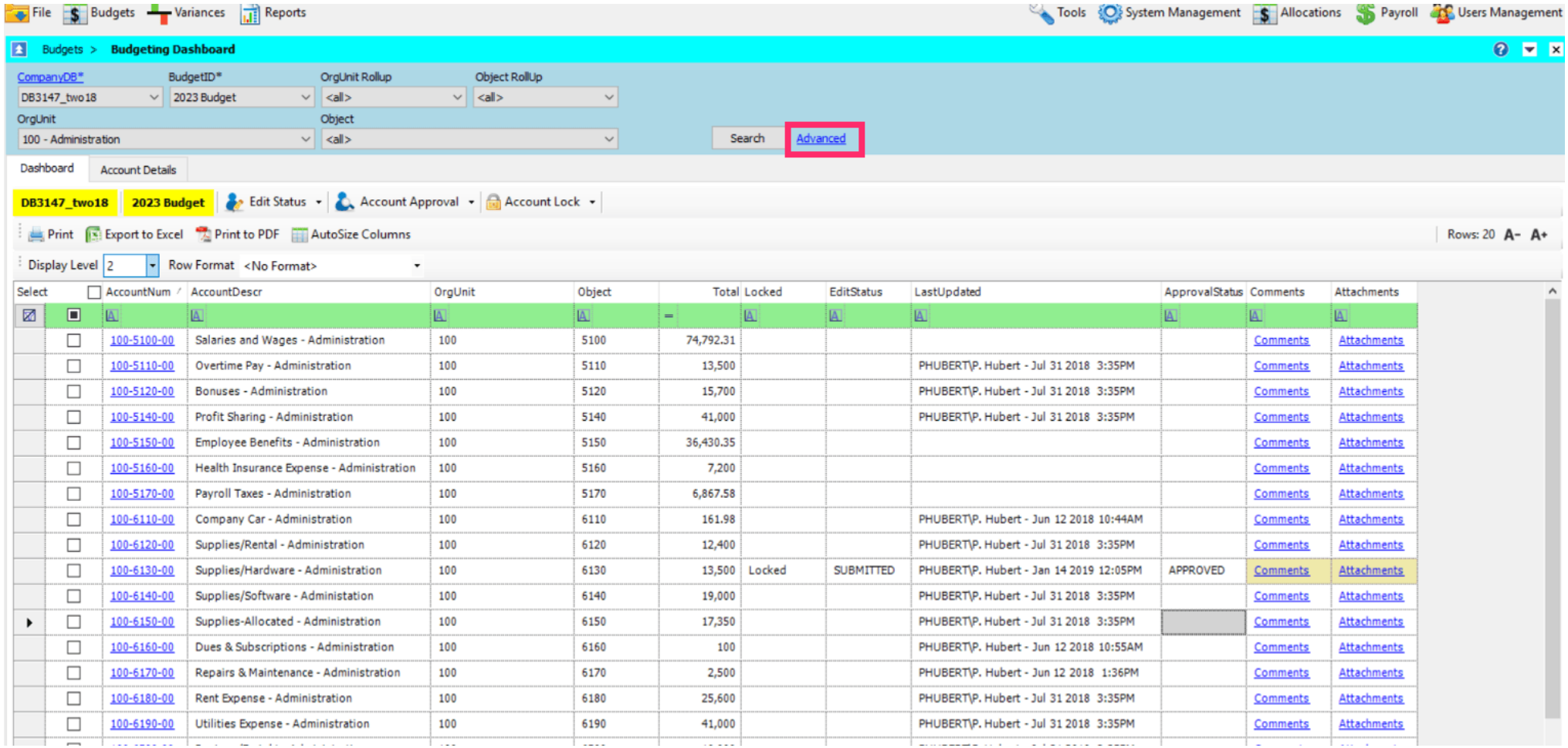


When attachments are present for any budget account, the Attachments box will be yellow.



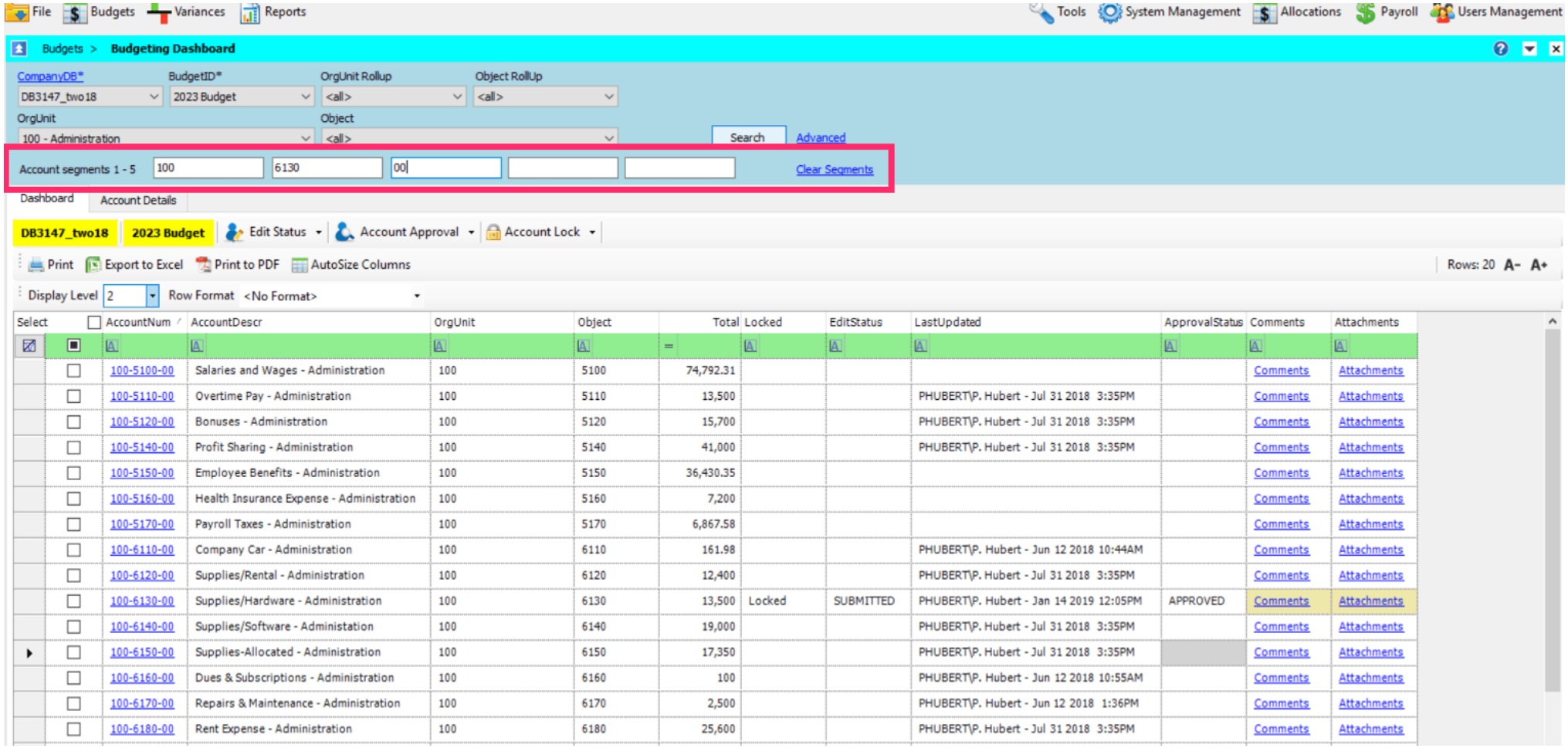
Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	PHUBERT\P. Hubert - Jan 14 2019 12:05PM	APPROVED	Comments	Attachments
	100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments

Now let's review how to look at budget accounts by segment. Click on Advanced.



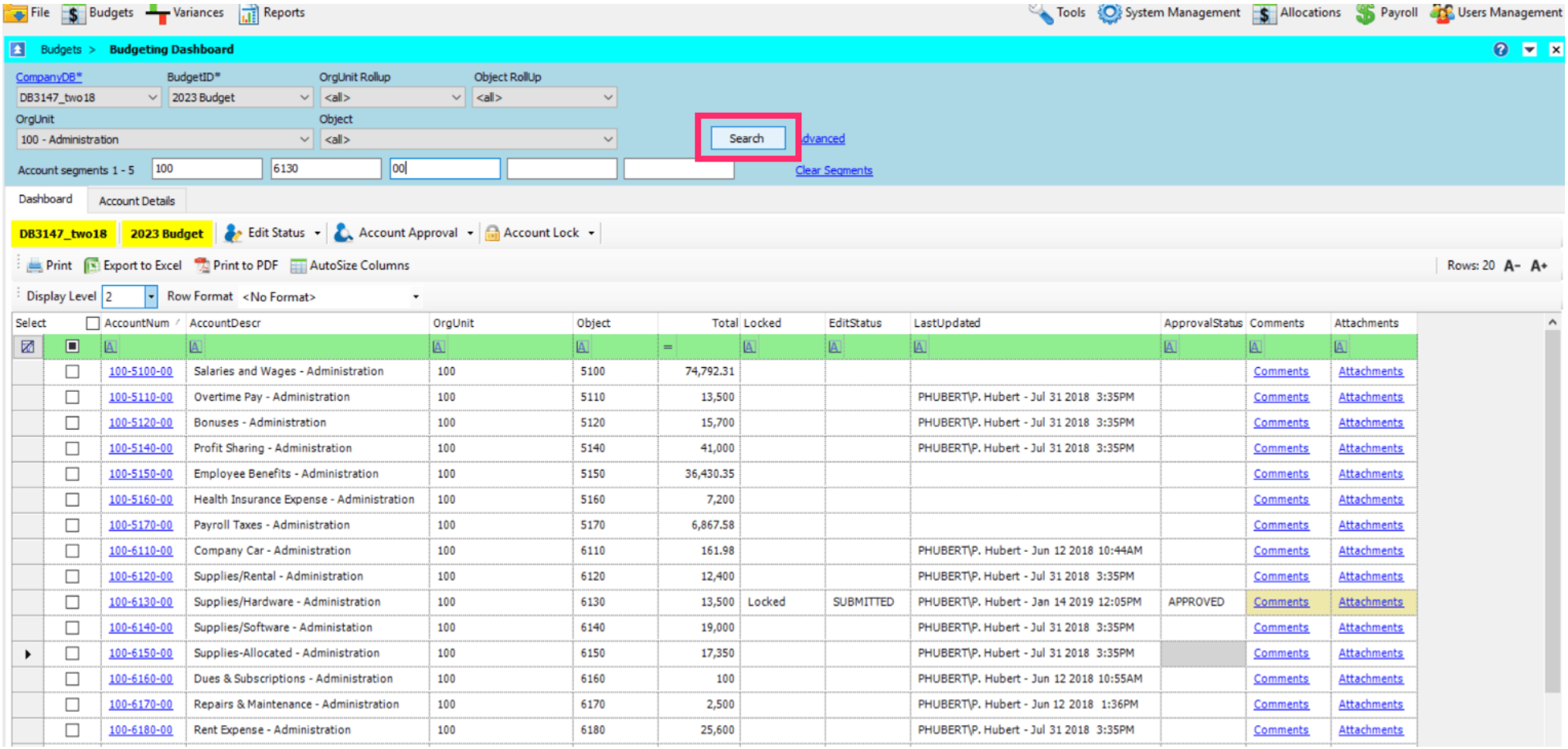
Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	PHUBERT\P. Hubert - Jan 14 2019 12:05PM	APPROVED	Comments	Attachments
	100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments

Enter the account segments you want to review. In this example, we will select 100-6130-00. Also, you can clear the segments entered & start over.



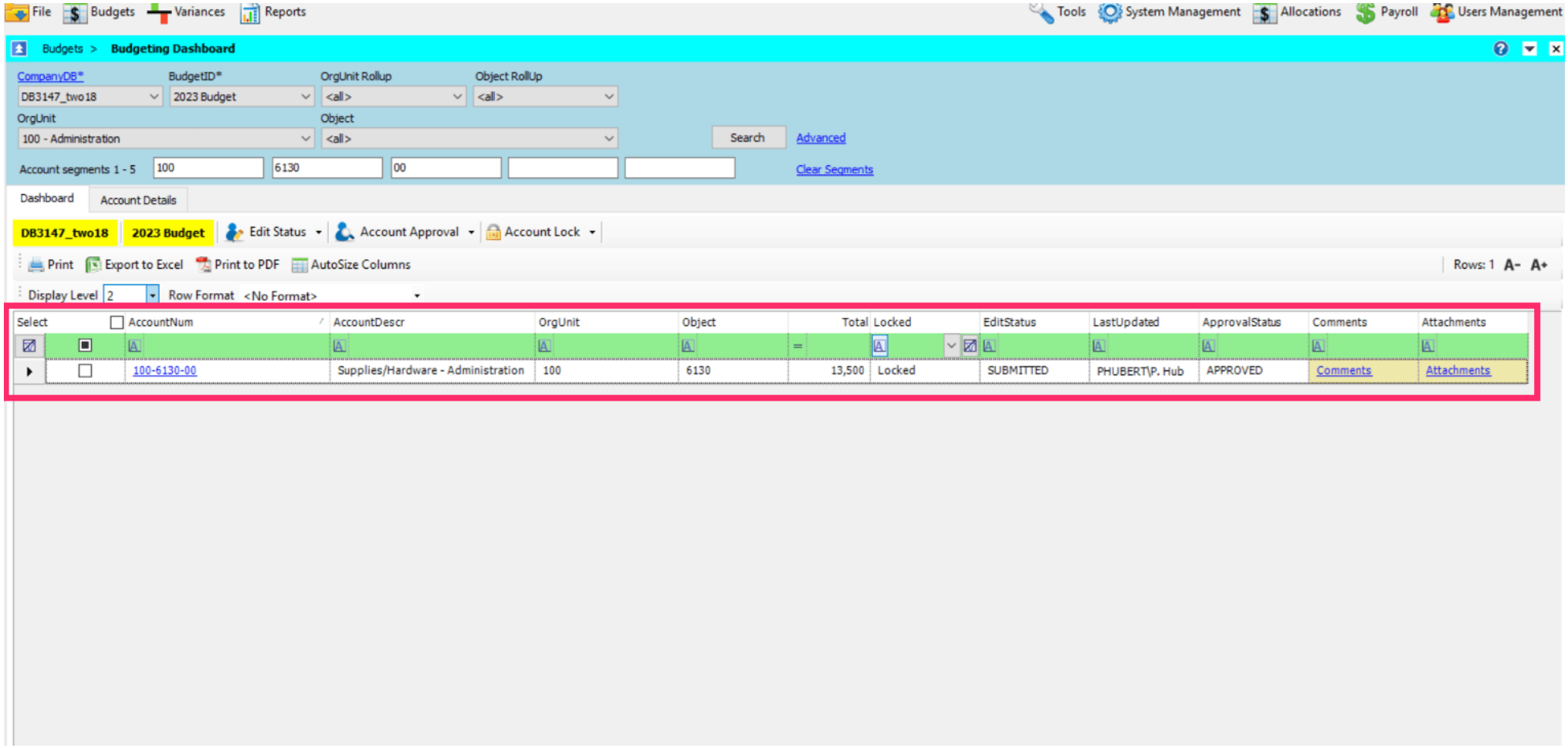
Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	PHUBERT\P. Hubert - Jan 14 2019 12:05PM	APPROVED	Comments	Attachments
	100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments

Click on Search.

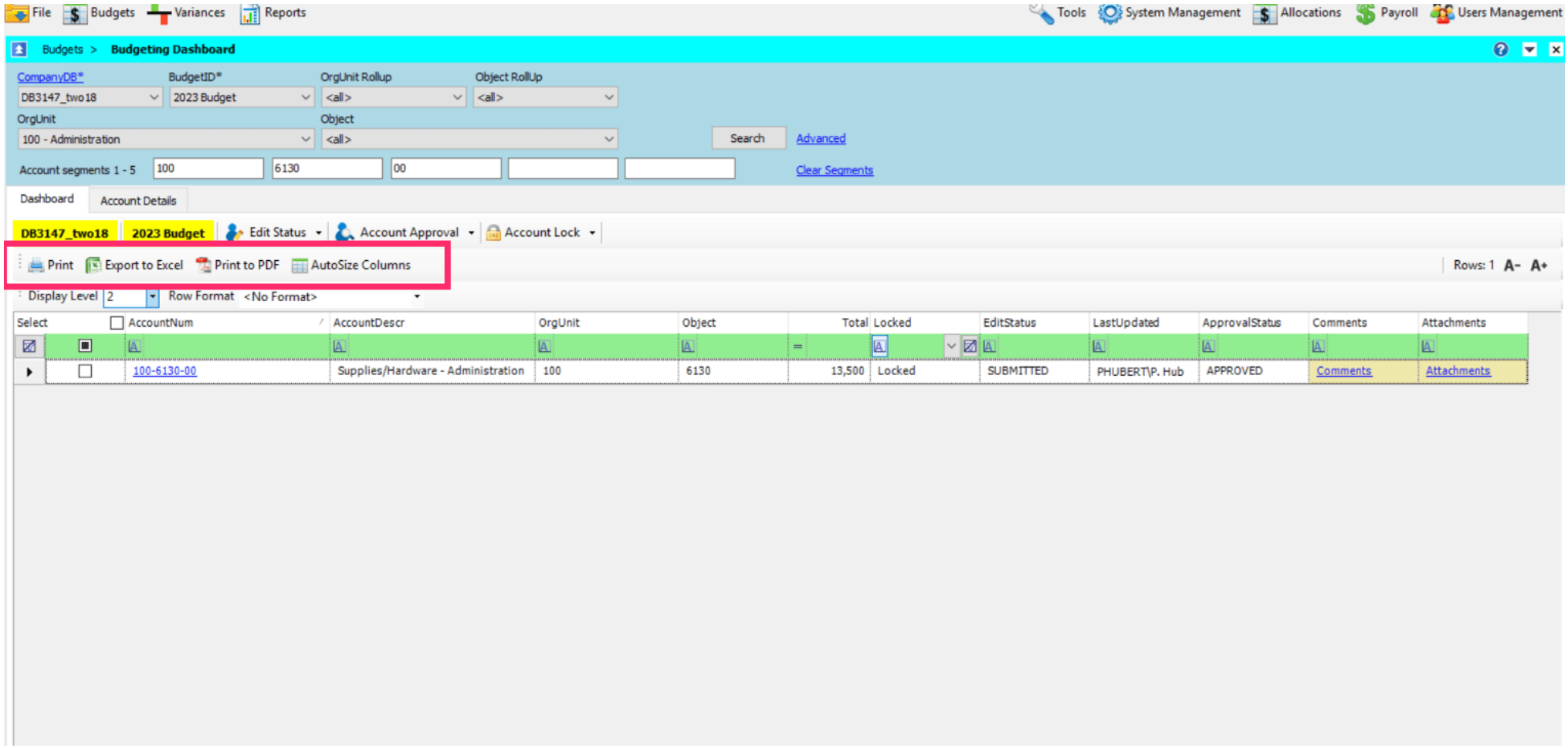


Select	AccountNum	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments
	100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	Attachments
	100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5120-00	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5140-00	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
	100-5160-00	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments
	100-5170-00	Payroll Taxes - Administration	100	5170	6,867.58					Comments	Attachments
	100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		Comments	Attachments
	100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6130-00	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	PHUBERT\P. Hubert - Jan 14 2019 12:05PM	APPROVED	Comments	Attachments
	100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6150-00	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
	100-6160-00	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments
	100-6170-00	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments
	100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments

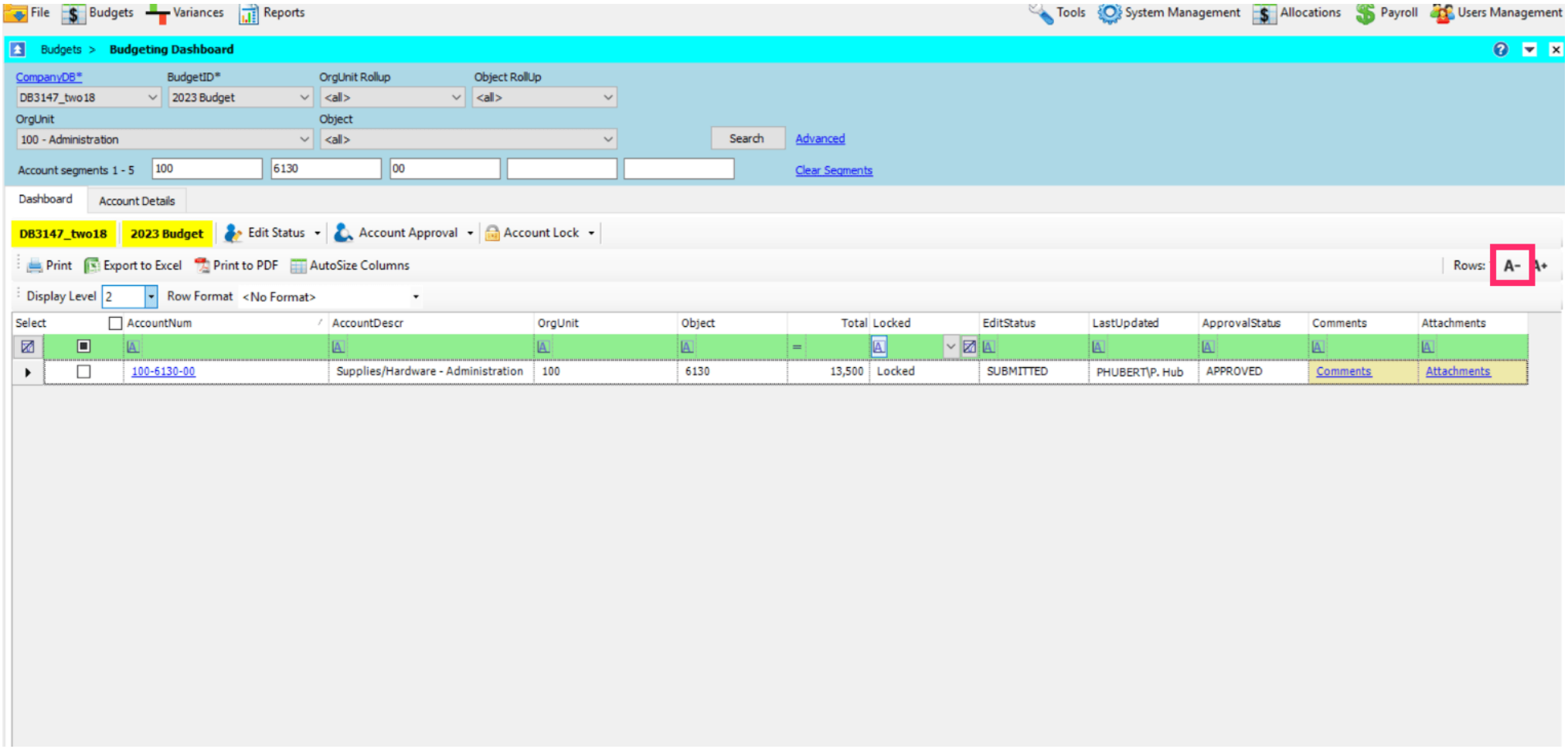
Now you see only the account segments entered in the advanced boxes along with all of the statuses for the budget process.



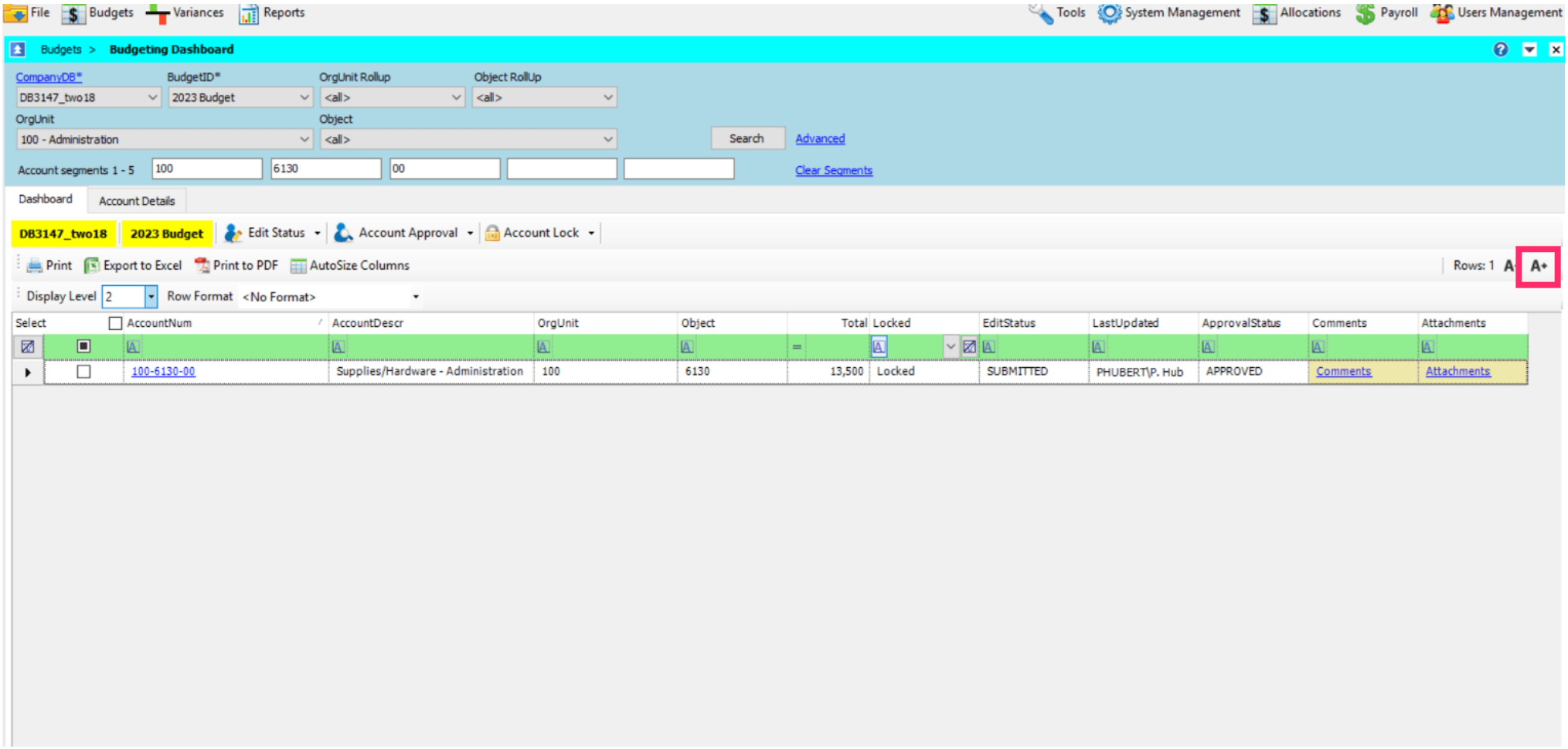
You can also print, export to excel, print to PDF and AutoSize Columns.



Click on A- to minimize or decrease the magnification of the screen.



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



That's It. You're Done.