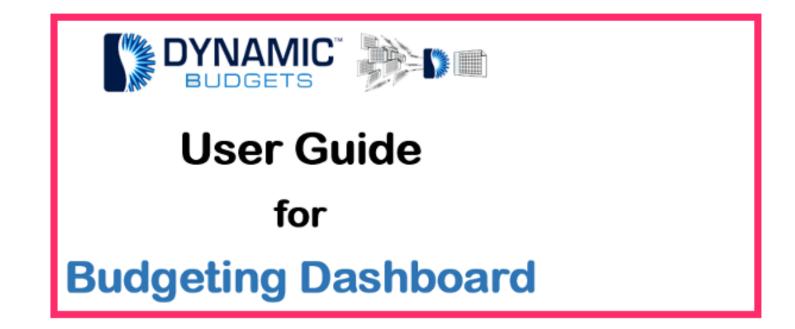


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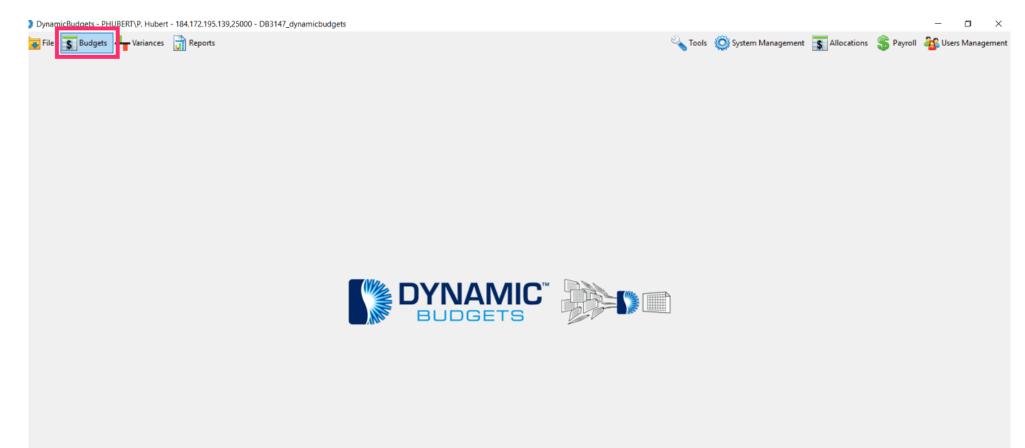
Dynamic Budgets User Guide for Budgeting Dashboard





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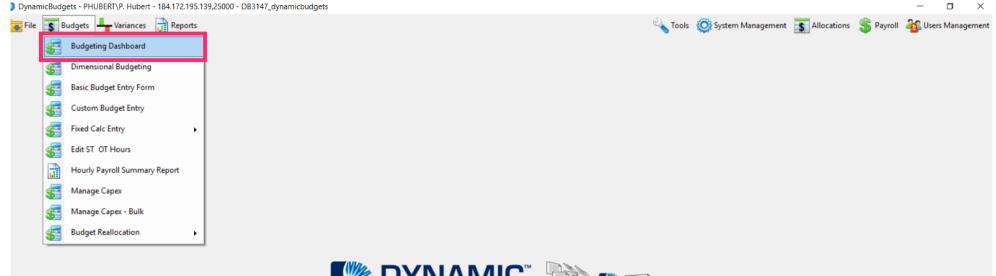
• We are going to review how to review the budgeting process status screen. Let's get started. Click on Budgets.





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







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#### UG-Budgeting Dashboard

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## 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.

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## Click on the CompanyDB dropdown list. Make your selection. In this example, select DB3147\_two18.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets												
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# Click on the BudgetID dropdown list. Make your selection. In this example, select 2023 Budget.

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

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

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

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#### UG-Budgeting Dashboard

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### Click on Search.

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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.

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		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	
		<u>100-6160-00</u>	Dues & Subscriptions - Administrati	100	6160	100			PHUBERT\P. Hub		Comments	<u>Attachments</u>	
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#### Let's look at account 100-6130-00.

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		<u>100-5110-00</u>	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hub		Comments	Attachments	*****
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		<u>100-5140-00</u>	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hub		Comments	Attachments	
		<u>100-5150-00</u>	Employee Benefits - Administration	100	5150	36,430.35					Comments	<u>Attachments</u>	
		100-5160-00	Health Insurance Expense - Admini	100	5160	7,200					Comments	<u>Attachments</u>	
		<u>100-5170-00</u>	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	
		<u>100-6120-00</u>	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hub		Comments	<u>Attachments</u>	
		<u>100-6130-00</u>	Supplies/Hardware - Administration	00	6130	13,500			PHUBERT\P. Hub		Comments	Attachments	
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		<u>100-6150-00</u>	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hub		Comments	Attachments	
		<u>100-6160-00</u>	Dues & Subscriptions - Administrati	100	6160	100			PHUBERT\P. Hub		Comments	Attachments	
		<u>100-6170-00</u>	Repairs & Maintenance - Administra	100	6170	2,500			PHUBERT\P. Hub		Comments	Attachments	
		<u>100-6180-00</u>	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hub		Comments	Attachments	
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#### UG-Budgeting Dashboard

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

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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.

-	-	PHUBERT\P. Hubert - 184.172.195.139	9,25000 - DB3147_dynamicbudgets					🔌 Tools	👸 System Man	agement 💽 A	llocations 🔍 Pa	yroll 🔐 Users Ma	
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		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	
		<u>100-5160-00</u>	Health Insurance Expense - Admini	100	5160	7,200					Comments	Attachments	
		<u>100-5170-00</u>	Payroll Taxes - Administration	100	5170	6,867.58		-			Comments	Attachments	
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		100-6120-00	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hub		Comments	Attachments	
		<u>100-6130-00</u>	upplies/Hardware - Administration	100	6130	13,500			PHUBERT\P. Hub		Comments	<u>Attachments</u>	
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		<u>100-6150-00</u>	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hub		<u>Comments</u>	Attachments	
		<u>100-6160-00</u>	Dues & Subscriptions - Administrati	100	6160	100			PHUBERT\P. Hub		Comments	Attachments	
		<u>100-6170-00</u>	Repairs & Maintenance - Administra	100	6170	2,500			PHUBERT\P. Hub		<u>Comments</u>	Attachments	
		<u>100-6180-00</u>	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hub		<u>Comments</u>	Attachments	
		<u>100-6190-00</u>	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hub		Comments	Attachments	



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.

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		100-5110-00	~	Show 'Submi		A	ministration	100	511	0	13,500			PHUBERT\P. Hub		Comments	٤ ١	Attachments	
		100-5120-00	~	Show 'Re-sub	bmitted'	nin	stration	100	512	0	15,700			PHUBERT\P. Hub		Comments	٤ ١	Attachments	
		100-5140-00	_		Profit Sharing	1 - A	Iministration	100	514	0	41,000			PHUBERT\P. Hub		Comments	٤ ١	Attachments	
		100-5150-00			Employee Be	nefit	ts - Administration	100	515	0	36,430.35					Comments	٤ ١	<u>Attachments</u>	
		100-5160-00			Health Insura	ance	Expense - Admini	100	516	0	7,200					Comments	٤ ١	<u>Attachments</u>	
		100-5170-00			Payroll Taxes	- Ac	dministration	100	517	0	6,867.58					Comments	٤ ١	<u>Attachments</u>	
		100-6110-00			Company Car	r - Ad	dministration	100	611	0	161.98			PHUBERT\P. Hub		Comments	٤. /	Attachments	
		100-6120-00			Supplies/Ren	tal -	Administration	100	612	0	12,400			PHUBERT\P. Hub		Comments	٤ ١	<u>Attachments</u>	
•		<u>100-6130-00</u>			Supplies/Har	dwa	are - Administration	100	613	0	13,500			PHUBERT\P. Hub		Comments	٤ ٤	<u>Attachments</u>	
		<u>100-6140-00</u>			Supplies/Sof	twar	re - Administation	100	614	0	19,000			PHUBERT\P. Hub		Comments	<u>s</u>	<u>Attachments</u>	
		<u>100-6150-00</u>			Supplies-Allo	cate	ed - Administration	100	615	0	17,350			PHUBERT\P. Hub		Comments	٤ ٤	<u>Attachments</u>	
		<u>100-6160-00</u>			Dues & Subs	cript	tions - Administrati	100	616	0	100			PHUBERT\P. Hub		Comments	٤ ا	<u>Attachments</u>	
		<u>100-6170-00</u>			Repairs & Ma	inte	nance - Administra	100	617	0	2,500			PHUBERT\P. Hub		Comments	2	<u>Attachments</u>	
		<u>100-6180-00</u>			Rent Expense	e - Ad	dministration	100	618	0	25,600			PHUBERT\P. Hub		Comments	٤ ٤	<u>Attachments</u>	
		100-6190-00			Utilities Expe	ense	- Administration	100	619	0	41,000			PHUBERT\P. Hub		Comments	<u>s</u> /	Attachments	



zgidwani

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

Dyna	micBudg	ets - PHUBERT\	P. Hubert - 184.172.195.139,25000 - DB3147_	dynamicbudgets								_	٥
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00 - /	Administra	ation	<ul> <li>✓ <al></al></li> </ul>		~	S	earch Adva	anced					
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isp	lay Level	2 • Ro	w Format <no format=""></no>										
ect	Г	AccountNum	AccountDescr	OrgUnit	Object	Tota	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments	
		A	A	A	A	-	A	A		A	A	A	
		100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	Attachments	
T		100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	-
t		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	5150								
-				100		7,200					Comments	Attachments	
-		100-5170-00	Payroll Taxes - Administration		5170	6,867.58					Comments	Attachments	
		100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		<u>Comments</u>	Attachments	-
		<u>100-6120-00</u>	Supplies/Rental - Administration	100	6120	12,400		1	PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	
		<u>100-6130-00</u>	Supplies/Hardware - Administration	100	6130	13,500		SUBMITTED	SUBMITTED - PHUBERT\P. HUBERT - 14Jan2019 12:07:54		<u>Comments</u>	Attachments	
		<u>100-6140-00</u>	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-6150-00</u>	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-6160-00</u>	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	<u>Attachments</u>	
		100-6180-00	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	
			-		1								



zgidwani

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.

		-	P. Hubert - 184.172.195.139,25000 - DB3147_0	dynamicbudgets					🔌 Tools  🥨 System Manageme	at Allecat			
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DrgUnit 100 - Ar	dministra	tion	Object		~	S	earch Ac	ivanced					
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elect		AccountNum /	AccountDescr	OrgUnit	Object	Total	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments	^
		A	A	A	A	-	A	A	A	A	A	A	
		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	
		<u>100-5140-00</u>	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		100-5150-00	Employee Benefits - Administration	100	5150	36,430.35					Comments	<u>Attachments</u>	
		<u>100-5160-00</u>	Health Insurance Expense - Administration	100	5160	7,200					Comments	<u>Attachments</u>	
		<u>100-5170-00</u>	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	<u>Attachments</u>	
		<u>100-6120-00</u>	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	
۲.		100-6130-00	Supplies/Hardware - Administration	100	6130	13,500		SUBMITTED	SUBMITTED - PHUBERT\P. HUBERT - 14Jan2019 12:07:54		Comments	<u>Attachments</u>	
		100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-6150-00</u>	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-6160-00</u>	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	<u>Attachments</u>	
		<u>100-6170-00</u>	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments	
		<u>100-6180-00</u>	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	



#### UG-Budgeting Dashboard

zgidwani

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.

) Dyna	micBudg	ets - PHUBERT	P. Hubert - 184.172.195.139,25000 - DB3147_	dynamicbudgets								-	o ×
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		100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	<u>Attachments</u>	
		<u>100-5110-00</u>	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-5120-00</u>	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-5140-00</u>	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
		<u>100-5150-00</u>	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments	
		<u>100-5160-00</u>	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments	
		<u>100-5170-00</u>	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	
		<u>100-6120-00</u>	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		<u>Comments</u>	<u>Attachments</u>	
•		<u>100-6130-00</u>	Supplies/Hardware - Administration	100	6130	13,500	SUBI	MITTED	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	<u>Attachments</u>	
		<u>100-6160-00</u>	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	<u>Attachments</u>	



#### UG-Budgeting Dashboard

zgidwani

## 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.

Dyna	micBudg	ets - PHUBERT\F	P. Hubert - 184.172.195.139,25000 - DB3147_0	dynamicbudgets								- c	o ×
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Select		AccountNum /	AccountDescr	OrgUnit	Object	=	Locked	EditStatus	LastUpdated	ApprovalStatus	Comments	Attachments	Ŷ
		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	15,500			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	
0		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	



#### UG-Budgeting Dashboard

zgidwani

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.

Dynamic	Budg	ets - PHUBERT\F	P. Hubert - 184.172.195.139,25000 - DB3147_0	dynamicbudgets								-	٥
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lect		AccountNum /		OrgUnit	Object		Locked	EditStatus	LastUpdated	ApprovalStatus		Attachments	
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		100-5100-00	Salaries and Wages - Administration	100	5100	74,792.31					Comments	<u>Attachments</u>	
		100-5110-00	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	
L		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					<u>Comments</u>	<u>Attachments</u>	-
		<u>100-5160-00</u>	Health Insurance Expense - Administration	100	5160	7,200					<u>Comments</u>	Attachments	-
[		<u>100-5170-00</u>	Payroll Taxes - Administration	100	5170	6,867.58					<u>Comments</u>	<u>Attachments</u>	
[		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	<u>Attachments</u>	
0		100-6130-00	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	SUBMITTED - PHUBERT\P. HUBERT - 14Jan2019 12:07:54		Comments	<u>Attachments</u>	
L		<u>100-6140-00</u>	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
[		<u>100-6150-00</u>	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	
[		<u>100-6160-00</u>	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	<u>Attachments</u>	
[		<u>100-6170-00</u>	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	<u>Attachments</u>	
[		<u>100-6180-00</u>	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	
ſ		<u>100-6190-00</u>	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>	



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.

🔰 Dyna	micBudg	ets - PHUBERT\F	P. Hubert - 184.172.195.1	39,2500	00 - DB3147_d	ynamicbudgets									-	o ×
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DB31	47_two1	18 2023 Bud	get 🛛 🧞 Edit Status	2	Account App	oroval 👻 🔒 Ac	count Lo	ck 🕶								
÷	Drint (3	Export to Excel	Print to PDF		UnderRevie	w									Rower 20	A- A+
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_	olay Level		w Format <no format=""></no>		Approved											
Select		AccountNum /			Denied			Object		Locked	EditStatus	LastUpdated	ApprovalStatus		Attachments	Â
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#### UG-Budgeting Dashboard

zgidwani

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

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#### UG-Budgeting Dashboard

zgidwani

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

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### UG-Budgeting Dashboard

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

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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.

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		<u>100-5150-00</u>	Employee Benefits - Administration	100	5150	36,430.35				-	Comments	Attachments
		<u>100-5160-00</u>	Health Insurance Expense - Admini	100	5160	7,200				-	Comments	Attachments
		<u>100-5170-00</u>	Payroll Taxes - Administration	100	5170	6,867.58					Comments	<u>Attachments</u>
		<u>100-6110-00</u>	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hub		Comments	Attachments
		<u>100-6120-00</u>	Supplies/Rental - Administration	100	6120	12,400			PHUBERT\P. Hub		Comments	Attachments
		<u>100-6130-00</u>	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	PHUBERT\P. Hub	APPROVED	Comments	<u>Attachments</u>
		100-6140-00	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hub		Comments	<u>Attachments</u>
		<u>100-6150-00</u>	Supplies-Allocated - Administration	100	6150	17,350			PHUBERT\P. Hub		Comments	<u>Attachments</u>
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		<u>100-6170-00</u>	Repairs & Maintenance - Administra	100	6170	2,500			PHUBERT\P. Hub		<u>Comments</u>	<u>Attachments</u>
		<u>100-6180-00</u>	Rent Expense - Administration	100	6180	25,600			PHUBERT\P. Hub		Comments	<u>Attachments</u>
		100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hub		Comments	Attachments

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		<u>100-5160-00</u>	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments	
		<u>100-5170-00</u>	Payroll Taxes - Administration	100	5170	6,867.58					Comments	<u>Attachments</u>	
		100-6110-00	Company Car - Administration	100	6110	161.98			PHUBERT\P. Hubert - Jun 12 2018 10:44AM		Comments	Attachments	
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		<u>100-6130-00</u>	Supplies/Hardware - Administration	100	6130	13,500	Locked	SUBMITTED	PHUBERT\P. Hubert - Jan 14 2019 12:05PM	APPROVED	Comments	Attachments	
		<u>100-6140-00</u>	Supplies/Software - Administation	100	6140	19,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attacnments	1
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		<u>100-6160-00</u>	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments	
		<u>100-6170-00</u>	Repairs & Maintenance - Administration	100	6170	2,500			PHUBERT\P. Hubert - Jun 12 2018 1:36PM		Comments	Attachments	
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		100-6190-00	Utilities Expense - Administration	100	6190	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments	



### UG-Budgeting Dashboard

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

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		<u>100-5110-00</u>	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	1	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	
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#### 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.

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		<u>100-5100-00</u>	Salaries and Wages - Administration	100	5100	74,792.31					<u>Comments</u>	<u>Attachments</u>
		<u>100-5110-00</u>	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>
		<u>100-5120-00</u>	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	<u>Attachments</u>
		<u>100-5140-00</u>	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
		<u>100-5160-00</u>	Health Insurance Expense - Administration	100	5160	7,200					Comments	<u>Attachments</u>
		<u>100-5170-00</u>	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
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		100-6160-00	Dues & Subscriptions - Administration	100	6160	100			PHUBERT\P. Hubert - Jun 12 2018 10:55AM		Comments	Attachments
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#### UG-Budgeting Dashboard

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#### Click on Search.

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		<u>100-5110-00</u>	Overtime Pay - Administration	100	5110	13,500			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
		<u>100-5120-00</u>	Bonuses - Administration	100	5120	15,700			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
		<u>100-5140-00</u>	Profit Sharing - Administration	100	5140	41,000			PHUBERT\P. Hubert - Jul 31 2018 3:35PM		Comments	Attachments
		<u>100-5150-00</u>	Employee Benefits - Administration	100	5150	36,430.35					Comments	Attachments
		<u>100-5160-00</u>	Health Insurance Expense - Administration	100	5160	7,200					Comments	Attachments
		<u>100-5170-00</u>	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
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## Now you see only the account segments entered in the advanced boxes along with all of the statuses for the budget process.

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

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

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

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That's It. You're Done.



## That's It. You're Done.