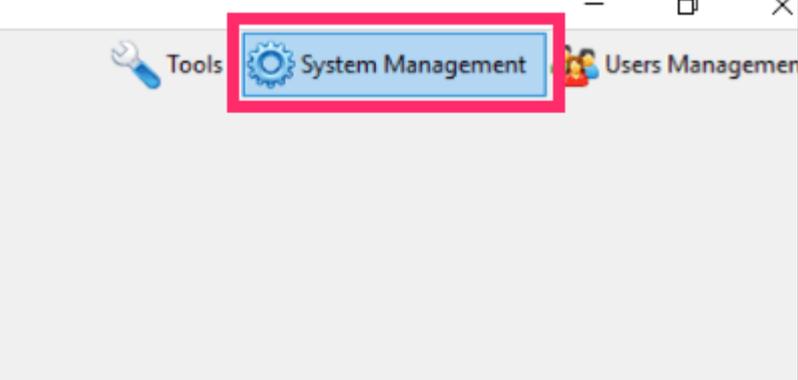
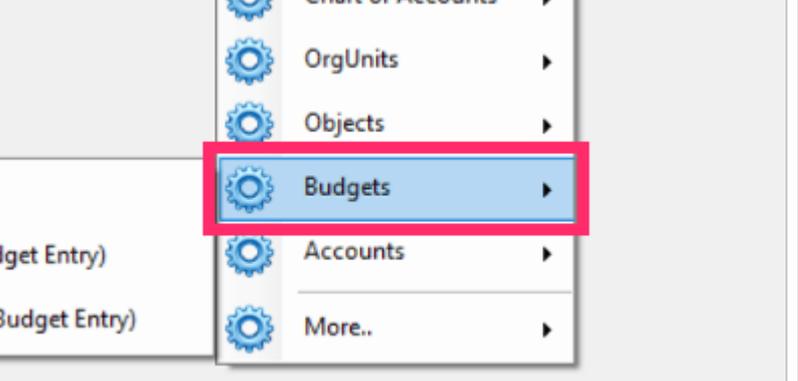
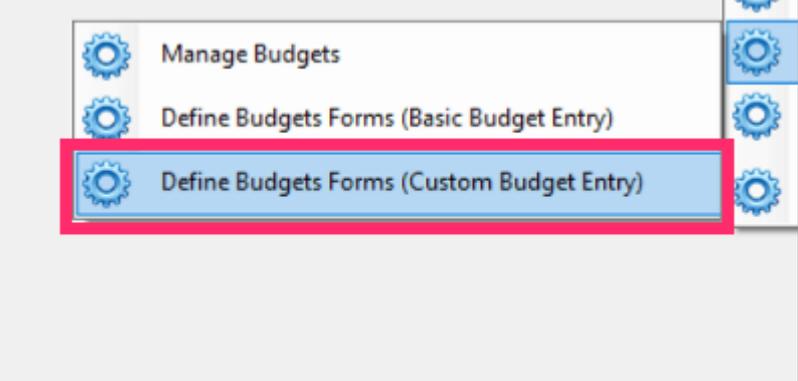
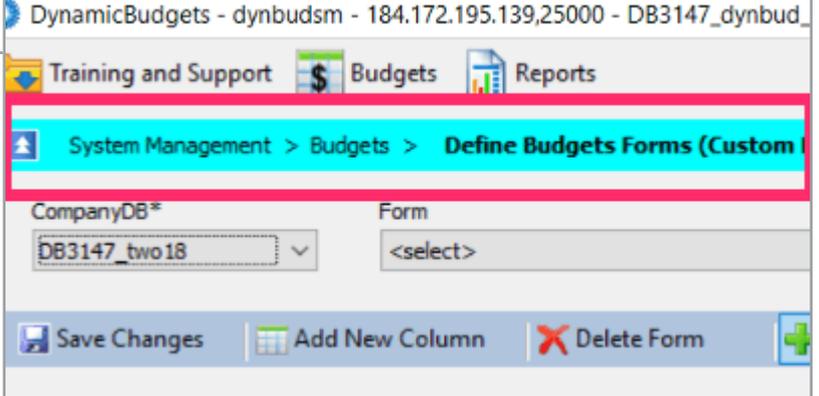
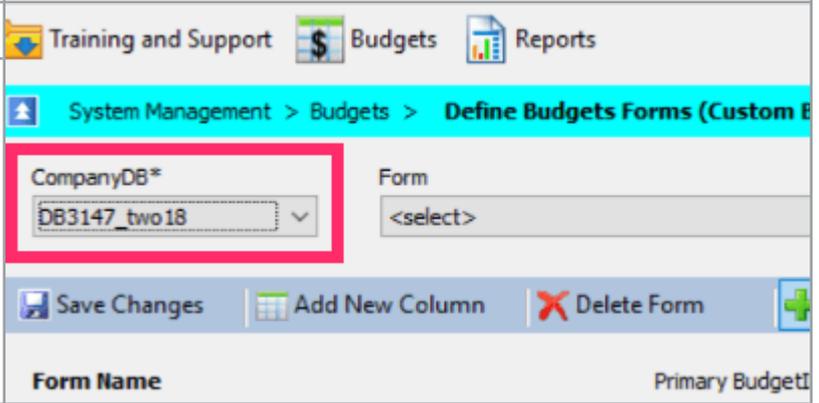
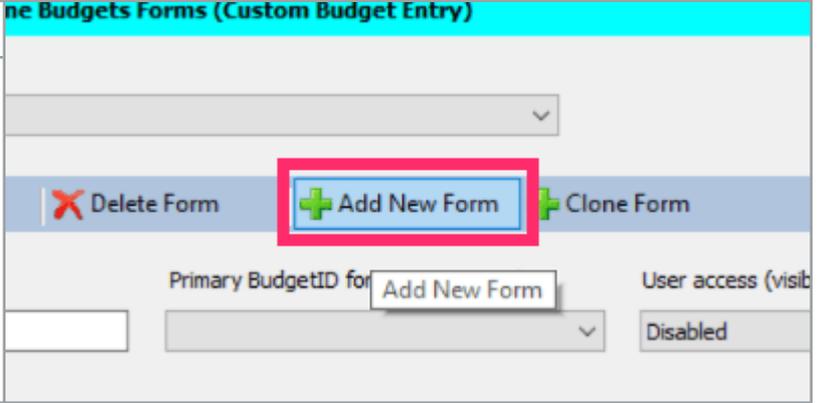


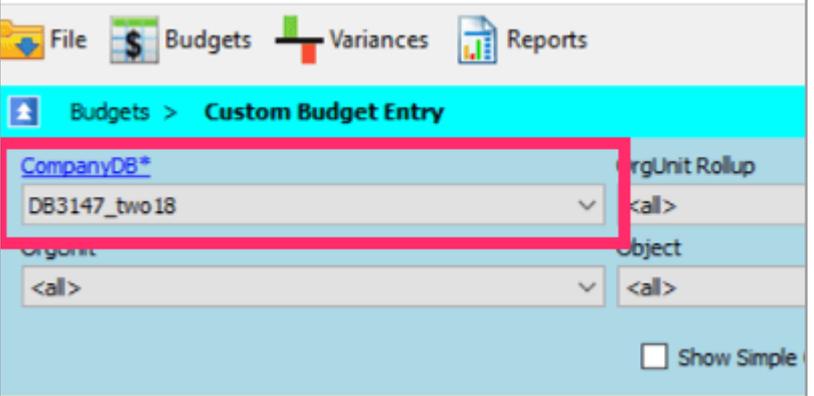
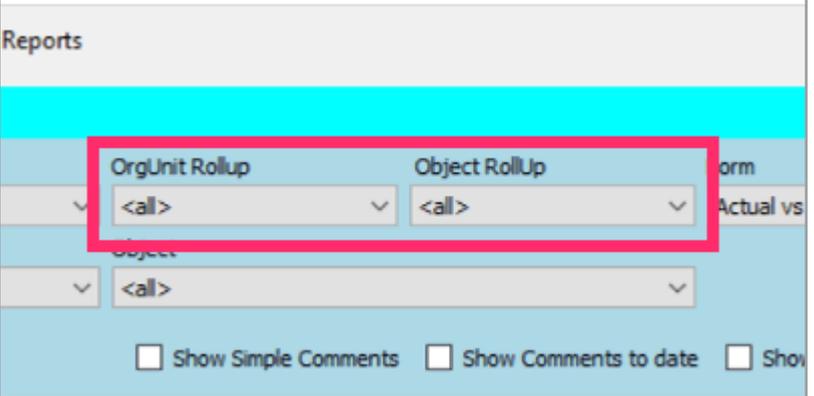
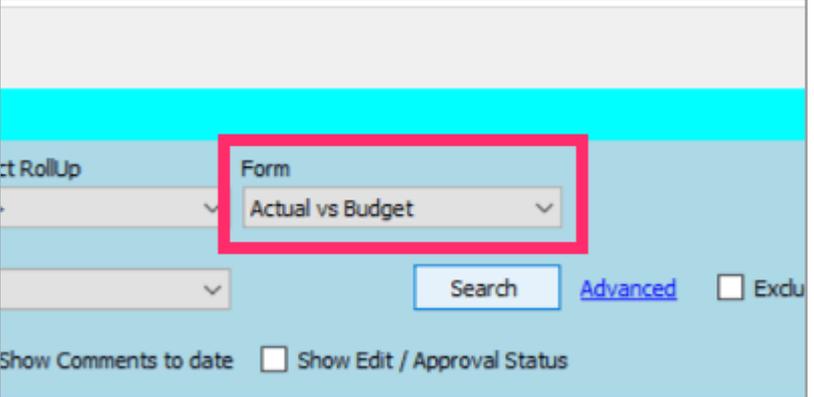
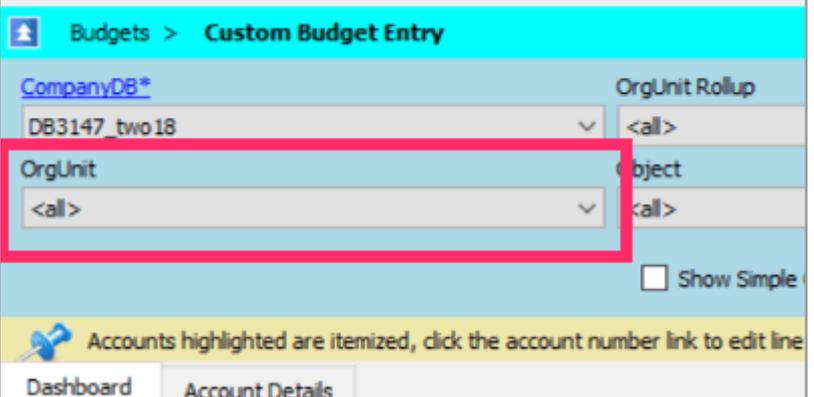
<p> Dynamic Budgets User Guide for Custom Budget Entry</p>	<p>1</p> 
<p> We are going to review how to create a custom budget entry screen.</p> <p>Let's get started. Click on <b>System Management</b>.</p>	<p>2</p> 
<p> Click on <b>Budgets</b>.</p>	<p>3</p> 
<p> Click on Define Budgets Forms (<b>Custom Budget Entry</b>).</p>	<p>4</p> 

<p> Note: As a reminder, this path shows you how to get to this screen again.</p> <p>In this example, you would go to the System Management menu, Budgets then Define Budgets Forms (Custom Budget Entry).</p>	<p>5</p> 
<p> Click on the <b>CompanyDB</b> dropdown list. Make your selection.</p> <p>In this example, select DB3147_two18.</p>	<p>6</p> 
<p> Click on <b>Add New Form</b>.</p>	<p>7</p> 
<p> Enter the Form Name.</p>	<p>8</p> 

<p>9</p> <p> A message will appear, <b>New form created successfully</b>. The form name entered, <b>Actual vs. Budget</b>.</p> <p>Note: If you want to change the name, just type the new name in the white box and click on save changes.</p>	<p>The screenshot shows a software interface for creating a form. At the top, there are buttons for 'Save Changes', 'Add New Column', and 'Delete Form'. Below these, the form title is 'Actual vs Budget # 3015'. A text input field containing 'Actual vs Budget' is highlighted with a red box. To the right, there is a 'Primary BudgetID' dropdown menu with '2018 Actual' selected. Below the form title, there is a 'Column Layout' section with a yellow banner that says 'To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button'. Below this, there is a table header with columns: 'Column Position', 'Column Name', 'Data Entry Type', and 'BudgetID'.</p>
<p>10</p> <p> Select the <b>Primary BudgetID for Accounts List</b> from the dropdown list.</p> <p>In this example, we will select <b>2018 Actual</b>.</p>	<p>The screenshot shows the same software interface as in step 9. The 'Primary BudgetID for Accounts List *' dropdown menu is highlighted with a red box and contains the selection '2018 Actual'. To the right of this dropdown, there is a 'User access (visibility)' dropdown menu with 'Application User' selected. Below these, there are two checkboxes: 'Allow period as input' and 'Flip sign for Variances'. Below the checkboxes, there is a yellow banner that says 'To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button'.</p>
<p>11</p> <p> Select the <b>User Access (visibility)</b> from the dropdown list.</p> <p>In this example, we will select <b>Application User</b>.</p>	<p>The screenshot shows the same software interface as in step 10. The 'User access (visibility)' dropdown menu is highlighted with a red box and contains the selection 'Application User'. Below this, there are two checkboxes: 'Allow period as input' and 'Flip sign for Variances'. Below the checkboxes, there is a yellow banner that says 'To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button'.</p>
<p>12</p> <p> You have the option to:</p> <ol style="list-style-type: none"><li>1. Allow period as input. We will select this option for this example.</li><li>2. Exclude zero value accounts.</li><li>3. Flip sign for variances.</li></ol>	<p>The screenshot shows the same software interface as in step 11. Three checkboxes are highlighted with a red box: 'Allow period as input', 'Exclude zero value accounts', and 'Flip sign for Variances (Better Worse for CR vs DR Accts)'. Below the checkboxes, there is a yellow banner that says 'To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button'.</p>

<p> We will review actual vs budget for the current month.</p> <p>Enter the BudgetID (2018 Actual and 2018 Budget), fiscal month (Aug), Month and report level (GLCode).</p>	13	<p>a row, click the row header to select the entire row (one or multiple) and then hit th</p> <table border="1"> <thead> <tr> <th>Column Name</th> <th>Data Entry Type</th> <th>BudgetID</th> </tr> </thead> <tbody> <tr> <td>Month 2018 Actual</td> <td>ReadOnly</td> <td>2018 Actual</td> </tr> <tr> <td>Month 2018 Budget</td> <td>ReadOnly</td> <td>2018 Budget</td> </tr> <tr> <td>Month Comments</td> <td>Comments</td> <td>2018 Actual</td> </tr> <tr> <td>Month Comments History</td> <td>CommentsHistory</td> <td>2018 Actual</td> </tr> <tr> <td>YTD 2018 Actual</td> <td>ReadOnly</td> <td>2018 Actual</td> </tr> </tbody> </table>	Column Name	Data Entry Type	BudgetID	Month 2018 Actual	ReadOnly	2018 Actual	Month 2018 Budget	ReadOnly	2018 Budget	Month Comments	Comments	2018 Actual	Month Comments History	CommentsHistory	2018 Actual	YTD 2018 Actual	ReadOnly	2018 Actual						
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<p> Enter comments &amp; review comments history.</p> <p>Enter the BudgetID (2018 Actual), fiscal month (Dec), YTD, report level (GLCode), 1st Calc Factor (1) for 2018 Actual, 2nd Calc Factor (2) for 2018 Budget &amp; 3rd Calc Factor (1) for the 1st set of Comments.</p>	14	<table border="1"> <thead> <tr> <th>Column Name</th> <th>Data Entry Type</th> <th>BudgetID</th> </tr> </thead> <tbody> <tr> <td>Month 2018 Actual</td> <td>ReadOnly</td> <td>2018 Actual</td> </tr> <tr> <td>Month 2018 Budget</td> <td>ReadOnly</td> <td>2018 Budget</td> </tr> <tr> <td>Month Comments</td> <td>Comments</td> <td>2018 Actual</td> </tr> <tr> <td>Month Comments History</td> <td>CommentsHistory</td> <td>2018 Actual</td> </tr> <tr> <td>YTD 2018 Actual</td> <td>ReadOnly</td> <td>2018 Actual</td> </tr> <tr> <td>YTD 2018 Budget</td> <td>ReadOnly</td> <td>2018 Budget</td> </tr> <tr> <td>YTD Comments</td> <td>Comments</td> <td>2018 Actual</td> </tr> </tbody> </table>	Column Name	Data Entry Type	BudgetID	Month 2018 Actual	ReadOnly	2018 Actual	Month 2018 Budget	ReadOnly	2018 Budget	Month Comments	Comments	2018 Actual	Month Comments History	CommentsHistory	2018 Actual	YTD 2018 Actual	ReadOnly	2018 Actual	YTD 2018 Budget	ReadOnly	2018 Budget	YTD Comments	Comments	2018 Actual
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<p> You have the option to select a color for your data. Just double-click on the cell and make a selection.</p> <p>In this example, we will select colors for the month comments and YTD comments.</p>	17	<table border="1"><thead><tr><th>Color</th><th>NumberFormat</th><th>Hidden</th><th>BackgroundColor</th><th>Text Color</th><th>FormulaResolved</th></tr></thead><tbody><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td>FFFF80</td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td>80FFFF</td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr><tr><td></td><td>Value</td><td><input type="checkbox"/></td><td></td><td></td><td></td></tr></tbody></table>	Color	NumberFormat	Hidden	BackgroundColor	Text Color	FormulaResolved		Value	<input type="checkbox"/>					Value	<input type="checkbox"/>					Value	<input type="checkbox"/>	FFFF80				Value	<input type="checkbox"/>					Value	<input type="checkbox"/>					Value	<input type="checkbox"/>					Value	<input type="checkbox"/>	80FFFF				Value	<input type="checkbox"/>					Value	<input type="checkbox"/>			
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<p> Now let's look at the Custom Budget Entry screen.</p> <p>Click on <b>Budgets</b>.</p>	19	<p>File Budgets Variances Reports</p>																																																												
<p> Click on <b>Custom Budget Entry</b>.</p>	20	<ul style="list-style-type: none"><li>Budgeting Dashboard</li><li>Dimensional Budgeting</li><li>Basic Budget Entry Form</li><li><b>Custom Budget Entry</b></li><li>Fixed Calc Entry</li><li>Edit ST_OT Hours</li><li>Hourly Payroll Summary Report</li></ul>																																																												

<p>21</p> <p> Click on the <b>CompanyDB dropdown list</b>. Make your selection.</p> <p>In this example, select DB3147_two18.</p>	
<p>22</p> <p> Click on the <b>OrgUnit &amp; Object Rollup dropdown lists</b>. Make your selection.</p> <p>In this example, select all for both.</p>	
<p>23</p> <p> Click on the <b>Form dropdown list</b>. Make your selection.</p> <p>In this example, we will <b>select the form we just created</b> which is named Actual vs. Budget.</p>	
<p>24</p> <p> Click on the <b>OrgUnit dropdown list</b>. Make your selection.</p> <p>In this example, select all.</p>	

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

In this example, select all.

26 Click on **Search**.

27 Now you see the **Custom Budget Entry screen we created** which reviews the month actual & budget along with comments & comments history as well as YTD actual & budget along with YTD comments & comments history.

	Month 2018 Actual	Month 2018 Budget	Month Comments	Month Comments History
=	=	=	Eq	A
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	-	-		
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28



That's It. You're Done.



**DYNAMIC**<sup>™</sup>  
BUDGETS



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