



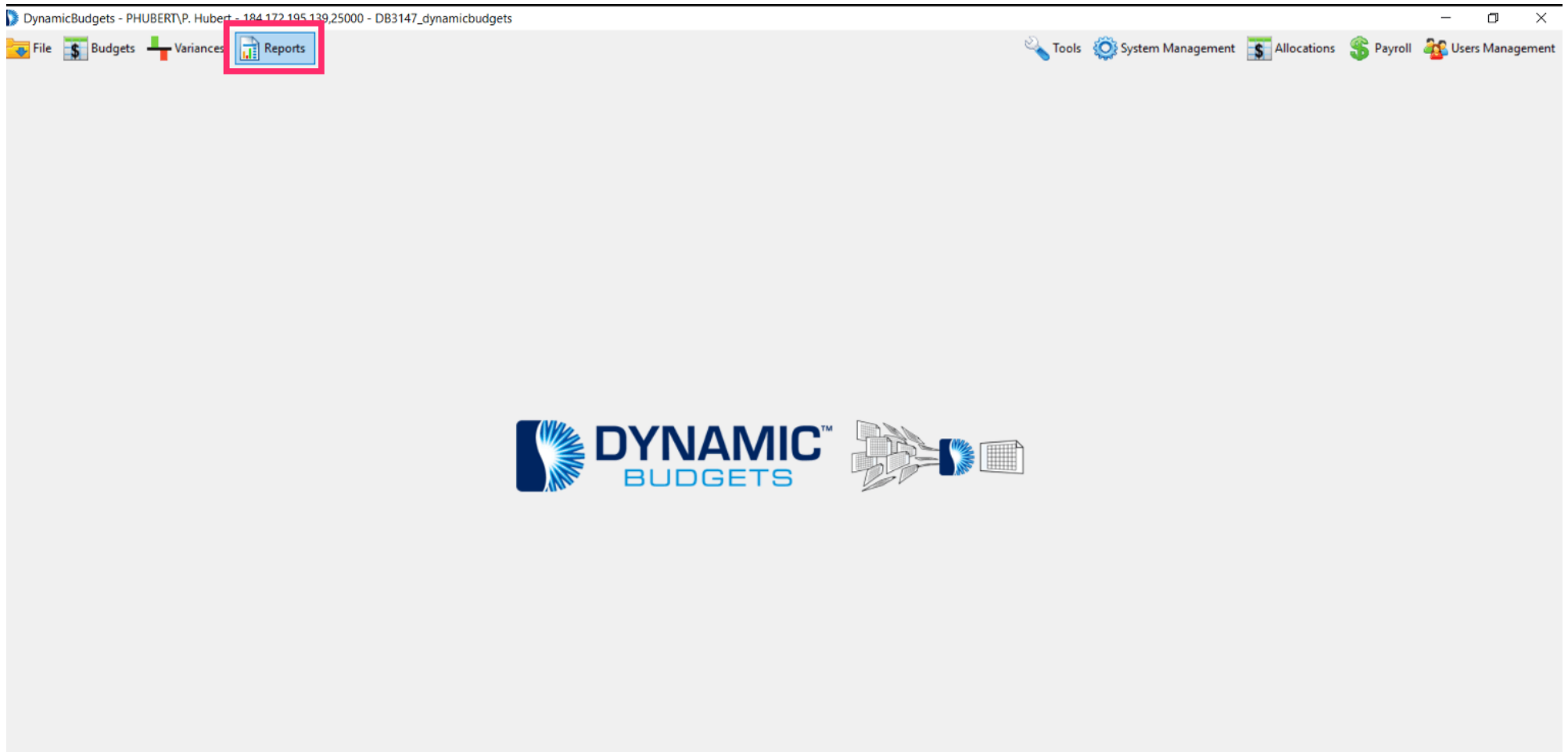
Dynamic Budgets User Guide for Custom Report User Access Visibility



User Guide for Custom Report User Access Visibility

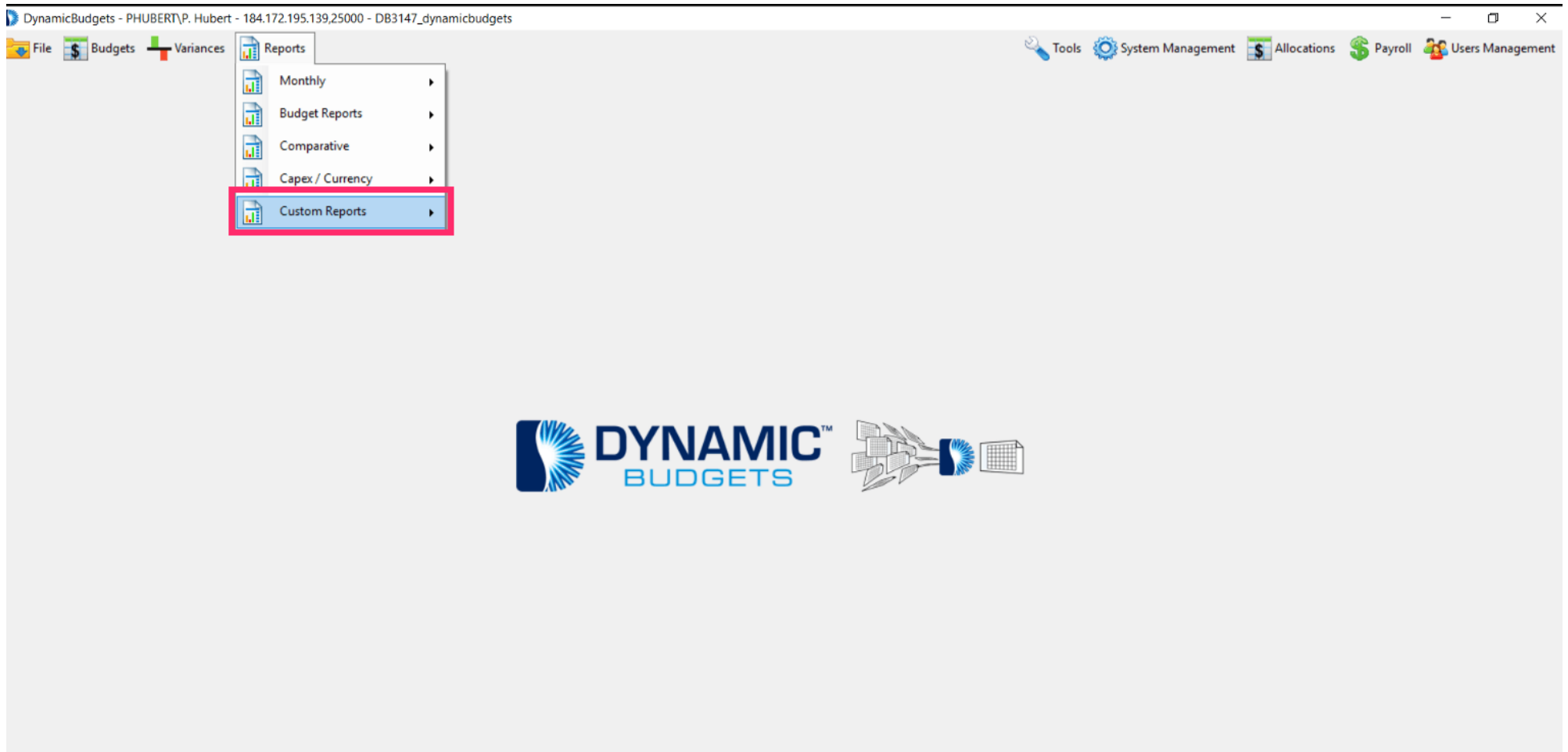


Click on **Reports**.



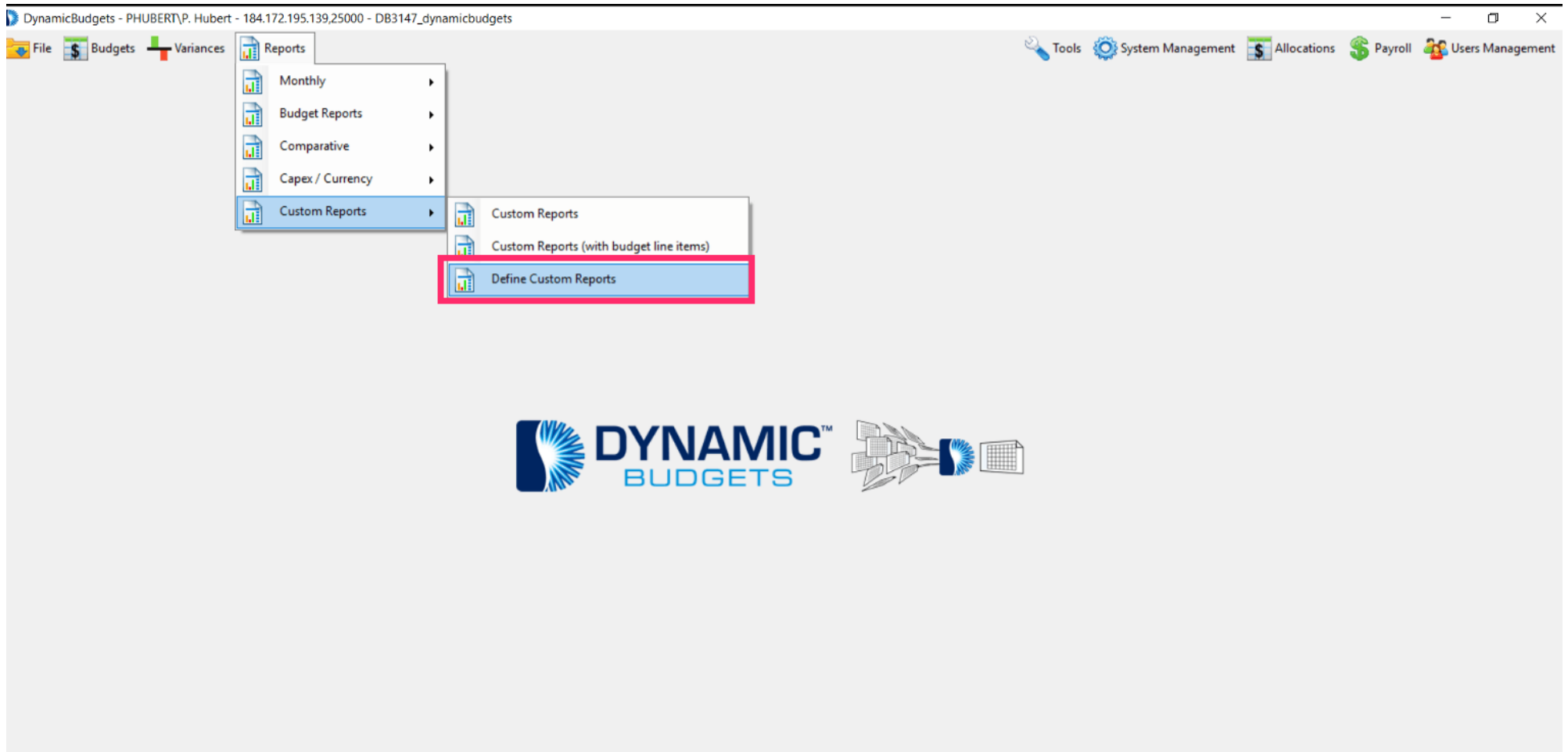


Click on **Custom Reports**.





Click on **Define Custom Reports**.





Click on the **CompanyDB** dropdown list. Make a selection. In this example, we will select **DB3147_two18**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

Company/DB* Report

DB3147_two18 <select>

Save Changes Add New Column Delete Report Add New Report Clone Report

Form Name Primary BudgetID for Accounts List * User access (visibility)

Allow period as input Exclude zero value accounts

Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	VarCompCol	VarBaseCol	VarCommitments	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Th
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- Click on the **Report** dropdown list. Make a selection. In this example, we will select **23 vs 24 Actual**.

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Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18

Report

<select>
<select>
23 vs 24 Actual
23 vs 24 vs 24 Budget
Monthly Summary w/budget & variances 2324

Save Changes Add New Clone Report

Form Name Primary BudgetID for Accounts List* User access (visibility) Disabled

Allow period as input Exclude zero value accounts
Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	VarCompCol	VarBaseCol	VarCommitments	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Th
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Click on the **User Access** dropdown list. Make a selection. You can disable access or allow different levels of user access. **This will enable users to see this report.**

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual # 6 Primary BudgetID for Accounts List * 23 vs 24 Actual

User access (visibility) ☐ Allow period as input ☐ Exclude zero value accounts
☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete key

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month	YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	2023 Actual	ReadOnly	2023 Actual	Dec	YTD	GLCode					Value	<input type="checkbox"/>				
2	2024 Actual	ReadOnly	2024 Actual	Dec	YTD	GLCode					Value	<input type="checkbox"/>				
3	23 vs 24 Actual	VarianceValue		Dec	YTD	GLCode	2	1	1		Value	<input type="checkbox"/>	FFFF80		(Col2 - Col1)	
4	%	VariancePcnt		Dec	YTD	GLCode	2	1	1		Value	<input type="checkbox"/>	80FF80		(Col2 - Col1) / Col1	
5	Enter Comments Here	Comments		Dec	YTD	GLCode	2	1	1		Value	<input type="checkbox"/>				
6	Comments History	CommentsHistory		Dec	YTD	GLCode	2	1	1		Value	<input type="checkbox"/>				
7											Value	<input type="checkbox"/>				
8											Value	<input type="checkbox"/>				
9											Value	<input type="checkbox"/>				
10											Value	<input type="checkbox"/>				
11											Value	<input type="checkbox"/>				
12											Value	<input type="checkbox"/>				
13											Value	<input type="checkbox"/>				
14											Value	<input type="checkbox"/>				
15											Value	<input type="checkbox"/>				

User access (visibility) dropdown options: Administrator - Restricted, Disabled, Application User, Administrator - Restricted, Administrator - Unrestricted, System Manager



Click on **Save Changes**. A message will appear that reads, "Saved changes successfully."

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Reports > Custom Reports > Define Custom Reports

CompanyDB* DB3147_two18 Report 23 vs 24 Actual

Save Changes Add New Column Delete Report Add New Report Clone Report

23 vs 24 Actual Primary BudgetID for Accounts List * 2024 Actual User access (visibility) Administrator - Restricted

☐ Allow period as input ☐ Exclude zero value accounts
☐ Flip sign for Variances (Better\Worse for CR vs DR Accts)

Column Layout Row Layout Accounts Search Filter

To delete a row, click the row header to select the entire row (one or multiple) and then hit the Delete Selected button

Column Position	Column Name	Data Entry Type	BudgetID	Fiscal Month	Month / YTD	Report Level	1st Calc Factor	2nd Calc Factor	3rd Calc Factor	NumberFormat	Hidden	Background Color	Text Color	FormulaResolved	Threshold
1	2023 Actual	ReadOnly	2023 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
2	2024 Actual	ReadOnly	2024 Actual	Dec	YTD	GLCode				Value	<input type="checkbox"/>				
3	23 vs 24 Actual	VarianceValue		Dec	YTD	GLCode	2	1	1	Value	<input type="checkbox"/>	FFFF80		(Col2 - Col1)	
4	%	VariancePcnt		Dec	YTD	GLCode	2	1	1	Value	<input type="checkbox"/>	80FF80		(Col2 - Col1) / Col1	
5	Enter Comments Here	Comments		Dec	YTD	GLCode	2	1	1	Value	<input type="checkbox"/>				
6	Comments History	CommentsHistory		Dec	YTD	GLCode	2	1	1	Value	<input type="checkbox"/>				
7										Value	<input type="checkbox"/>				
8										Value	<input type="checkbox"/>				
9										Value	<input type="checkbox"/>				
10										Value	<input type="checkbox"/>				
11										Value	<input type="checkbox"/>				
12										Value	<input type="checkbox"/>				
13										Value	<input type="checkbox"/>				
14										Value	<input type="checkbox"/>				
15										Value	<input type="checkbox"/>				



That's It. You're Done.



That's It. You're Done.