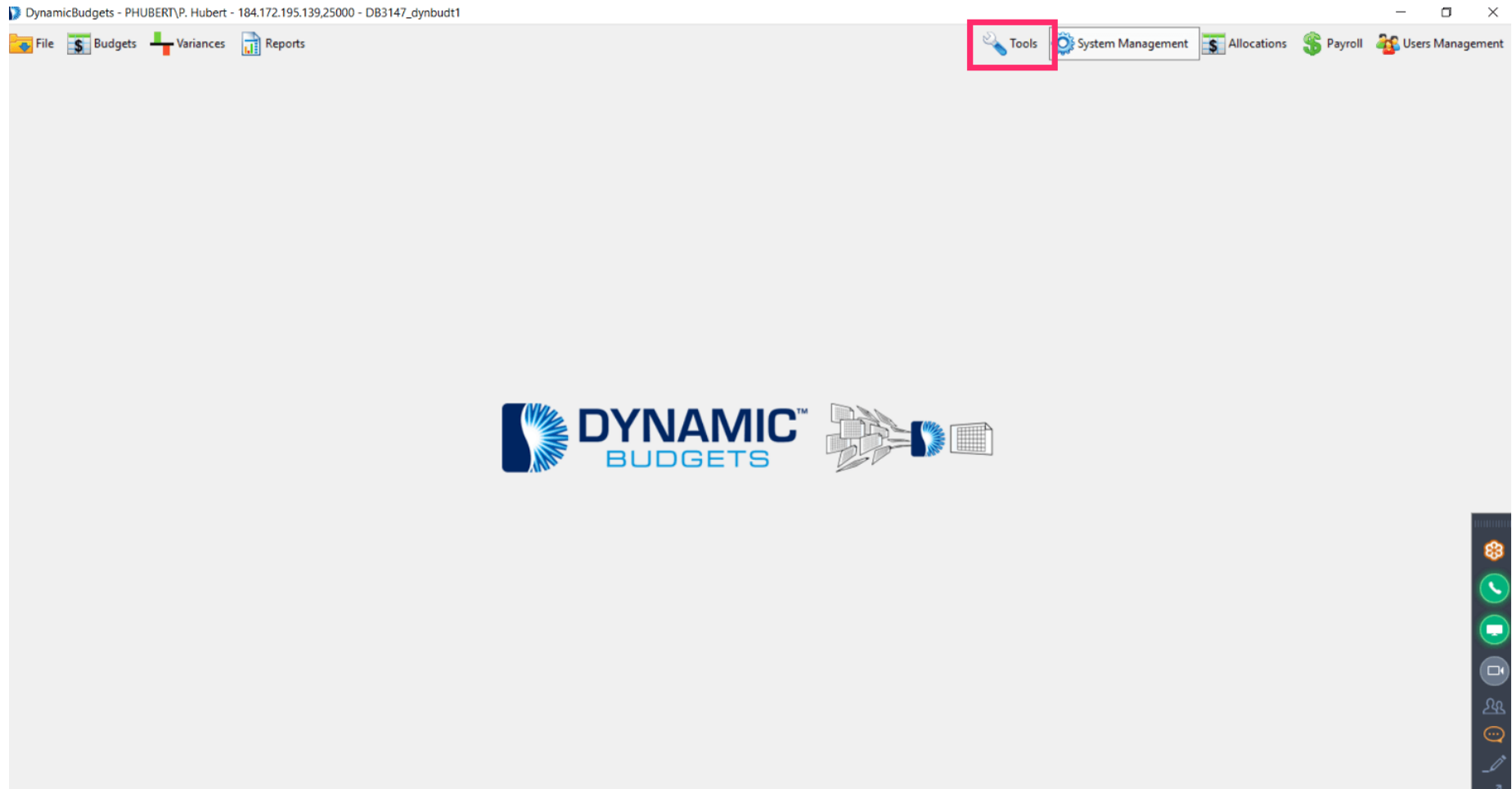


 Dynamic Budgets User Guide for Duplicate Budget.



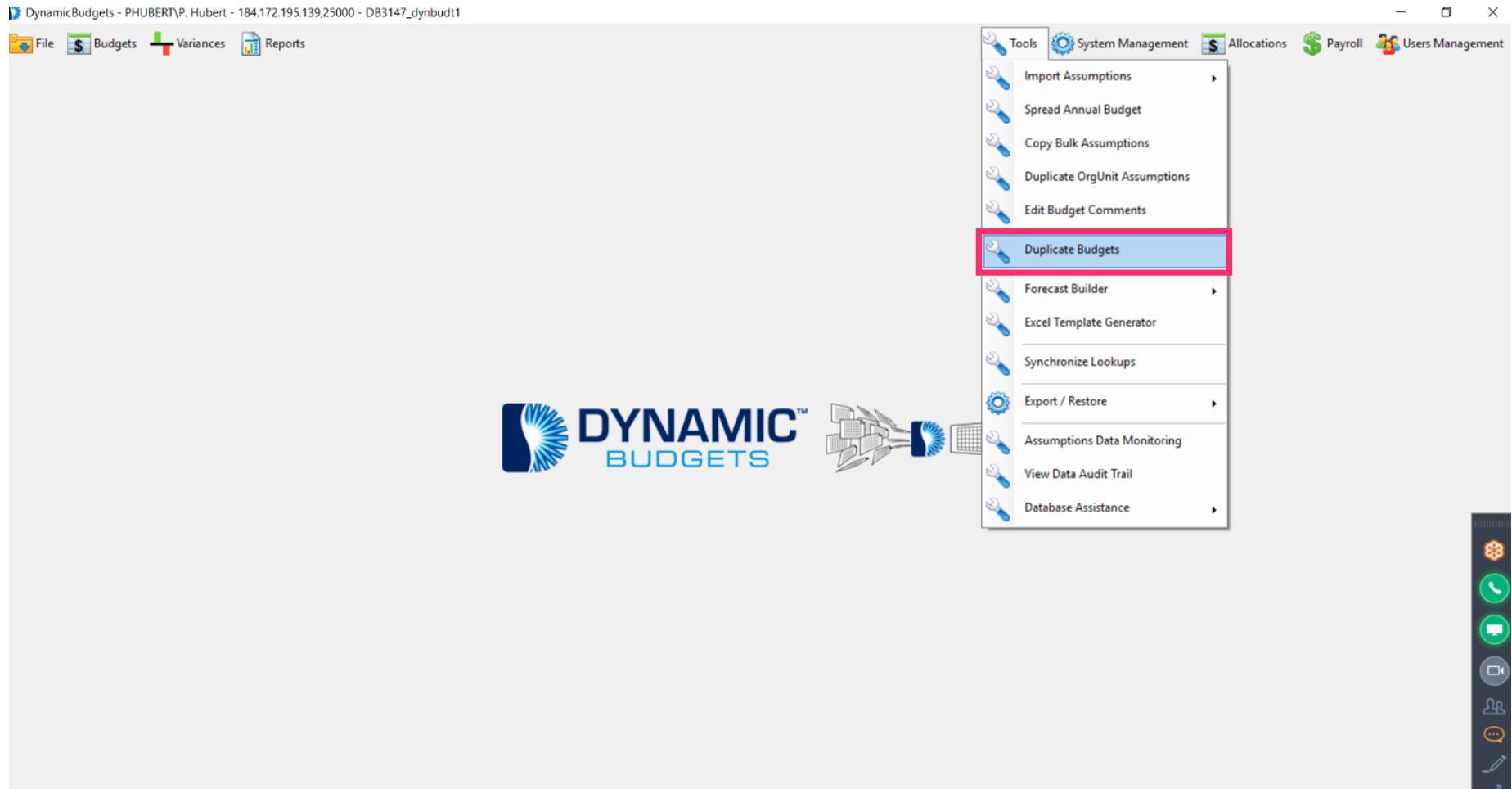


Click on **Tools**.





Click on **Duplicate Budgets**.





You will automatically navigate to the **Duplicate Assumptions** tab.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments
☐ Include file attachments
☐ Include edit status

Duplicate

Source data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

New BudgetID (max 15 chars)

Duplicated data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.



Select the CompanyDB to copy from the dropdown menu. For this example, we will select **TWO**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO (selected)
 Select BudgetID to copy: Test 2018 Bud
☐ Include file attachments
☐ Include edit status
 Duplicate

Source data

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

New BudgetID (max 15 chars)

Duplicated data

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Map Lookup BudgetIDs Log



Select the BudgetID to copy from the dropdown menu. For this example, we will select **Test 2018 Bud.**

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO

☐ Include account approval

☐ Include file attachments

☐ Include edit status

Source data

BudgetID	Test 2018 Bud
Budgeted_Accounts	322
Budgeted_Assumptions	2

Select BudgetID to copy

- Test 2018 Bud
- PH Budget
- Test 2018 Bud**
- Test FCAST 2017

Duplicate

New BudgetID (max 15 chars)

Duplicated data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs Log



Now you have 3 optional selections to include with your duplicate assumptions: 1. You can click in the box to **Include account approvals and comments**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO

Select BudgetID to copy: Test 2018 Bud

☒ Include account approvals and comments

☐ Include file attachments

☐ Include edit status

Source data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Duplicated data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.

2. You can click in the box to **Include file attachments**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO

Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments

☒ Include file attachments

☐ Include edit status

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Duplicated data:

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Source data:

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.



3. You can click in the box to **Include edit status**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO

Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments

☐ Include file attachments

☒ Include edit status

Source data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Duplicated data

BudgetID	
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.



Note: You can select all three options if necessary.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO Select BudgetID to copy: Test 2018 Bud

☒ Include account approvals and comments
☒ Include file attachments
☒ Include edit status

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Source data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Duplicated data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.



In this example, we will uncheck all options.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO

Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments

☐ Include file attachments

☐ Include edit status

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Duplicated data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Source data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.

Click in the New BudgetID box and **type 2019 Budget**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments
☐ Include file attachments
☐ Include edit status

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Source data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Duplicated data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.



Click on **Duplicate**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments

☐ Include file attachments

☐ Include edit status

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Source data:

BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Duplicated data:

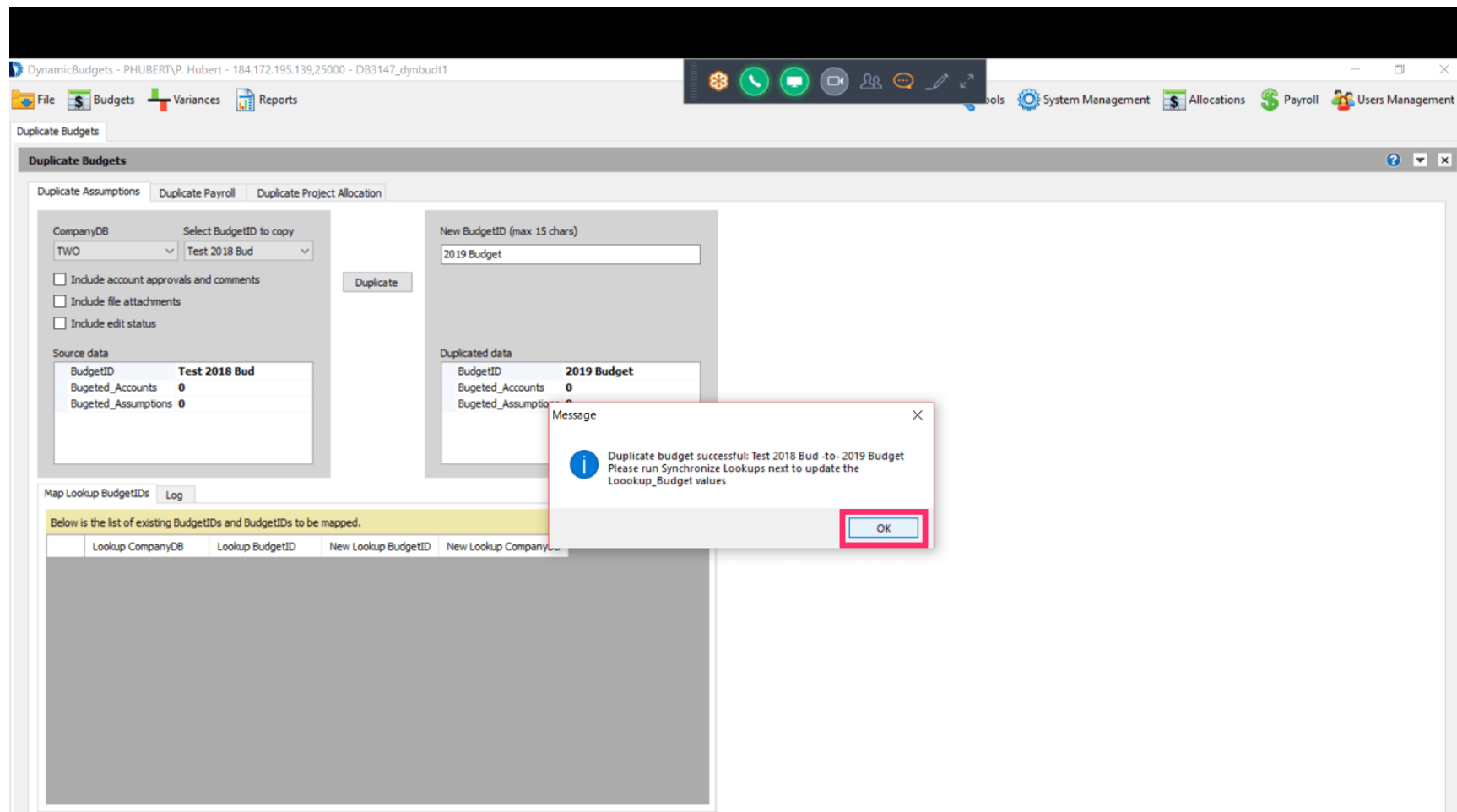
BudgetID	Budgeted_Accounts	Budgeted_Assumptions
	0	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.

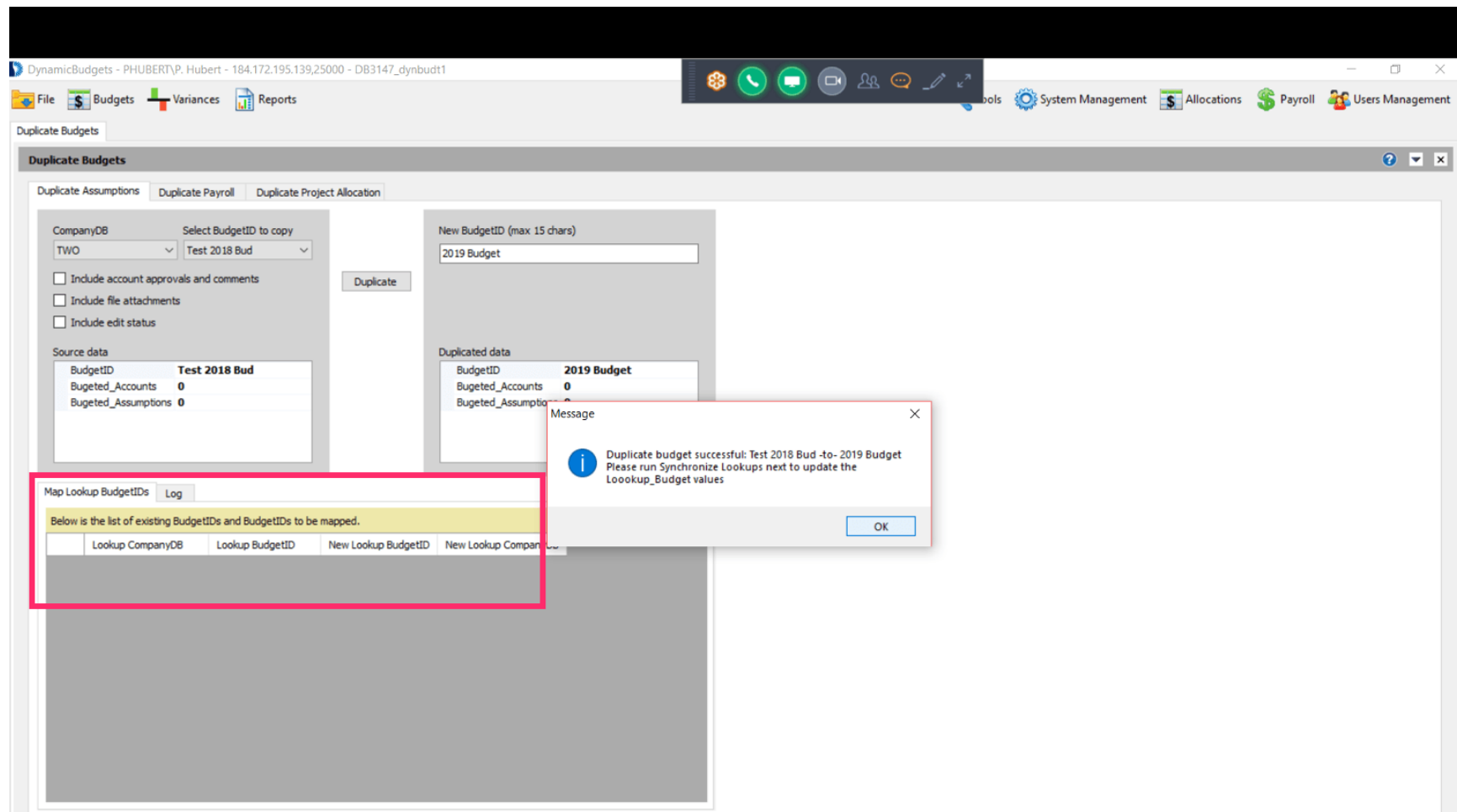


A message box will appear that reads, **Duplicate budget successful: Test 2018 Bud-to-2019 Budget**. Please run Synchronize Lookups next to update the Lookup_Budget values. Now Click **OK**.





Note: You do NOT need to run the Synchronize routine if the **Map Lookup BudgetIDs** tab is empty or does not list BudgetIDs to be mapped.



DynamicBudgets - PHUBERT\p. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Duplicate Budgets

Duplicate Assumptions Duplicate Payroll Duplicate Project Allocation

CompanyDB: TWO Select BudgetID to copy: Test 2018 Bud

☐ Include account approvals and comments

☐ Include file attachments

☐ Include edit status

Source data

BudgetID	Test 2018 Bud
Budgeted_Accounts	0
Budgeted_Assumptions	0

Duplicate

New BudgetID (max 15 chars): 2019 Budget

Duplicated data

BudgetID	2019 Budget
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.

Lookup CompanyDB	Lookup BudgetID	New Lookup BudgetID	New Lookup Company
------------------	-----------------	---------------------	--------------------

Message

Duplicate budget successful: Test 2018 Bud -to- 2019 Budget
Please run Synchronize Lookups next to update the Lookup_Budget values

OK



To verify the duplicate budget is added, click on **System Management**.

DynamicBudgets - PHUBERT\p. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File
Budgets
Variances
Reports

System Management
Allocations
Payroll
Users Management

Duplicate Budgets

Duplicate Assumptions
Duplicate Payroll
Duplicate Project Allocation

CompanyDB
Select BudgetID to copy

TWO
Test 2018 Bud

☐ Include account approvals and comments
☐ Include file attachments
☐ Include edit status

Source data

BudgetID	Test 2018 Bud
Budgeted_Accounts	0
Budgeted_Assumptions	0

New BudgetID (max 15 chars)

2019 Budget

Duplicated data

BudgetID	2019 Budget
Budgeted_Accounts	0
Budgeted_Assumptions	0

Map Lookup BudgetIDs
Log

Below is the list of existing BudgetIDs and BudgetIDs to be mapped.

	Lookup CompanyDB	Lookup BudgetID	New Lookup BudgetID	New Lookup CompanyDB



Click on **Budgets, Manage Budgets.**

The screenshot shows the 'DynamicBudgets' application window. The main window is titled 'Duplicate Budgets' and contains several tabs: 'Duplicate Assumptions', 'Duplicate Payroll', and 'Duplicate Project Allocation'. The 'Duplicate Assumptions' tab is active, showing a form with 'CompanyDB' set to 'TWO' and 'Select BudgetID to copy' set to 'Test 2018 Bud'. There are checkboxes for 'Include account approvals and comments', 'Include file attachments', and 'Include edit status'. A 'Duplicate' button is visible. Below the form is a table showing 'Source data' for 'Test 2018 Bud' with columns 'BudgetID', 'Budgeted_Accounts', and 'Budgeted_Assumptions'. The 'Duplicate Assumptions' table shows 'BudgetID' as '2019 Budget' and 'Budgeted_Accounts' and 'Budgeted_Assumptions' as '0'. At the bottom, there is a 'Map Lookup BudgetIDs' section with a table header: 'Lookup CompanyDB', 'Lookup BudgetID', 'New Lookup BudgetID', and 'New Lookup CompanyDB'. The 'System Management' menu is open, showing options like 'Manage Servers', 'Companies', 'Chart of Accounts', 'OrgUnits', 'Objects', 'Budgets', 'Accounts', and 'More..'. The 'Budgets' option is highlighted with a red box.



Select CompanyDB **TWO**.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports

Duplicate Budgets Manage Budgets

Manage Budgets

CompanyDB **TWO** Show Budgets

Link ERP Budgets Link to Company (specified above)

Selected Budget

All Budgets

Selected Budget for All Companies

Enter New Custom Budget Create New Budget

Budget Year # of Years

Historical Average 2017 3 Create Average

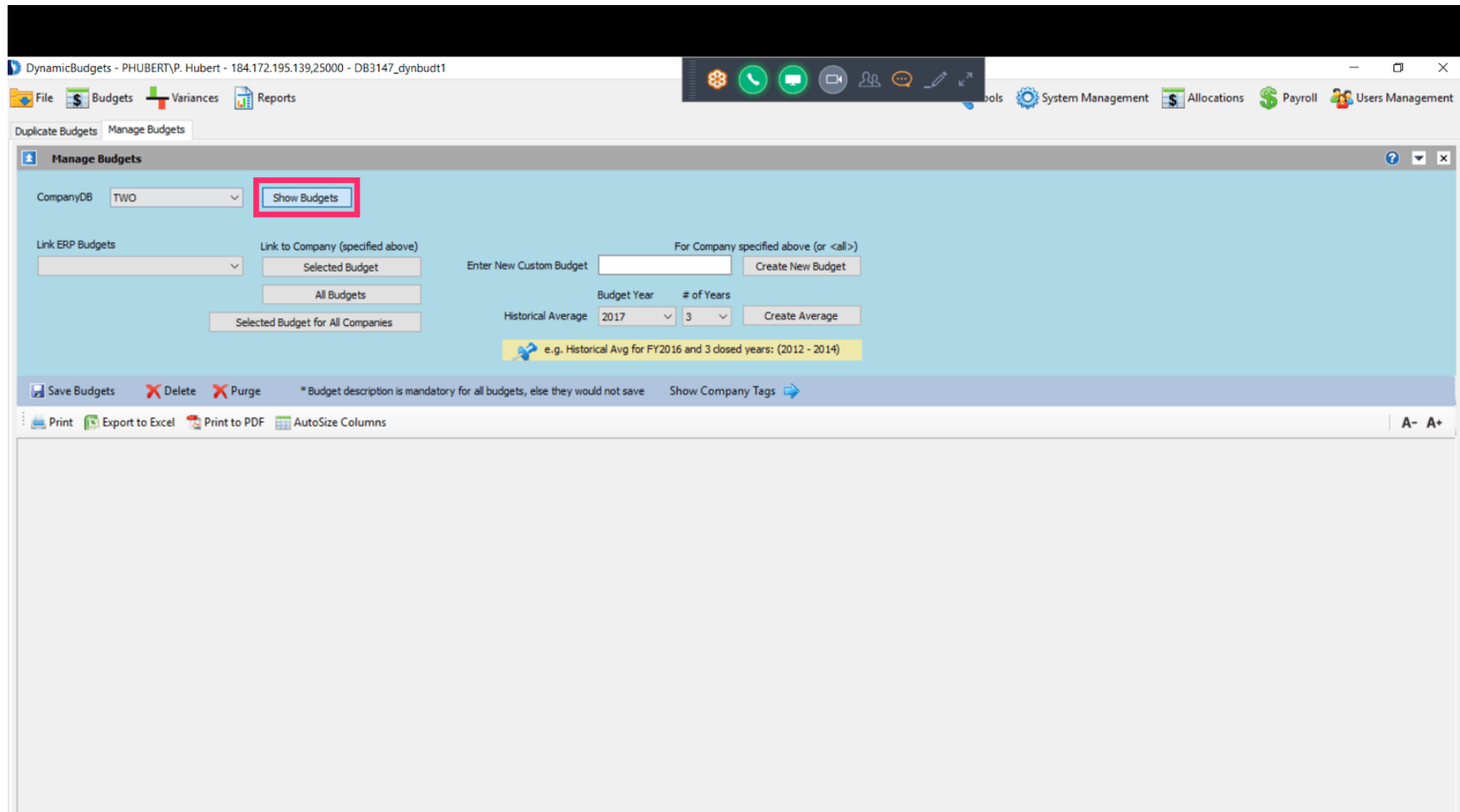
e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge * Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns



Click on **Show Budgets**.



DynamicBudgets - PHUBERT\p. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports

Duplicate Budgets Manage Budgets

Manage Budgets

CompanyDB: TWO **Show Budgets**

Link ERP Budgets:

Link to Company (specified above): Selected Budget All Budgets Selected Budget for All Companies

Enter New Custom Budget: Create New Budget

Budget Year: 2017 # of Years: 3 Create Average

Historical Average: 2017 3 e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge * Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns



Now you see that 2019 Budget was added.

DynamicBudgets - PHUBERT\p. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports

Duplicate Budgets Manage Budgets

Manage Budgets

CompanyDB: TWO Show Budgets

Link ERP Budgets: [Dropdown] Link to Company (specified above): [Dropdown] Selected Budget: [Dropdown] All Budgets: [Dropdown] Selected Budget for All Companies: [Dropdown]

Enter New Custom Budget: [Text Box] Create New Budget

Budget Year: [Dropdown] # of Years: [Dropdown] Create Average

Historical Average: 2017 3 e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge * Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns Rows: 10 A+ A-

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_TWO15	2014 Actual	2014 Actual	2014	01/01/2014	12/31/2014	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2015 Actual	2015 Actual	2015	01/01/2015	12/31/2015	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2016 Actual	2016 Actual	2016	01/01/2016	12/31/2016	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2017 Actual	2017 Actual	2017	01/01/2017	12/31/2017	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2018 Actual	2018 Actual	2018	01/01/2018	12/31/2018	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2019 Budget	2019 Budget	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	BUDGET1	Demo	2014	01/01/2014	12/31/2014	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	PH Budget	PH Budget	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	Test 2018 Bud	Test 2018 Bud	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	Test FCAST 2017	Test FCAST 2017	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Click on the X to close.

DynamicBudgets - PHUBERT\p. Hubert - 184.172.195.139,25000 - DB3147_dynbudt1

File Budgets Variances Reports

Tools System Management Allocations Payroll Users Management

Duplicate Budgets Manage Budgets

Manage Budgets

CompanyDB: TWO Show Budgets

Link ERP Budgets: [Dropdown] Selected Budget: [Dropdown] All Budgets: [Dropdown] Selected Budget for All Companies: [Dropdown]

Link to Company (specified above)

Enter New Custom Budget: [Text Box] Create New Budget

Budget Year: 2017 # of Years: 3 Create Average

Historical Average: 2017 3 e.g. Historical Avg for FY2016 and 3 closed years: (2012 - 2014)

Save Budgets Delete Purge * Budget description is mandatory for all budgets, else they would not save Show Company Tags

Print Export to Excel Print to PDF AutoSize Columns Rows: 10 A- A+

CompanyDB	BudgetID (15)	Description (30)	Year	FromDate	ToDate	Source	Locked	Actual	Imported	SortOrder	UserRoleAccess	IsBudgeted	InSummary	InLookups	InReports
DB3147_TWO15	2014 Actual	2014 Actual	2014	01/01/2014	12/31/2014	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2015 Actual	2015 Actual	2015	01/01/2015	12/31/2015	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2016 Actual	2016 Actual	2016	01/01/2016	12/31/2016	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2017 Actual	2017 Actual	2017	01/01/2017	12/31/2017	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2018 Actual	2018 Actual	2018	01/01/2018	12/31/2018	ERP	Not Locked	True	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	2019 Budget	2019 Budget	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	BUDGET1	demo	2014	01/01/2014	12/31/2014	ERP	Not Locked	False	True	0	Application Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	PH Budget	PH Budget	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	Test 2018 Bud	Test 2018 Bud	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DB3147_TWO15	Test FCAST 2017	Test FCAST 2017	2017	11/01/2017	11/01/2017	DynamicB	Not Locked	False	False	0	Application Use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



That's It. You're Done



That's It. You're Done.