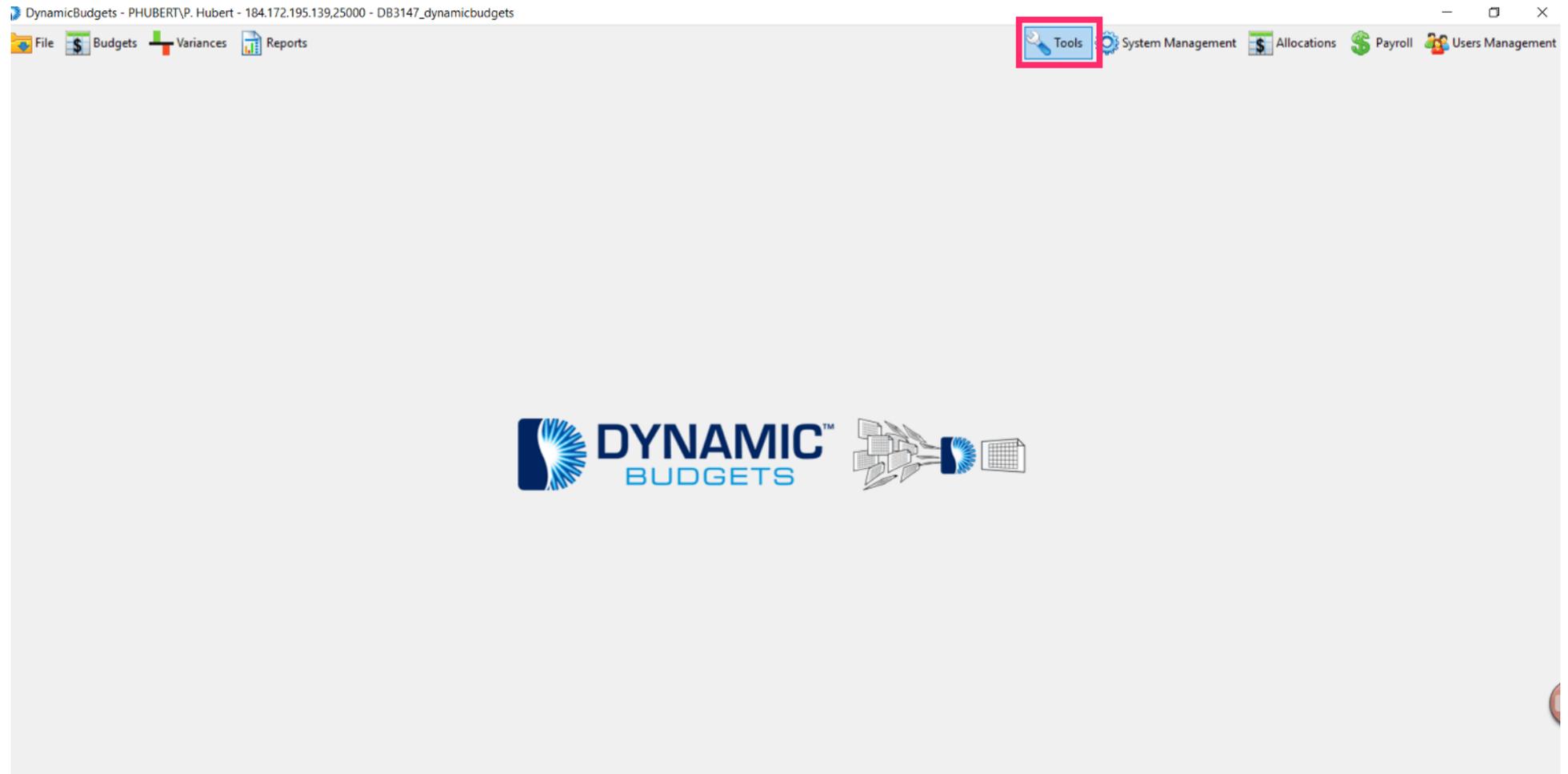


 Dynamic Budgets User Guide for Edit Budget Comments



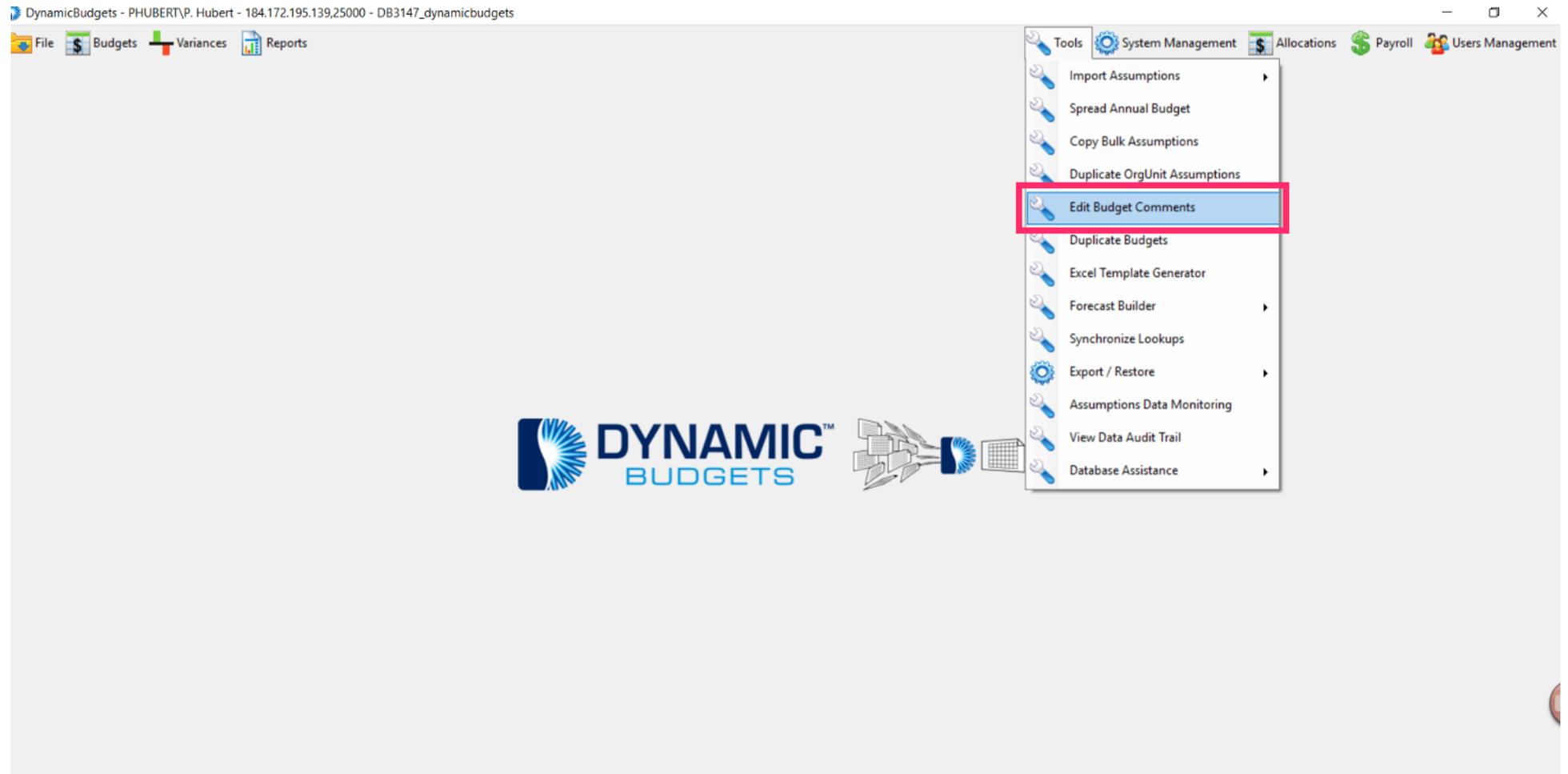


We are going to review how to edit budget comments. Let's get started. Click on **Tools**.



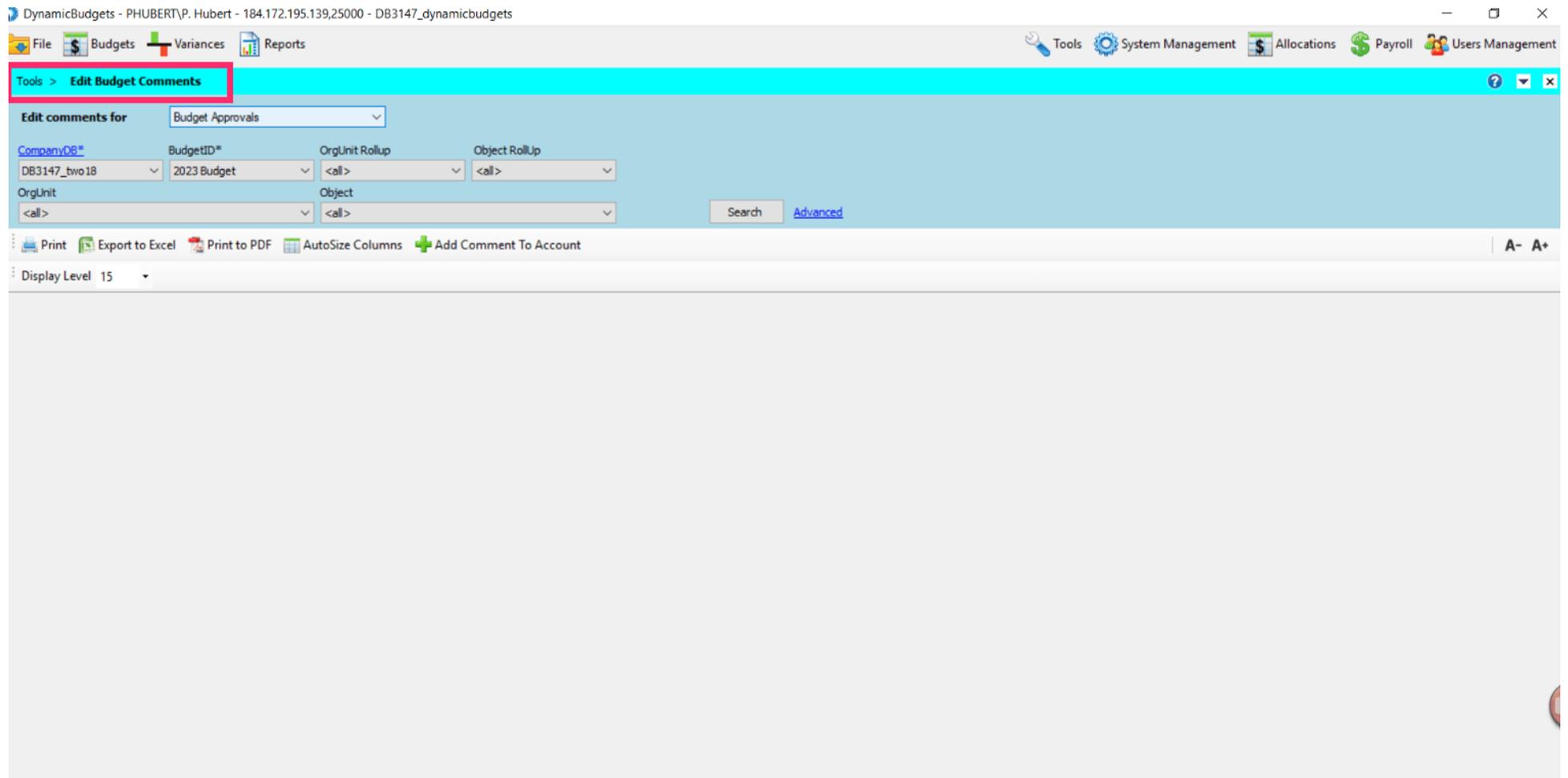


Click on **Edit Budget Comments**.





Note: *As a reminder, this path shows you how to get to this screen again.* In this example, you would go to the Tools menu, then Edit Budget Comments.





Click on the Edit Comments for dropdown list. Make your selection. In this example, select Budget Approvals.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Tools > Edit Budget Comments

Edit comments for Budget Approvals

CompanyDB* BudgetID* OrgUnit Rollup Object RollUp

DB3147_two18 2023 Budget <all> <all>

OrgUnit Object

<all> <all> Search Advanced

Print Export to Excel Print to PDF AutoSize Columns Add Comment To Account A- A+

Display Level 15

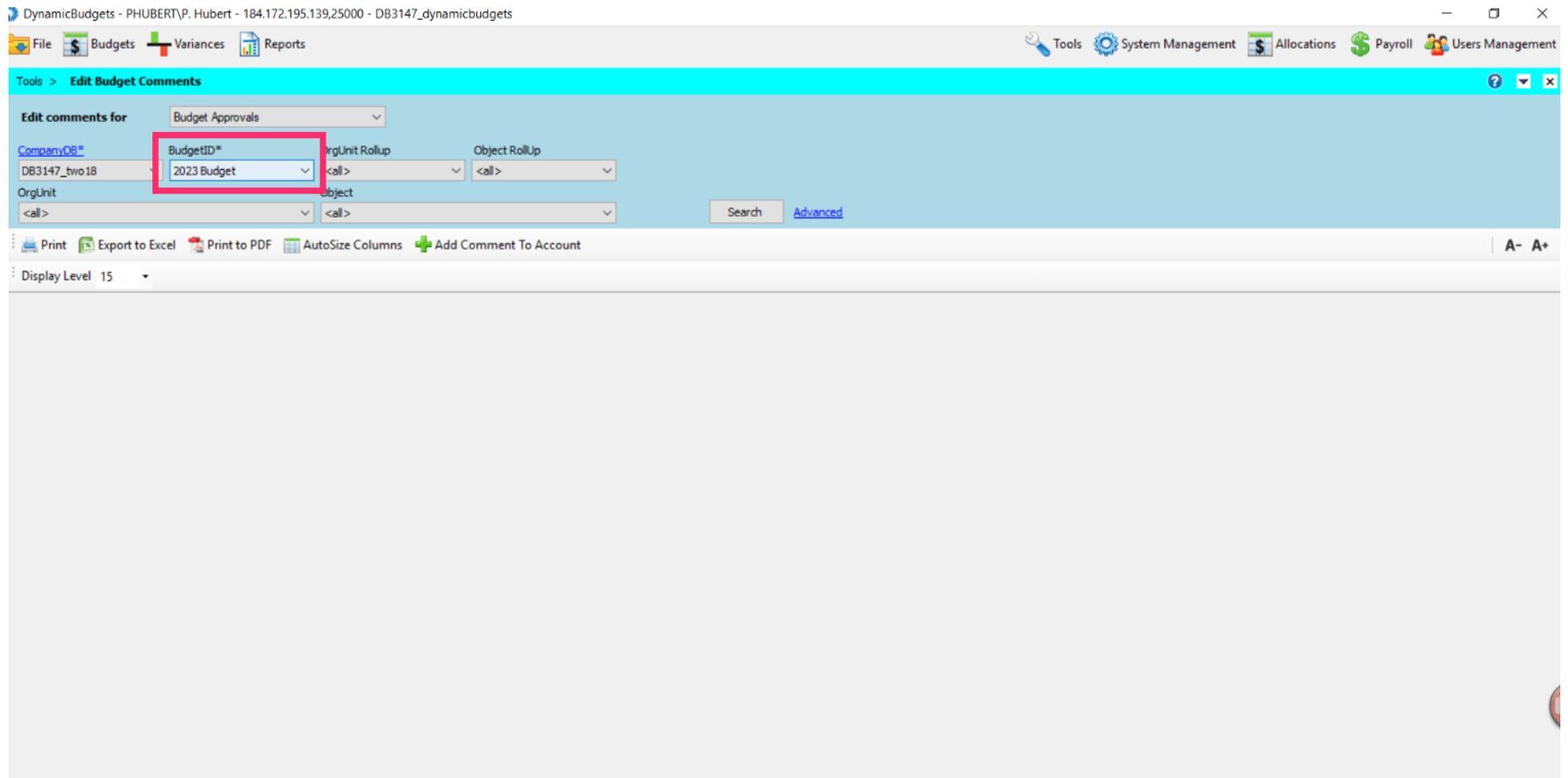


Click on the **CompanyDB** dropdown list. Make your selection. In this example, select DB3147_two18.

The screenshot shows the 'Edit Budget Comments' interface. At the top, there's a navigation bar with 'File', 'Budgets', 'Variances', and 'Reports'. Below that, a toolbar contains 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. The main content area is titled 'Edit Budget Comments' and includes a dropdown for 'Edit comments for' set to 'Budget Approvals'. Below this are several dropdown menus: 'CompanyDB*' (highlighted with a red box and containing 'DB3147_two18'), 'BudgetID*' (containing '023 Budget'), 'OrgUnit Rollup' (containing '<all>'), and 'Object RollUp' (containing '<all>'). There are also 'Original' and 'Object' dropdowns. A 'Search' button and a link to 'Advanced' are present. At the bottom, there's a toolbar with 'Print', 'Export to Excel', 'Print to PDF', 'AutoSize Columns', and 'Add Comment To Account'. The 'Display Level' is set to '15'.

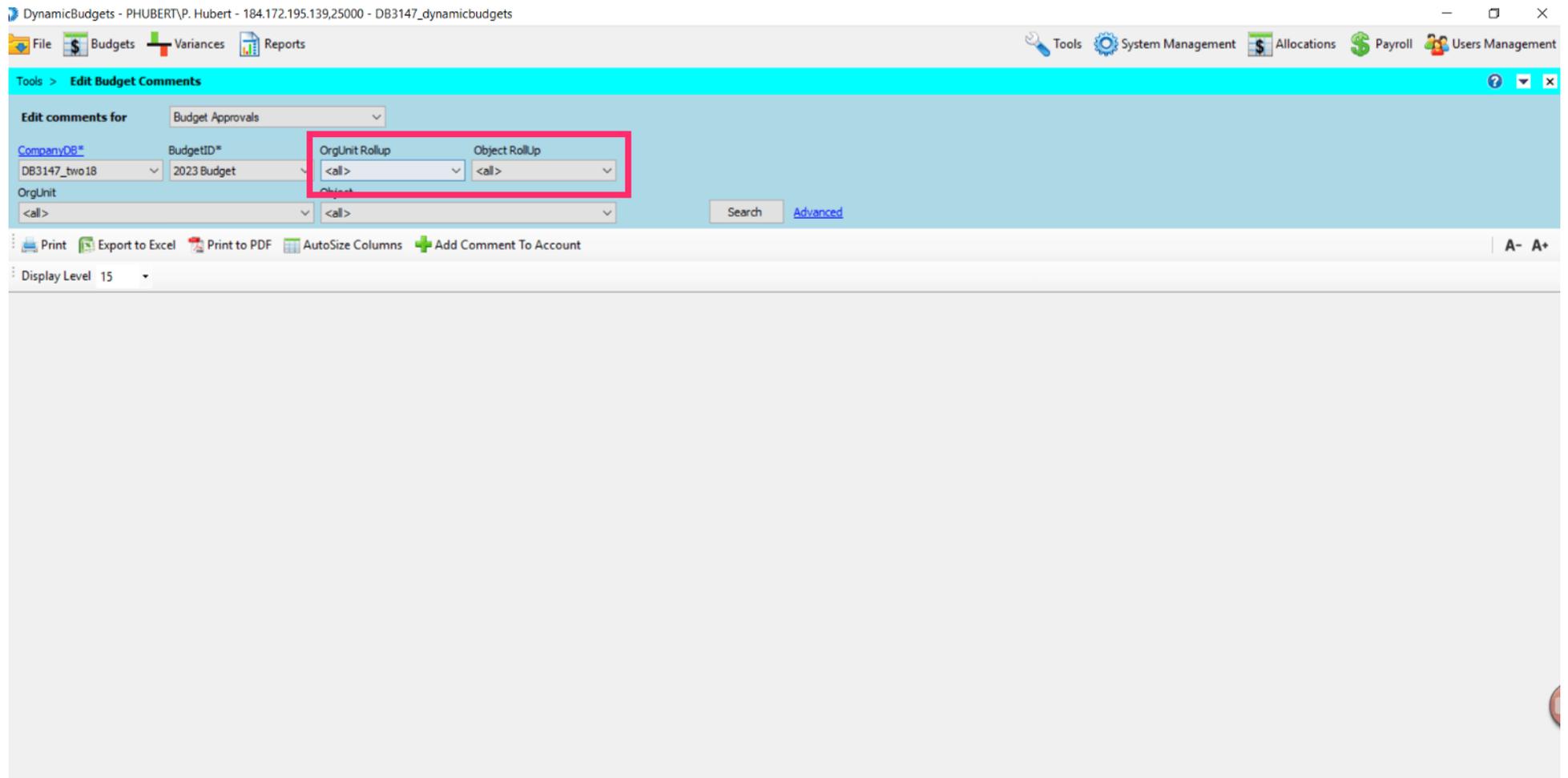


Click on the BudgetID dropdown list. Make your selection. In this example, select 2023 Budget.





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



The screenshot shows the 'Edit Budget Comments' interface. At the top, there's a navigation bar with 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. Below that, the 'Edit Budget Comments' section is active. It features a dropdown for 'Edit comments for' set to 'Budget Approvals'. Below this, there are fields for 'CompanyDB*' (DB3147_two18) and 'BudgetID*' (2023 Budget). The 'OrgUnit Rollup' and 'Object RollUp' dropdowns are highlighted with a red box and both show '<all>'. There are also 'OrgUnit' and 'Object' dropdowns below them, both set to '<all>'. A 'Search' button and a link to 'Advanced' are present. At the bottom, there's a toolbar with 'Print', 'Export to Excel', 'Print to PDF', 'AutoSize Columns', and 'Add Comment To Account'. The 'Display Level' is set to 15.



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



UG-Edit Budget Comments

zgidwani



Click on **Search**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Tools > Edit Budget Comments

Edit comments for Budget Approvals

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

OrgUnit <all> Object <all> Search Advanced

Print Export to Excel Print to PDF AutoSize Columns Add Comment To Account A- A+

Display Level 15



Now you see the comments posted to date which include UpdatedBy, Comments, and Date the comment was posted.

The screenshot shows the 'Edit Budget Comments' interface. At the top, there are navigation tabs: File, Budgets, Variances, and Reports. Below these are various tool icons: Tools, System Management, Allocations, Payroll, and Users Management. The main header is 'Tools > Edit Budget Comments'. Below this, there are several dropdown menus for filtering: 'Edit comments for' (set to Budget Approvals), 'CompanyDB*' (DB3147_two18), 'BudgetID*' (2023 Budget), 'OrgUnit Rollup' (<all>), 'Object RollUp' (<all>), 'OrgUnit' (<all>), and 'Object' (<all>). There are 'Search' and 'Advanced' buttons. Below the filters, there are action buttons: Print, Export to Excel, Print to PDF, AutoSize Columns, and Add Comment To Account. The table below has columns for 'UpdatedBy', 'COMMENTS', 'Delete', and 'Save'. A red box highlights a comment entry with the following details:

UpdatedBy	COMMENTS	Delete	Save
PHUBERT.P. Hubert	Great!	Delete	Save Changes

 Double-click in the white comment cell. Make any necessary changes.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Tools > Edit Budget Comments

Edit comments for Budget Approvals

CompanyDB* BudgetID* OrgUnit Rollup Object RollUp

DB3147_two18 2023 Budget <all> <all>

OrgUnit Object

<all> <all> Search Advanced

Print Export to Excel Print to PDF AutoSize Columns Add Comment To Account Rows: 1 A- A+

Display Level 15

UpdatedBy	COMMENTS	Delete	Save
100-6130-00 Supplies/Hardware - Administration			
2019-01-14 11:08:37			
PHUBERT\p. Hubert	Great!	Delete	Save Changes



Click on **Save Changes**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Tools > Edit Budget Comments

Edit comments for: Budget Approvals

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

OrgUnit: <all> Object: <all> Search Advanced

Print Export to Excel Print to PDF AutoSize Columns Add Comment To Account Rows: 1 A- A+

Display Level 15

UpdatedBy	COMMENTS	Delete	Save
PHUBERT\p. Hubert	Great Job!	Delete	Save Changes



Click on **Yes** to confirm changes.

The screenshot shows the 'Edit Budget Comments' interface. At the top, there are navigation tabs: File, Budgets, Variances, and Reports. Below these are icons for Tools, System Management, Allocations, Payroll, and Users Management. The main content area is titled 'Edit Budget Comments' and contains several dropdown menus for 'Edit comments for', 'CompanyDB*', 'BudgetID*', 'OrgUnit Rollup', 'Object RollUp', 'OrgUnit', and 'Object'. There are also 'Search' and 'Advanced' buttons. Below the filters, there are icons for 'Print', 'Export to Excel', 'Print to PDF', 'AutoSize Columns', and 'Add Comment To Account'. A table is displayed with columns 'UpdatedBy' and 'COMMENTS'. A row is selected with 'PHUBERT\P. Hubert' and 'Great Job!'. A 'Confirm' dialog box is overlaid on the table, asking 'Are you sure to save changes to this comment?'. The 'Yes' button in the dialog is highlighted with a red box.

If you need to delete the comment, click on **Delete**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Tools > Edit Budget Comments

Edit comments for Budget Approvals

CompanyDB* BudgetID* OrgUnit Rollup Object Rollup

DB3147_two18 2023 Budget <all> <all>

OrgUnit Object

<all> <all> Search Advanced

Print Export to Excel Print to PDF AutoSize Columns Add Comment To Account Rows: 1 A- A+

Display Level 15

UpdatedBy	COMMENTS	Delete	Save
PHUBERT\p. Hubert	Great Job!	Delete	Save Changes



Click on **Yes** to confirm deleted comment.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Tools > Edit Budget Comments

Edit comments for Budget Approvals

CompanyDB* BudgetID* OrgUnit Rollup Object Rollup

DB3147_two18 2023 Budget <all> <all>

OrgUnit Object

<all> <all> Search Advanced

Print Export to Excel Print to PDF AutoSize Columns Add Comment To Account Rows: 1 A- A+

Display Level 15

UpdatedBy	COMMENTS	Delete	Save
PHUBERT\p. Hubert	Great Job!	Delete	Save Changes

100-6130-00 Supplies/Hardware - Administration

2019-01-14 11:08:37

Confirm

Are you sure to delete this comment?

Yes No



That's It. You're Done.



That's It. You're Done.