Dynamic Budgets User Guide for Manage OrgUnits

DYNAMIC™ BUDGETS

User Guide

for

Manage OrgUnits

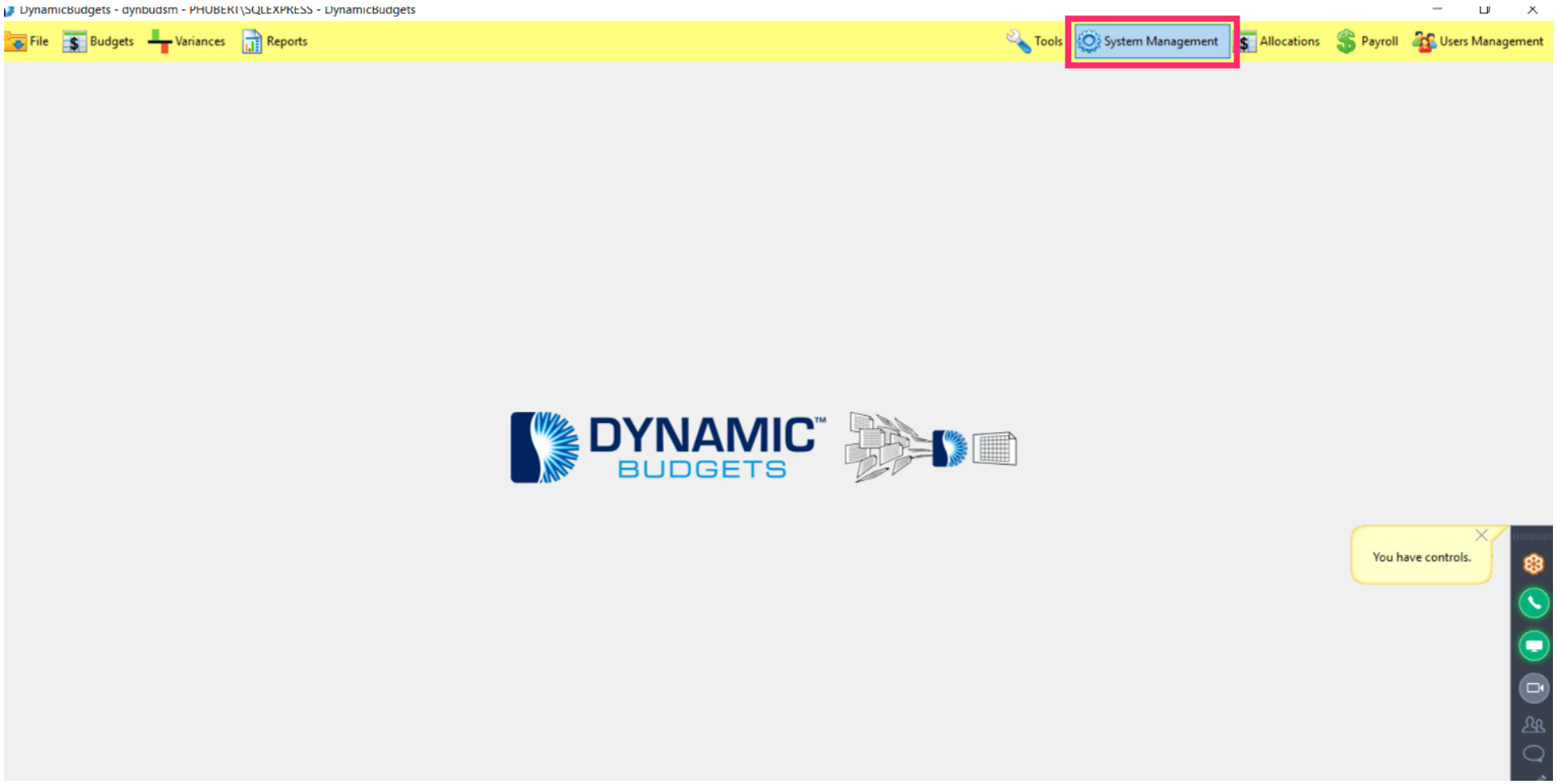
Add OrgUnits, Manage OrgUnits: Module Purpose During Client Configuration, the client's OrgUnits or Depts need to be added to Dynamic Budgets to make them available for budgeting and reporting purposes. They are managed in the Manage OrgUnits tab.

DYNAMIC™ BUDGETS

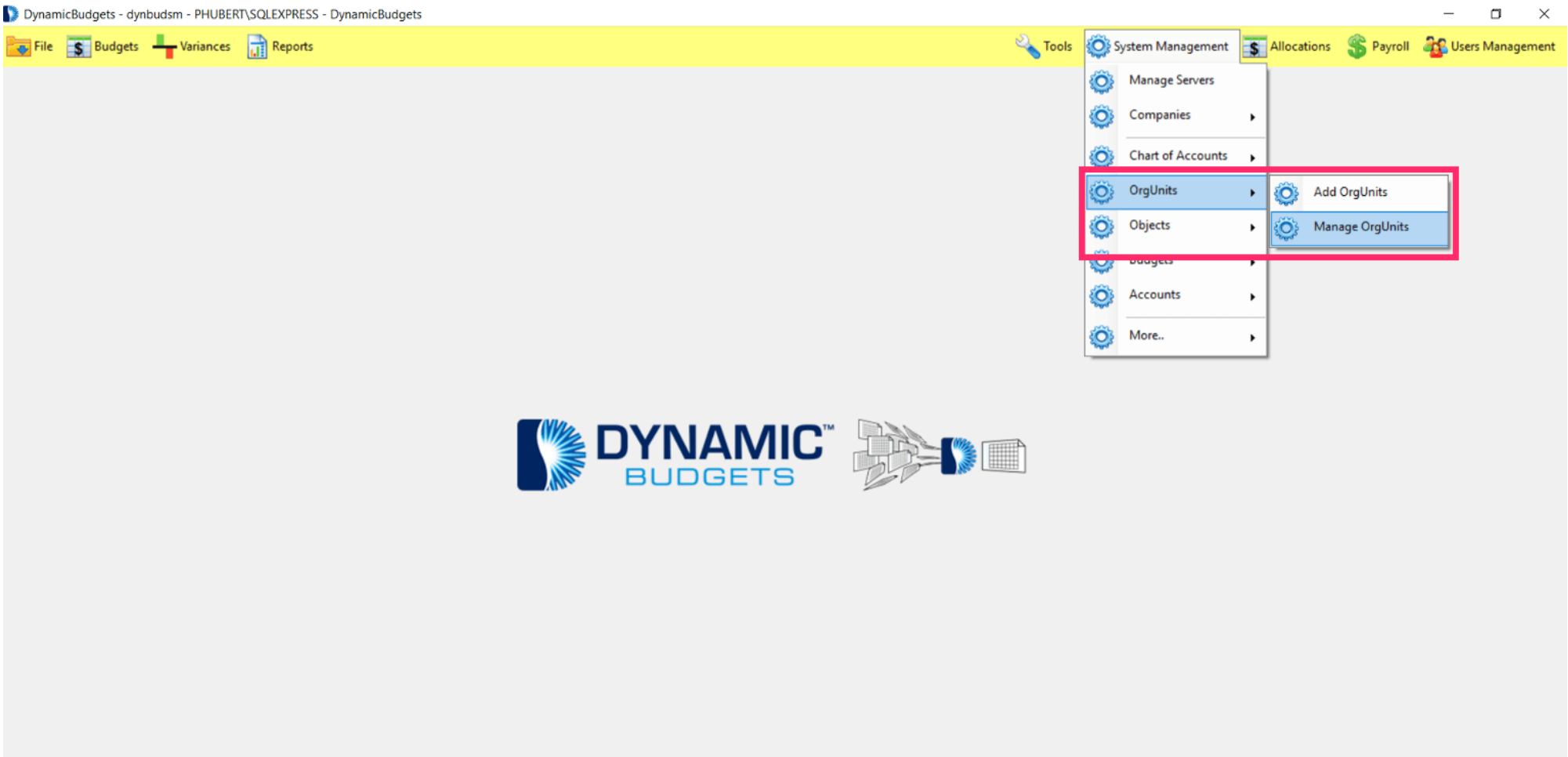
Add OrgUnits, Manage OrgUnits

Purpose: During Client Configuration, the client's OrgUnits, which are typically called departments in most organizations, need to be added to Dynamic Budgets to make them available for budgeting and reporting purposes. They are managed in the Manage OrgUnits tab.

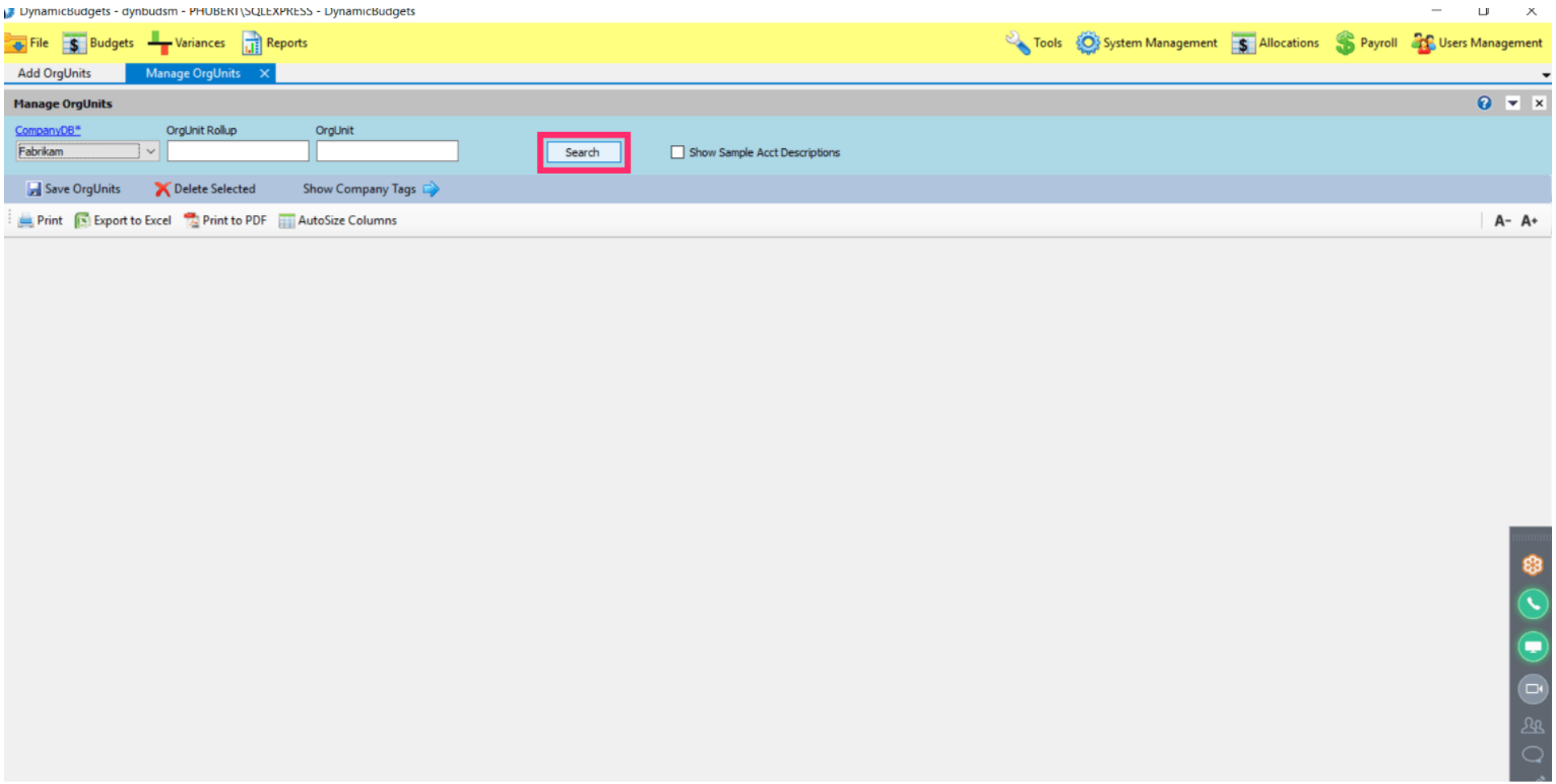
Click on System Management.



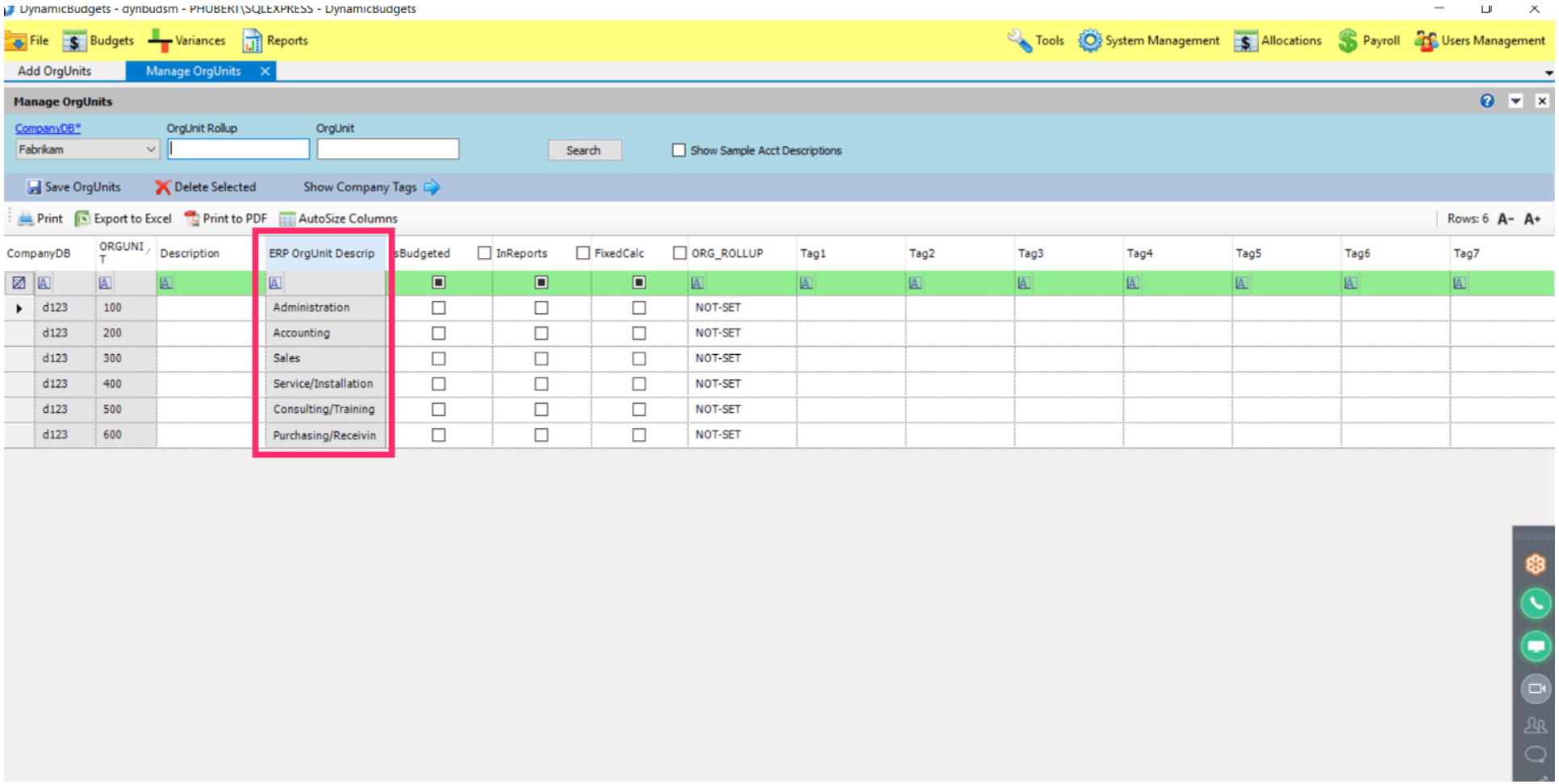
Click on OrgUnits, Manage OrgUnits.



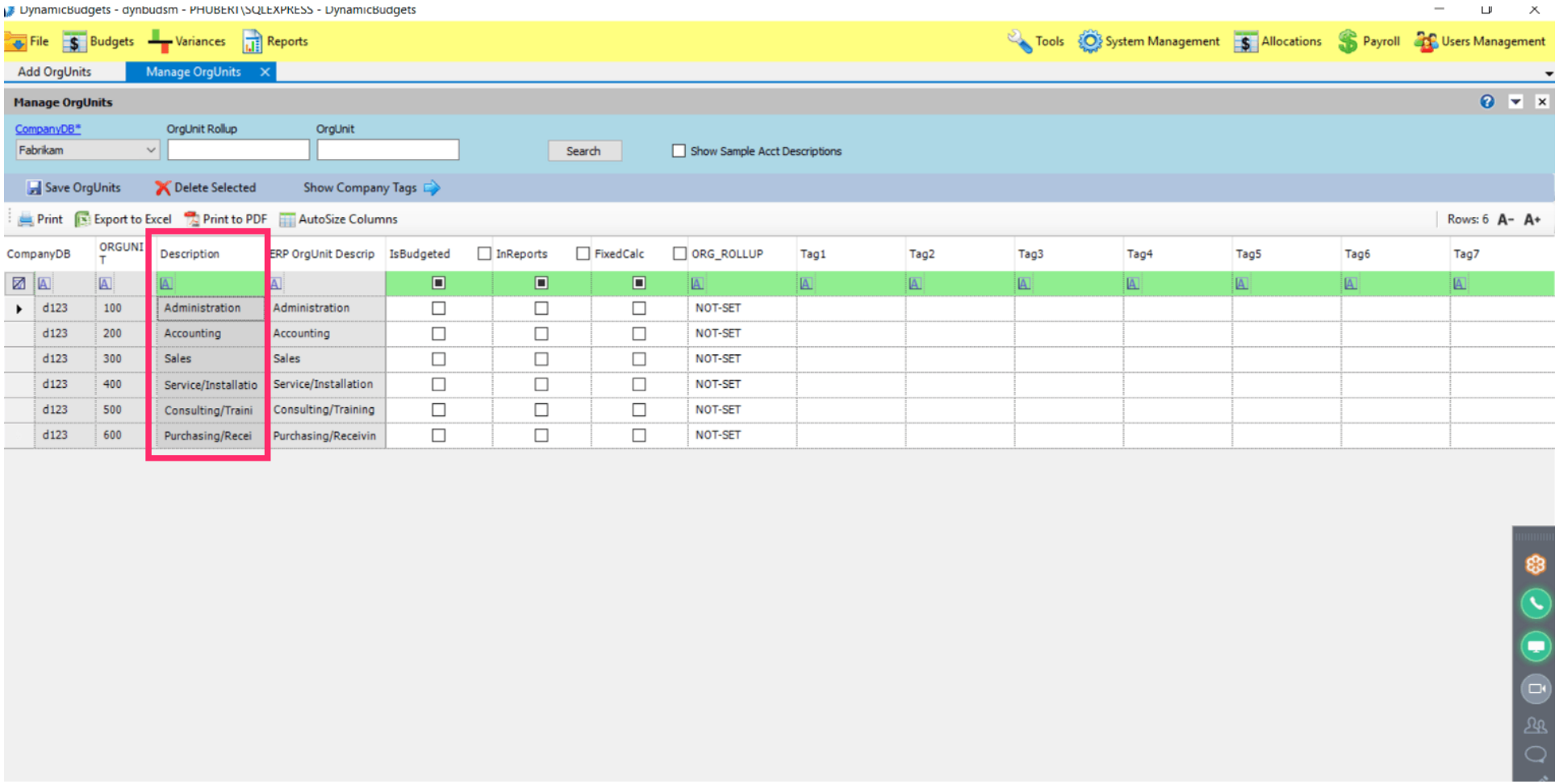
Click on Search.



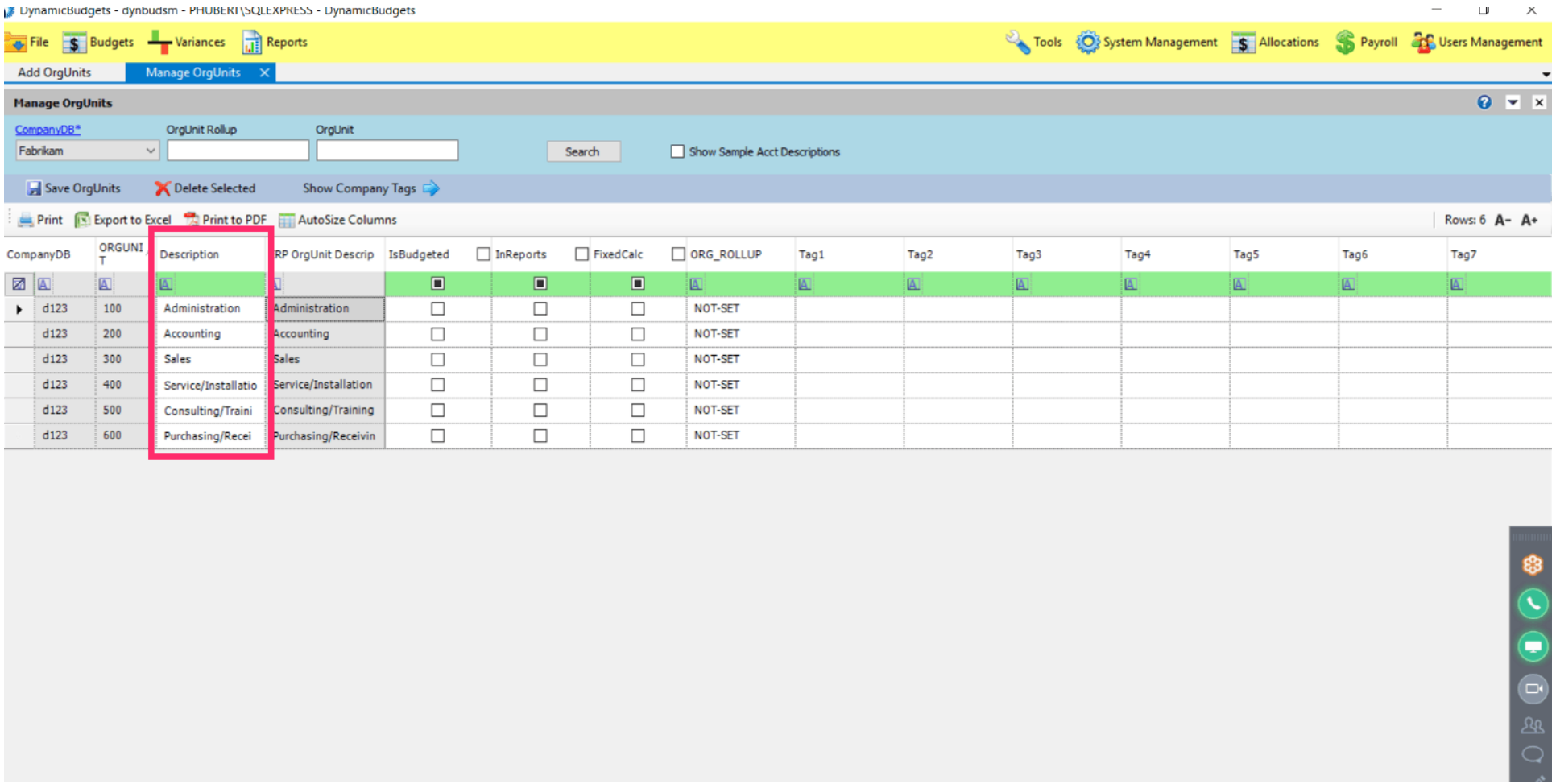
Note: If there are descriptions in the ERP OrgUnit Descrip column, we can copy those descriptions to the Description column. Please verify if the descriptions are accurate.



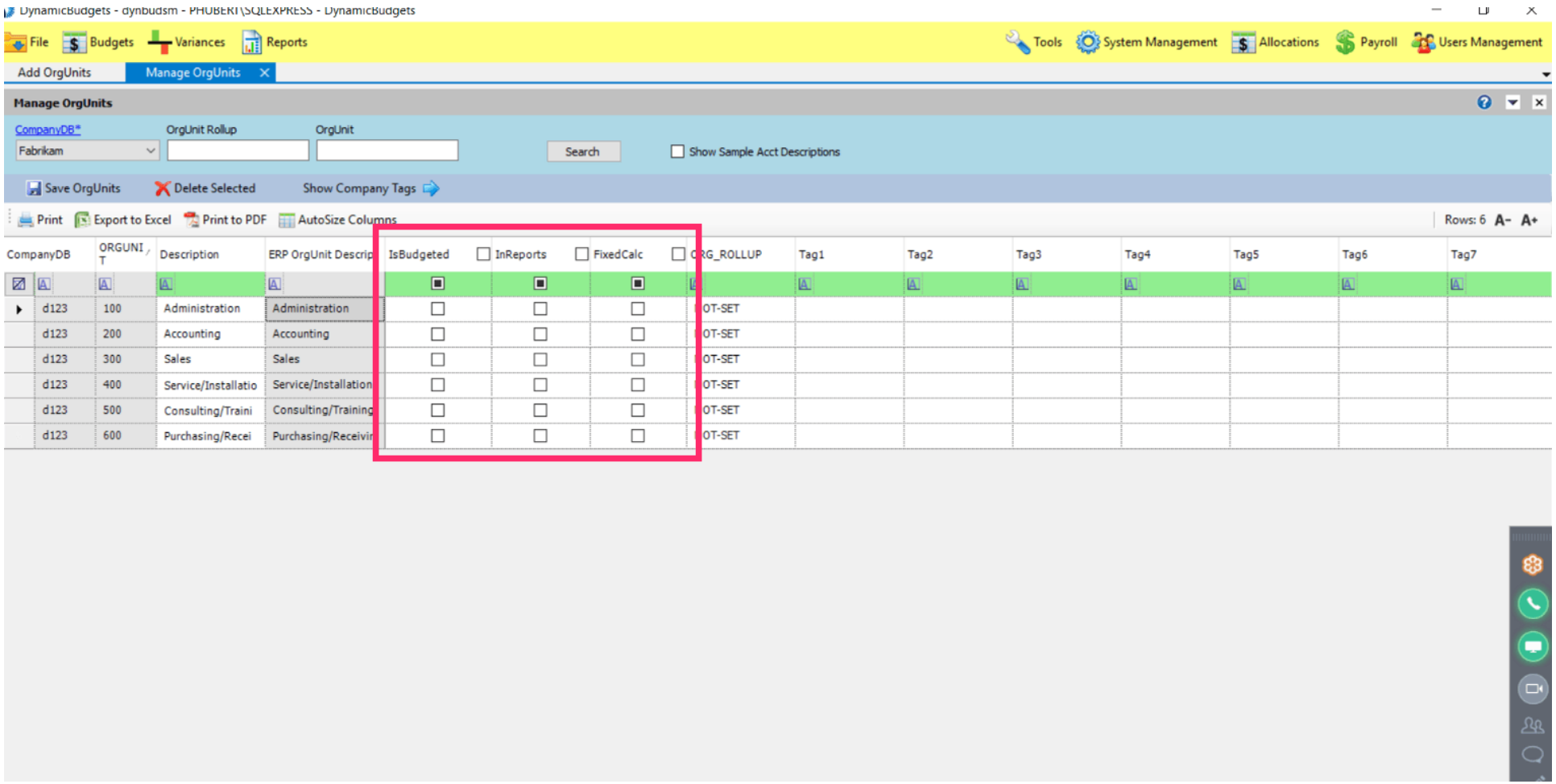
Use Shortcuts: Control C, to copy Control V, to paste OR Right-click copy, paste



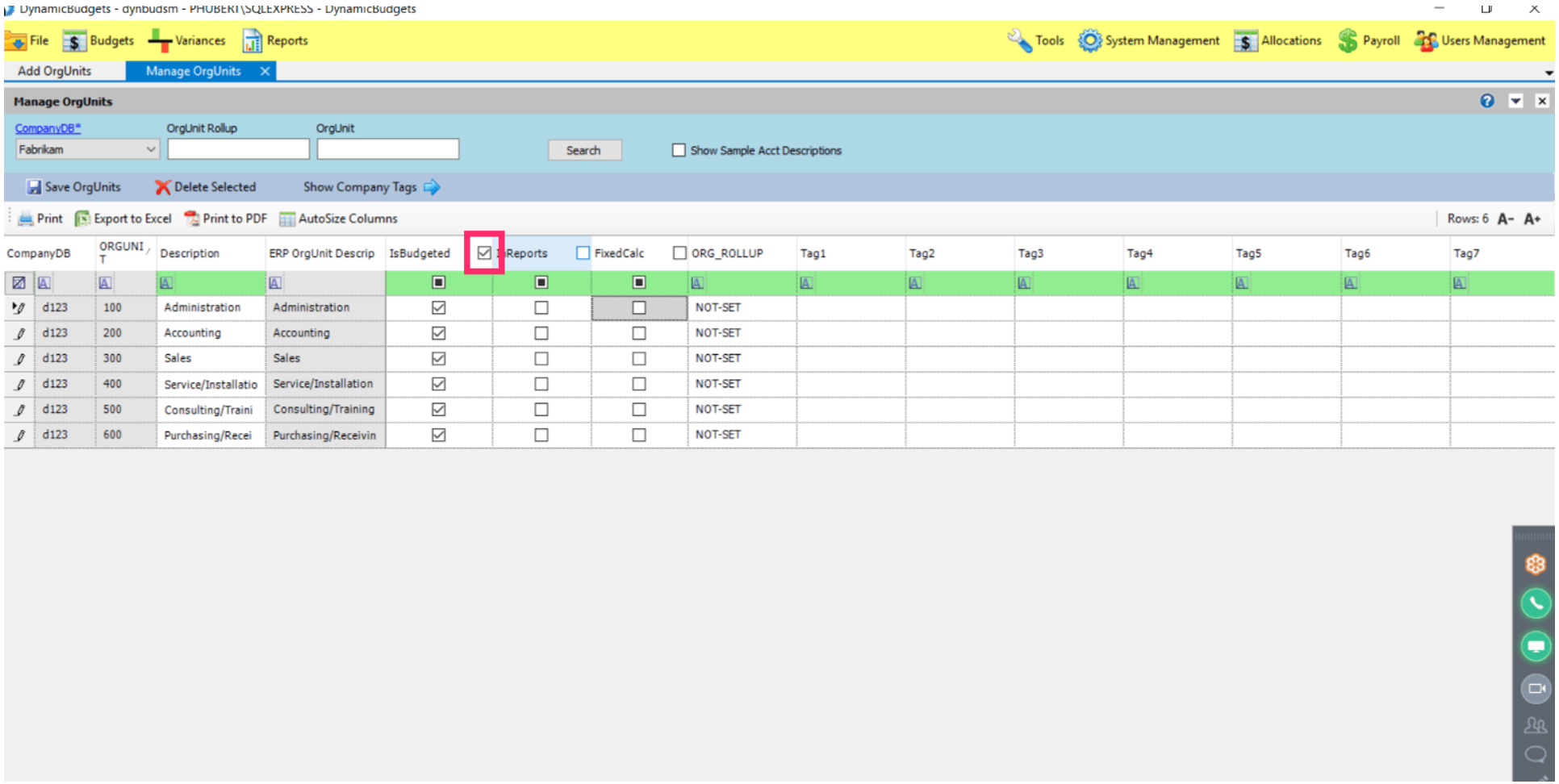
Note: You can change the descriptions in the white Description column by typing in the cell.



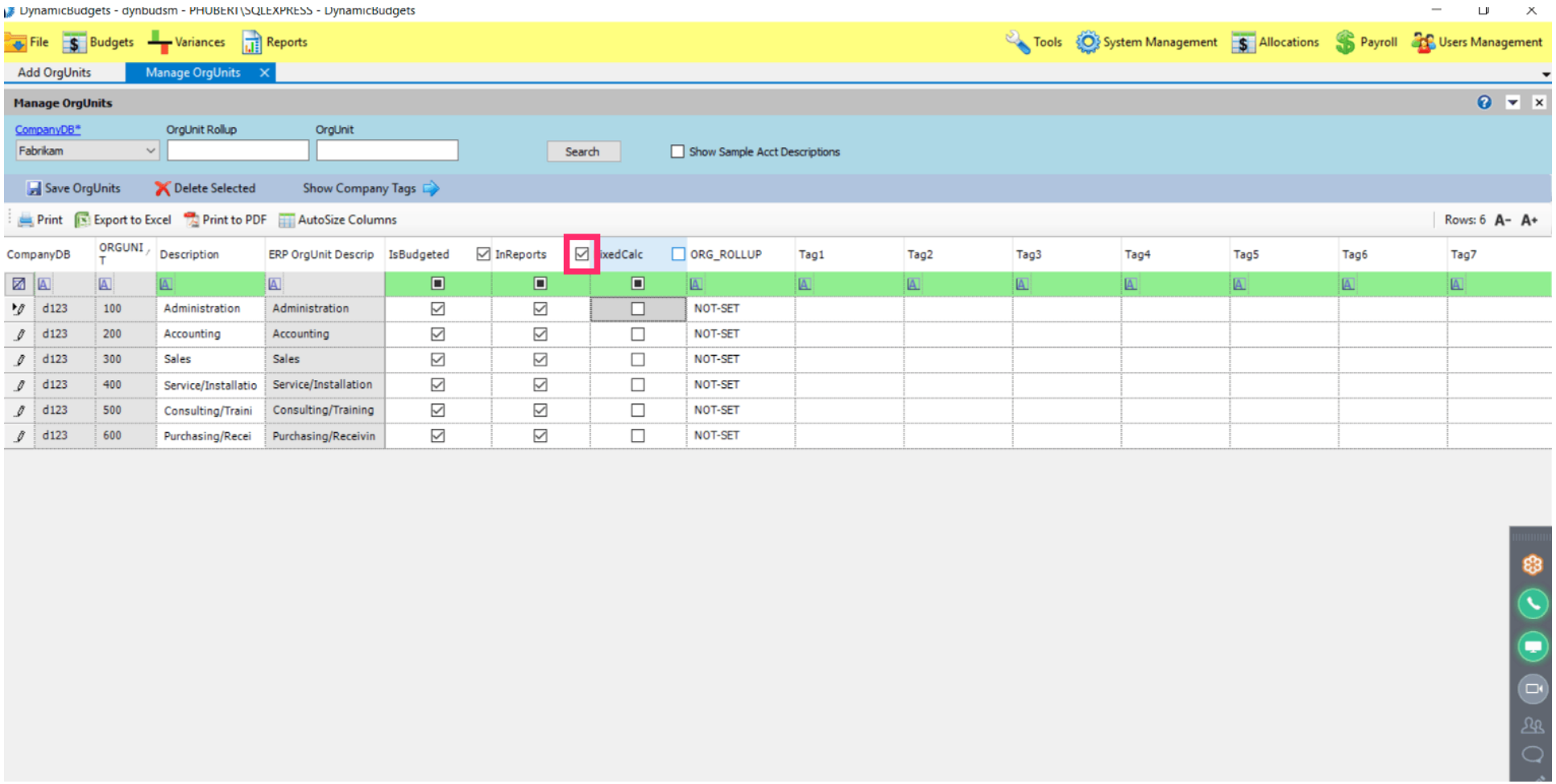
Note: You have the ability to turn on the following 3 columns: 1. IsBudgeted 2. InReports 3. FixedCalc



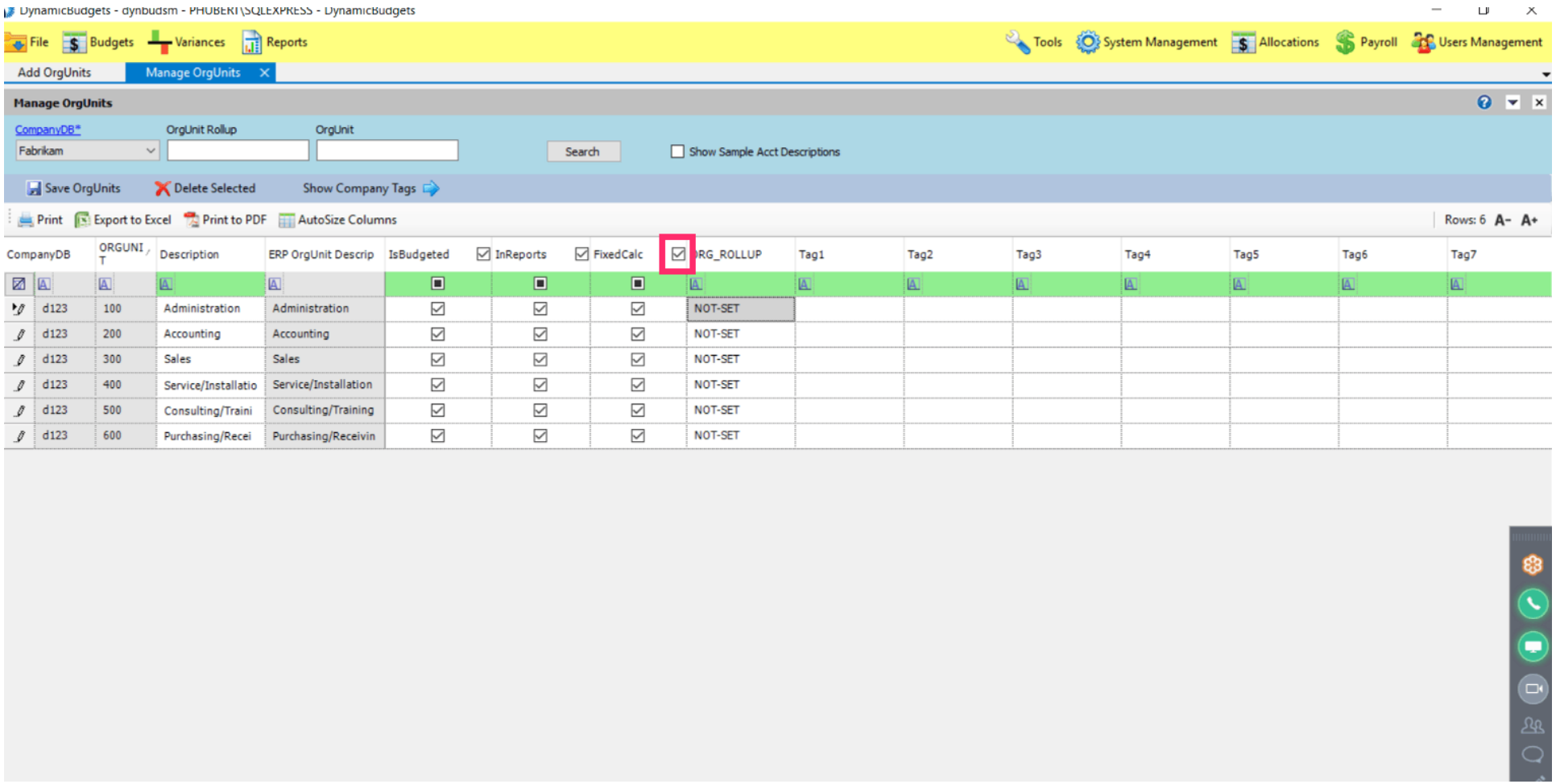
Click in the box to the right of IsBudgeted. This turns on these accounts for budgeting purposes.



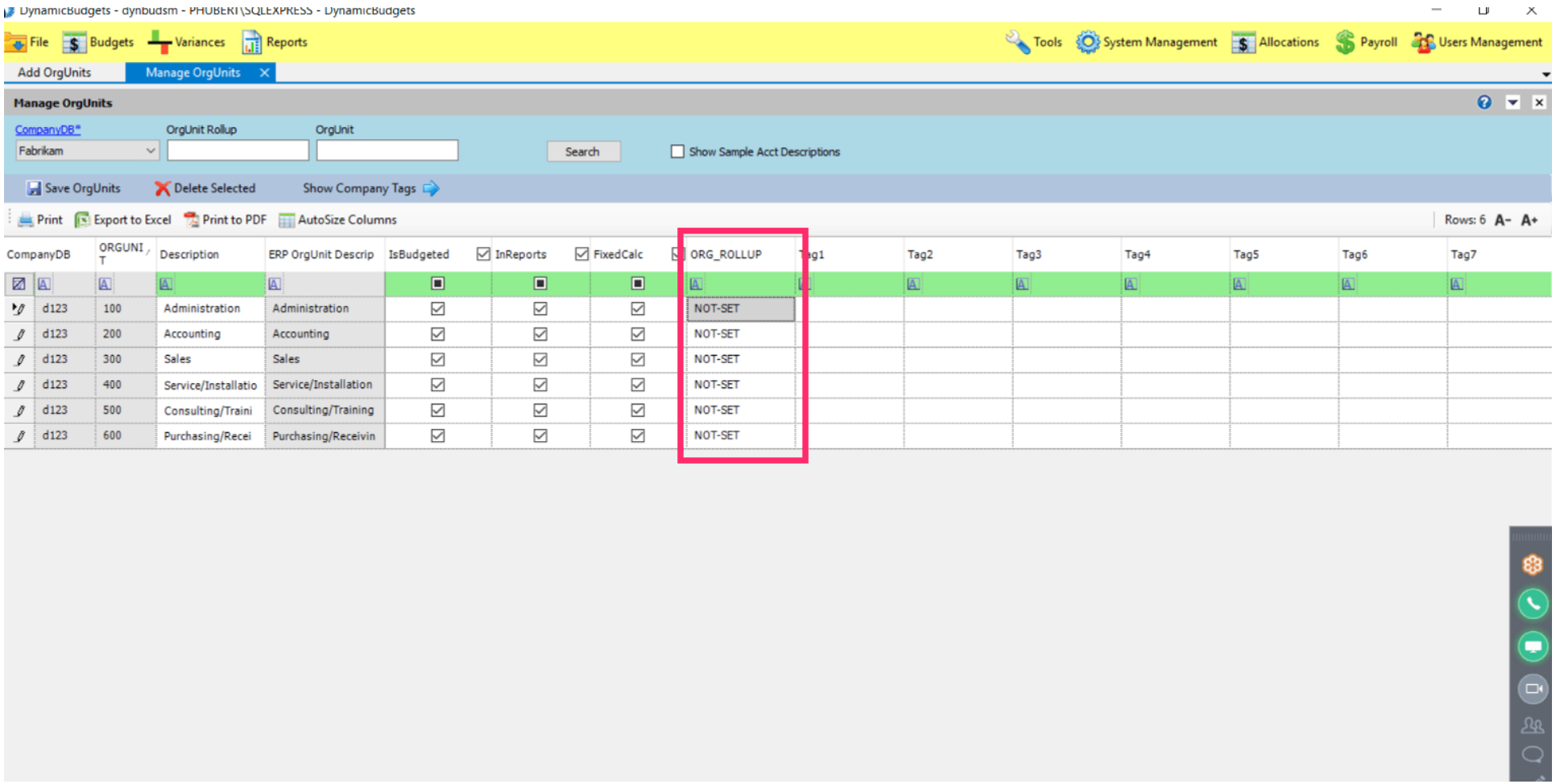
Click in the box to the right of InReporting. This turns on these accounts for reporting purposes.



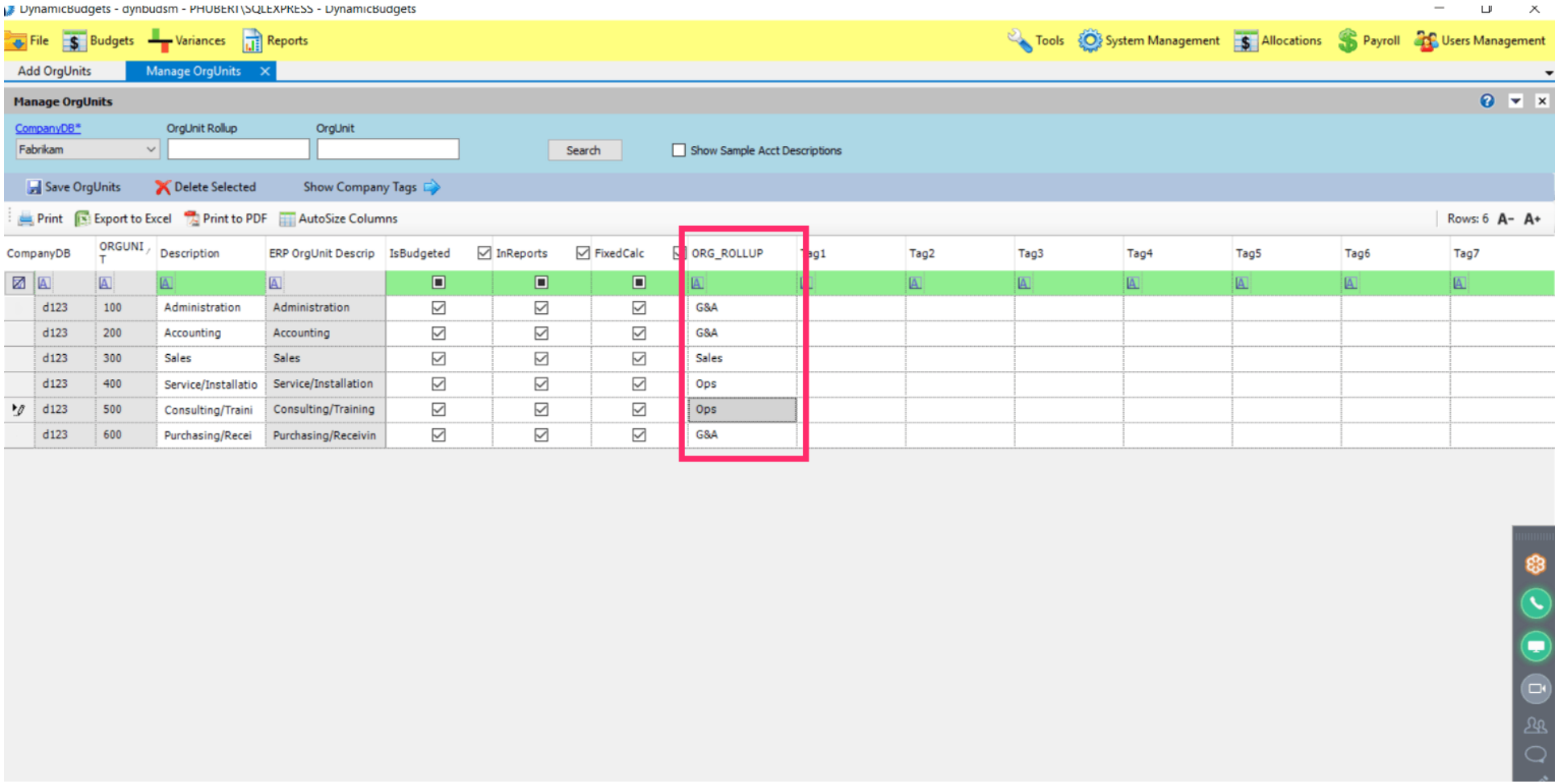
Click in the box to the right of FixedCalc. This turns on the ability to use the excel-like or Fixed Calculation entry form in the modules.



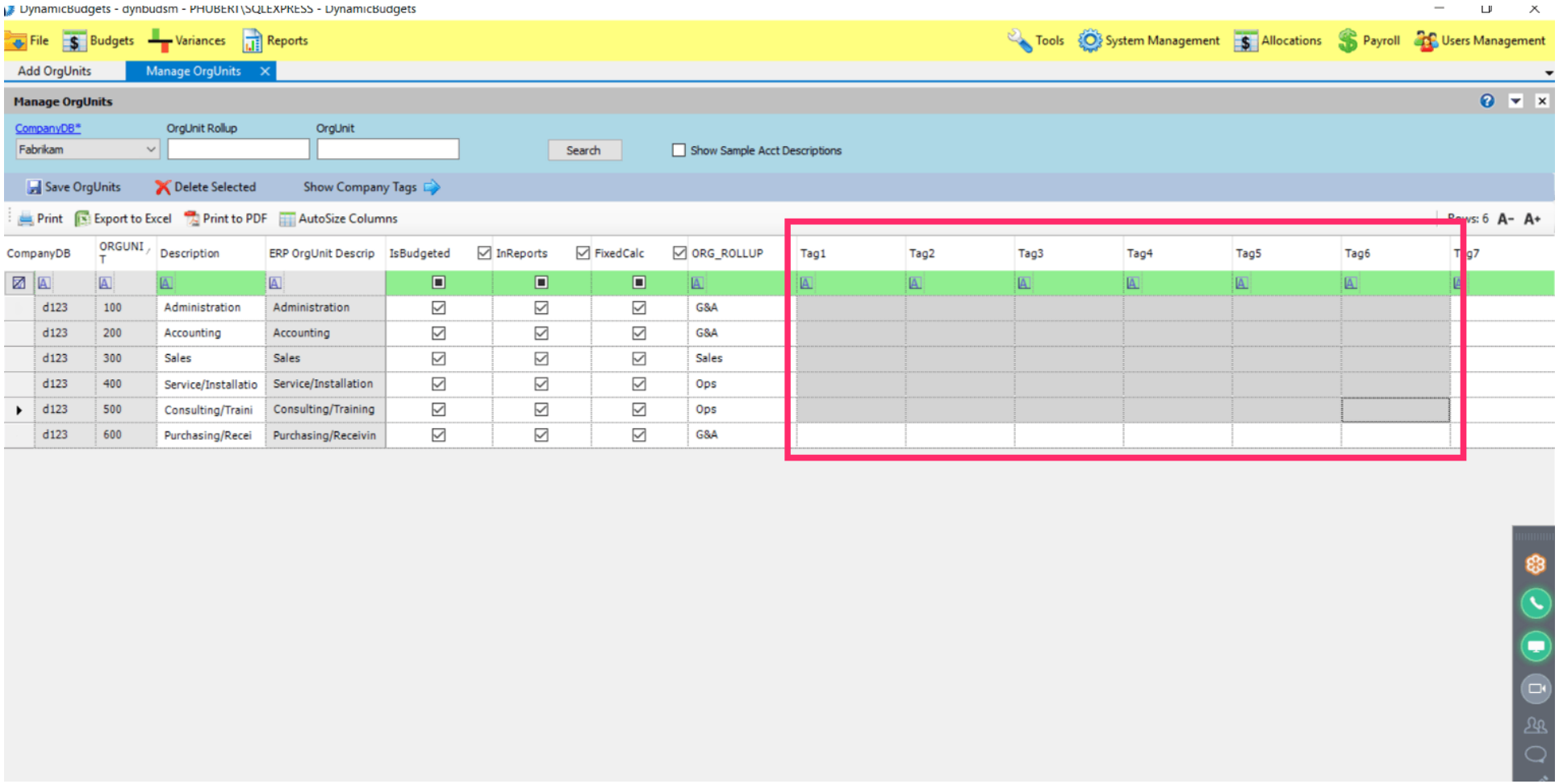
Note: The ORG_ROLLUP column is used for rollup values. Many of our screens have dropdown choices for department rollups.



Note: You can type in departments for each account. In this example, we used three departments-G&A, Sales, & Ops. Most departments are assigned by numbers in ranges. Please verify if the descriptions and ranges are accurate for assignment purposes.



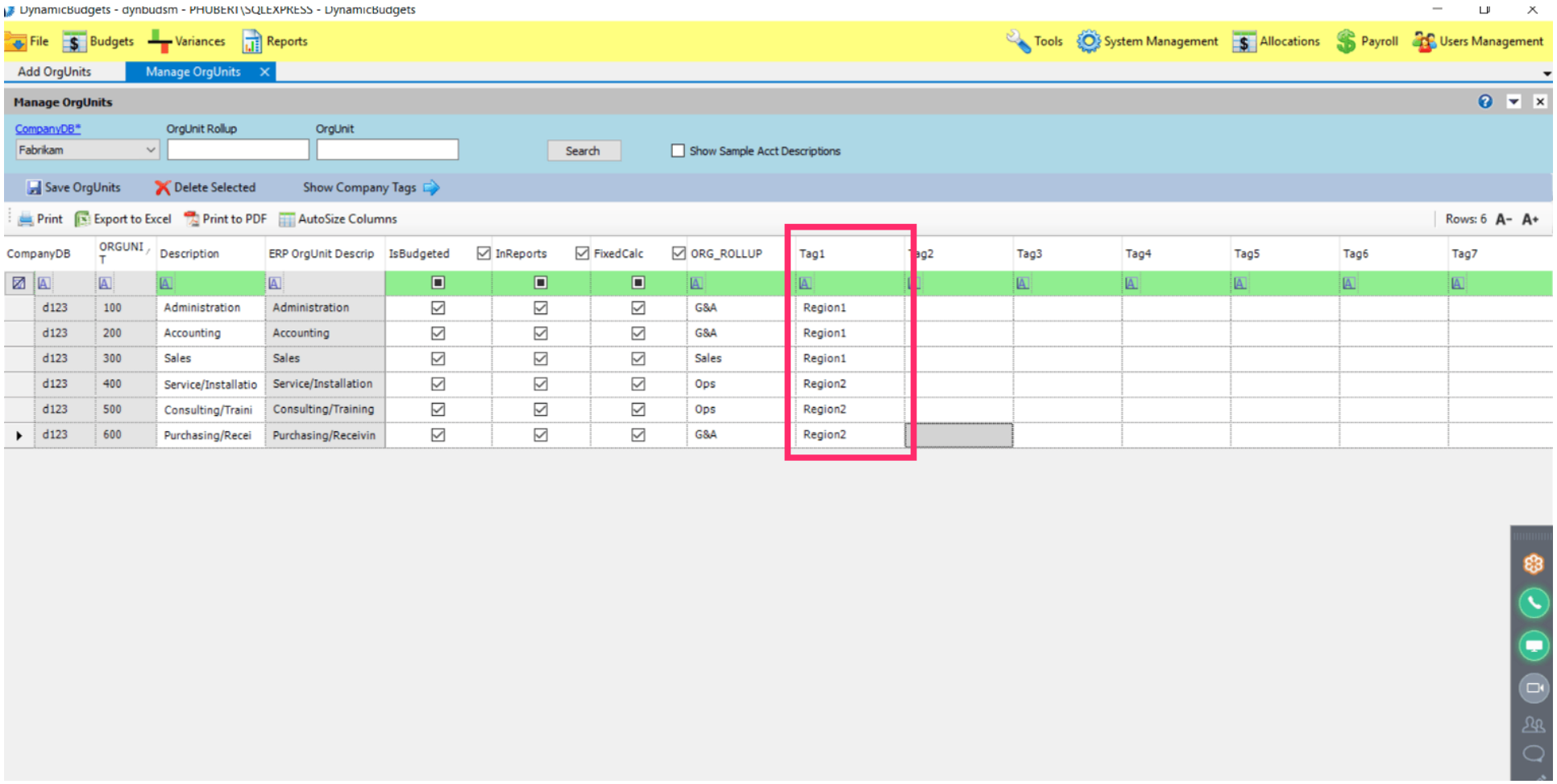
Note: We have other reporting tag columns available if you have other reasons to group account numbers or departments into different areas. Custom reports can be built using these tags or labels.



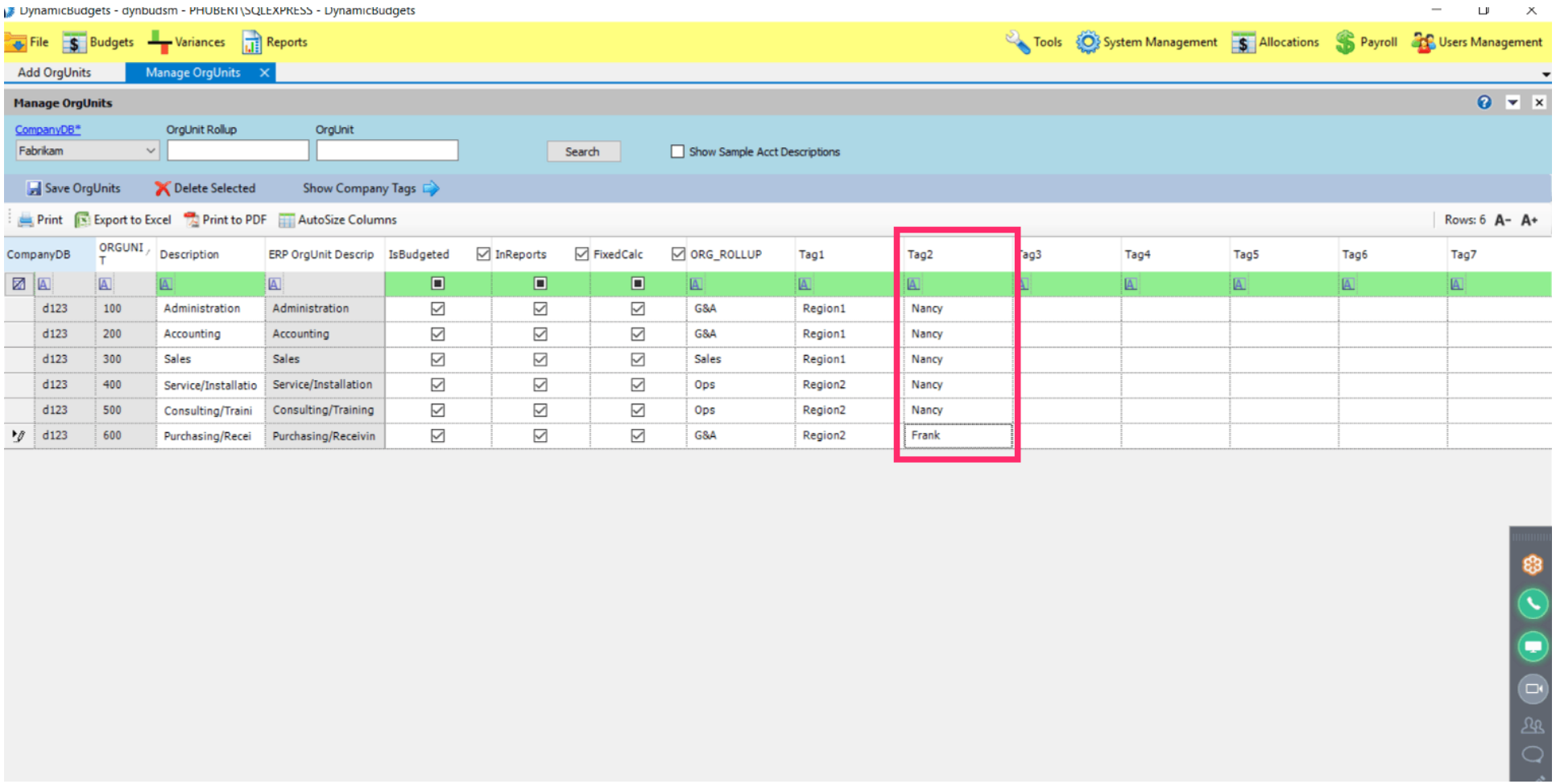
UG-Manage OrgUnits

zgidwani

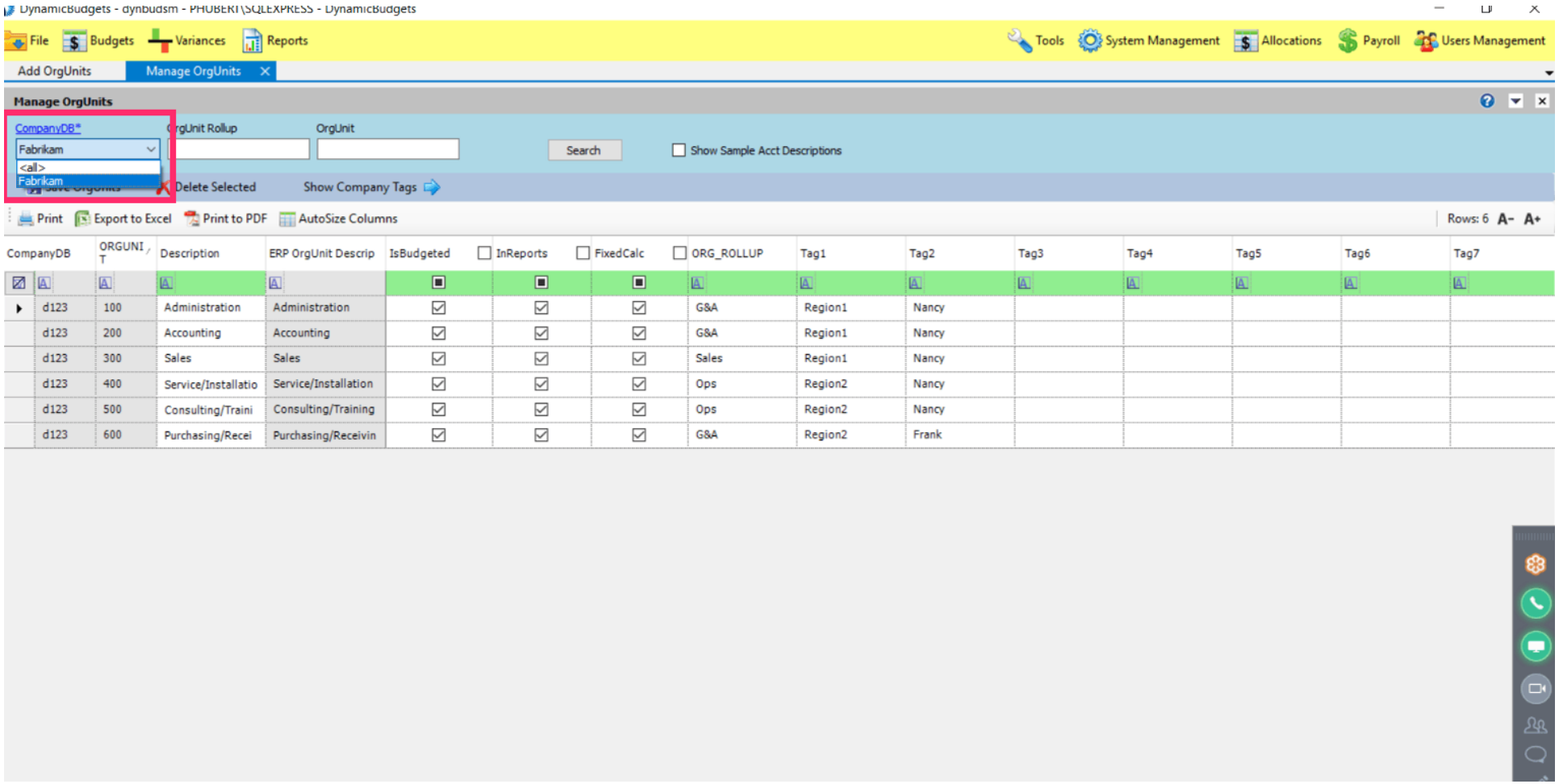
Note: An example used for Tag1 is grouping the ORG_ROLLUP departments by Region.



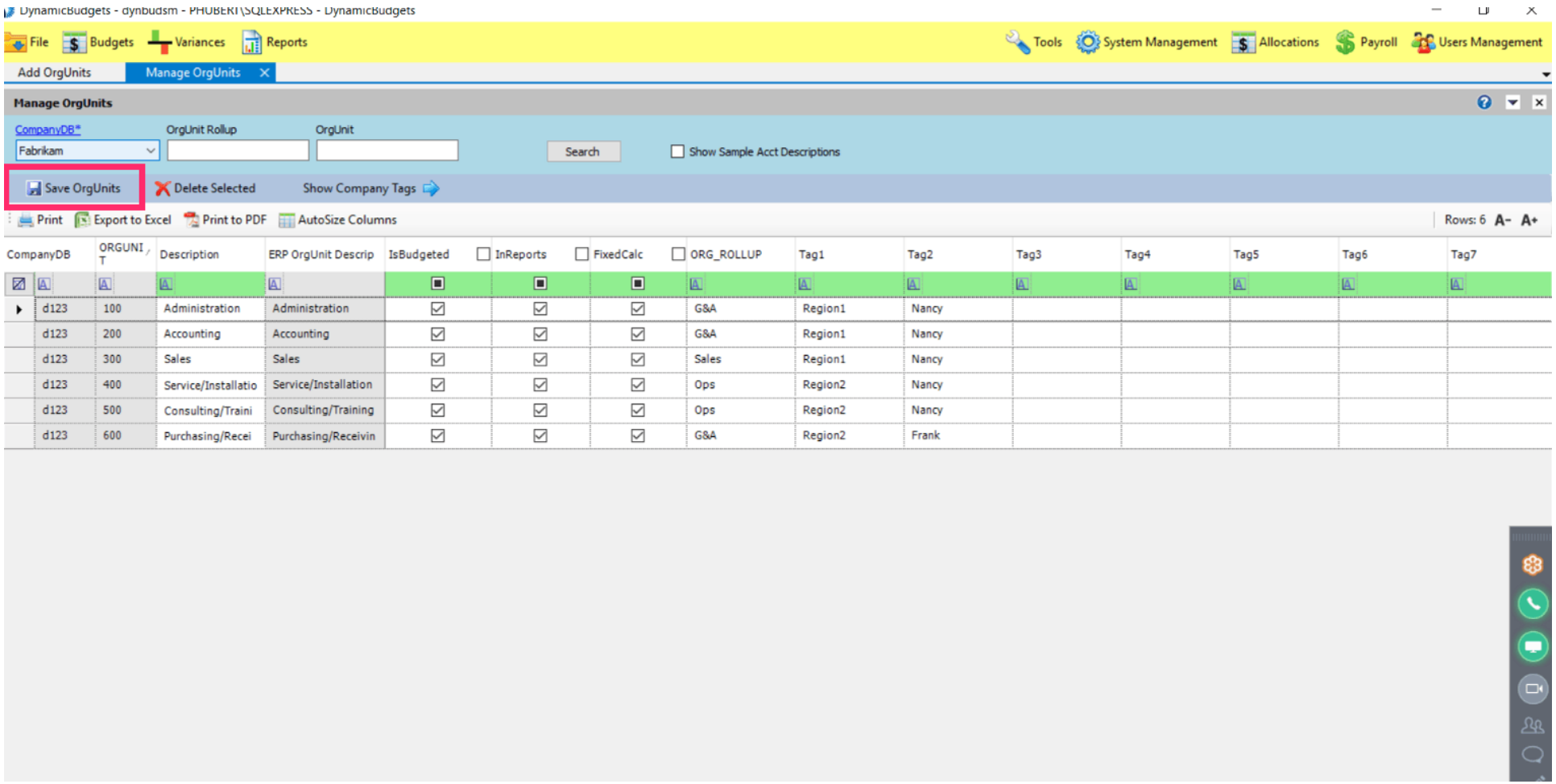
Note: An example used for Tag2 is grouping the ORG_ROLLUP departments by region AND by Managers.



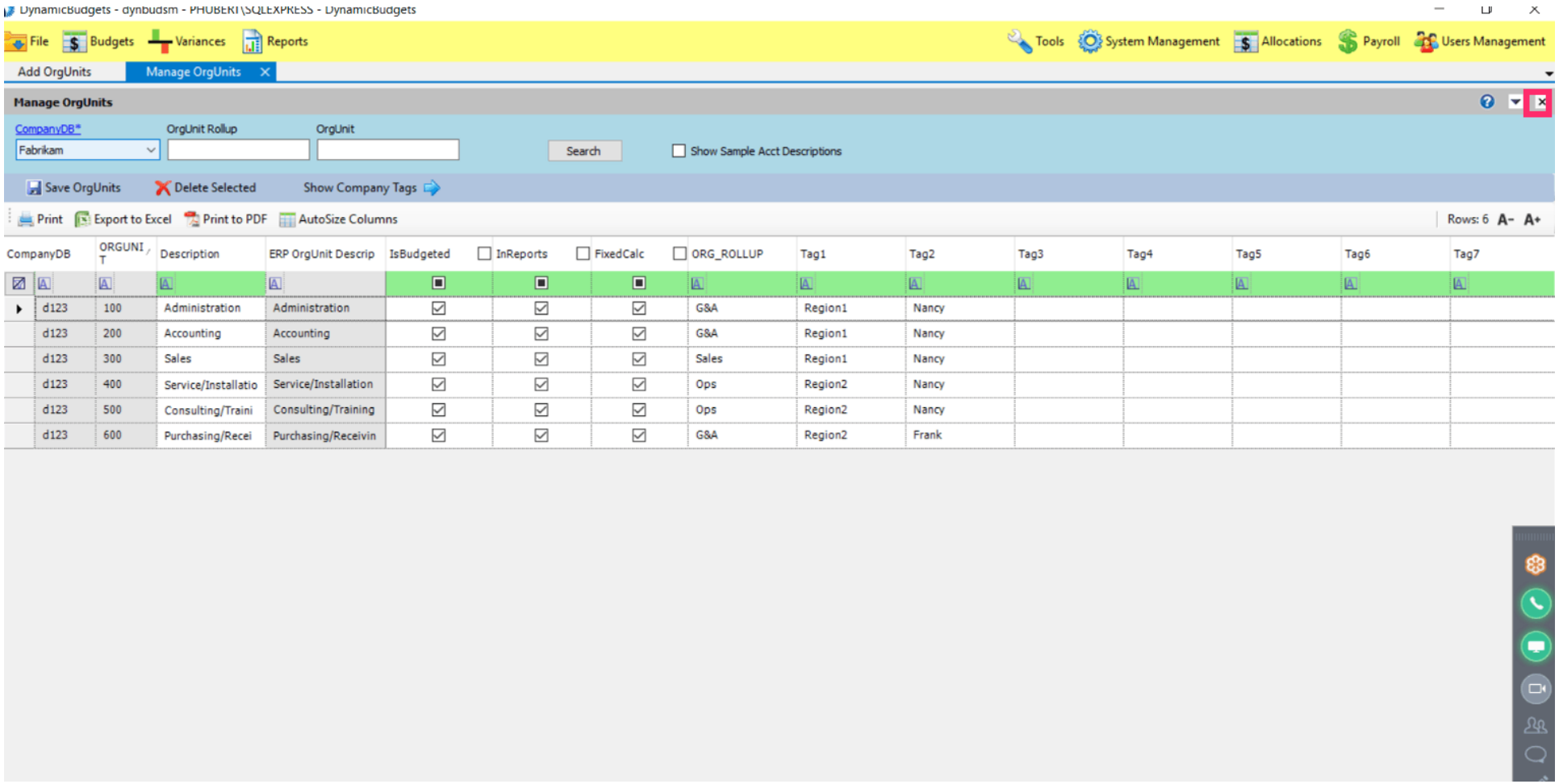
Note: You can select a company or ALL companies from the dropdown menu. If you select ALL, all account numbers for all companies will appear on the screen to perform the previous tasks simultaneously.



Now Click on Save OrgUnits. A message will appear that reads Saved OrgUnits Successfully .



Click on the X to close.



That's It. You're Done.