



## Dynamic Budgets User Guide for MidYear Blending-YTD & Budget



# User Guide for MidYear Blending-YTD & Budget



MidYear Blending-YTD & Budget: Module Purpose This assumption is based on current financial information along with budget data to create estimates as a predictor of future performance.



### MidYear Blending-YTD & Budget

Purpose: This assumption is based on current financial information along with budget data to create estimates as a predictor of future performance.



# UG-MidYear Blending-YTD & Budget

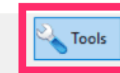
zgidwani



Click on **Tools**.

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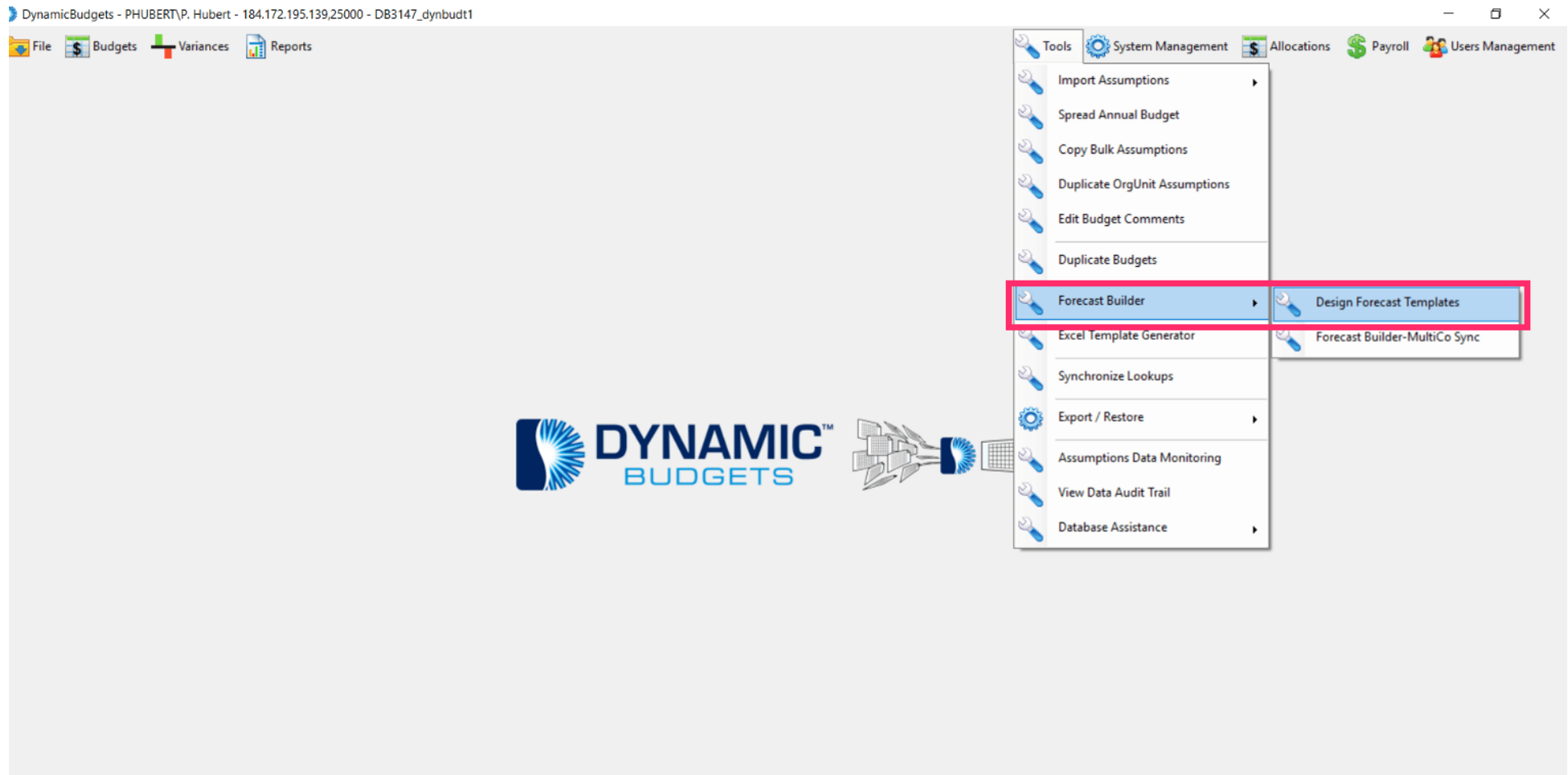
File Budgets Variances Reports



System Management Allocations Payroll Users Management



Click on **Forecast Builder, Design Forecast Templates.**





Click on the dropdown menu for **CompanyDB**. In this example, select **TWO**.

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Design Forecast Templates

**Design Forecast Templates**

CompanyDB\*  
TWO  
THREE  
TWO

Template Name  
<select>

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID Forecast Template Name  
Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
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Click on **Add New Template**.

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Design Forecast Templates

**Design Forecast Templates**

CompanyDB\* TWO Template Name <select>

Save Template Add Column Delete Template **Add New Template** Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

Add New Template

ID Forecast Template Name

☐ Form Enabled

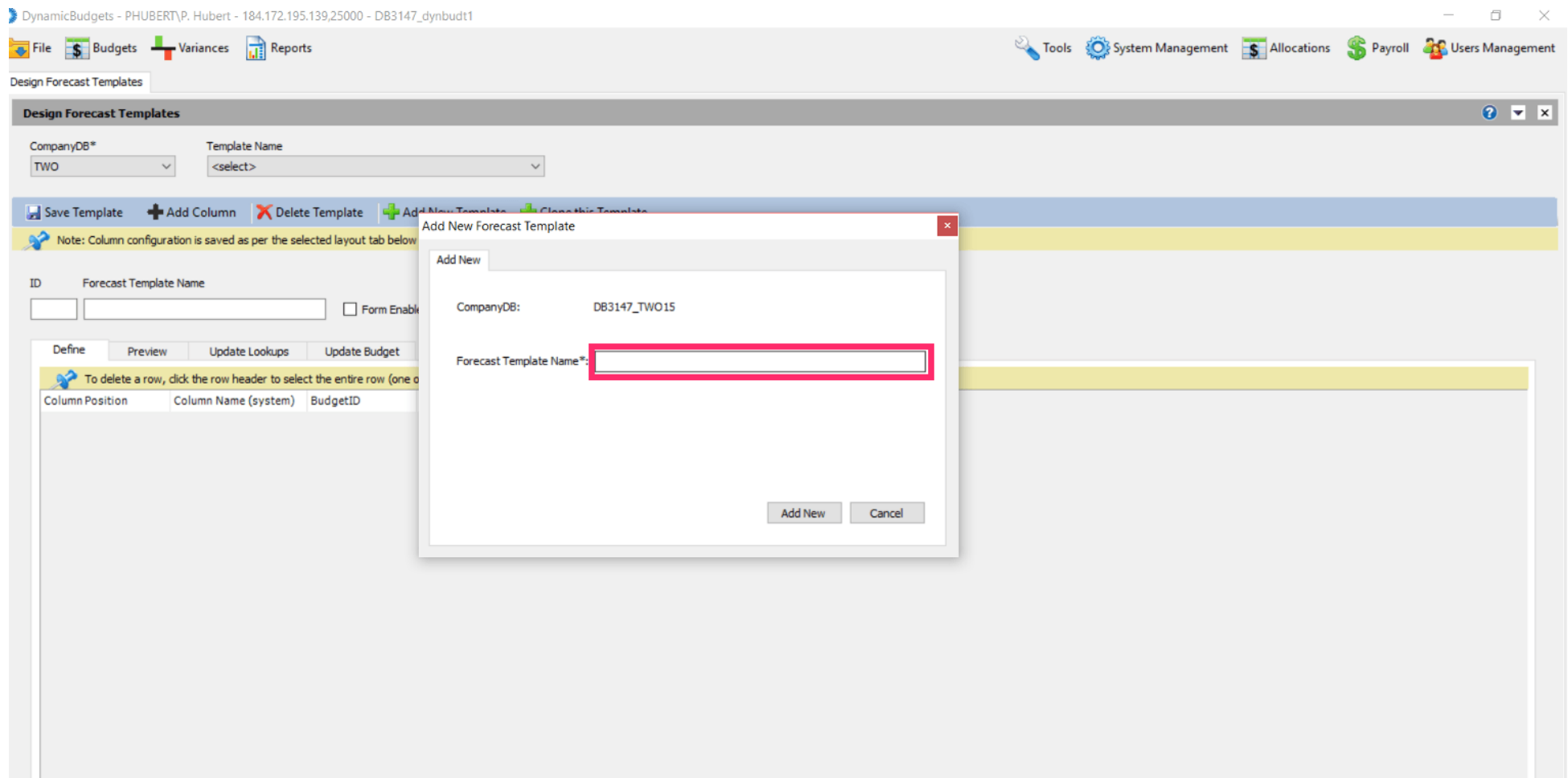
Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold



Click in the Forecast Template Name box. Enter the new name of the template. In this example, we will type **2017 YTD & Budget**.



The screenshot shows the 'DynamicBudgets' application interface. The main window is titled 'Design Forecast Templates' and contains a 'CompanyDB\*' dropdown set to 'TWO' and a 'Template Name' dropdown set to '<select>'. Below these are buttons for 'Save Template', 'Add Column', 'Delete Template', 'Add New Template', and 'Close this Template'. A note states: 'Note: Column configuration is saved as per the selected layout tab below'. The 'Add New Forecast Template' dialog box is open, showing 'CompanyDB: DB3147\_TWO15' and a 'Forecast Template Name\*' text box, which is highlighted with a red rectangle. At the bottom of the dialog are 'Add New' and 'Cancel' buttons.



Click on **Add New**.

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Design Forecast Templates

Design Forecast Templates

CompanyDB\* TWO Template Name <select>

Save Template Add Column Delete Template Add New Template Close this Template

Note: Column configuration is saved as per the selected layout tab below

ID Forecast Template Name Form Enable

Define Preview Update Lookups Update Budget

To delete a row, click the row header to select the entire row (one of)

Column Position Column Name (system) BudgetID

Add New Forecast Template

Add New

CompanyDB: DB3147\_TWO15

Forecast Template Name\*: 2017 YTD & Budget

Add New Cancel





Note: **Leave P00 blank** with no budgetid or fiscal period selected unless you have a 13-month fiscal period. Only define parameters for period 1 through period 12. **When you save the template P00 will not display.**

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### Design Forecast Templates

CompanyDB\*: TWO Template Name: 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID: 63 Forecast Template Name: 2017 YTD & Budget Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01		Jan	Month	GLCode	0	
3	P02		Feb	Month	GLCode	0	
4	P03		Mar	Month	GLCode	0	
5	P04		Apr	Month	GLCode	0	
6	P05		May	Month	GLCode	0	
7	P06		Jun	Month	GLCode	0	
8	P07		Jul	Month	GLCode	0	
9	P08		Aug	Month	GLCode	0	
10	P09		Sep	Month	GLCode	0	
11	P10		Oct	Month	GLCode	0	
12	P11		Nov	Month	GLCode	0	
13	P12		Dec	Month	GLCode	0	



Click on the BudgetID dropdown menu. Select a **budget description**. In this example, select **2017 Actual**.

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Design Forecast Templates

Design Forecast Templates

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID Forecast Template Name  
63 2017 YTD & Budget ☒ Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period Month / YTD	Report Level	NumberFormat	Threshold
1	P00		Jan	Month	GLCode	0
2	P01		Feb	Month	GLCode	0
3	P02		Mar	Month	GLCode	0
4	P03		Apr	Month	GLCode	0
5	P04		May	Month	GLCode	0
6	P05		Jun	Month	GLCode	0
7	P06		Jul	Month	GLCode	0
8	P07		Aug	Month	GLCode	0
9	P08		Sep	Month	GLCode	0
10	P09		Oct	Month	GLCode	0
11	P10		Nov	Month	GLCode	0
12	P11		Dec	Month	GLCode	0
13	P12					



In this example, the books are closed through August 2017. We need to **add budgetid 2017 actual** to January through August then **change the budgetid to 2017 Budget** for the remaining months in the fiscal period. Use Shortcut: **Control C**, to copy

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Design Forecast Templates

Design Forecast Templates

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID 63 Forecast Template Name 2017 YTD & Budget Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00			Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02		Feb	Month	GLCode	0	
4	P03		Mar	Month	GLCode	0	
5	P04		Apr	Month	GLCode	0	
6	P05		May	Month	GLCode	0	
7	P06		Jun	Month	GLCode	0	
8	P07		Jul	Month	GLCode	0	
9	P08		Aug	Month	GLCode	0	
10	P09		Sep	Month	GLCode	0	
11	P10		Oct	Month	GLCode	0	
12	P11		Nov	Month	GLCode	0	
13	P12		Dec	Month	GLCode	0	



Click in the budgetid cell for February, **shift, down arrow** to capture through August.

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Design Forecast Templates

Design Forecast Templates

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID Forecast Template Name

63 2017 YTD & Budget ☒ Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02		Feb	Month	GLCode	0	
4	P03		Mar	Month	GLCode	0	
5	P04		Apr	Month	GLCode	0	
6	P05		May	Month	GLCode	0	
7	P06		Jun	Month	GLCode	0	
8	P07		Jul	Month	GLCode	0	
9	P08		Aug	Month	GLCode	0	
10	P09		Sep	Month	GLCode	0	
11	P10		Oct	Month	GLCode	0	
12	P11		Nov	Month	GLCode	0	
13	P12		Dec	Month	GLCode	0	



Use shortcut: **Control V**, to paste

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Design Forecast Templates

Design Forecast Templates

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID Forecast Template Name

63 2017 YTD & Budget ☒ Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02	2017 Actual	Feb	Month	GLCode	0	
4	P03	2017 Actual	Mar	Month	GLCode	0	
5	P04	2017 Actual	Apr	Month	GLCode	0	
6	P05	2017 Actual	May	Month	GLCode	0	
7	P06	2017 Actual	Jun	Month	GLCode	0	
8	P07	2017 Actual	Jul	Month	GLCode	0	
9	P08	2017 Actual	Aug	Month	GLCode	0	
10	P09		Sep	Month	GLCode	0	
11	P10		Oct	Month	GLCode	0	
12	P11		Nov	Month	GLCode	0	
13	P12		Dec	Month	GLCode	0	



Click on the BudgetID dropdown menu. Select a **budget description**. In this example, select **2017 Budget** for the month of September.

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Design Forecast Templates

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID 63 Forecast Template Name 2017 YTD & Budget Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02	2017 Actual	Feb	Month	GLCode	0	
4	P03	2017 Actual	Mar	Month	GLCode	0	
5	P04	2017 Actual	Apr	Month	GLCode	0	
6	P05	2017 Actual	May	Month	GLCode	0	
7	P06	2017 Actual	Jun	Month	GLCode	0	
8	P07	2017 Actual	Jul	Month	GLCode	0	
9	P08	2017 Actual	Aug	Month	GLCode	0	
10	P09	2017 Budget	Sep	Month	GLCode	0	
11	P10		Oct	Month	GLCode	0	
12	P11		Nov	Month	GLCode	0	
13	P12		Dec	Month	GLCode	0	



In this example, the books are closed through August 2017. We need to **change the budgetid to 2017 Budget** for the remaining months in the fiscal period. Use Shortcut: **Control C, to copy**

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Design Forecast Templates

**Design Forecast Templates**

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID 63 Forecast Template Name 2017 YTD & Budget Form Enabled

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Column Position	Column Name (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02	2017 Actual	Feb	Month	GLCode	0	
4	P03	2017 Actual	Mar	Month	GLCode	0	
5	P04	2017 Actual	Apr	Month	GLCode	0	
6	P05	2017 Actual	May	Month	GLCode	0	
7	P06	2017 Actual	Jun	Month	GLCode	0	
8	P07	2017 Actual	Jul	Month	GLCode	0	
9	P08	2017 Actual	Aug	Month	GLCode	0	
10	P09	2017 Budget	Sep	Month	GLCode	0	
11	P10		Oct	Month	GLCode	0	
12	P11		Nov	Month	GLCode	0	
13	P12		Dec	Month	GLCode	0	



Use shortcut: **Control V**, to paste

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Design Forecast Templates

Design Forecast Templates

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

Save Template

ID Forecast Template Name

63 2017 YTD & Budget ☒ Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02	2017 Actual	Feb	Month	GLCode	0	
4	P03	2017 Actual	Mar	Month	GLCode	0	
5	P04	2017 Actual	Apr	Month	GLCode	0	
6	P05	2017 Actual	May	Month	GLCode	0	
7	P06	2017 Actual	Jun	Month	GLCode	0	
8	P07	2017 Actual	Jul	Month	GLCode	0	
9	P08	2017 Actual	Aug	Month	GLCode	0	
10	P09	2017 Budget	Sep	Month	GLCode	0	
11	P10	2017 Budget	Oct	Month	GLCode	0	
12	P11	2017 Budget	Nov	Month	GLCode	0	
13	P12	2017 Budget	Dec	Month	GLCode	0	





Note: If you are on a grey cell, the change is not final until you move to a white cell. **Now Click in a white cell.**

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Design Forecast Templates

**Design Forecast Templates**

CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

ID 63 Forecast Template Name 2017 YTD & Budget Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P01	2017 Actual	Jan	Month	GLCode	0	
2	P02	2017 Actual	Feb	Month	GLCode	0	
3	P03	2017 Actual	Mar	Month	GLCode	0	
4	P04	2017 Actual	Apr	Month	GLCode	0	
5	P05	2017 Actual	May	Month	GLCode	0	
6	P06	2017 Actual	Jun	Month	GLCode	0	
7	P07	2017 Actual	Jul	Month	GLCode	0	
8	P08	2017 Actual	Aug	Month	GLCode	0	
9	P09	2017 Budget	Sep	Month	GLCode	0	
10	P10	2017 Budget	Oct	Month	GLCode	0	
11	P11	2017 Budget	Nov	Month	GLCode	0	
12	P12	2017 Budget	Dec	Month	GLCode	0	



Click on **Save Template.**

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Design Forecast Templates

**Design Forecast Templates**

CompanyDB\* TWO Template Name 2017 YTD & Budget

**Save Template** + Add Column X Delete Template + Add New Template + Clone this Template

Note: Column configuration is saved as per the selected layout tab below i.e. if you make changes to 'Grid Layout' tab, keep that tab 'Selected' when you hit the Save button

Save Template

ID Forecast Template Name

63 2017 YTD & Budget ☒ Form Enabled

Define Preview Update Lookups Update Budget

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 (system)	BudgetID	Fiscal Period	Month / YTD	Report Level	NumberFormat	Threshold
1	P00		0	Month	GLCode	0	
2	P01	2017 Actual	Jan	Month	GLCode	0	
3	P02	2017 Actual	Feb	Month	GLCode	0	
4	P03	2017 Actual	Mar	Month	GLCode	0	
5	P04	2017 Actual	Apr	Month	GLCode	0	
6	P05	2017 Actual	May	Month	GLCode	0	
7	P06	2017 Actual	Jun	Month	GLCode	0	
8	P07	2017 Actual	Jul	Month	GLCode	0	
9	P08	2017 Actual	Aug	Month	GLCode	0	
10	P09	2017 Budget	Sep	Month	GLCode	0	
11	P10	2017 Budget	Oct	Month	GLCode	0	
12	P11	2017 Budget	Nov	Month	GLCode	0	
13	P12	2017 Budget	Dec	Month	GLCode	0	



Click on **Yes** to confirm you want to save this template. A message will appear that reads, **saved changes successfully**. Note: the incomplete data is referring to P00. Remember the budgetid should be blank.

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Design Forecast Templates

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CompanyDB\* TWO Template Name 2017 YTD & Budget

Save Template Add Column Delete Template Add New Template Clone this Template

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ID 63 Forecast Template Name 2017 YTD & Budget Form Enabled

Define Preview Update Lookups Update Budget

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

Column Position	Column Name (system)	BudgetID	Fiscal Period	Month / YTD	Re
1	P00		0	Month	G
2	P01	2017 Actual	Jan	Month	G
3	P02	2017 Actual	Feb	Month	G
4	P03	2017 Actual	Mar	Month	G
5	P04	2017 Actual	Apr	Month	G
6	P05	2017 Actual	May	Month	GLCode 0
7	P06	2017 Actual	Jun	Month	GLCode 0
8	P07	2017 Actual	Jul	Month	GLCode 0
9	P08	2017 Actual	Aug	Month	GLCode 0
10	P09	2017 Budget	Sep	Month	GLCode 0
11	P10	2017 Budget	Oct	Month	GLCode 0
12	P11	2017 Budget	Nov	Month	GLCode 0
13	P12	2017 Budget	Dec	Month	GLCode 0

Confirm

Some of column definitions contain invalid or incomplete data. These columns will be ignored when saving, and will be deleted.

Do you want to continue saving with incomplete column definitions?

Yes No

 Note: P00 row has been removed after you saved the template.

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Design Forecast Templates

Design Forecast Templates

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1	P01	2017 Actual	Jan	Month	GLCode	0	
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3	P03	2017 Actual	Mar	Month	GLCode	0	
4	P04	2017 Actual	Apr	Month	GLCode	0	
5	P05	2017 Actual	May	Month	GLCode	0	
6	P06	2017 Actual	Jun	Month	GLCode	0	
7	P07	2017 Actual	Jul	Month	GLCode	0	
8	P08	2017 Actual	Aug	Month	GLCode	0	
9	P09	2017 Budget	Sep	Month	GLCode	0	
10	P10	2017 Budget	Oct	Month	GLCode	0	
11	P11	2017 Budget	Nov	Month	GLCode	0	
12	P12	2017 Budget	Dec	Month	GLCode	0	



Click on the X to close this screen.

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Design Forecast Templates

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CompanyDB\* TWO Template Name 2017 YTD & Budget

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3	P03	2017 Actual	Mar	Month	GLCode	0	
4	P04	2017 Actual	Apr	Month	GLCode	0	
5	P05	2017 Actual	May	Month	GLCode	0	
6	P06	2017 Actual	Jun	Month	GLCode	0	
7	P07	2017 Actual	Jul	Month	GLCode	0	
8	P08	2017 Actual	Aug	Month	GLCode	0	
9	P09	2017 Budget	Sep	Month	GLCode	0	
10	P10	2017 Budget	Oct	Month	GLCode	0	
11	P11	2017 Budget	Nov	Month	GLCode	0	
12	P12	2017 Budget	Dec	Month	GLCode	0	



That's It. You're Done.



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