



Slide 1

Slide notes: To set up for Budget Revision Capture, we go to the Budget Control Parameters.

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1 Main Controls 2 Mapping Controls

Budget Control

Financial Report Settings

i.e. which Budget the current Financial Reports should use when Budget values are included.

Previous Budget Starts At: 100

Number Of Recent Budget Periods: 12

Budget Capture Settings

i.e. Settings for the new Budget to be captured, and which is usually different from the Budget in use on current Financial Reports.

Previous Budget Starts At	Jan 2009 (p 96)
For Future New Budget	Jan 2010 (p 100)
Number Of Budget Periods	12
Change Actual Yr Expected	n
Description Of Periods	0
Expected Starts At	Jul 2009 (p 102)
New Many Expectable	0

[Save](#)

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Financial Report Settings

i.e. which Budget the current Financial Reports should use when Budget values are included.

Previous Budget Start At	100
Number Of Report Budget Periods	12

Budget Capture Settings

i.e. Settings for the new Budget to be captured, and which is usually different from the Budget in use on current Financial Reports.

Previous Budget Start At	Jan 2009 (p 96)
New Budget Start At	Jan 2010 (p 100)
Number Of Budget Periods	12
Change Actual With Expected	n
Description Of Parameter	0
Expected Start At	Jul 2009 (p 102)
New Money Expectable	0

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Slide 3

Slide notes: The Expected Budget is the basis for Budget Revisions throughout the Year, and we set the Expected to start at that point from where we wish to revise, i.e. the start of the remaining part of the Year.

Budget Control

Financial Report Settings i.e. which Budget the current Financial Reports should use when Budget values are included.

Previous Budget Start At: Jan 2010 (p 100)

Number Of Report Budget Periods: 12

Budget Capture Settings i.e. Settings for the new Budget to be captured, and which is usually different from the Budget in use on current Financial Reports.

Previous Budget Start At: Jan 2009 (p 96)

To Period New Budget: Jan 2010 (p 100)

Number Of Budget Periods: 12

Change Actual With Expected: n

Description Of Periods: 0

Expected Start At: 100

New Many Expecteds: 0

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Slide 4

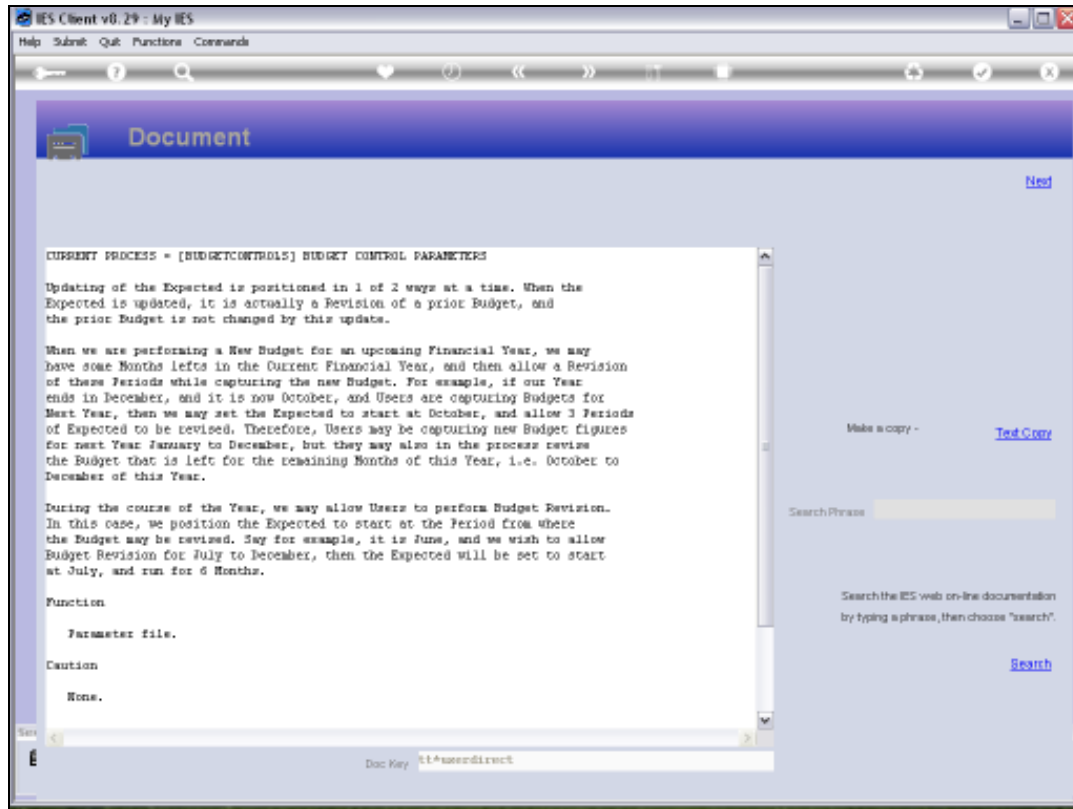
Slide notes: For example, if the 2nd half of the Year remains and will be revised, in a Financial Year that runs from January through December, then we will now point the Expected to start at July, and allow 6 Expected Periods to be revised. If the Financial Year runs from July to June, for example, and we set the Expected at July, with 12 Expecteds, then we would be revising the entire Budget Year.



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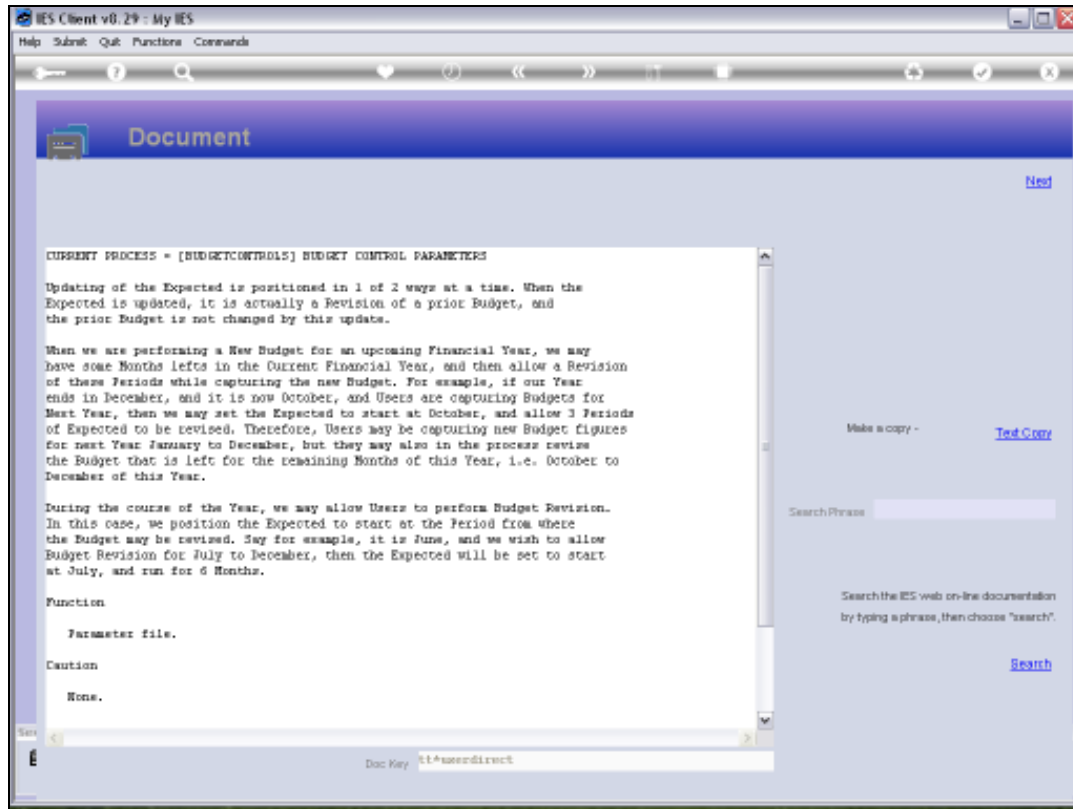


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Slide 7

Slide notes: Here we have an explanation of how to adjust for Budget Revision Capture. Of course, if we do the Budget Revision by Importing only, then there is no need to adjust the Control Parameters, since with Budget Imports, we specify which kind of Budget we are importing, and also the Periods to be affected.



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CURRENT PROCESS = [BUDGETCONTROLS] BUDGET CONTROL PARAMETERS

Updating of the Expected is positioned in 1 of 2 ways at a time. When the Expected is updated, it is actually a Revision of a prior Budget, and the prior Budget is not changed by this update.

When we are performing a New Budget for an upcoming Financial Year, we may have some Months lefts in the Current Financial Year, and then allow a Revision of these Periods while capturing the new Budget. For example, if our Year ends in December, and it is now October, and Users are capturing Budgets for Next Year, then we may set the Expected to start at October, and allow 3 Periods of Expected to be revised. Therefore, Users may be capturing new Budget figures for next Year January to December, but they may also in the process revise the Budget that is left for the remaining Months of this Year, i.e. October to December of this Year.

During the course of the Year, we may allow Users to perform Budget Revision. In this case, we position the Expected to start at the Period from where the Budget may be revised. Say for example, it is June, and we wish to allow Budget Revision for July to December, then the Expected will be set to start at July, and run for 6 Months.

Function

Parameter file.

Caution

None.

Doc Key: It*userdirect

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Search Phrase

Search the IES web on-line documentation by typing a phrase, then choose "search".

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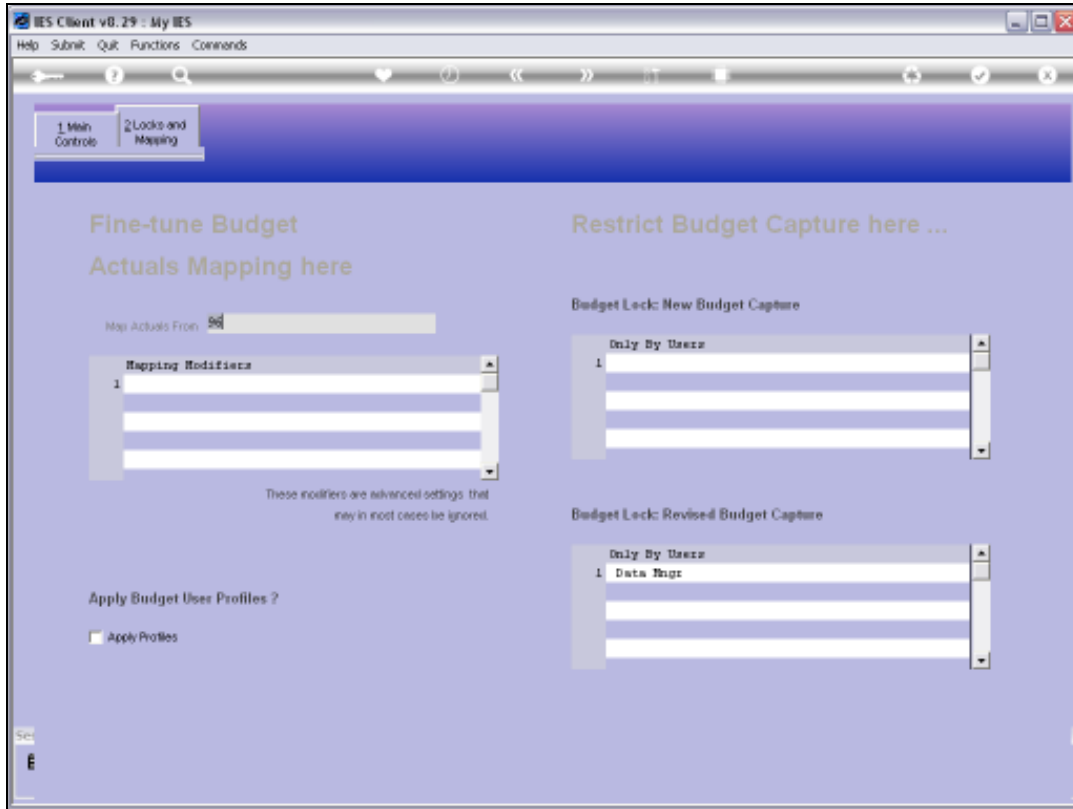
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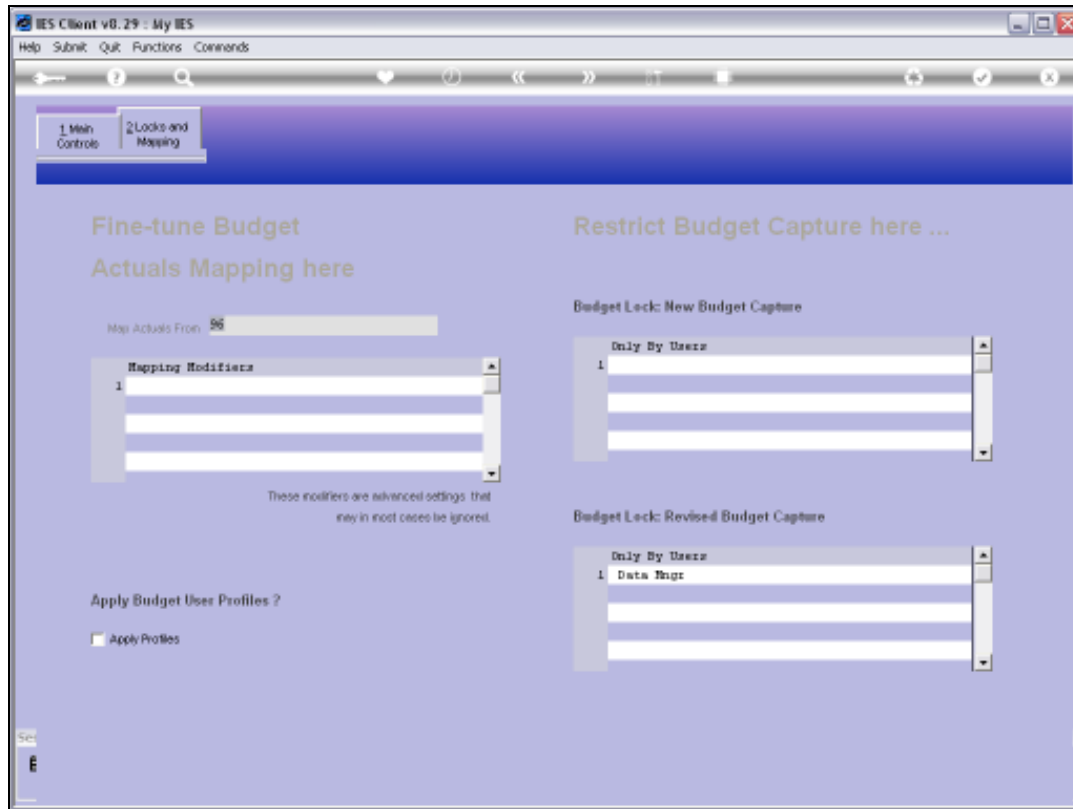
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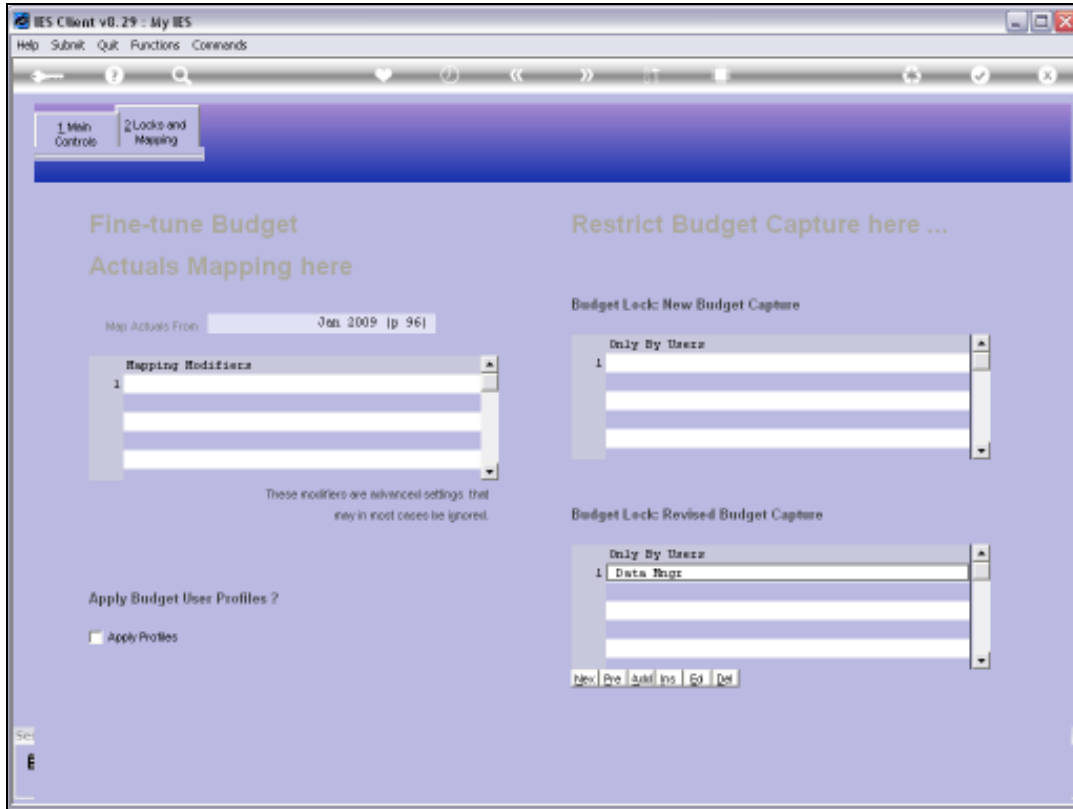


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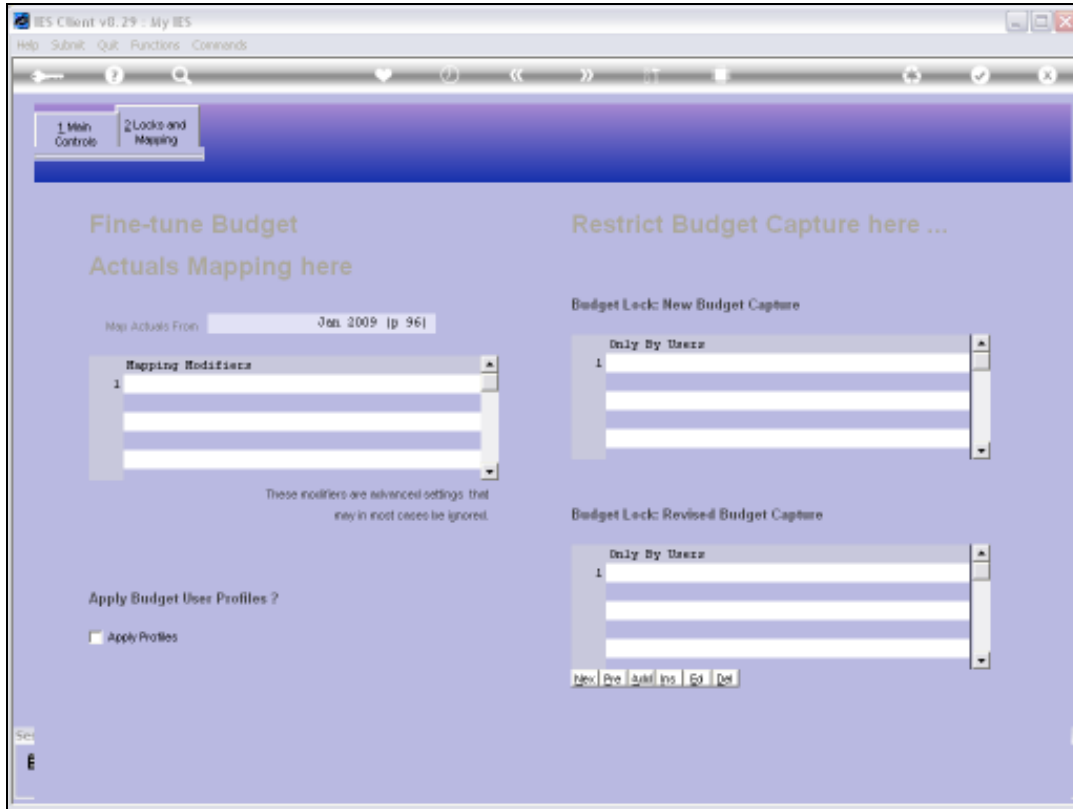


Slide 12

Slide notes: If there is a Budget Lock in place, i.e. listing 1 or more Users at the 'only' field, to protect the Revised Budget, then we need to release this Lock to allow general Budget Revision Capture.



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