



Slide 1

Slide notes: We are busy dealing with principles of Budget Capture, and in this tutorial we wish to clarify the principal of the KPI and Financial conversions that are optional with Physical Budgets.

The screenshot shows the IES Client v0.29: My IES interface. At the top, there are tabs for '1 Min' and '2 Note'. The main title is 'PHYSICALS: - Budget and Expected'. Below this, there are input fields for 'Ledger Code', 'Key Perf Indicator', 'Resource', 'Hpi Factor' (set to 0.00), and 'Conversion' (set to 0.00). To the right, there are 'Increase %' and 'Decrease %' fields, both set to 0.00. On the far right, there is a vertical list of action links: 'Copy Previous', 'Copy Plus', 'Copy Minus', 'Increase by %', 'Decrease by %', 'Initialze', 'Spread', 'Totals', 'Chart It', and 'Update'. Below these fields is a red note: 'Note: This process updates new Budget AND new Expected (Forecast) Values!'. Underneath the note is a table with columns for 'Budget', 'Previous', and 'Actuals'. The table contains 12 rows of data, all with values of 0.00. The months listed are Jan 2010 through Dec 2010.

	Budget		Previous	Actuals
1	0.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 2
Slide notes:

1 Min 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code:

Key Perf Indicator:

Resource:

Hpi Factor:

Conversion:

Increase %:

Decrease %:

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialize](#)
[Spread](#)
[Totals](#)
[Chart It](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals
1	0.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 3

Slide notes: Physical Budgets are optional, but they are very useful. If and when we do them, we never do them on all GL Accounts, but only on those Accounts where it makes sense to have a Physical Budget. For example, an Account where we charge Man Hours or Tractor Hours or some similar Resource that we may measure the application of. That is the type of Account where we will usually choose to do a Physical Budget.

The screenshot shows the IES Client v0.29: My IES interface. At the top, there are tabs for '1 Min' and '2 Note'. The main heading is 'PHYSICALS: - Budget and Expected'. Below this, there are several input fields: 'Ledger Code' (05100222), 'Key Perf Indicator', 'Resource', 'Hpi Factor' (0.00), and 'Conversion' (0.00). To the right, there are 'Increase %' and 'Decrease %' fields, both set to 0.00. On the far right, there is a vertical list of action links: 'Copy Previous', 'Copy Plus', 'Copy Minus', 'Increase by %', 'Decrease by %', 'Initialize', 'Spread', 'Totals', 'Chart It', and 'Update'. Below the input fields, a red note states: 'Note: This process updates new Budget AND new Expected (Forecast) Values!'. Underneath the note is a table with columns for 'Budget', 'Previous', and 'Actuals'. The table contains 12 rows of data, all with values of 0.00.

	Budget		Previous	Actuals
1	0.00	Jan 2010	0.00	0.00
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3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 4
Slide notes:

IES Client v0.29: My IES

Help Subst Quit Functions Commands

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
 Key Perf Indicator:
 Resource: H Money
 Hpi Factor: 0
 Conversion: 1.00

Increase %: 0.00
 Decrease %: 0.00

[Copy Previous](#)
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[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart It](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals	
1	0.00	Jan 2010	0.00	0.00	0.00
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3	0.00	Mar 2010	0.00	0.00	0.00
4	0.00	Apr 2010	0.00	0.00	0.00
5	0.00	May 2010	0.00	0.00	0.00
6	0.00	Jun 2010	0.00	0.00	0.00
7	0.00	Jul 2010	0.00	0.00	0.00
8	0.00	Aug 2010	0.00	0.00	0.00
9	0.00	Sep 2010	0.00	0.00	0.00
10	0.00	Oct 2010	0.00	0.00	0.00
11	0.00	Nov 2010	0.00	0.00	0.00
12	0.00	Dec 2010	0.00	0.00	0.00

Slide 5

Slide notes: This Account is a good example of an Account where we will NOT do a Physical Budget, because it is a Cost of Sales Account and there is no specific Resource that we can measure here, but for that reason it is also a good example of an Account with no KPI or Financial Conversion rate.

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
 Key Perf Indicator:
 Resource: Money
 Hpi Factor: 0
 Conversion: 1.00

Increase %: 0.00
 Decrease %: 0.00

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals	
1	0.00	Jan 2010	0.00	0.00	
2	0.00	Feb 2010	0.00	0.00	
3	0.00	Mar 2010	0.00	0.00	
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7	0.00	Jul 2010	0.00	0.00	
8	0.00	Aug 2010	0.00	0.00	
9	0.00	Sep 2010	0.00	0.00	
10	0.00	Oct 2010	0.00	0.00	
11	0.00	Nov 2010	0.00	0.00	
12	0.00	Dec 2010	0.00	0.00	

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 Initialize
 Spread
 Totals
 Chart It
 Update

Slide 6

Slide notes: To specify a Resource for a GL Account is entirely optional, even when Physical Budgets are in use. When there is no Resource specified for the Account, then the system will indicate a 'Money' Resource, in other words, a straight Financial Account. In this case, a default Financial Conversion of '1' is indicated. So if we Budget for a Physical Quantity of 100, then the Financial Budget will also be 100, and the KPI is not in use at all. It is also a very useful way to do all the Budgets with the same Capture screen, because for Financial Accounts, we can also Budget by Physical on a 1-to-1 basis.

IES Client v0.29: My IES

Help Subst Quit Functions Commands

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
Key Perf Indicator:
Resource: H Money
Hpi Factor: 0
Conversion: 1.00

Increase %: 0.00
Decrease %: 0.00

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8	0.00	Aug 2010	0.00	0.00	
9	0.00	Sep 2010	0.00	0.00	
10	0.00	Oct 2010	0.00	0.00	
11	0.00	Nov 2010	0.00	0.00	
12	0.00	Dec 2010	0.00	0.00	

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Slide notes:

IES Client v0.29: My IES

Help Lookup Back Field Restart Line Edit Mini Menu Submit Field Quit Edit

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
Key Perf Indicator:
Resource: H. Honey
Hpi Factor: 0.00
Conversion: 1.00

Increase %: 0.00
Decrease %: 0.00

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[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals
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6	0.00	Jun 2010	0.00	0.00
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8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Max Prev Next Ins 60 Tot

Slide 8
Slide notes:

IES Client v0.29 : My IES

Help Lookup Back Field Restart Line Edit Mini Menu Submit Field Quit Edit

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
Key Perf Indicator:
Resource: H. Honey
Hpi Factor: 0.00
Conversion: 1.00

Increase %: 0.00
Decrease %: 0.00

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[Initialze](#)
[Spread](#)
[Totals](#)
[Chart It](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals
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5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Max Prev Add Inv 50 Tot

Slide 9
Slide notes:

IES Client v0.29 : My IES

Help Lookup Back Field Restart Line Edit Mini Menu Submit Field Quit Edit

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
Key Perf Indicator:
Resource: H. Honey
Hpi Factor: 0.00
Conversion: 1.00

Increase %: 0.00
Decrease %: 0.00

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9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Max Pre Add Inv 50 Tot

Slide 10
Slide notes:

IES Client v8.29: My IES

Help InfoLab Connections Login Logout Comparison Wizard How do I DataMarts Business Modules ActionPacue Option Select

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
 Key Perf Indicator:
 Resource: H Honey
 Kpi Factor: 0.00
 Conversion: 1.00

Increase %: 0.00
 Decrease %: 0.00

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[Totals](#)
[Chart It](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals
1	100.00	Jan 2010	0.00	0.00
2		Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Max Pre | 50 | Tot

Slide 11

Slide notes: Since there is no KPI, then when we capture a Physical Quantity it is not transformed from KPI to Physical, because there is no KPI, and the Quantity is seen as a straight Physical Quantity.

IES Client v0.29: My IES

Help Subst Quit Functions Commands

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
 Key Perf Indicator:
 Resource: H Money
 Hpl Factor: 0.00
 Conversion: 0.00

Increase %: 0.00
 Decrease %: 0.00

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8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 12

Slide notes: Even the update of the Financial Budget can be inhibited by changing the conversion to zero. When it is zero, then the Financial Budget will not be updated at all.

IES Client v0.29 : My IES

Help Subst Quit Functions Commands

1 Min 2 Note

PHYSICALS: - Budget and Expected

Ledger Code: 051-00-222 RETAIL COST OF SALES: RIVERSIDE
Key Perf Indicator:
Resource: H. Money
Hpi Factor: 0.00
Conversion: 0

Increase %: 0.00
Decrease %: 0.00

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8	0.00	Aug 2010	0.00	0.00	
9	0.00	Sep 2010	0.00	0.00	
10	0.00	Oct 2010	0.00	0.00	
11	0.00	Nov 2010	0.00	0.00	
12	0.00	Dec 2010	0.00	0.00	

Slide 13
Slide notes:

IES Client v8.29 : My IES
Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 851-00-222 RETAIL COST OF SALES: RIVERGIDE
Key Perf Indicator:
Resource: K Honey
KPI Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

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[Increase by %](#)
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[Totals](#)
[Chart/](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

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8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	0.00
10	0.00	Oct 2010	0.00
11	0.00	Nov 2010	0.00
12	0.00	Dec 2010	0.00

Slide 14
Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: Increase %:
 Key Perf Indicator: Decrease %:
 Resource:
 Kpi Factor:
 Conversion:

[Copy Previous](#)
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[Spread](#)
[Totals](#)
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[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

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7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	0.00
10	0.00	Oct 2010	0.00
11	0.00	Nov 2010	0.00
12	0.00	Dec 2010	0.00

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Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code:

Key Perf Indicator:

Resource: H. Honey

Kpi Factor: 0.00

Conversion: 0.00

Increase %: 0.00

Decrease %: 0.00

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6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	0.00
10	0.00	Oct 2010	0.00
11	0.00	Nov 2010	0.00
12	0.00	Dec 2010	0.00

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Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 70
 Key Perf Indicator:
 Resource: K Honey
 KPI Factor: 0.00
 Conversion: 0.00

Increase %: 0.00
 Decrease %: 0.00

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Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
1	100.00	Jan 2010	0.00
2	0.00	Feb 2010	0.00
3	0.00	Mar 2010	0.00
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5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	0.00
10	0.00	Oct 2010	0.00
11	0.00	Nov 2010	0.00
12	0.00	Dec 2010	0.00

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Slide notes:

IES Client v8.29 : My IES
Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700
Key Perf Indicator:
Resource: H. Hovey
Kpi Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

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Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
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6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	0.00
10	0.00	Oct 2010	0.00
11	0.00	Nov 2010	0.00
12	0.00	Dec 2010	0.00

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Slide notes:

IES Client v8.29 : My IES
Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 7005
Key Perf Indicator:
Resource: K. Hovey
KPI Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

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Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
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5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 19
Slide notes:

PHYSICALS: - Budget and Expected

Ledger Code: 70055
Key Perf Indicator:
Resource: K. Hovey
KPI Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

[Copy Previous](#)
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[Decrease by %](#)
[Initial](#)
[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
1	100.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 20

Slide notes:

The screenshot shows the IES Client v8.29: My IES interface. At the top, there are tabs for '1 Main' and '2 Notes'. The main heading is 'PHYSICALS: - Budget and Expected'. Below this, there are input fields for 'Ledger Code' (700550), 'Key Perf Indicator', 'Resource' (K. Hovey), 'Kpi Factor' (0.00), and 'Conversion' (0.00). To the right, there are 'Increase %' and 'Decrease %' fields, both set to 0.00. A vertical toolbar on the right side contains buttons: Copy Previous, Copy Plus, Copy Minus, Increase by %, Decrease by %, Initialize, Spread, Totals, Chart, and Update. A note in red text states: 'Note: This process updates new Budget AND new Expected (Forecast) Values!'. Below the note is a table with columns: Budget, Previous, and Actuals. The table contains 12 rows of data for months from Jan 2010 to Dec 2010.

	Budget	Previous	Actuals
1	100.00	Jan 2010	0.00
2	0.00	Feb 2010	0.00
3	0.00	Mar 2010	0.00
4	0.00	Apr 2010	0.00
5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	0.00
10	0.00	Oct 2010	0.00
11	0.00	Nov 2010	0.00
12	0.00	Dec 2010	0.00

Slide 21
Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 7005503
Key Perf Indicator:
Resource: K. Hovey
KPI Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart/](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
1	100.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 22

Slide notes:

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 70055031
Key Perf Indicator:
Resource: K. Hovey
KPI Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart/](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
1	100.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 23

Slide notes:

PHYSICALS: - Budget and Expected

Ledger Code: 70055031
Key Perf Indicator:
Resource: H. Hovey
KPI Factor: 0.00
Conversion: 0.00

Increase %: 0.00
Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart/](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
1	100.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	0.00	0.00
10	0.00	Oct 2010	0.00	0.00
11	0.00	Nov 2010	0.00	0.00
12	0.00	Dec 2010	0.00	0.00

Slide 24

Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: Hk Hectares
 Resource: mhr: Man Hour
 Kpi Factor: 38
 Conversion: 2L-50

Increase %: 0.00
 Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initial](#)
[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
1	480.00	Jan 2010	0.00
2	0.00	Feb 2010	0.00
3	0.00	Mar 2010	0.00
4	0.00	Apr 2010	0.00
5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	613.33
10	0.00	Oct 2010	613.33
11	0.00	Nov 2010	613.33
12	0.00	Dec 2010	613.33

Slide 25

Slide notes: Here we have an example of an Account where a Physical Budget is very appropriate, because we are measuring Man Hours used for Planting of Hectares of Land. There is a Man Hours Resource indicated, and a KPI of Hectares.

IES Client v8.29 : My IES

Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: HA Hectares
 Resource: mhr: Man Hour
 Kpi Factor: 32
 Conversion: 2L-50

Increase %: 0.00
 Decrease %: 0.00

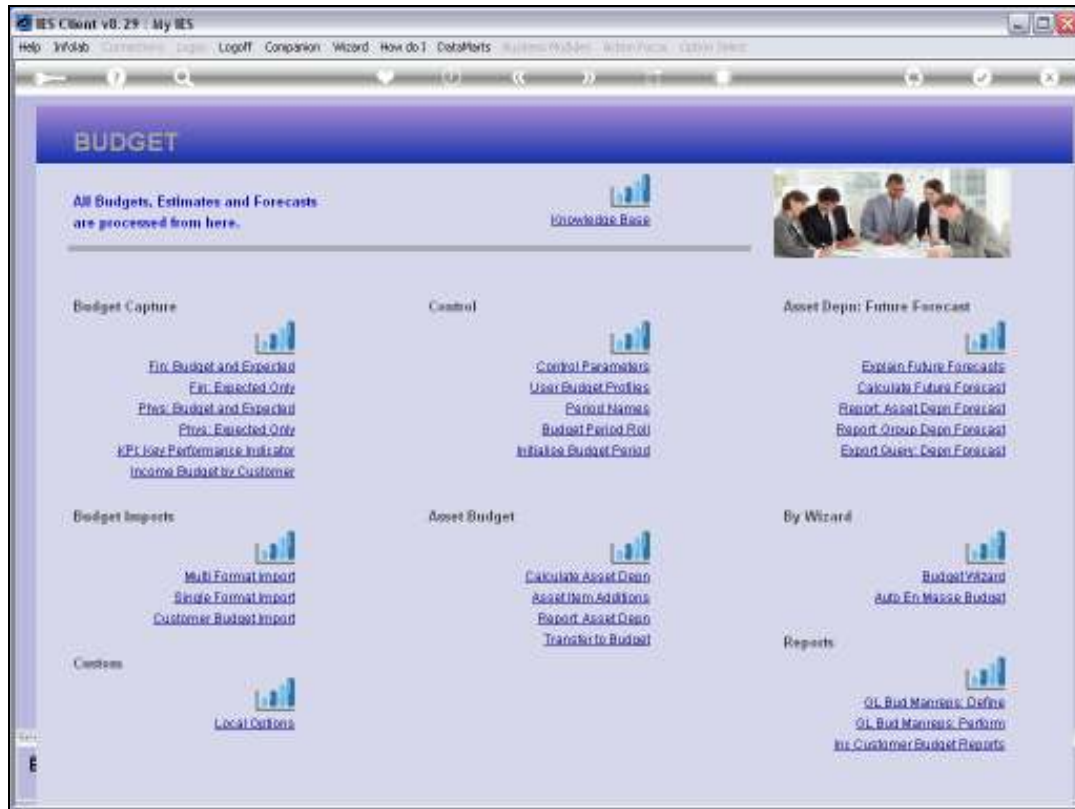
[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
1	460.00	Jan 2010	0.00
2	0.00	Feb 2010	0.00
3	0.00	Mar 2010	0.00
4	0.00	Apr 2010	0.00
5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	613.33
10	0.00	Oct 2010	613.33
11	0.00	Nov 2010	613.33
12	0.00	Dec 2010	613.33

Slide 26

Slide notes: The question is, where does this Resource and KPI come from? Actually, it is a setting on the GL Account. Let's have a look.



Slide 27
Slide notes:



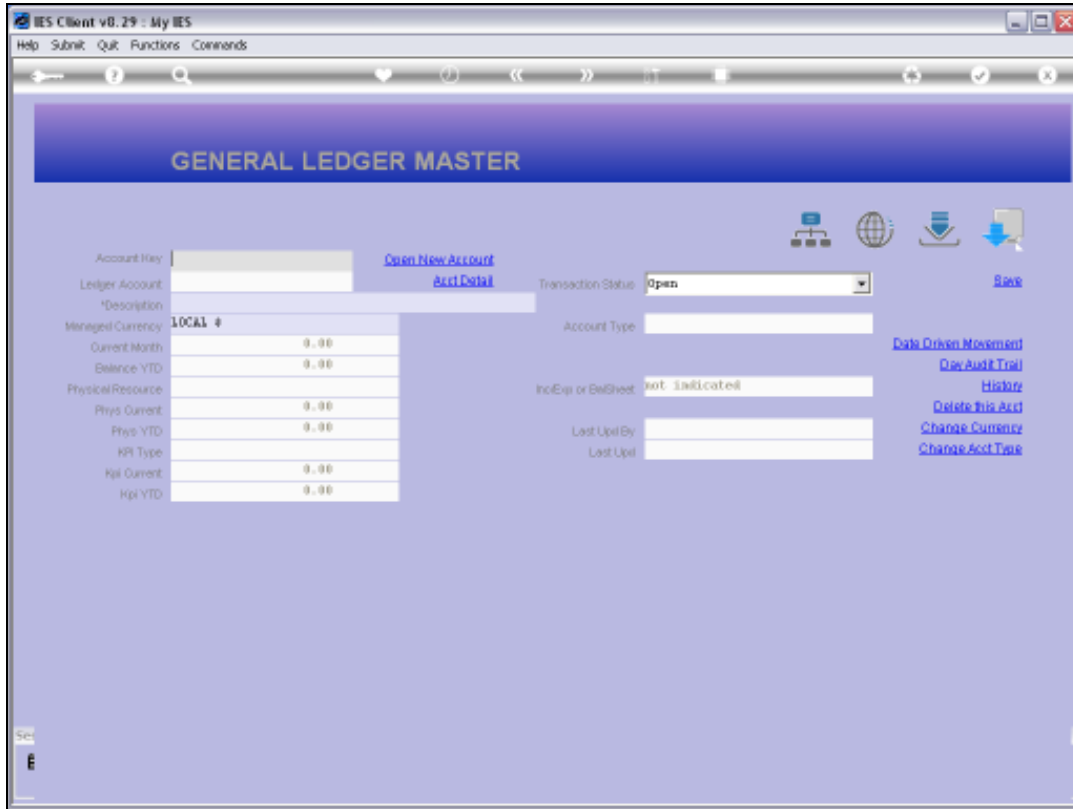
Slide 28
Slide notes:



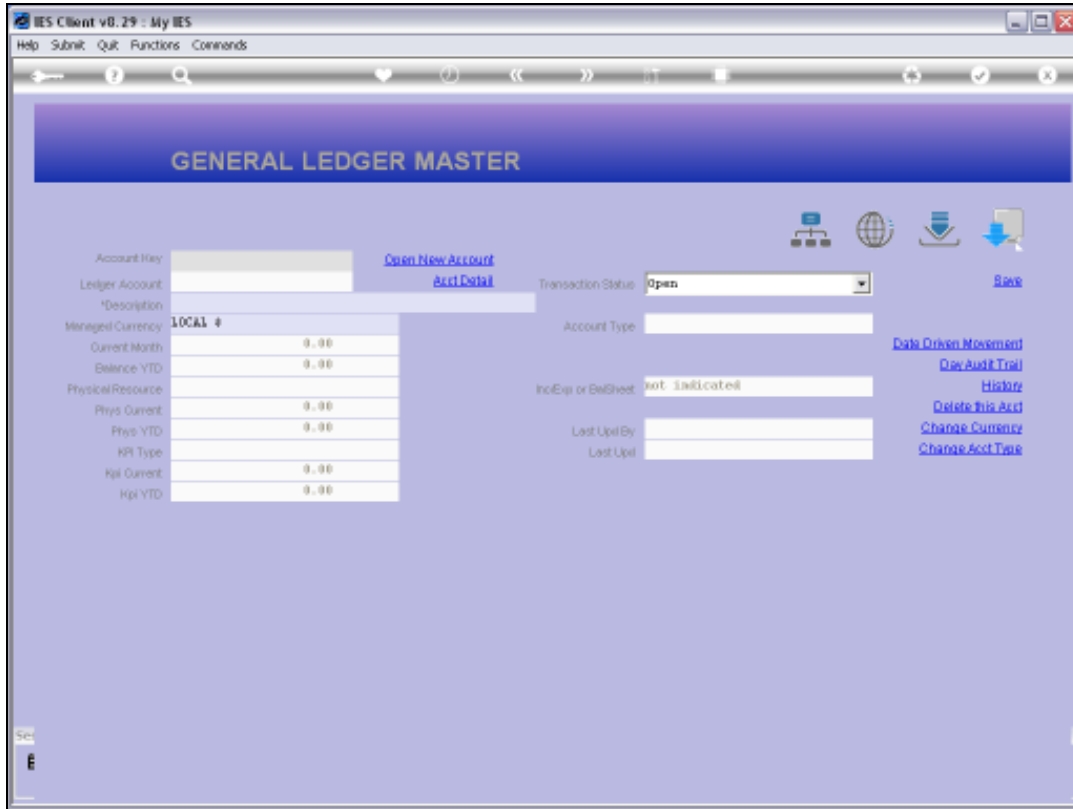
Slide 29
Slide notes:



Slide 30
Slide notes:

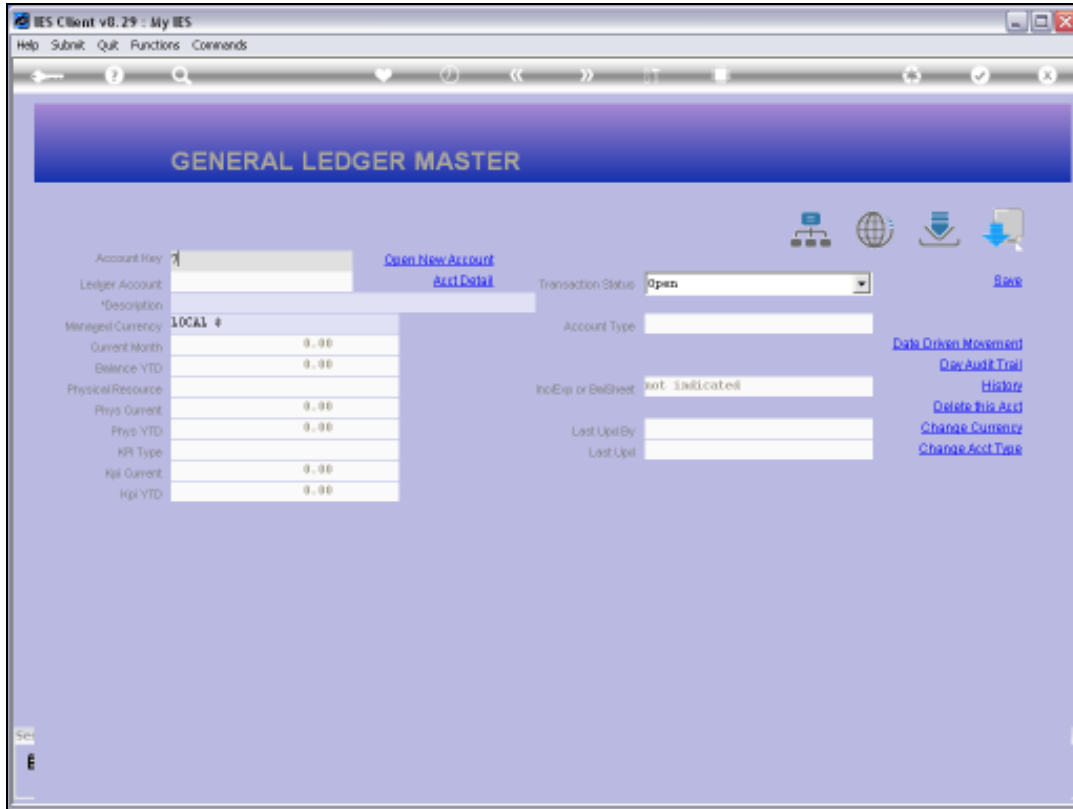


Slide 31
Slide notes:

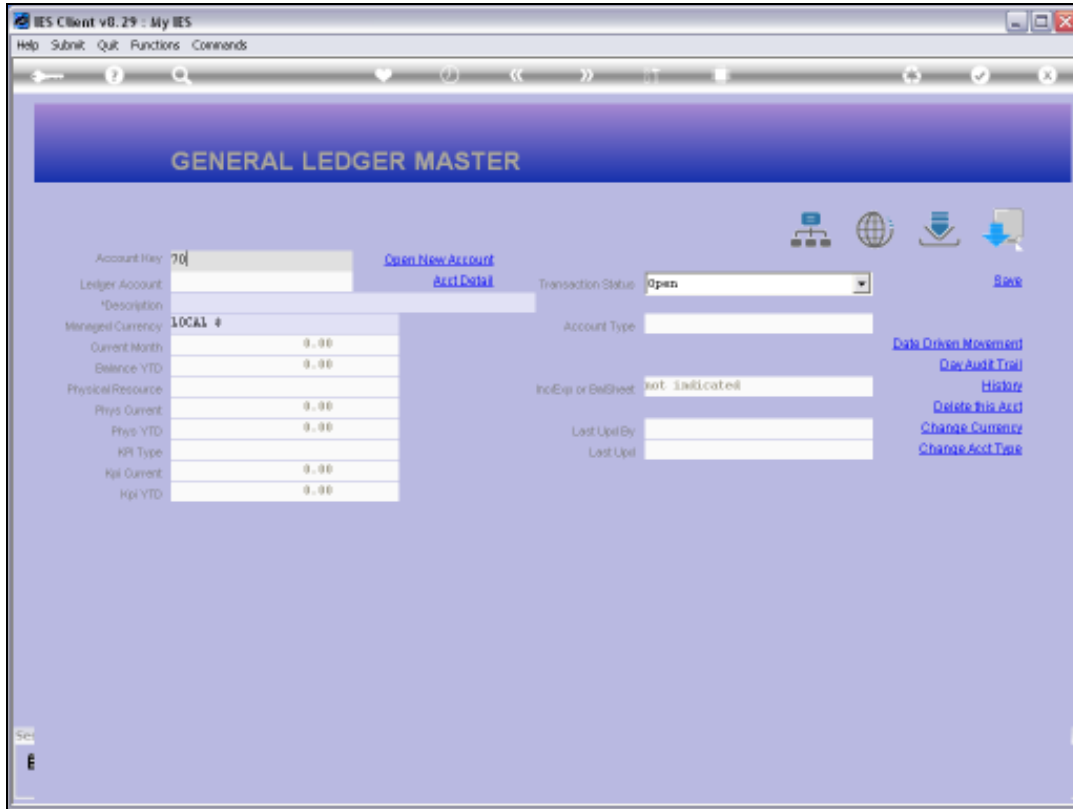


Slide 32

Slide notes:

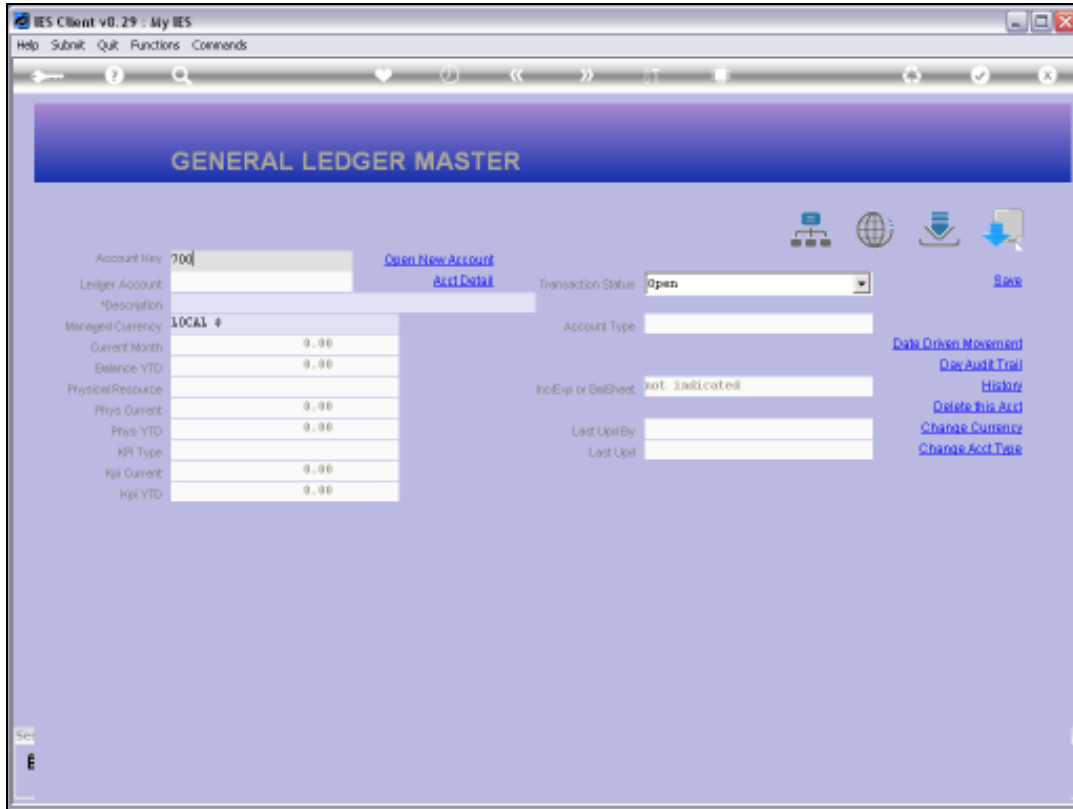


Slide 33
Slide notes:



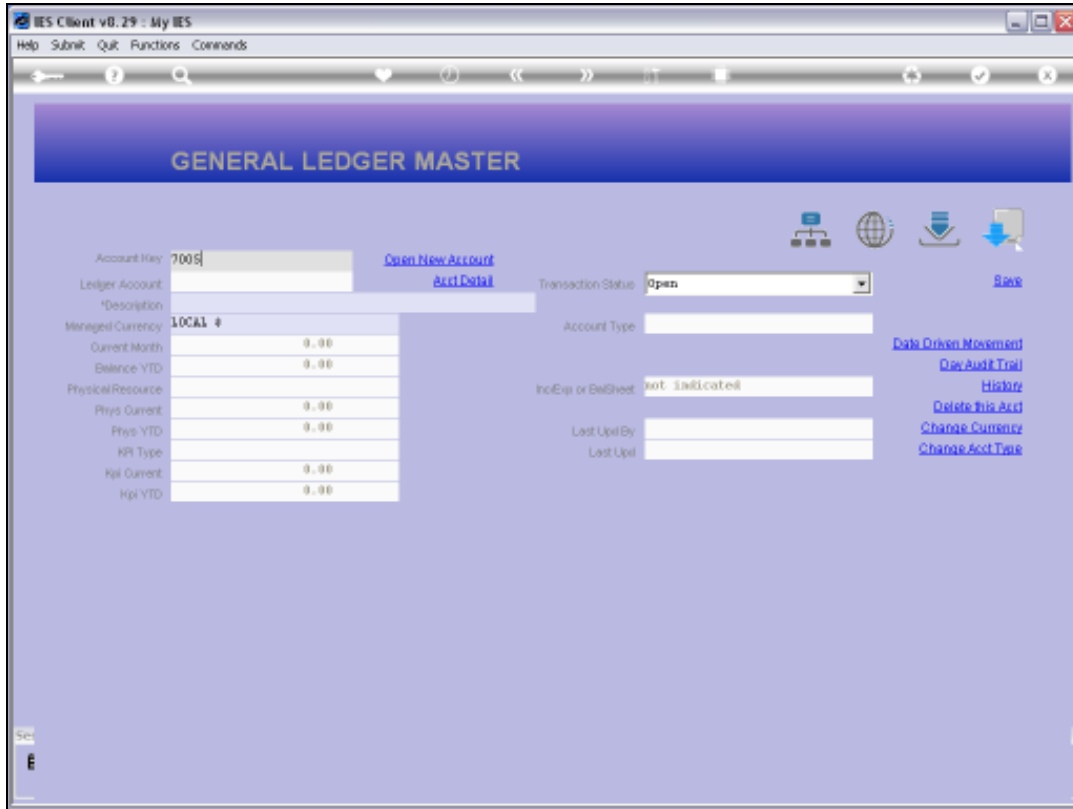
Slide 34

Slide notes:



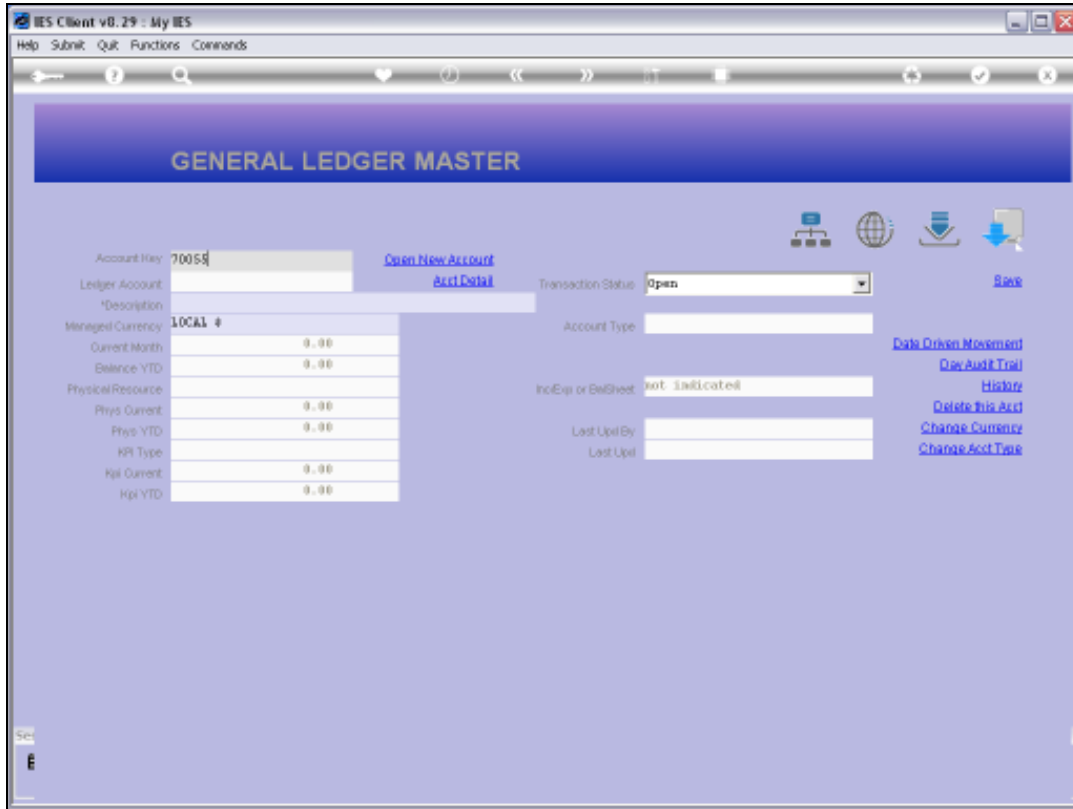
Slide 35

Slide notes:



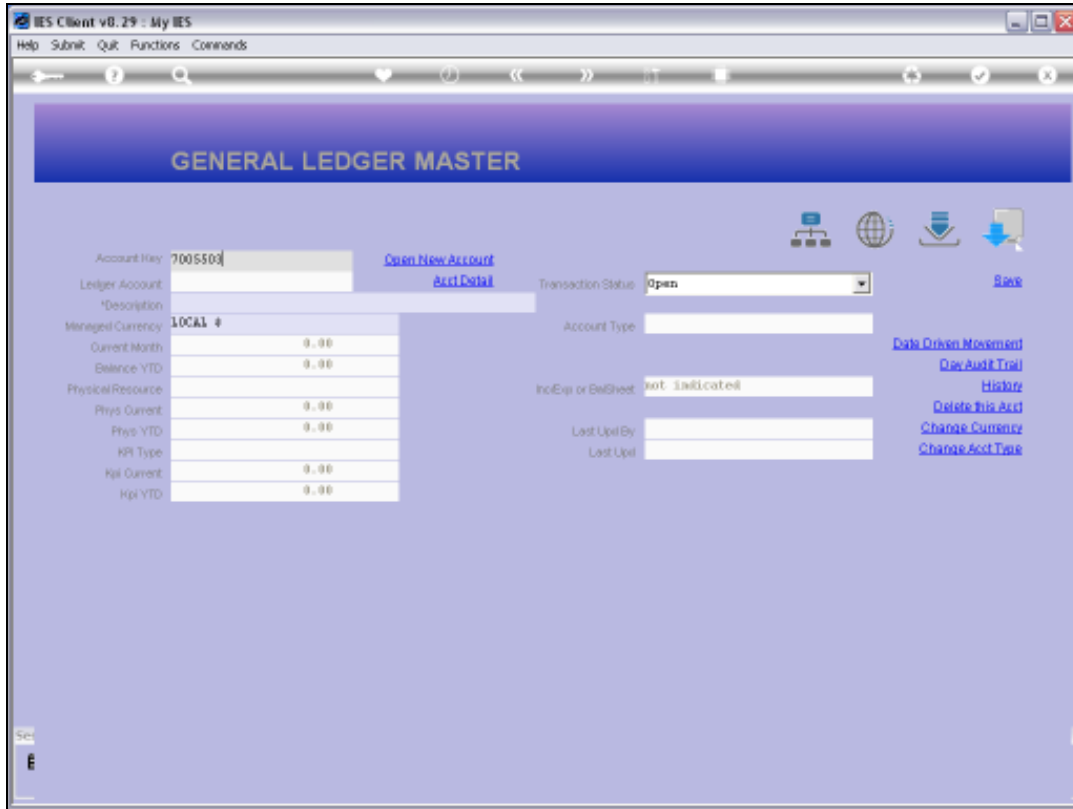
Slide 36

Slide notes:



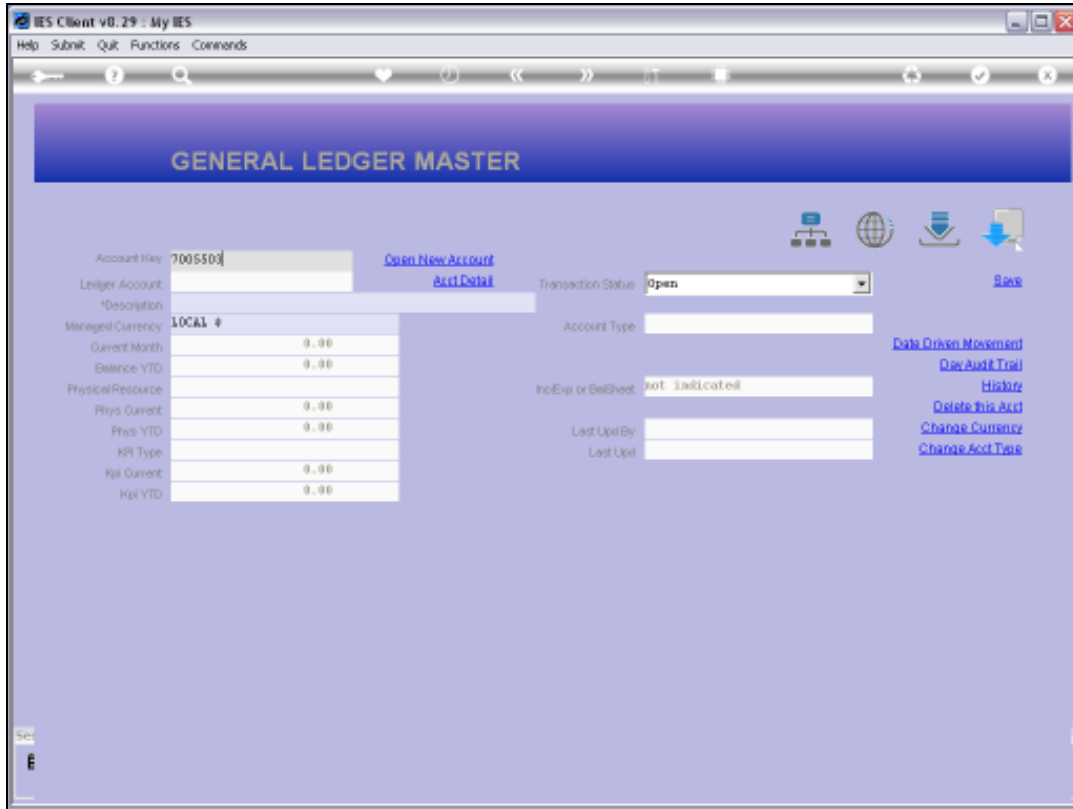
Slide 37

Slide notes:

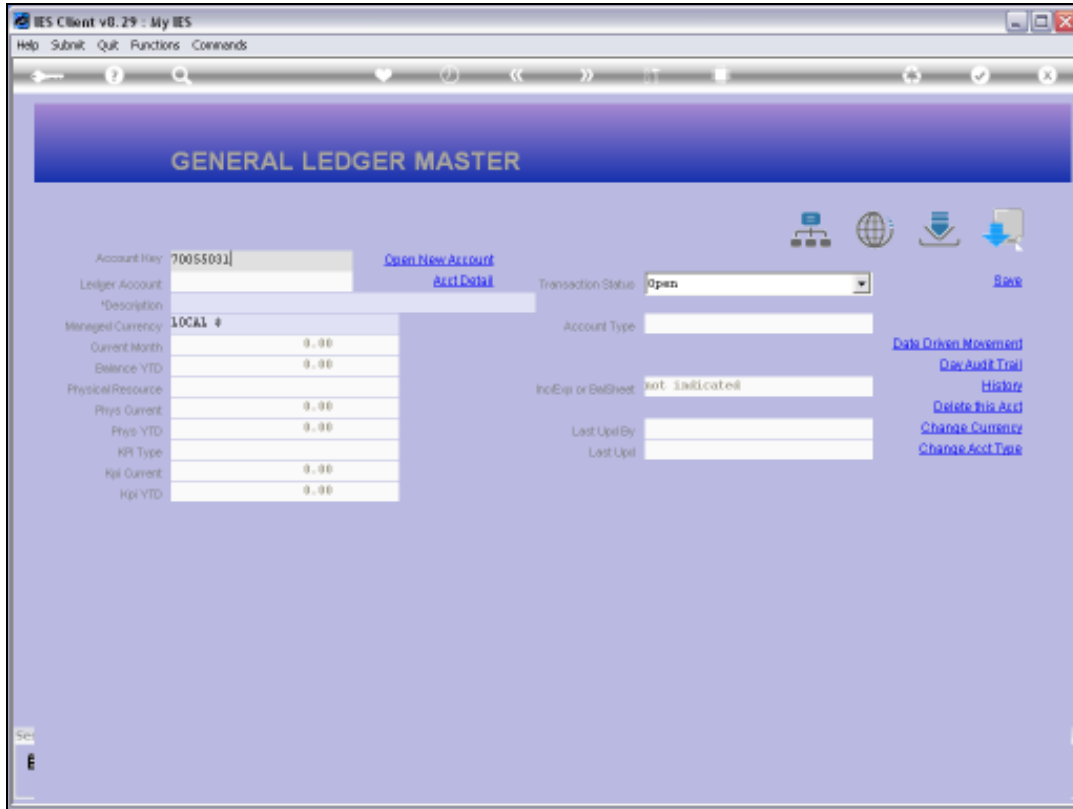


Slide 38

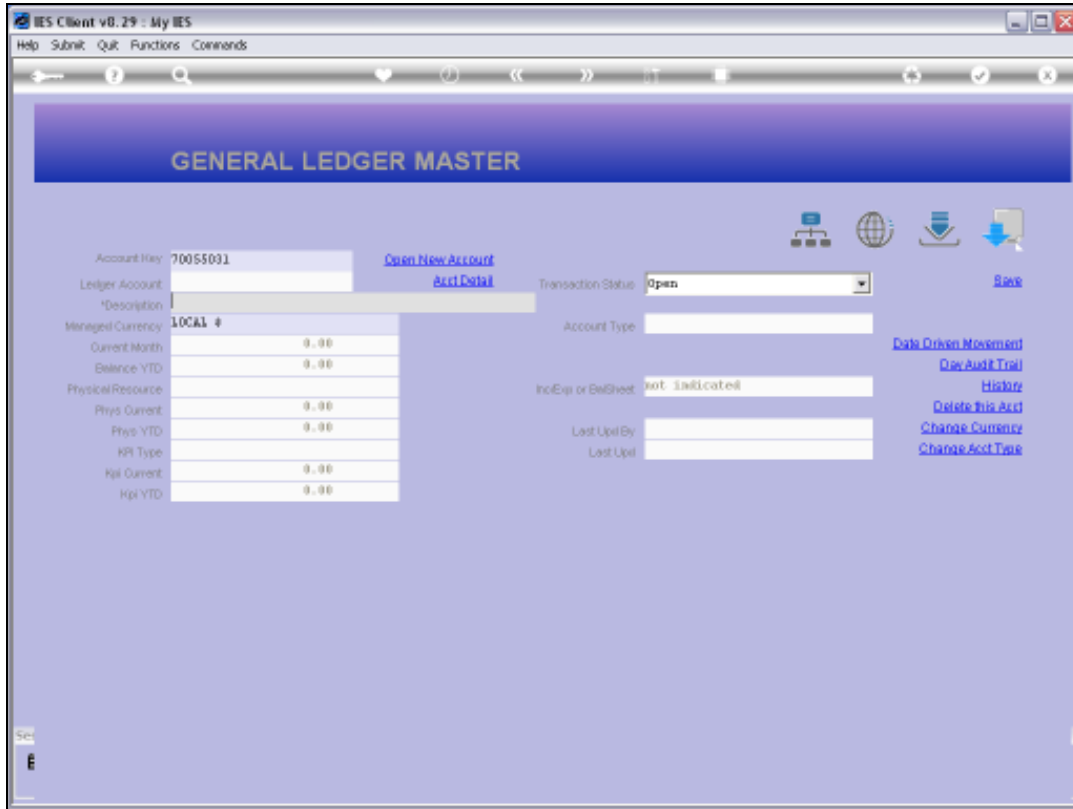
Slide notes:



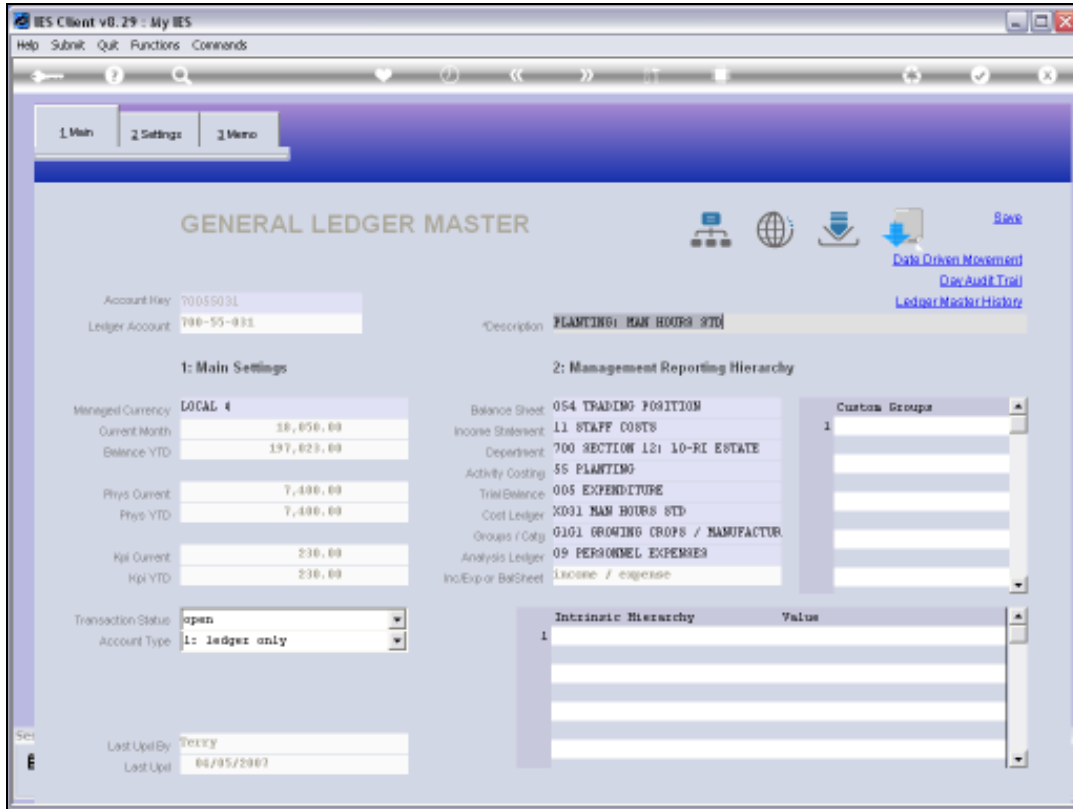
Slide 39
Slide notes:



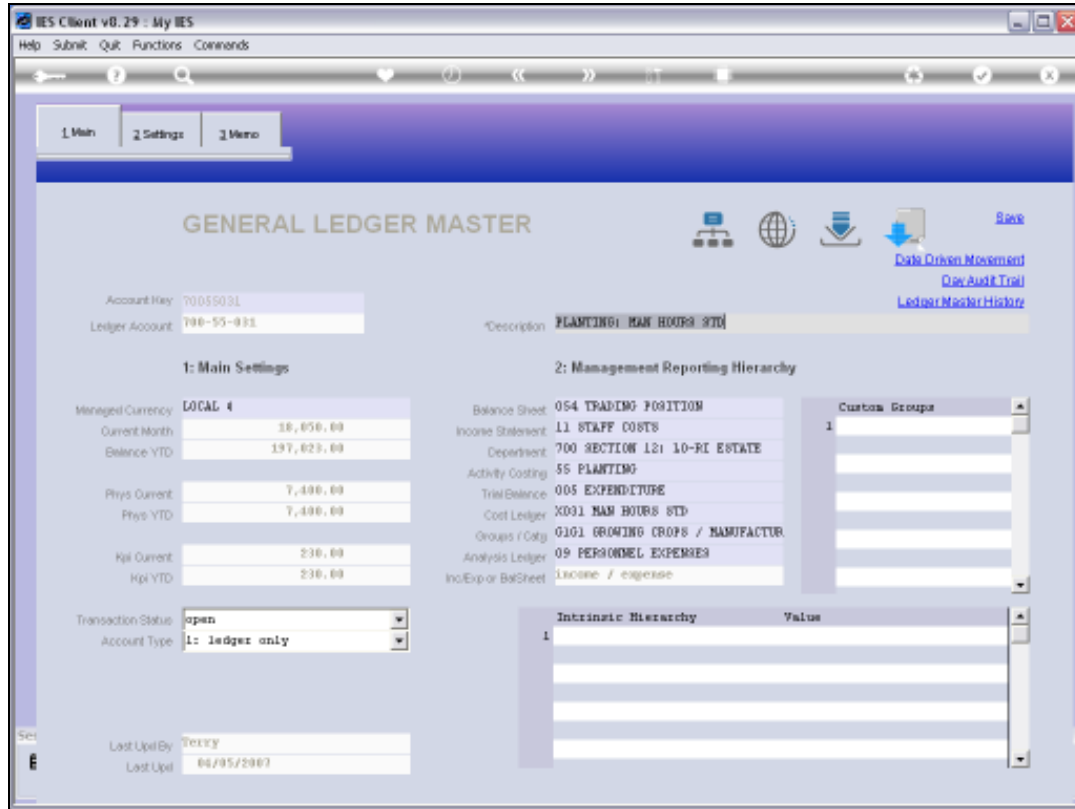
Slide 40
Slide notes:



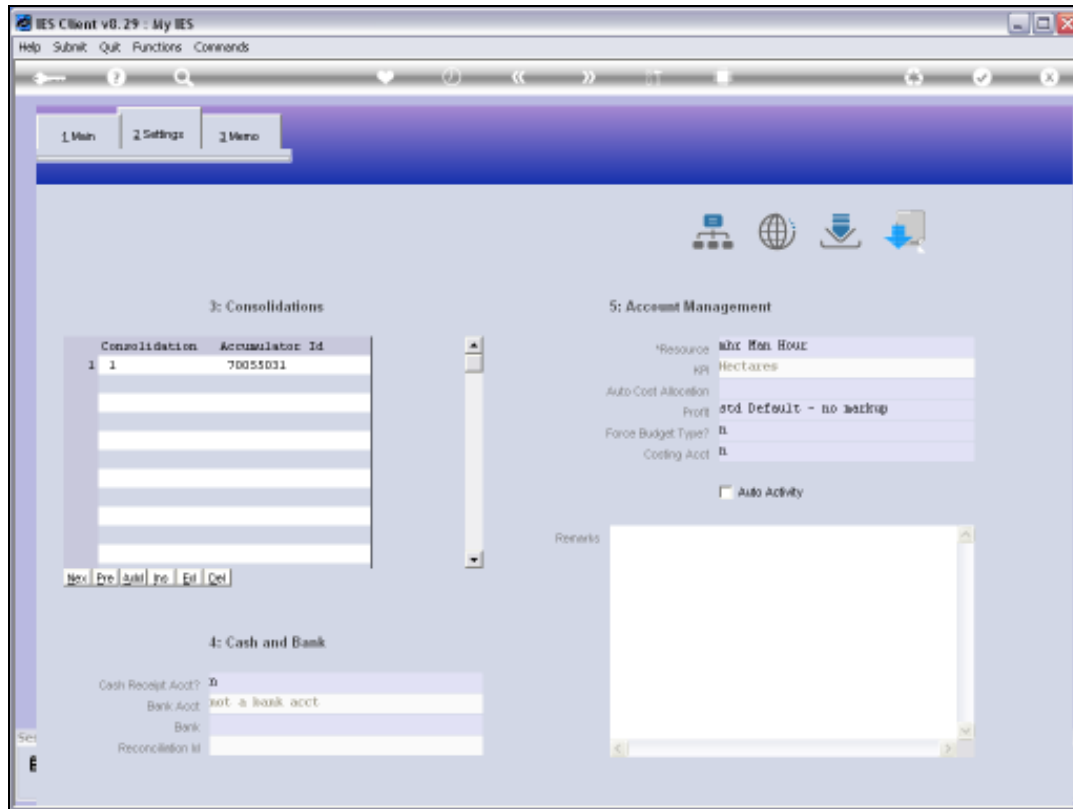
Slide 41
Slide notes:



Slide 42
Slide notes:

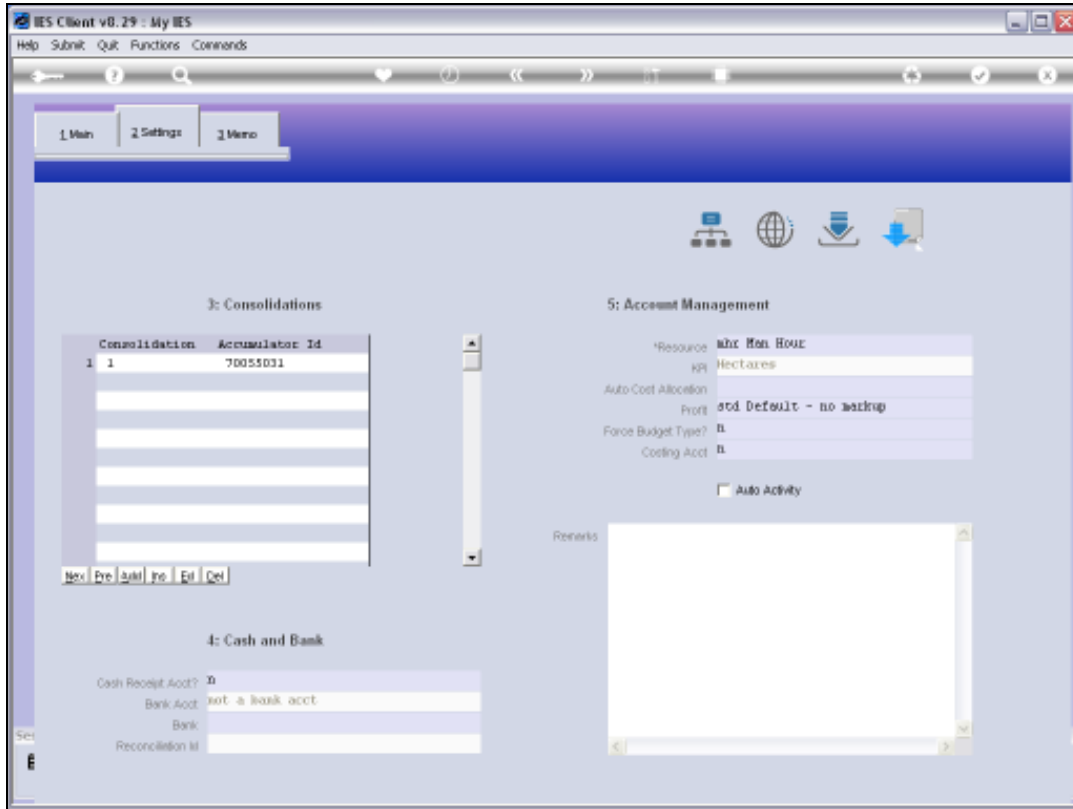


Slide 43
Slide notes:



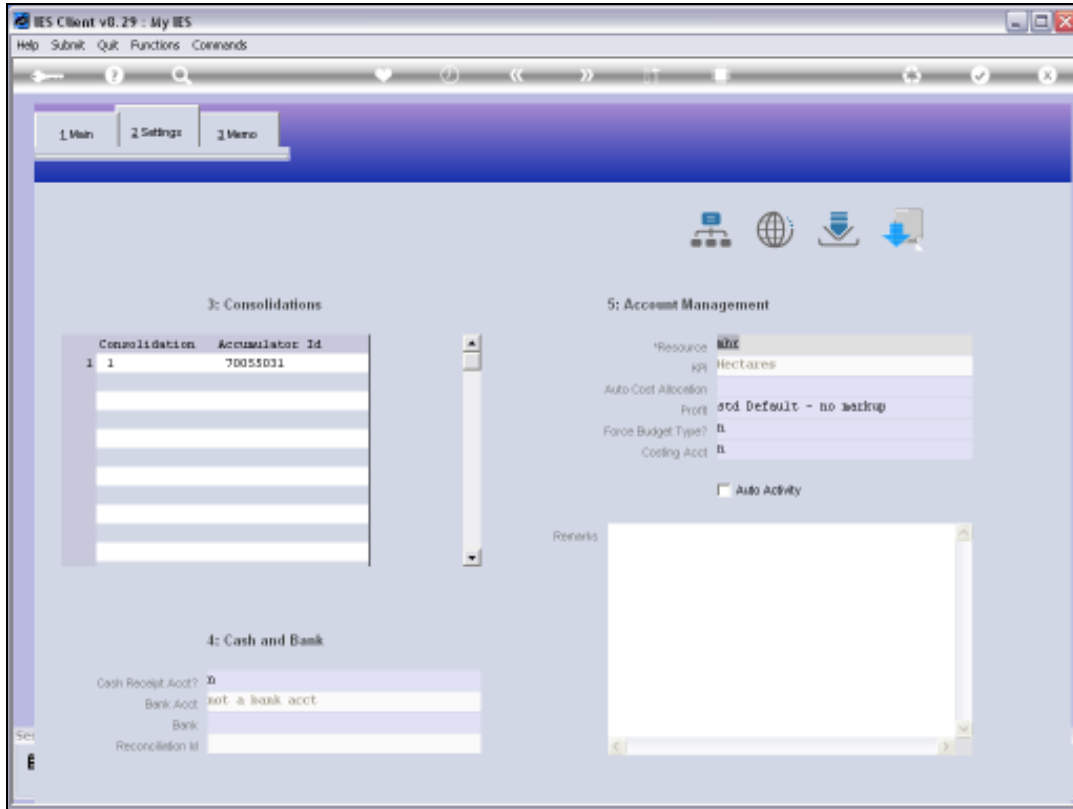
Slide 44

Slide notes: To specify a Resource on a GL Account is entirely optional, and we usually only do it for the Accounts where we want to measure Physicals by Resource. The KPI is derived from the Resource, and only if a KPI has been listed for that Resource. So let's have a look at this Resource.



Slide 45

Slide notes:



Slide 46

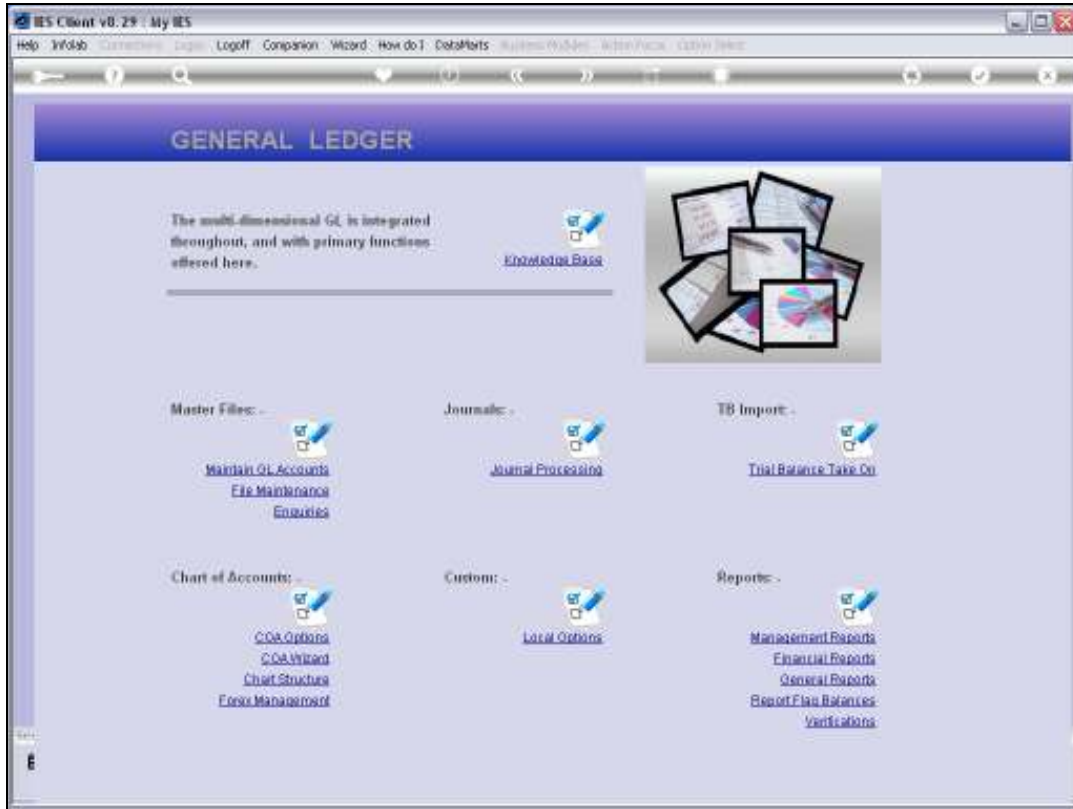
Slide notes:



Slide 47
 Slide notes:

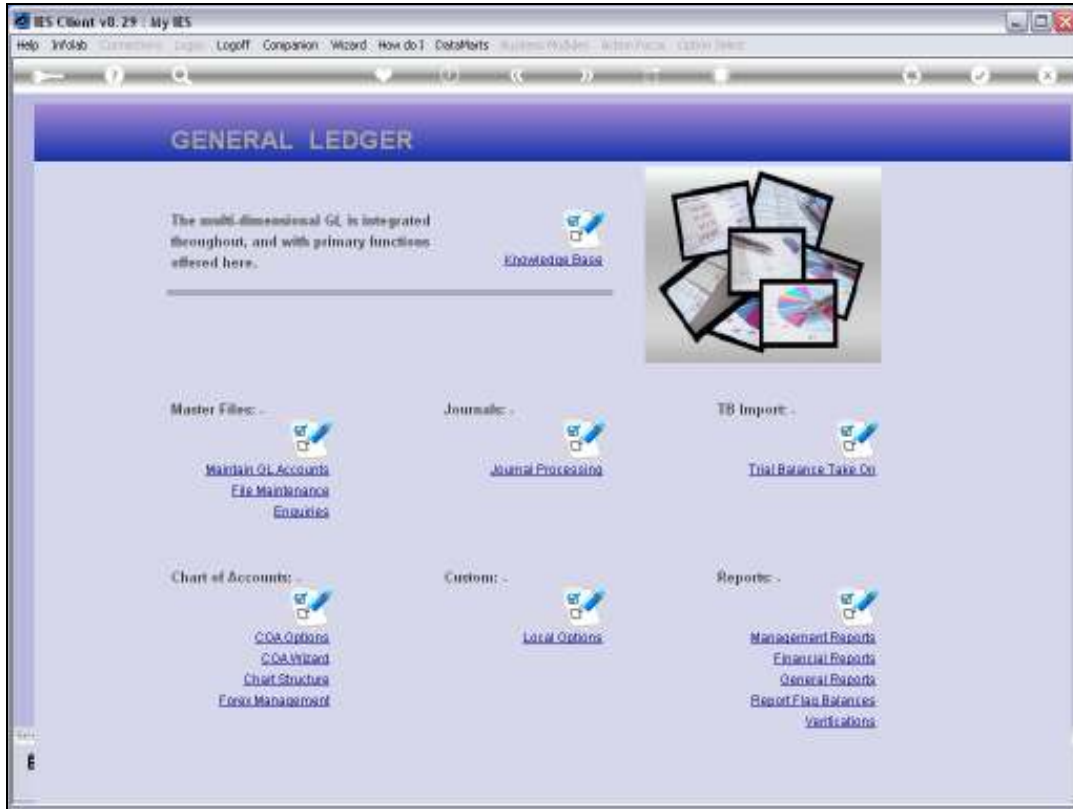


Slide 48
 Slide notes:

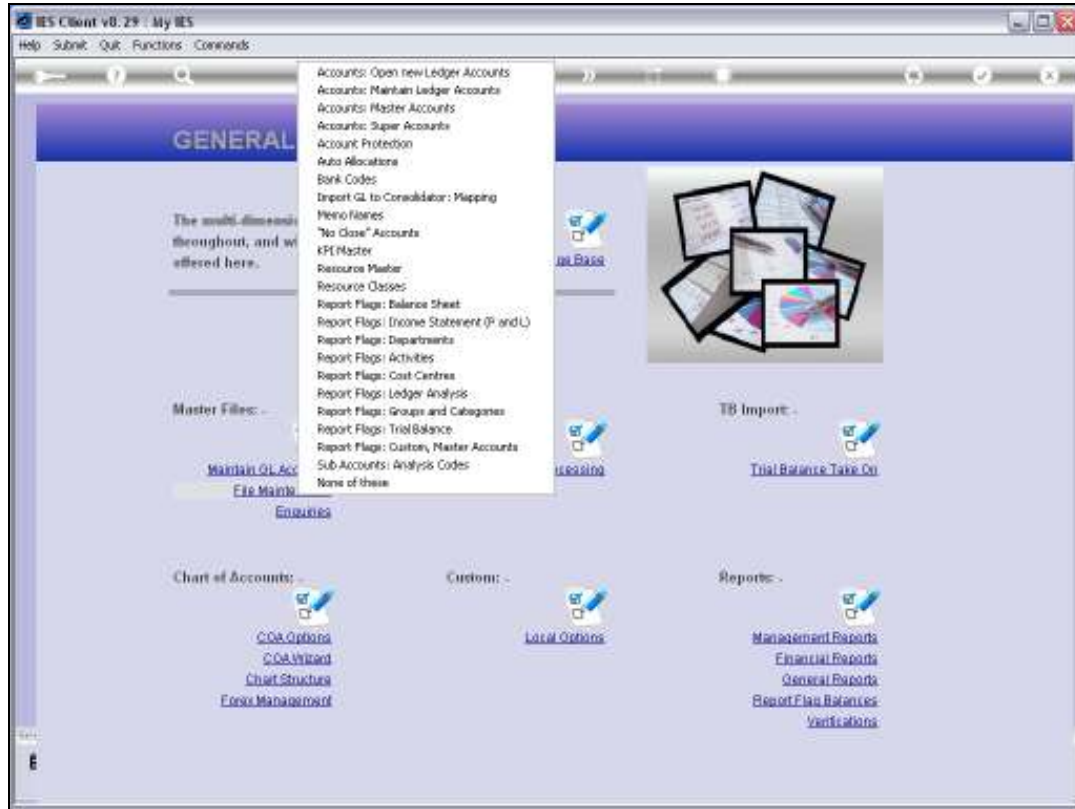


Slide 49

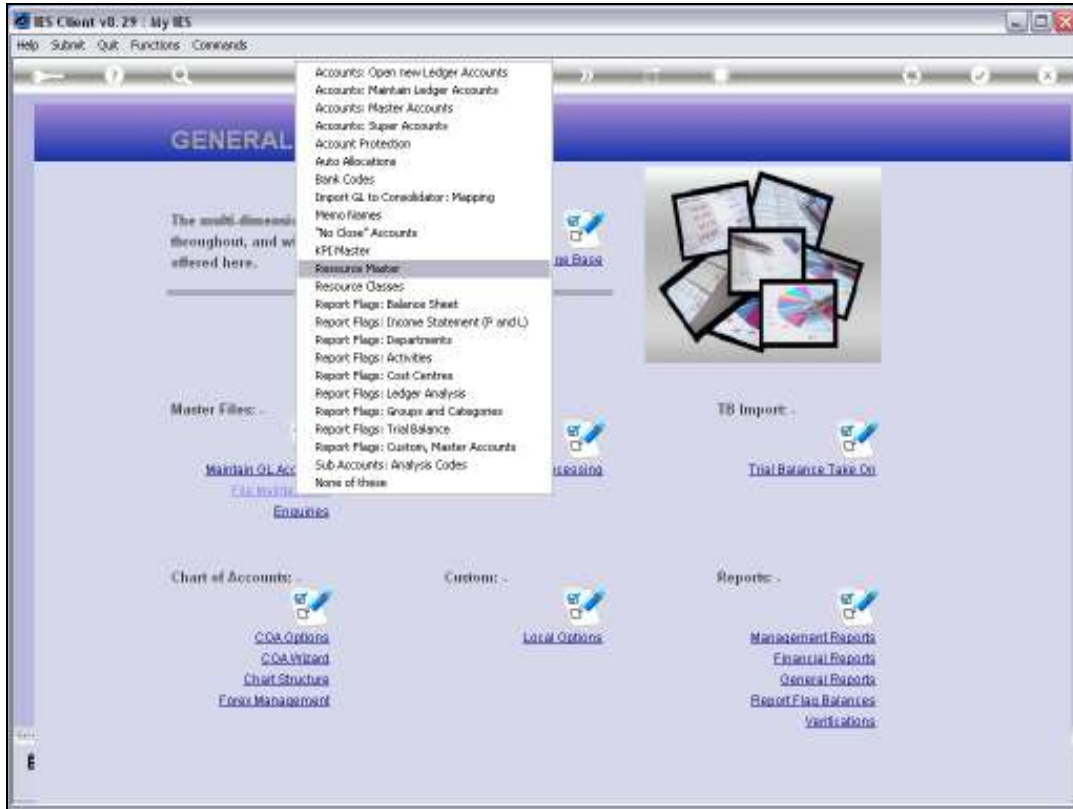
Slide notes:



Slide 50
Slide notes:

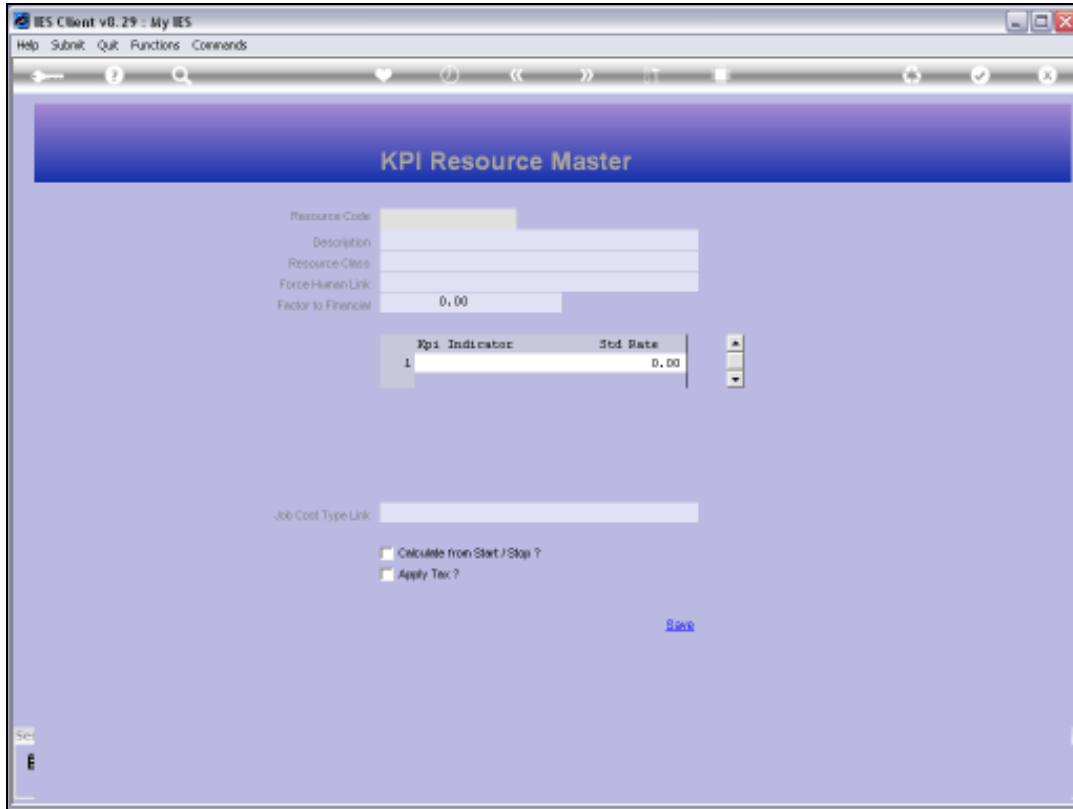


Slide 51
Slide notes:



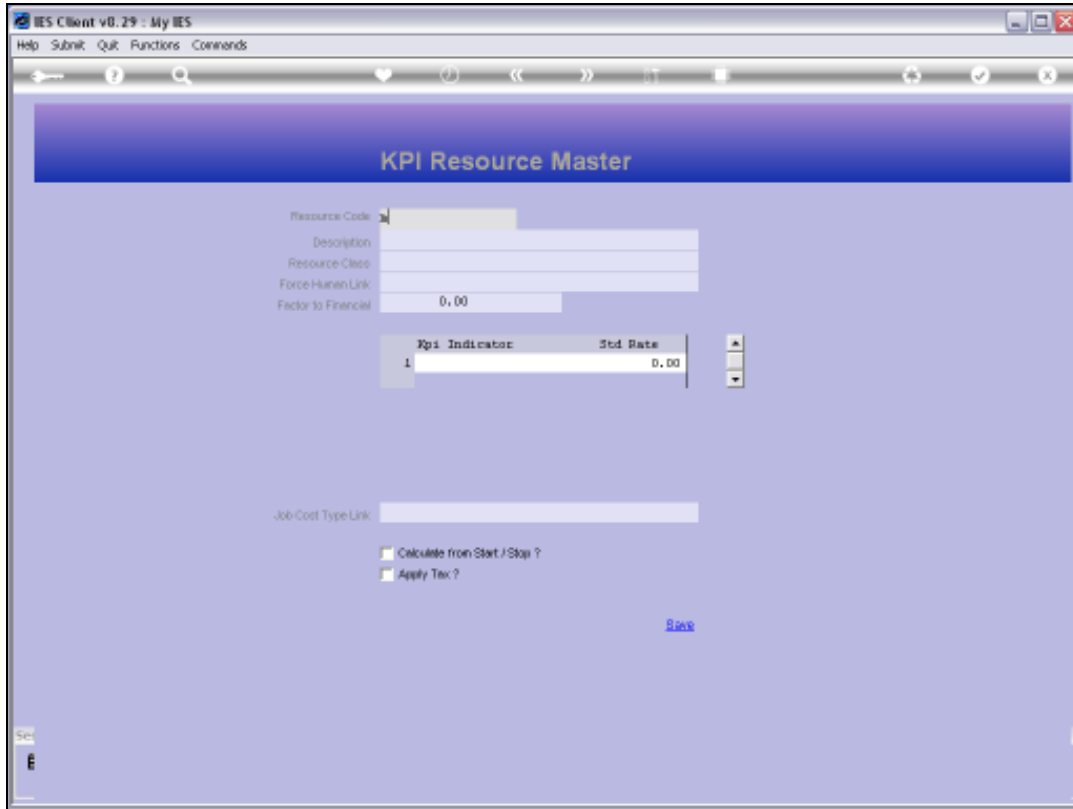
Slide 52

Slide notes:



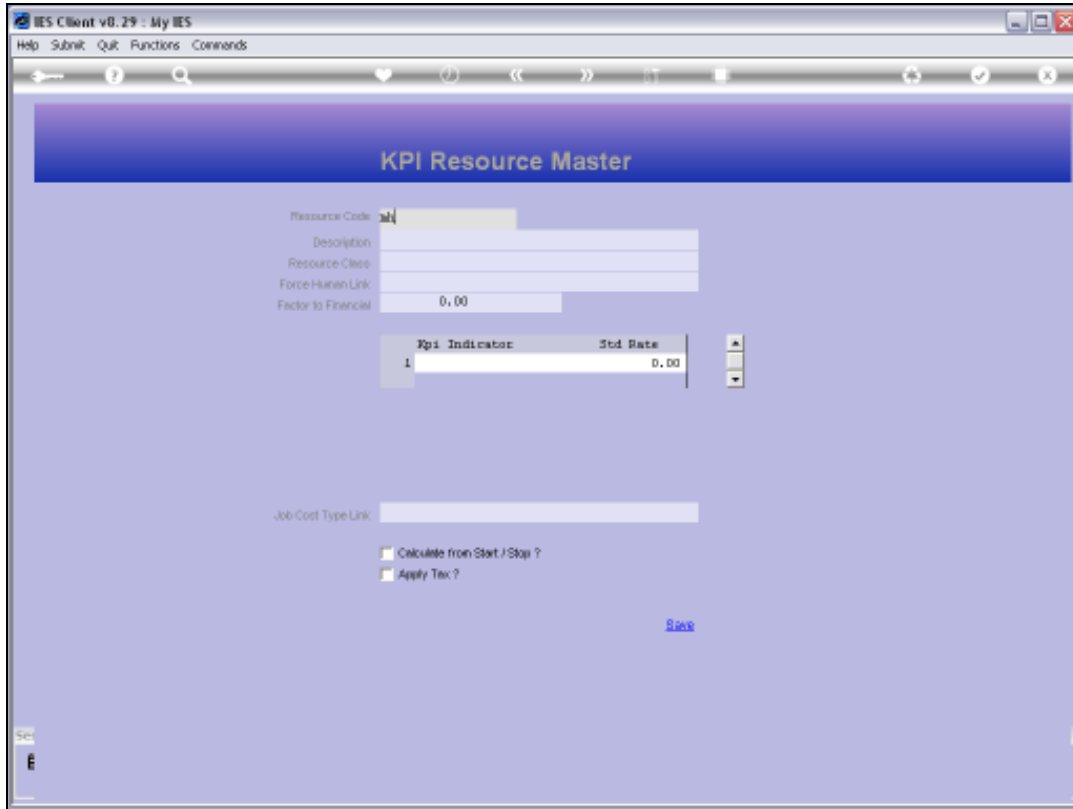
Slide 53

Slide notes:



Slide 54

Slide notes:



Slide 55

Slide notes:

The screenshot shows a web browser window titled "IES Client v8.29 : My IES". The browser's address bar is empty, and the page title is "KPI Resource Master". The form contains the following fields and controls:

- Resource Code:
- Description:
- Resource Class:
- Force-Human Link:
- Factor to Financial:
- Kpi Indicator:

Kpi Indicator	Std Rate
1	0.00
- Job-Cost Type Link:
- Calculate from Start / Stop ?
- Apply Tax ?
- [Save](#)

Slide 56

Slide notes:

The screenshot shows a web browser window titled "IES Client v8.29: My IES". The browser's address bar is empty, and the page title is "KPI Resource Master". The form contains the following fields and data:

- Resource Code: mhr
- Description: Man Hours
- Resource Class: mhr Man Hours
- Force Human Link: *
- Factor to Financial: 21.50
- Kpi Indicator table:

Kpi Indicator	Std Rate
1 HA Hectarea	32.00
- Job-Cost Type Link: (empty)
- Calculate from Start / Stop?:
- Apply Tax?:

A "Save" button is located at the bottom right of the form.

Slide 57

Slide notes: A Resource is always part of a Resource Class. In this example, we see the Resource of 'Man Hours' belonging to the Resource Class called 'Man Hours', and the reason being that we can have many different Resource codes that are used for Man Hours, each with a different KPI or Rate.

The screenshot shows a web application window titled "IES Client v8.29: My IES". The main content area is titled "KPI Resource Master". The form contains the following fields and data:

- Resource Code: mhr
- Description: Man Hour
- Resource Class: mhr
- Force Human Link: *
- Factor to Financial: 21.50
- Kpi Indicator table:

Kpi Indicator	Std Rate
1 HA Hectares	32.00
- Job-Cost Type Link: (empty field)
- Calculate from Start / Stop?:
- Apply Tax?:

A "Save" button is located at the bottom right of the form.

Slide 58

Slide notes: This Man Hour Resource currently costs 21.50 in our Currency, for 1 Unit. Therefore, when we use this on a Physical Budget, then each Man Hour will Cost 21.50 in the Financial Budget. And this Resource is connected to the Hectares KPI, and when applied, it consumes a standard of 32 Man Hours to perform 1 KPI, i.e. 1 Hectare.

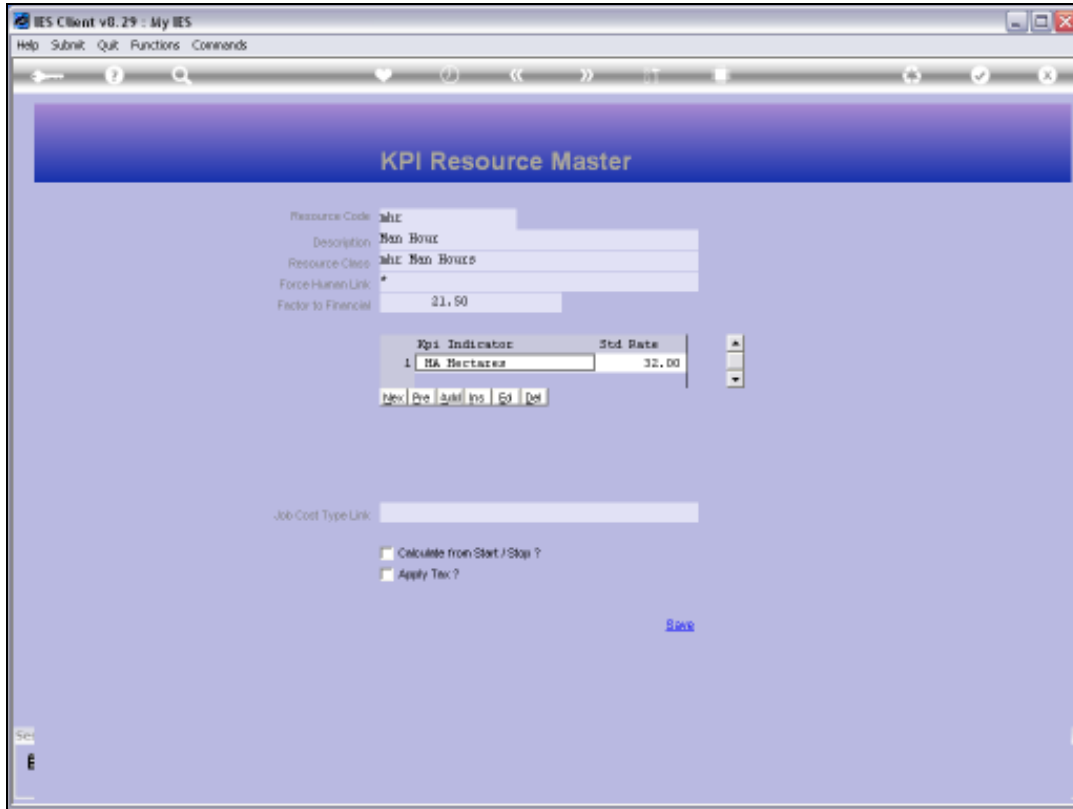
The screenshot shows a web browser window titled "IES Client v8.29 : My IES". The browser's address bar and navigation buttons are visible. The main content area displays the "KPI Resource Master" form. The form includes the following fields and controls:

- Resource Code:
- Description:
- Resource Class:
- Force Human Link:
- Factor to Financial:
- A table with columns "Kpi Indicator" and "Std Rate":

Kpi Indicator	Std Rate
1 HA Hectarea	32.00
- Job-Cost Type Link:
- Checkboxes: Calculate from Start / Stop ? and Apply Tax ?
- A "Save" button.

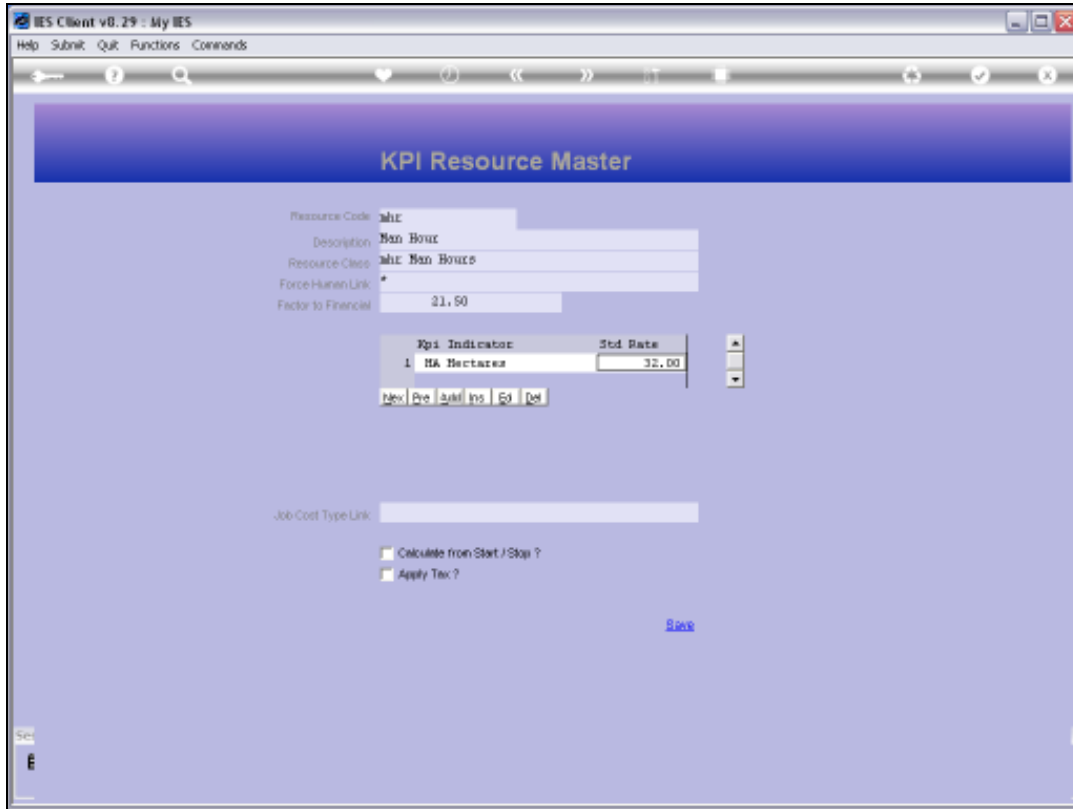
Slide 59

Slide notes: However, when we perform a Physical Budget, then the KPI Indicator and the Financial Rate are only defaults, meaning we can adapt them for any Account where this Resource is used.



Slide 60

Slide notes: Let's have a quick look at that.



Slide 61
Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: HA Hectares
 Resource: mhr: Man Hour
 Kpi Factor: 32
 Conversion: 2L-50

Increase %: 0.00
 Decrease %: 0.00

[Copy Previous](#)
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[Increase by %](#)
[Decrease by %](#)
[Initial](#)
[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
1	480.00	Jan 2010	0.00
2	0.00	Feb 2010	0.00
3	0.00	Mar 2010	0.00
4	0.00	Apr 2010	0.00
5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	613.33
10	0.00	Oct 2010	613.33
11	0.00	Nov 2010	613.33
12	0.00	Dec 2010	613.33

Slide 62

Slide notes: In this example, we change the default KPI factor form 32 to 20, therefore, if we capture 10 Hectares, the Physical will now become 200, and no longer 320.

IES Client v8.29 : My IES
Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
Key Perf Indicator: HA Hectares
Resource: HR: Man Hour
Kpi Factor: 20
Conversion: 21.50

Increase %: 0.00
Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initial](#)
[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget		Previous	Actuals	
1	460.00	Jan 2010	0.00	0.00	
2	0.00	Feb 2010	0.00	0.00	
3	0.00	Mar 2010	0.00	0.00	
4	0.00	Apr 2010	0.00	0.00	
5	0.00	May 2010	0.00	0.00	
6	0.00	Jun 2010	0.00	0.00	
7	0.00	Jul 2010	0.00	0.00	
8	0.00	Aug 2010	0.00	0.00	
9	0.00	Sep 2010	613.33	0.00	
10	0.00	Oct 2010	613.33	0.00	
11	0.00	Nov 2010	613.33	0.00	
12	0.00	Dec 2010	613.33	0.00	

Slide 63

Slide notes:

IES Client v8.29 : My IES

Help Lookup Back Field Restart Line Edit Mini Menu Submit Field Quit Edit

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: HA Hectares
 Resource: HR: Man Hour
 Kpi Factor: 20.00
 Conversion: 2L-50

Increase %: 0.00
 Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
1	480.00	Jan 2010	0.00
2		Feb 2010	0.00
3	0.00	Mar 2010	0.00
4	0.00	Apr 2010	0.00
5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	613.33
10	0.00	Oct 2010	613.33
11	0.00	Nov 2010	613.33
12	0.00	Dec 2010	613.33

Sec

Esc

Nav Prev Add Ins Del Del

Slide 64
 Slide notes:

IES Client v8.29 : My IES

Help Lookup Back Field Restart Line Edit Mini Menu Submit Field Quit Edit

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
Key Perf Indicator: HA Hectares
Resource: HR: Man Hour
Kpi Factor: 20.00
Conversion: 2L-50

Increase %: 0.00
Decrease %: 0.00

[Copy Previous](#)
[Copy Plus](#)
[Copy Minus](#)
[Increase by %](#)
[Decrease by %](#)
[Initialze](#)
[Spread](#)
[Totals](#)
[Chart/](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
1	480.00	Jan 2010	0.00	0.00
2	0.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	613.33	0.00
10	0.00	Oct 2010	613.33	0.00
11	0.00	Nov 2010	613.33	0.00
12	0.00	Dec 2010	613.33	0.00

Sec

Esc

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Slide 65
Slide notes:

IES Client v8.29 : My IES

Help Lookup Back Field Restart Line Edit Mini Menu Submit Field Quit Edit

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: HA Hectares
 Resource: Man Hour
 Kpi Factor: 20.00
 Conversion: 2L-50

Increase %: 0.00
 Decrease %: 0.00

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[Totals](#)
[Chart/](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals
1	400.00	Jan 2010	0.00
2	200.00	Feb 2010	0.00
3		Mar 2010	0.00
4	0.00	Apr 2010	0.00
5	0.00	May 2010	0.00
6	0.00	Jun 2010	0.00
7	0.00	Jul 2010	0.00
8	0.00	Aug 2010	0.00
9	0.00	Sep 2010	613.33
10	0.00	Oct 2010	613.33
11	0.00	Nov 2010	613.33
12	0.00	Dec 2010	613.33

Sec
E

Nov Dec Add Inv Del Del

Slide 66
 Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: HA Hectares
 Resource: Man Hour
 Kpi Factor: 20.00
 Conversion: 2L-50

Increase %: 0.00
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[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

Budget	Previous	Actuals		
1	480.00	Jan 2010	0.00	0.00
2	200.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	613.33	0.00
10	0.00	Oct 2010	613.33	0.00
11	0.00	Nov 2010	613.33	0.00
12	0.00	Dec 2010	613.33	0.00

Sec
E

New Prev Add Inv Del Del

Slide 67

Slide notes: And the Financial Conversion can also be changed, to apply a specific conversion that is different from the standard conversion, for this Account Budget.

IES Client v8.29 : My IES
Help Submit Quit Functions Commands

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
Key Perf Indicator: HA Hectares
Resource: HR: Man Hour
Kpi Factor: 20.00
Conversion: 21.5

Increase %: 0.00
Decrease %: 0.00

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[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

	Budget	Previous	Actuals	
1	400.00	Jan 2010	0.00	0.00
2	200.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	613.33	0.00
10	0.00	Oct 2010	613.33	0.00
11	0.00	Nov 2010	613.33	0.00
12	0.00	Dec 2010	613.33	0.00

Slide 68

Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Comments

1 Main 2 Notes

PHYSICALS: - Budget and Expected

Ledger Code: 700-55-031 PLANTING: MAN HOURS STD
 Key Perf Indicator: HA Hectares
 Resource: HR: Man Hour
 Kpi Factor: 20.00
 Conversion: 30

Increase %: 0.00
 Decrease %: 0.00

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[Spread](#)
[Totals](#)
[Chart](#)
[Update](#)

Note: This process updates new Budget AND new Expected (Forecast) Values!

Budget	Previous	Actuals		
1	480.00	Jan 2010	0.00	0.00
2	200.00	Feb 2010	0.00	0.00
3	0.00	Mar 2010	0.00	0.00
4	0.00	Apr 2010	0.00	0.00
5	0.00	May 2010	0.00	0.00
6	0.00	Jun 2010	0.00	0.00
7	0.00	Jul 2010	0.00	0.00
8	0.00	Aug 2010	0.00	0.00
9	0.00	Sep 2010	613.33	0.00
10	0.00	Oct 2010	613.33	0.00
11	0.00	Nov 2010	613.33	0.00
12	0.00	Dec 2010	613.33	0.00

Slide 69

Slide notes: So KPI's and Financial Budgets can be automatically processed together with the Physical Budget, as a 3-in-1, or either, or neither.