

# Enterprise Budgeting

## Enterprise Budgeting Training Course

### Day 1

9.00am – 9.30am

#### Welcome and Introduction

9.30am – 10.15am

#### Prerequisite Configuration

#### Enterprise Budgeting Overview and Demonstration

#### Budget Models

- ✓ New Budget Model Wizard
- ✓ Related Exercises

10.15am – 10.30am Morning Tea

10.30am – 12.30pm

#### Budget Data Tables (BDT)

- ✓ Database Tables
- ✓ Initialising a BDT Model
- ✓ Related Exercise

12.30pm – 1.15pm Lunch

1.15pm – 3.00pm

#### Working with Budget Packs

- ✓ Working with Budget Packs
- ✓ Administering Budget Packs

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- ✓ Accessing
- ✓ Budget Entry
- ✓ Related Exercises

3.00pm – 3.15pm Afternoon Tea

3.15pm – 4.15pm

#### Working with Budget Packs

- ✓ Budget Data Table Enquiry
- ✓ Related Exercises

#### Working with Budget Modes, BDT and Packs

- ✓ Setting up Budget Models
- ✓ Versions for Budgets
- ✓ Ledger Update Values
- ✓ Related Exercises

4.15pm – 4.30pm

#### End of Day Wrap Up



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### Day 2

9.00am – 9.15am

#### Overview

9.15am – 10.15am

#### Working with Budget Modes, BDT and Packs

- ✓ Budget Configuration
- ✓ Budget Groups
- ✓ Adding Columns to Budget Models
- ✓ Related Exercises

10.15am – 10.30am Morning Tea

10.30am – 12.30pm

#### Working with Budget Modes, BDT and Packs

- ✓ Setting up Budget Packs for Budget Models
- ✓ Related Exercises

12.30pm – 1.15pm Lunch

1.15pm – 3.00pm

#### Working with Budget Modes, BDT and Packs

- ✓ Spreading Methods
- ✓ Spreading Rules
- ✓ Variables
- ✓ Related Exercises

3.00pm – 3.15pm Afternoon Tea

3.15pm – 4.15pm

#### Working with Budget Modes, BDT and Packs

- ✓ Row Calculation Rules
- ✓ Budget Rules Calculator
- ✓ Budget Pack Tabs
- ✓ New Accounts
- ✓ Protection Rules
- ✓ Related Exercises

4.15pm – 4.30pm

#### End of Day Wrap Up

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## Enterprise Budgeting Training Course

### Day 3

9.00am – 9.15am

#### Overview

9.15am – 10.15am

#### Working with Budget Data Table Updates

- ✓ Considerations
- ✓ Post to Ledgers
- ✓ Related Exercises

*10.15am – 10.30am Morning Tea*

10.30am – 12.30pm

#### Working with Budget Worksheet

- ✓ Budget Worksheet Types
- ✓ Adding Columns
- ✓ Linking Worksheets to the Budget Model
- ✓ Importing/Exporting Budget Worksheets
- ✓ Related Exercises

*12.30pm – 1.15pm Lunch*

1.15pm – 3.00pm

#### Working with Budget Models

- ✓ Setting up Versions
- ✓ Rolling Over Budget Versions

- ✓ Column Calculation Rules
- ✓ XLOne Reports for Budget Packs
- ✓ BI Portlets for Budget Packs
- ✓ Comments for Budget Model
- ✓ Spreadsheet Rules
- ✓ Related Exercises

*3.00pm – 3.15pm Afternoon Tea*

3.15pm – 4.15pm

#### Working with Budget Models

- ✓ Target Budgeting
- ✓ Approval Levels
- ✓ Snapshots
- ✓ Handover Versions
- ✓ Related Exercises

4.15pm – 4.30pm

#### End of Day Wrap Up

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