

Enterprise Budgeting Training

Course Synopsis	
Duration	3 Days
Course Outline	This course provides attendees with an understanding of how to design, configure and maintain Enterprise Budgeting models, packs and worksheets.
Attendees	Attendees are expected to be experienced users with knowledge of TechnologyOne financial concepts and business budgeting requirements..
Course Objectives	The purpose of this course is to achieve the following objectives: <ul style="list-style-type: none"> • Design and configure Budget Models
Course Topics	During this course participants will be given the opportunity to learn: <ul style="list-style-type: none"> • Budget Models • Budget Data Tables • Budget Worksheets • Rule Configuration • Budget Models and Packs • Version Control • User Access
Areas not covered in this course	This course does not include more advanced features of the Enterprise Budgeting product, including Cross Product Integration and Advanced Calculation Expressions.

Enterprise Budgeting Training

Course Agenda Day 1	
Time/Duration	Topic
9:00am - 9:30am	Welcome and Introduction
9:30am - 10:15am	Prerequisite Configuration Enterprise Budgeting Overview and Demonstration Budget Models <ul style="list-style-type: none"> • New Budget Model Wizard • Related Exercises
10:15am - 10:30am	Morning Break
10:30am - 12:30pm	Budget Data Tables (BDT) <ul style="list-style-type: none"> • Database Tables • Initialising a BDT Model • Related Exercises
12:30pm - 1:15pm	Lunch Break
1:15pm - 3:00pm	Working with Budget Packs <ul style="list-style-type: none"> • Working with Budget Packs • Administering Budget Packs • Accessing • Budget Entry • Related Exercises
3:00pm - 3:15pm	Afternoon Break
3:15pm - 4:15pm	Working with Budget Packs <ul style="list-style-type: none"> • Budget Data Table Enquiry • Related Exercises Working with Budget Modes, BDT and Packs <ul style="list-style-type: none"> • Setting up Budget Models • Versions for Budgets • Ledger Update Values • Related Exercises
4:15pm - 4:30pm	End of Day Wrap Up

Enterprise Budgeting Training

Course Agenda Day 2	
Time/Duration	Topic
9:00am - 9:15am	Overview
9:15am - 10:15am	Working with Budget Modes, BDT and Packs <ul style="list-style-type: none"> • Budget Configuration • Budget Groups • Adding Columns to Budget Models • Related Exercises
10:15am - 10:30am	Morning Break
10:30am - 12:30pm	Working with Budget Modes, BDT and Packs <ul style="list-style-type: none"> • Setting up Budget Packs for Budget Models • Related Exercises
12:30pm - 1:15pm	Lunch Break
1:15pm - 3:00pm	Working with Budget Modes, BDT and Packs <ul style="list-style-type: none"> • Spreading Methods • Spreading Rules • Variables • Related Exercises
3:00pm - 3:15pm	Afternoon Break
3:15pm - 4:15pm	Working with Budget Modes, BDT and Packs <ul style="list-style-type: none"> • Row Calculation Rules • Budget Rules Calculator • Budget Pack Tabs • New Accounts • Protection Rules • Related Exercises
4:15pm - 4:30pm	End of Day Wrap Up

Enterprise Budgeting Training

Course Agenda Day 3	
Time/Duration	Topic
9:00am - 9:15am	Overview
9:15am - 10:15am	Working with Budget Data Table Updates <ul style="list-style-type: none"> • Considerations • Post to Ledgers • Related Exercises
10:15am - 10:30am	Morning Break
10:30am - 12:30pm	Working with Budget Worksheet <ul style="list-style-type: none"> • Budget Worksheet Types • Adding Columns • Linking Worksheets to the Budget Model • Importing/Exporting Budget Worksheets • Related Exercises
12:30pm - 1:15pm	Lunch Break
1:15pm - 3:00pm	Working with Budget Models <ul style="list-style-type: none"> • 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 Break
3:15pm - 4:15pm	Working with Budget Models <ul style="list-style-type: none"> • Target Budgeting • Approval Levels • Snapshots • Handover Versions • Related Exercises
4:15pm - 4:30pm	End of Day Wrap Up