



Budget Wizard

Budget Wizard enables you to load your Project Budgets from Excel. Bypass the Oracle data entry forms by downloading your Budget or Actual information into an Excel worksheet. Then you can modify the data to update existing budgets or create new budgets, or simply carry out a 'what if' analysis in Excel. Data can be quickly loaded directly into Oracle Projects. Budget Wizard is robust, fast, easy to use and flexible.

Enjoy the smoothest integration from your desktop to Oracle Projects.

Benefits

- Easy to use and customize
- Respects function and project security
- Close to zero implementation effort
- Cuts down data entry time
- Correct errors quickly and reload in minimal time
- Lets you automate Project Budget preparation

Feature Overview

- Based on MS-Excel
- Forms assist with data entry validation and error correction
- LOV's available
- Allows for all varieties of Budget and Plan Types
- Two way interface between Excel and Oracle Projects
- Delete errors, correct and reload in minimal time

BUDGET WIZARD										BUDGET LINE DETAILS and NON TIME-PHASED AMOUNTS						
BUDGET HEADER		UPLOAD RESULTS		PROJECT		BUDGET LINE DETAILS and NON TIME-PHASED AMOUNTS				Period Name						
Budget Type	Entry Method	Resource List	Upload OK	Upload Error	Project Number	Task Number	Resource Grp	Resource	Amount	Type	Rate Range Start	Date Range End	JAN-00	FEB-00	MAR-00	APR-
Capital Cost Budget	Lowest	Task	Expense Category	OK	OK	1.1		Labor	Raw Cost	OK	01-Jan-2010	31-Dec-2010	555	8,545	5,151	55
				OK	OK	1.2.1		Labor	Raw Cost	OK	01-Jan-2010	31-Dec-2010	8,584	3,522	1,561	8,008
				OK	OK	1.2.2		Labor	Raw Cost	3,453,554	01-Jan-2010	31-Dec-2010	484	1,168	1,564	22
				OK	OK	2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,194	335	894	8,811
				OK	OK	2.0		Labor	Raw Cost	765,795	01-Jan-2010	31-Dec-2010	6,691	2,841	3,498	95
				OK	OK	1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,694	582	1,561	8,008
				OK	OK	1.2.2		Labor	Raw Cost	3,453,554	01-Jan-2010	31-Dec-2010	484	1,168	1,564	22
				OK	OK	2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,194	335	894	8,811
				OK	OK	2.0		Labor	Raw Cost	765,795	01-Jan-2010	31-Dec-2010	6,691	2,841	3,498	95
				OK	OK	1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,694	582	1,561	8,008
				OK	OK	1.2.2		Labor	Raw Cost	3,453,554	01-Jan-2010	31-Dec-2010	484	1,168	1,564	22
				OK	OK	2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,194	335	894	8,811
				OK	OK	2.0		Labor	Raw Cost	765,795	01-Jan-2010	31-Dec-2010	6,691	2,841	3,498	95
				OK	OK	1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,694	582	1,561	8,008
				OK	OK	1.2.2		Labor	Raw Cost	3,453,554	01-Jan-2010	31-Dec-2010	484	1,168	1,564	22
				OK	OK	2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,194	335	894	8,811
				OK	OK	2.0		Labor	Raw Cost	765,795	01-Jan-2010	31-Dec-2010	6,691	2,841	3,498	95
				OK	OK	1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,694	582	1,561	8,008
				OK	OK	1.2.2		Labor	Raw Cost	3,453,554	01-Jan-2010	31-Dec-2010	484	1,168	1,564	22

Architecture

- Compatible with Microsoft Excel 2000 and later versions
- R11i to R12
- Uses Oracle Applications function security
- XML Web-based Communication
- No client install
- Install and setup in minutes

Budget Header

- Data Entry forms available for either Budget Types or Plan Types
- All LOV fields validated
- Fields color coded to indicate if mandatory or optional
- Forms and upload validation

Plan Version Settings dialog box showing configuration for Plan Type (Approved Budget), Plan Setup (Cost and Revenue Separately), Version Name (Capital Budgeting Stage 1), Cost (Top Task), Time Phasing (GL Period), Resource List (Expenditure Category), Revenue (Project), Time Phasing (GL Period), Resource List (None), Change Reason, and Description (Preliminary).

Budget Header Settings dialog box showing configuration for Budget Type (Approved Cost Budget), Budget Entry Method (Project by GL Period), Resource List (Expenditure Category), Version Name (Revision #1), Change Reason, and Description.

Budget Details

- Data entry forms are available to enter budget details such as project number, task & resource level and GL or PA period headers
- All LOV fields validated
- Fields color coded to indicate if mandatory or optional
- Forms and upload validation
- Use the worksheet to enter budget amounts against periods

Budget Details dialog box showing Project Number (Bottom-up Services), Bottom Task (1.1), Resource (Chargebacks), Amount Type (Raw Cost), Amount (1100), Date Range Start (01-Jan-2007), Date Range End (31-Dec-2007), and Line Comment.

Download

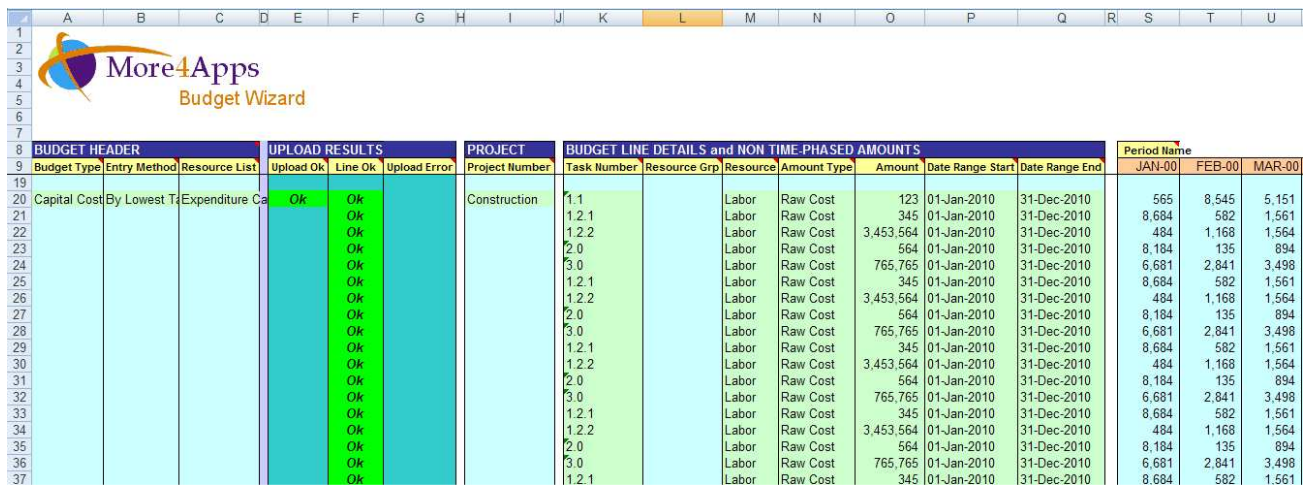
- Existing budgets and actuals can be extracted from Oracle Projects
- Information can subsequently be modified and re-loaded as updates to existing budgets/plans or to create new budgets/plans

Download Budgets and Actuals dialog box showing filters for Project, Task, Organization, Project Type, Classification, Role / Person, Project Status, Main Sort Order, Budget/Plan Type, Budget Entry Method, Change Reason, Budget Version, Line Sort Order, and various options for Period Phased Type, Data Type, Budget Value Options, Last Actuals Period, Level, Resource, Phasing, Value, Quantity, Cost Amounts, and Revenue Amounts.

Example Worksheet

Below is an example of the Budget Wizard worksheet, showing several budget lines being loaded into Oracle Projects.

The status columns enable the user to quickly see the progress of the records. Any rejected data can be quickly corrected and re-loaded.



BUDGET HEADER			UPLOAD RESULTS			PROJECT	BUDGET LINE DETAILS and NON TIME-PHASED AMOUNTS						Period Name			
Budget Type	Entry Method	Resource List	Upload Ok	Line Ok	Upload Error	Project Number	Task Number	Resource Grp	Resource	Amount Type	Amount	Date Range Start	Date Range End	JAN-00	FEB-00	MAR-00
Capital Cost	By Lowest T	Expenditure Ca	Ok	Ok		Construction	1.1		Labor	Raw Cost	123	01-Jan-2010	31-Dec-2010	565	8,545	5,151
			Ok	Ok			1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,684	582	1,561
			Ok	Ok			1.2.2		Labor	Raw Cost	3,453,564	01-Jan-2010	31-Dec-2010	484	1,168	1,564
			Ok	Ok			2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,184	135	894
			Ok	Ok			3.0		Labor	Raw Cost	765,765	01-Jan-2010	31-Dec-2010	6,681	2,841	3,498
			Ok	Ok			1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,684	582	1,561
			Ok	Ok			1.2.2		Labor	Raw Cost	3,453,564	01-Jan-2010	31-Dec-2010	484	1,168	1,564
			Ok	Ok			2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,184	135	894
			Ok	Ok			3.0		Labor	Raw Cost	765,765	01-Jan-2010	31-Dec-2010	6,681	2,841	3,498
			Ok	Ok			1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,684	582	1,561
			Ok	Ok			1.2.2		Labor	Raw Cost	3,453,564	01-Jan-2010	31-Dec-2010	484	1,168	1,564
			Ok	Ok			2.0		Labor	Raw Cost	564	01-Jan-2010	31-Dec-2010	8,184	135	894
			Ok	Ok			3.0		Labor	Raw Cost	765,765	01-Jan-2010	31-Dec-2010	6,681	2,841	3,498
			Ok	Ok			1.2.1		Labor	Raw Cost	345	01-Jan-2010	31-Dec-2010	8,684	582	1,561

Visit us at <http://www.more4apps.com> to download the trial version.
 Contact us at <http://www.more4apps.com/contactus/> for more information.