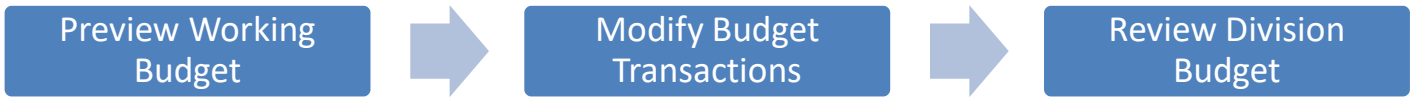


# UNIT 4 Planner at a Glance: 3-Step Budget Review Process (ALD / Division Deputy)



## Preview Working Budget

Go to [UNIT 4/AGRESSO](#) | [Common](#) | [Report ordering](#) | [Division Budget](#)

Order the working version budget (Version: 2020W) to preview the next year budget entered by the Account Holders. Click “Save” button to run the report.

UNIT4 Business World On!

Transaction entry x

**Menu**

- Your employment
- Procurement
- Project management
- Planner
- Information pages
- Common**

**Ordered reports**

- Your ordered reports
- Report ordering
- Adopted Budget
- Division Budget**

**Division Budget**

General parameters


Open parameters

Year: 2021  
Version: 2021D  
Period: 202101

Printer parameters

Save | Your ordered reports | Report variants | Create menu | Export

Go to [UNIT 4/AGRESSO](#) | [Common](#) | [Report ordering](#) | [Division Budget](#)

The report will be run under “Your Ordered Reports” menu and once available will show in “Finished” status. Click on  to retrieve the report in Excel.




### Your ordered reports

**Scheduled**

From: 2018-11-19 To: 2018-11-19

Filter

**Ordered reports**

<input type="checkbox"/>	Show report	User	Report name	Report ID	Order number	Scheduled	Completed	Server queue	File name	Status	Zoom	Show log
<input type="checkbox"/>		4427	Division Bud...	BUDGET	112	2018-11-19	2018-11-19	PLANNER	budgeta_11...	Finished		 


## Modify Budget Transactions

### Go to UNIT 4/AGRESSO | Planner | Transactions | Transaction Entry

Once the Working Version is closed, ALD can modify the budget transactions on all the divisional accounts.

Enter the selection criteria, press **Tab** to validate the selection and move to the next one. Use relation **"Role ID"** and search criteria **"ACCT-xxxx"** (xxxx stands for account number) to retrieve the account on which you want to modify the budget. Alternatively, use relation **"Fund"** and search criteria **"1"**

to retrieve all the NRC divisional accounts. Click  to go to the budget entry screen.

**N.B.** the  will not be activated until the criteria are entered properly.

UNIT4 Business World On!


Enter the selection criteria, press **Tab** to validate the selection and move to the next one.

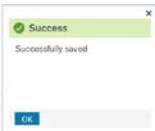
1) 2021D: ALD review

2) OPBUDDIV for ALD

3) Choose Fund 1 for all user's NRC accounts  
OR choose Role ID and ACCT-xxxx for one account only

4) Click Load

Click the existing rows to make changes or an empty row to create a new transaction entry. Enter all the \* required fields and then press .



indicates all the changes are saved.

UNIT4 Business World On!

**Budget Type:**  
Operations – annual operational costs (e.g. MRO)  
Upgrade – non-annual operational costs (e.g. Network upgrades)  
Major- one-time costs (e.g. Consultant study)

## Review Division Budget

[Go to AGRESSO](#) | [Information pages](#) | [Global information pages](#) | [Division Budget](#)

View the next year budget details as well as actual versus budget this year and last year.

UNIT4 Business World On!

♥ ↻ TRIUM

☰ Division Budget ✕

- Next Year Budget Details (D) ✕

#	ACCOUNT	ACCOUNT (T)	Sub Account	Budget Type	Description	Budget	Ref No (optional)		
1	3114	NUCLEAR MEDICINE DIVISIONAL	MRO	OPERATIONS	test	10,000.00			
Σ2						3114	NUCLEAR MEDICINE DIVISIONAL	MRO	10,000.00
Σ1						3114	NUCLEAR MEDICINE DIVISIONAL	10,000.00	

- Division Budget ✕

#	ACCOUNT	ACCOUNT (T)	Sub Account	Budget Type	Description	Budget	Actual This Year	Budget This Year	Actual Last Year	Budget Last Year			
12	3114	NUCLEAR MEDICINE DIVISIONAL	VISA			0.00	0.00	0.00	3,362.84	0.00	0.00		
Σ1						3114	10,000.00	0.00	12,680.01	98,009.58	126,500.00	115,296.94	124,500.00

- Division Budget Summary ✕

#	Account Number	ACCOUNT (T)	Budget Next Year (D)	Encumb Next Year	Encumb This Year	Actual This Year	Budget This Year	Actual Last Year	Budget Last Year
1	3103	PET RADIOISOTOPES	0.00	0.00	32,489.19	61,417.77	110,000.00	62,754.33	49,300.00
2	3114	NUCLEAR MEDICINE DIVISIONAL	10,000.00	0.00	12,680.01	98,009.58	126,500.00	115,296.94	124,500.00

Save layout
Reset layout
Export

**Or, Go to AGRESSO | Common | Report ordering | Division Budget**

Order Division Budget report (version: 2021D). You will need to retrieve the budget Excel file in "Your Ordered Reports" same way as on page 1 of this document.

**N.B.** AGRESSO reports refresh data every few minutes. Wait at least for 5 minutes after you've entered or changed budget transactions before running the report.