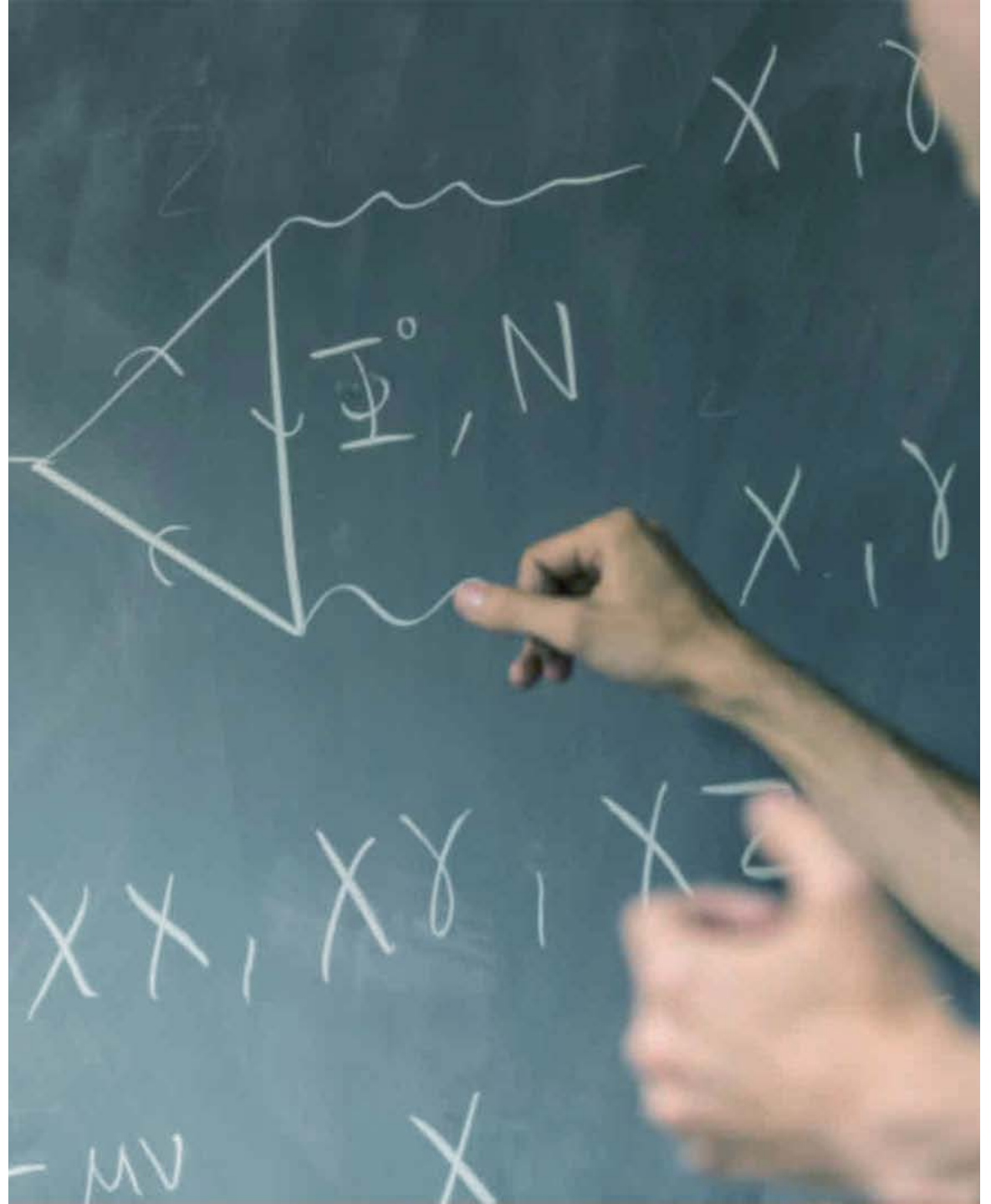


UNIT 4/AGRESSO Planner - For ALD



UNIT 4 Business World - Planner Overview

1. Preview Working Budget
2. Modify Budget Transactions

1. Preview Working Budget – find the report

UNIT4 Business World On!

The screenshot shows the UNIT4 Business World On! interface. On the left is a vertical menu with items: Procurement, Project management, Planner, Information pages, Common (highlighted with a red box), and Reports. On the right is a panel titled 'Ordered reports' containing a search bar, 'Your ordered reports', 'Report ordering' (highlighted with a light blue background and an upward arrow), and 'Division Budget' (highlighted with a red box). A red arrow points from the 'Division Budget' box to the explanatory text on the right.

Available for ALD.
Show all accounts of the Division

1. Preview Working Budget – run the report

☰ Division Budget x

Division Budget

⌵ General parameters

Open parameters

Year	<input type="text" value="2021"/>
Version	<input type="text" value="2021D"/>
Period	<input type="text" value="202101"/>

⌵ Printer parameters

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

→ 2021W: Account Holder working version
2021D: ALD review version

✔ Success

Successfully saved. The report output has order number 29 and is available in Your ordered reports.

OK

1. Preview Working Budget – retrieve the report

Menu

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

Ordered reports

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

Your ordered reports

Scheduled

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

Filter

Ordered reports

Click to download

<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"/>	<input type="checkbox"/>											
<input type="checkbox"/>	<input type="checkbox"/>	4427	Division Bud...	BUDGET	112	2018-11-19	2018-11-19	PLANNER	budgeta_11...	Finished		

2. Modify Budget Transactions – find the menu

UNIT4 Business World On!

The screenshot shows the UNIT4 Business World On! interface. At the top left, there is a hamburger menu icon. Below it, a 'Menu' section is displayed with several options: Procurement, Project management, Planner, Information pages, and Reports. The 'Planner' option is highlighted with a red box. To the right of the 'Planner' option, a 'Transactions' sub-menu is visible, containing the 'Transaction entry' option, which is also highlighted with a red box.

2. Modify Budget Transactions – enter the selection criteria

UNIT4 Business World On!

7

Transaction entry x

Transaction entry

Selection criteria

Version*
2021D - 2021 (2) - Division Head Review

Selection criteria

Transaction entry setup OPBUDDIV
Operating Budget for Division Heads

Relation Search criteria

Account Fund 1
National Research Council Fund

Load

Save Clear Export

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

2. Modify Budget Transactions – enter budget items

UNIT4 Business World On!

Transaction entry x

Transaction entry

Selection criteria Transactions

Version 2021D - 2021 (2) - Division Head Review

Selection criteria

Account from relation on Fund: National Research Council Fund (1)

Graphical presentation

Zoom	Account	Sub Account	Budget Type	Description	Budget	Reference
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	OPERATIONS	<input type="text"/>	0.00	<input type="text"/>
	1001 4022	CARDS CONSUM FREIGHT GAS ICBC MRO STATION VEHICLES VISA WATER	MAJOR OPERATIONS UPGRADE	Description: free-form text field, max 255 characters		Reference, can be PO#, document name, grants ref #, etc. Max 25 characters

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)

Save Clear Get template data Update template data Set values to zero Move start period Copy to version

Documentation

<http://www.triumf.ca/administration/accounting>

[Home](#) > [Administration](#) > [Accounting](#)

Accounting

[View](#) [Members](#) [Pages](#)

Contact Accounting

- [Contact Us](#)

Account Information

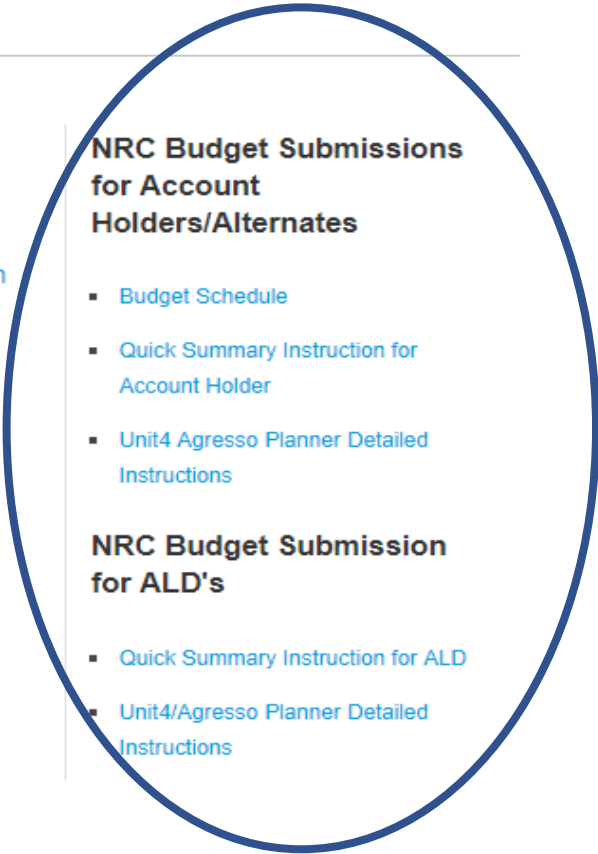
- [Opening a New Account](#)
- [Transferring Funds Between Accounts](#)

NRC Budget Submissions for Account Holders/Alternates

- [Budget Schedule](#)
- [Quick Summary Instruction for Account Holder](#)
- [Unit4 Agresso Planner Detailed Instructions](#)

NRC Budget Submission for ALD's

- [Quick Summary Instruction for ALD](#)
- [Unit4/Agresso Planner Detailed Instructions](#)



Thank you
Merci

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