

More4apps

Functional Impact Document

Budget Wizard

Created By: More4apps
Creation Date: 13/10/2018
Version: 5.0
Version Date: 14-Sep-2020

Contents

Release 14.1.54 – 14/09/20	3
1.1. Added new feature to download form - 'Include Projects/Tasks where no Budget/Plan exists'	4
1.2. Changes to 'Edit Upload Options' form.....	5
Release 14.1.45 – 05/03/2020	7
1.3. Added New Color Scheme	7
1.4. Added Cap/Bill Flag criteria for Task selection on the Download form	7
Release 14.1.37 – 18/10/2019	10
1.5. Added New Color Scheme	10
Release 14.1.20 – 05/03/2019	11
Release 14.1.09 – 01/12/2018	14



Release 14.1.54 – 14/09/2020

The following includes details of the incremental fixes, functionality changes and/or additions to the Budget Wizard as part of its development and release process.

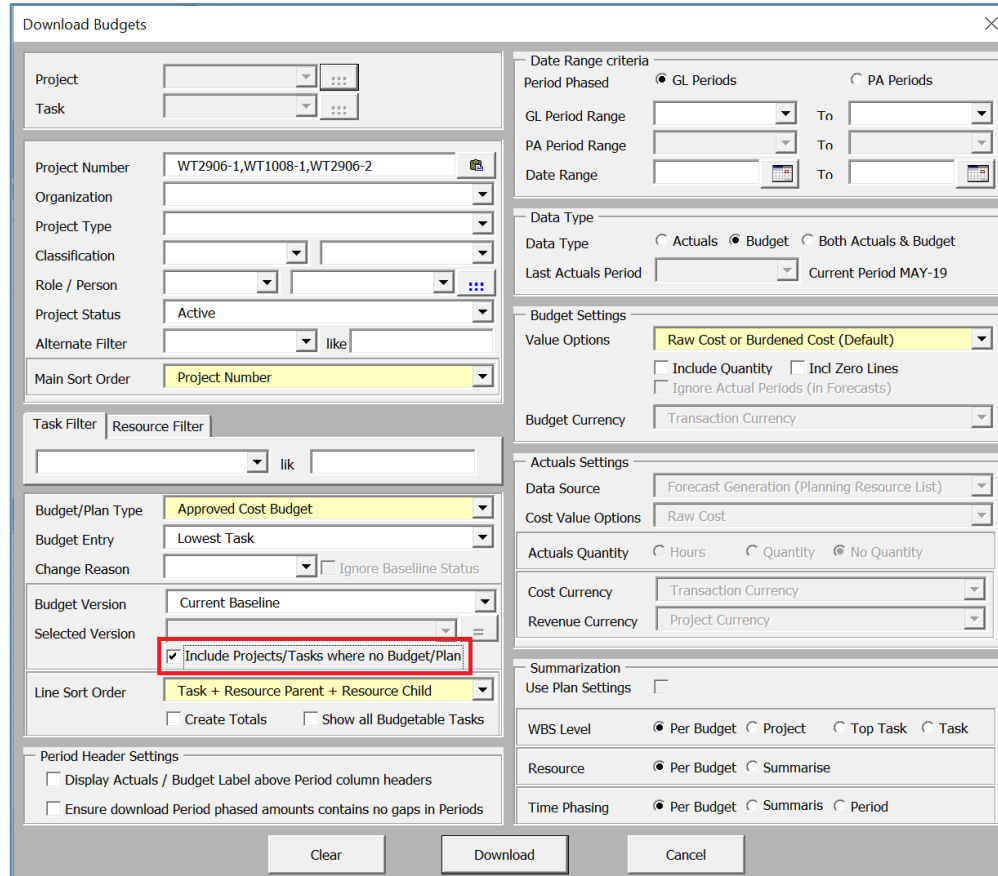
Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 14.1.20 or later. We have implemented a new color scheme in the previous version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

For information on the changes in this release, please see below:

1.1. Added new feature to Download Form - 'Include Projects/Tasks where no Budget/Plan exists'

Version: 14.1.53

Date: 14/07/2020



The screenshot shows the 'Download Budgets' dialog box with various filters and settings. The checkbox 'Include Projects/Tasks where no Budget/Plan' is checked and highlighted with a red box. Other visible settings include:

- Project:** WT2906-1, WT1008-1, WT2906-2
- Organization:** (empty)
- Project Type:** (empty)
- Classification:** (empty)
- Role / Person:** (empty)
- Project Status:** Active
- Main Sort Order:** Project Number
- Budget/Plan Type:** Approved Cost Budget
- Budget Entry:** Lowest Task
- Budget Version:** Current Baseline
- Selected Version:** (empty)
- Line Sort Order:** Task + Resource Parent + Resource Child
- Period Header Settings:**
 - Display Actuals / Budget Label above Period column headers
 - Ensure download Period phased amounts contains no gaps in Periods

A new checkbox **Include Projects/Tasks where no Budget/Plan exists** is added to the Download form.

If the checkbox for **Include Projects/Tasks where no Budget/Plan exists** is selected, Projects that don't have a Budget matching the budget criteria will be downloaded with just the Project Number and Tasks.

The example on the left shows 3 project numbers for the tool to search that have the status of **Active**. If any of the 3 projects do not match the status criteria, the tool will ignore them.

Select a **Budget/Plan Type** to use in the download filter. For example, if **Approved Cost Budget** is selected, Budgets with this Budget Type will be used in the download filter. Selected Projects that **DO NOT** have a budget matching the budget criteria will be downloaded with just the Project Number and Tasks. **Budget/Plan Type** is a mandatory criterion for this functionality. **All Budget Types** and **Selected Budget Types** options will **NOT** be usable with this functionality.

Budget Entry Method is optional, but it can be used by this functionality to determine what Tasks shall be downloaded by this functionality. i.e. if the BEM criteria is for Lowest Tasks only, then the feature can download only those Tasks. Using the BEM criteria will be optional. Therefore, if there is no BEM criteria, the Wizard will download the entire Work Breakdown Structure.

Once the skeleton projects and tasks are downloaded, you can enter a new Budget against them:

BUDGET TYPES				UPLOAD RESULTS			PROJECT		BUDGET LINE DETAILS											FUNDING		Period Name	
Budget Type	Entry Method	Resource List	Version Name	Description	Upload Ok	Line Ok	Upload Error	Project Number	Original	Task Number	Resource Grp	Resource	Amount Type	Amount	Date Range Start	Date Range End	Line Comment	Line DFF Context	Line Attribute1	Line Attribute15	Agree. Num	Period Name	
Approved Cost Budget								WT2906-1		1.0													
										1.1													
										1.1.1													
										1.1.2													
										1.2													
										2.0													
										3.0													
										4.0													
										4.1													
										4.2													
										4.3													
										4.4													
										4.5													
										4.6													
										4.7													
										4.8													
										4.9													
										4.10													
										4.11													
										4.12													
Approved Cost Budget								WT2906-2		1.0													
										1.1													
										1.1.1													
										1.1.2													
										1.2													
										2.0													
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										4.10													
										4.11													
										4.12													

1.2. Changes to 'Edit Upload Options' Form

Version: 14.1.50

Date: 08/06/2020

Edit Upload Options form has been split into separate pages for Budgets and Plans to avoid confusion.

The new look of the **Edit Upload Options** form is shown below:

Budget/Plan Upload Options

Choose action to be taken on the Draft version

Budgets Financial Plans

Replace Draft Version

Replace Draft Version

Edit Draft Version

Edit Options

Edit Period

This List contains the options for editing an existing Draft version and only takes effect if one of the "Edit" options is chosen in the top LOV.

The Wizard will first delete any Lines matching the Period/Task/Resource indicated by the data on the sheet, and then add the new lines. More detail on this is in the product documentation

When no change to Lines; ASK user if they want to update the draft header.

When Editing the Draft version you may find there are no changes but you still may want to update the draft version header. Select your preference here.

Rounding Options

Reject if exceeds Precision Allow if exceeds Precision Round if exceeds Precision

Round downloaded Currency Amounts to Currency Precision

Oracle will allow Budget/Plan amounts to exceed the maximum number of decimals allowed in the Budget/Plan Currency. These options allow you to decide what to do with any amounts found to exceed the Currency Precision. This does NOT affect Quantity values.

Accept Revert

Budget/Plan Upload Options

Choose action to be taken on the Draft version

Budgets Financial Plans

Replace Current Draft Version

Create New Non-Current Draft Version

Create New Current Draft Version

Create New Current Draft Version and Delete old one

Replace Current Draft Version

Edit Current Draft Version

Edit Indicated Draft Version (using Version Number)

Edit Indicated Draft Version and make Current

You may delete the prior Current Draft version if you are making your new version Current, but only if you have set the "More4Apps: BW Allow Delete Draft FinPlan" profile option to allow this.

Edit Options

Edit Period

This List contains the options for editing an existing Draft version and only takes effect if one of the "Edit" options is chosen in the top LOV.

The Wizard will first delete any Lines matching the Period/Task/Resource indicated by the data on the sheet, and then add the new lines. More detail on this is in the product documentation

When no change to Lines; ASK user if they want to update the draft header.

When Editing the Draft version you may find there are no changes but you still may want to update the draft version header. Select your preference here.

Rounding Options

Reject if exceeds Precision Allow if exceeds Precision Round if exceeds Precision

Round downloaded Currency Amounts to Currency Precision

Oracle will allow Budget/Plan amounts to exceed the maximum number of decimals allowed in the Budget/Plan Currency. These options allow you to decide what to do with any amounts found to exceed the Currency Precision. This does NOT affect Quantity values.

Accept Revert



Release 14.1.45 – 05/03/2020

The following includes details of the incremental fixes, functionality changes and/or additions to the Budget Wizard as part of its development and release process.

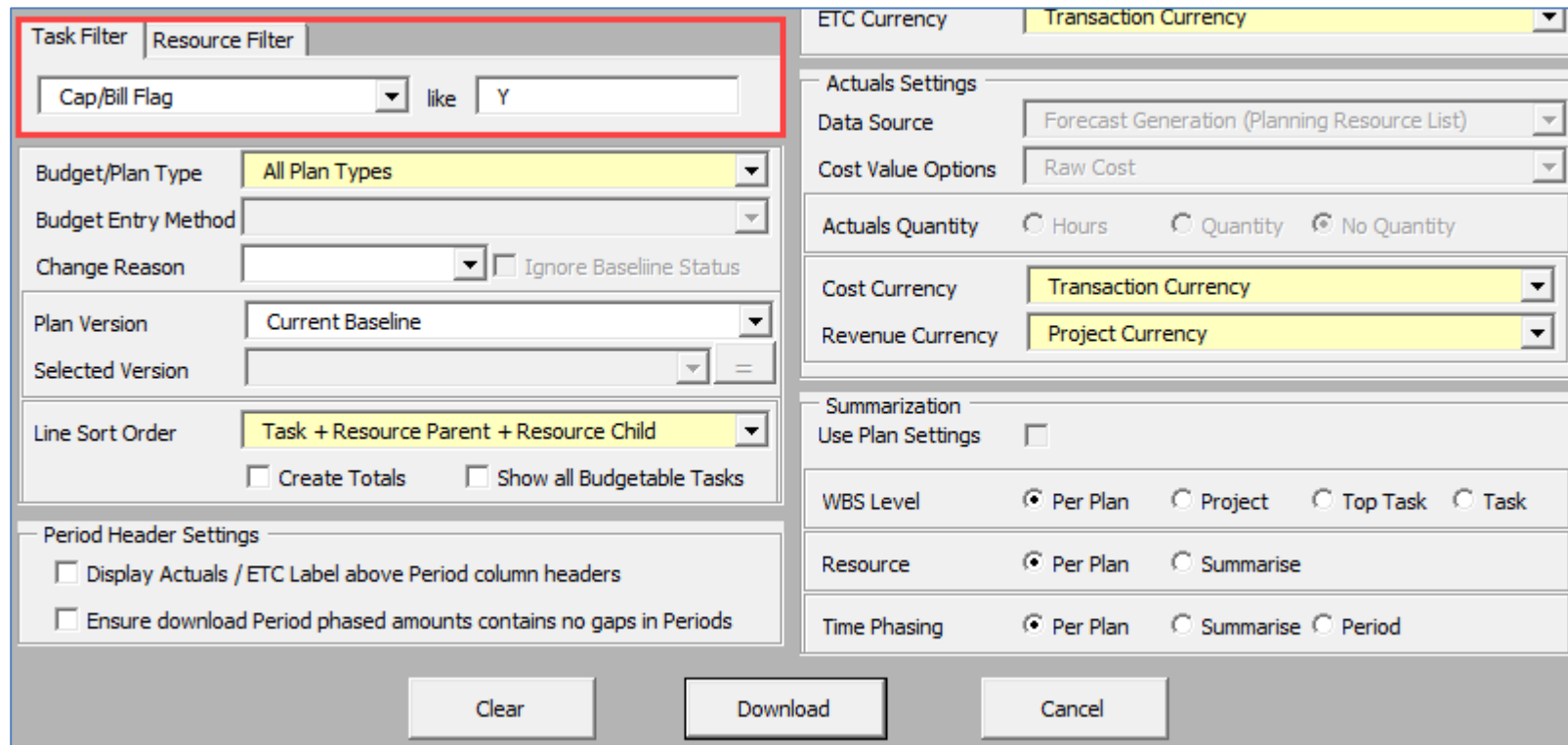
Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 14.1.20 or later. We have implemented a new color scheme in this version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

For information on the changes, please see below:

1.3. Added New Color Scheme																																																										
Version: 14.1.45		Date: 11/02/2020																																																								
<p>New More4apps brand applied. This will have no functional impact on users and is purely a cosmetic update.</p> <p>Existing templates with previous styles will work with this version, please note, however, the colors may change in these sheets when invoking Wizard functionality. See below for an example:</p>																																																										
<table border="1"> <thead> <tr> <th colspan="3">BUDGET WIZARD</th> <th colspan="3">UPLOAD RESULTS</th> <th>PROJECT</th> <th colspan="4">BUDGET LINE DETAILS</th> </tr> <tr> <th>Budget Type</th> <th>Entry Method</th> <th>Resource List</th> <th>Upload Ok</th> <th>Line Ok</th> <th>Upload Error</th> <th>Project Number</th> <th>Task Number</th> <th>Resource Grp</th> <th>Resource</th> <th>Amount Type</th> </tr> </thead> <tbody> <tr> <td>AFE</td> <td>Top/Bottom by</td> <td>Organization by Expenditure Category</td> <td></td> <td></td> <td></td> <td>Cost Plus</td> <td>1.1.1</td> <td>Services-East</td> <td>Business Ana</td> <td>Raw Cost</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Services-East</td> <td>Services-East</td> <td>Raw Cost</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Services-East</td> <td>Services-East</td> <td>Raw Cost</td> </tr> </tbody> </table>				BUDGET WIZARD			UPLOAD RESULTS			PROJECT	BUDGET LINE DETAILS				Budget Type	Entry Method	Resource List	Upload Ok	Line Ok	Upload Error	Project Number	Task Number	Resource Grp	Resource	Amount Type	AFE	Top/Bottom by	Organization by Expenditure Category				Cost Plus	1.1.1	Services-East	Business Ana	Raw Cost									Services-East	Services-East	Raw Cost									Services-East	Services-East	Raw Cost
BUDGET WIZARD			UPLOAD RESULTS			PROJECT	BUDGET LINE DETAILS																																																			
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1.4. Added Cap/Bill Flag criteria for Task selection on the Download form																																																										
Version: 14.1.42		Date: 07/01/2020																																																								

Added Cap/Bill Flag criteria for Task selection on the Download form. Enable Task criteria and Custom LOV filter to operate when downloading summary Budget/Actuals.

The example shows how to use the Task filter on the Download form by entering 'Y' in the condition field to download only Budgets against Tasks that have their Billable flag checked/enabled.



The screenshot displays the 'Download' form interface with the following settings:

- Task Filter:** Cap/Bill Flag like Y (highlighted with a red box)
- Resource Filter:** (Empty)
- Budget/Plan Type:** All Plan Types
- Budget Entry Method:** (Empty)
- Change Reason:** (Empty) Ignore Baseline Status
- Plan Version:** Current Baseline
- Selected Version:** (Empty)
- Line Sort Order:** Task + Resource Parent + Resource Child
- Create Totals Show all Budgetable Tasks
- Period Header Settings:**
 - Display Actuals / ETC Label above Period column headers
 - Ensure download Period phased amounts contains no gaps in Periods
- ETC Currency:** Transaction Currency
- Actuals Settings:**
 - Data Source:** Forecast Generation (Planning Resource List)
 - Cost Value Options:** Raw Cost
 - Actuals Quantity:** Hours Quantity No Quantity
 - Cost Currency:** Transaction Currency
 - Revenue Currency:** Project Currency
- Summarization:** Use Plan Settings
- WBS Level:** Per Plan Project Top Task Task
- Resource:** Per Plan Summarise
- Time Phasing:** Per Plan Summarise Period

Buttons at the bottom: Clear, Download, Cancel

For Project Zebra Building 28042015, Task 9.0 does not have the Billable flag selected/enabled. In the example below, the first download of the project includes Task 9.0. However, the Task Filter **Cap/Bill Flag** where the Billable flag is set to 'Y' is used for the second download. As the result, Task 9.0 is not included in the download.

PROJECT		BUDGET LINE DETAILS					Period Name				
Project Number	Original	Task Number	Resource Grp	Resource	Amount Type	Amount	Currency	JAN-13	FEB-13	MAR-13	APR-13
Zebra Building 28042015		1.1.1	Financial Eler	Airfare	Raw Cost		USD	500.00	500.00	500.00	500
			Financial Eler	Airfare	Revenue		USD	550.00	550.00	550.00	550
		1.1.2	Financial Eler	Airfare	Raw Cost		USD	400.00	400.00	400.00	400
			Financial Eler	Airfare	Revenue		USD	440.00	440.00	440.00	440
		2.0	Financial Eler	Airfare	Raw Cost		USD	666.00	666.00	666.00	666
			Financial Eler	Airfare	Revenue		USD	732.60	732.60	732.60	732
		3.0	Financial Eler	Airfare	Raw Cost		USD	777.00	777.00	777.00	777
			Financial Eler	Airfare	Revenue		USD	854.70	854.70	854.70	854
		9.0	Financial Eler	Airfare	Raw Cost		USD	888.00	888.00	888.00	888
			Financial Eler	Airfare	Revenue		USD	976.80	976.80	976.80	976
Zebra Building 28042015		1.1.1	Financial Eler	Airfare	Raw Cost		USD	500.00	500.00	500.00	500
			Financial Eler	Airfare	Revenue		USD	550.00	550.00	550.00	550
		1.1.2	Financial Eler	Airfare	Raw Cost		USD	400.00	400.00	400.00	400
			Financial Eler	Airfare	Revenue		USD	440.00	440.00	440.00	440
		2.0	Financial Eler	Airfare	Raw Cost		USD	666.00	666.00	666.00	666
			Financial Eler	Airfare	Revenue		USD	732.60	732.60	732.60	732
		3.0	Financial Eler	Airfare	Raw Cost		USD	777.00	777.00	777.00	777
			Financial Eler	Airfare	Revenue		USD	854.70	854.70	854.70	854

Release 14.1.37 – 18/10/2019

The following includes details of the incremental fixes, functionality changes and/or additions to the Budget Wizard as part of its development and release process.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 14.1.20 or later. We have implemented a new color scheme in this version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

For information on the changes, please see below:

1.5. Added New Color Scheme

Version: 14.1.25	Date: 28/05/2019
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More4Apps has implemented a new logo and color scheme, see below for an example:

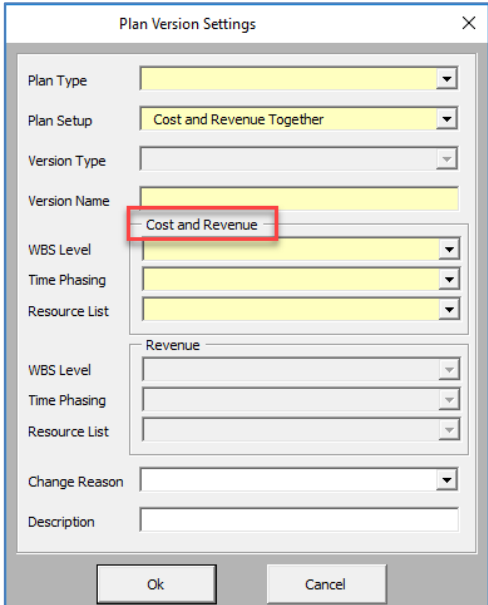
Events										
Event										
Event Status	Event Message	Event ID	Upload Action	Project Name	Project Number	Task Name	Task Number	Agreement Number	Event Number	Event Reference
<i>Default Values</i>										
Error	API Error: PA_E	106234	Update	Professional	A101				1	M4A-760350
Accepted		109237	Create	Professional	A101	Business R	1.0		8	M4A-764173
Validated		49872		Professional	A101	Business R	1.0		1	
Validated	No upload has	96978		Professional	A101	Business R	1.0		2	M4A-706414

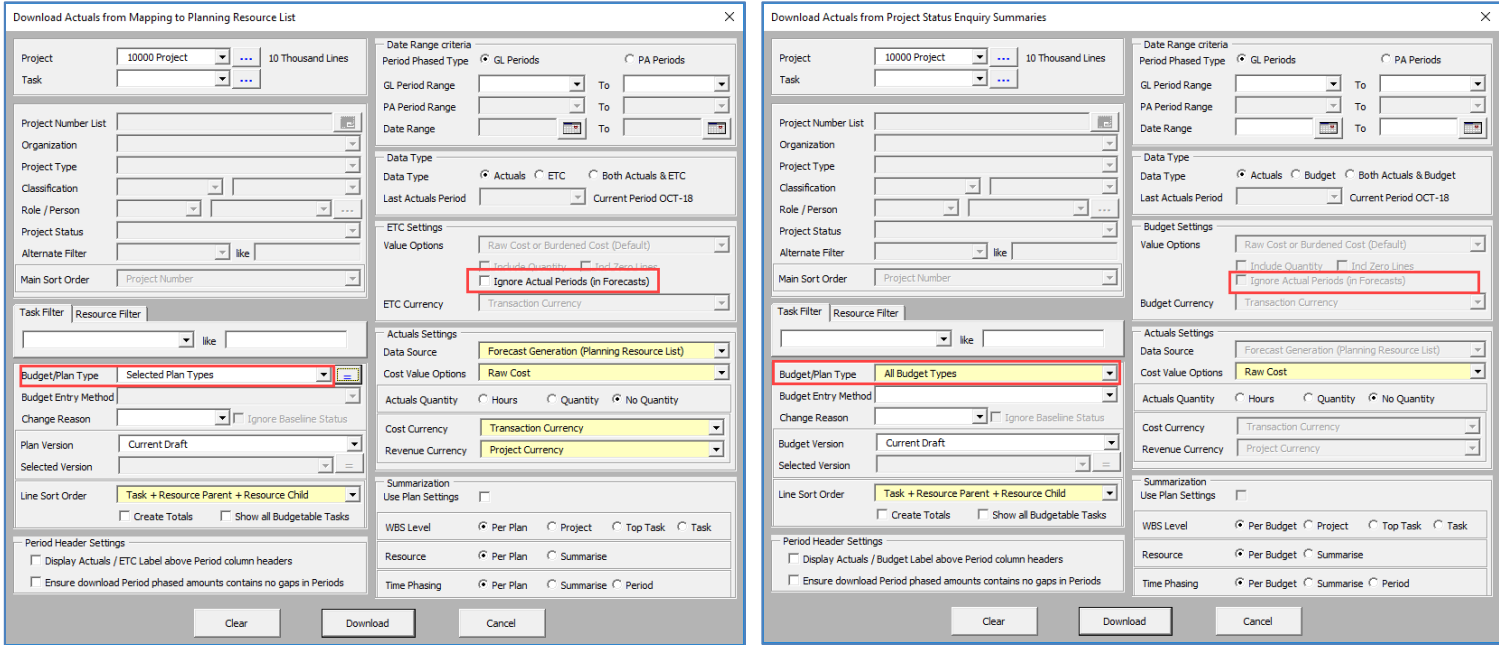
No column names have been added or modified.

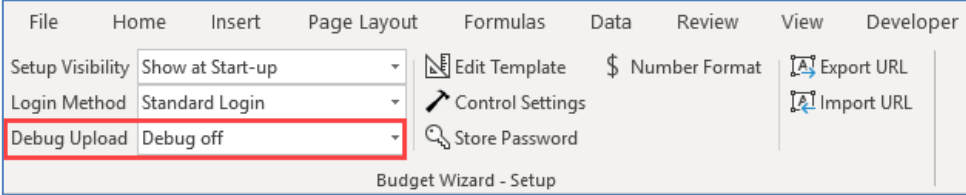
Release 14.1.20 – 05/03/2019

This release includes various bug fixes and enhancements/changes.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. Workplan mode has been removed in this version and Project Wizard must be used to upload Resource Planning details. You can still use your current template worksheets in the new version. There is no product package required for this version.

Version	Date	Description
14.1.15	01-02-19	<p>Change label Cost under Plan Version Settings to Cost and Revenue when Cost and Revenue Together Plan Setup option is selected:</p>  <p>Download form changed to enable the Ignore Actuals Periods checkbox for All Plan Types and Selected Plan Types options.</p>

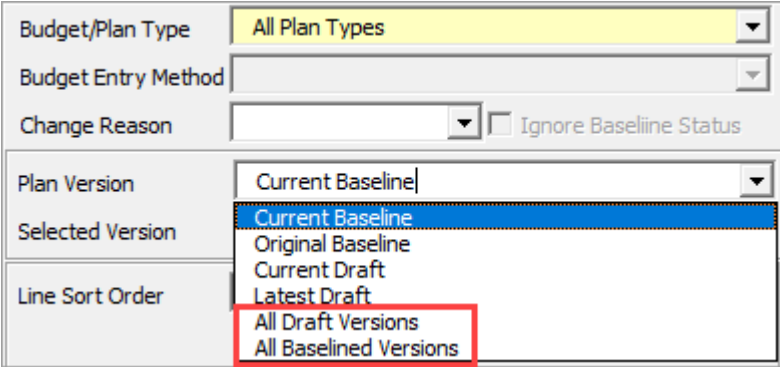
Version	Date	Description
		<p>Download form changed to disable the Ignore Actuals Periods checkbox for Budget Types options.</p> 
14.1.14	31-01-19	<p>Removed Wizard Mode option from the Budget Wizard ribbon and removed Workplan mode as an option in the Wizard.</p> <p>The rationale behind the removal is that the Workplan functionality in Budget Wizard does not provide any value to users who can load time-phased Resource Assignments into the draft workplan. In Oracle EBS, users are unable to see or update the period-phased values loaded by Budget Wizard as the form does not support Period phasing. Budget Wizard cannot load non-time-phased Resource Assignments as it does not have the Start and End Date columns required.</p> <p>Non-time-phased Resource Assignments and Non-Resource ETC amounts can be loaded into the workplan using Project Wizard.</p>

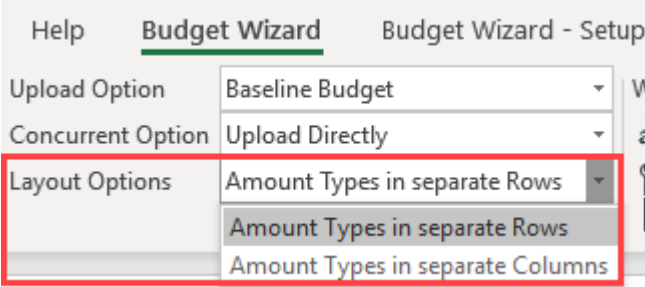
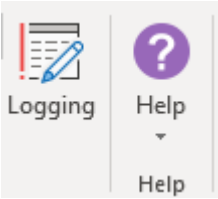
Version	Date	Description
		<p>It is NOT possible to period phase these values at all.</p> <p>Budget Wizard can load only one of 4 types of ETC values into the workplan:</p> <ul style="list-style-type: none"> • Resource / Period - Yes • Resource / Non-Period - No (no date columns) • Non-Resource / Period - No (No API support) • Non-Resource / Non-Period - No (No columns or API support) <p>Here is Project Wizard's comparison:</p> <ul style="list-style-type: none"> • Resource / Period - No (no period columns) • Resource / Non-Period - Yes • Non-Resource / Period - No (No API support) • Non-Resource / Non-Period - Yes <p>Therefore, there is a very limited use for the functionality in the Budget Wizard, which seems to be an oddity of the API, providing some limited functionality not available in the Oracle EBS.</p>
14.1.10	20-12-18	<p>Moved 'Debug Upload' option from 'Budget Wizard' tab to 'Budget Wizard - Setup' tab on the ribbon.</p> 

Release 14.1.09 – 01/12/2018

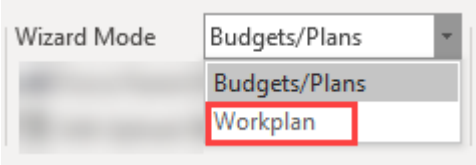
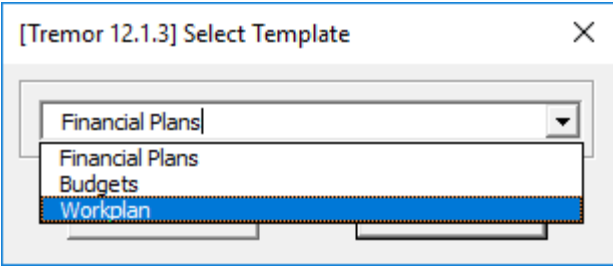
This release includes various bug fixes and enhancements/changes.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version. There is no product package required with this new version.

Version	Date	Description
14.1.06	15-10-18	<p>Download form – Plan Version List of Values</p> <p>Two new options are added:</p> <ul style="list-style-type: none"> • All Draft Versions • All Baselined Versions <p>The new options allow you to select either all draft versions or all baselined versions to download to the sheet.</p> 
14.1.05	08-10-18	<p>Function Security</p> <p>Added functional security controls over uploading and downloading Budgets. Users without Projects responsibility will not have access to view or make changes to Budgets via the Budget Wizard.</p>

Version	Date	Description
		<p>Note - This security is applicable to Budgets, not Financial Plans or Workplans.</p> <p>Added profile options to disable the new functional security controls as follows:</p> <ul style="list-style-type: none"> • More4Apps: BW Disable functional security preventing uploads • More4Apps: BW Disable functional security preventing downloads
14.1.01	02-08-18	<p>Added a new dropdown of Layout Options on the Budget Wizard menu ribbon:</p>  <p>Added new Logging button and Help buttons on the Budget Wizard menu ribbon:</p>  <p>Added a sample sheet Layout options explained to explain the new layout feature.</p> <p>New optional columns and two different layout options added. These 4 columns are not on the seeded Templates. If you wish to use them, please add them to the Templates yourself using the Edit Template option on the Setup ribbon.</p>

Version	Date	Description																																																													
		<p>New columns are:</p> <ul style="list-style-type: none"> • Raw Cost • Burdened Cost • Revenue • Quantity <p>Two new layout options:</p> <ul style="list-style-type: none"> • Amount Types in separate Rows: This option is the default and existing layout option used in the Wizard. It displays the Amount Type and Amount in rows for each Task/Resource combination. This option is ONLY applicable when Period Phasing is NOT used. The exception to this rule is when downloading. <p>Row layout option example:</p> <table border="1"> <thead> <tr> <th>PROJECT</th> <th colspan="2">BUDGET LINE DETAILS</th> <th colspan="2"></th> </tr> <tr> <th>Project Number</th> <th>Task Num</th> <th>Resource</th> <th>Resource</th> <th>Amount Type</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td rowspan="12">Time & Materials</td> <td rowspan="12">1.0</td> <td>Financial</td> <td>Computers</td> <td>Quantity</td> <td>1,000.00</td> </tr> <tr> <td>Financial</td> <td>Computers</td> <td>Raw Cost</td> <td>1,000.00</td> </tr> <tr> <td>People</td> <td>Miscellaneous</td> <td>Quantity</td> <td>1,000.00</td> </tr> <tr> <td>People</td> <td>Miscellaneous</td> <td>Raw Cost</td> <td>1,000.00</td> </tr> <tr> <td>People</td> <td>PCN500.PRINCIPAL CONSULTANT</td> <td>Quantity</td> <td>20,000.00</td> </tr> <tr> <td>People</td> <td>PCN500.PRINCIPAL CONSULTANT</td> <td>Raw Cost</td> <td>20,000.00</td> </tr> <tr> <td>People</td> <td>SCN500.SENIOR CONSULTANT</td> <td>Quantity</td> <td>10,000.00</td> </tr> <tr> <td>People</td> <td>SCN500.SENIOR CONSULTANT</td> <td>Raw Cost</td> <td>10,000.00</td> </tr> <tr> <td>People</td> <td>SMR400.SENIOR MANAGER</td> <td>Quantity</td> <td>5,000.00</td> </tr> <tr> <td>People</td> <td>SMR400.SENIOR MANAGER</td> <td>Raw Cost</td> <td>5,000.00</td> </tr> <tr> <td>Financial</td> <td>Telecommunications</td> <td>Quantity</td> <td>500.00</td> </tr> <tr> <td>Financial</td> <td>Telecommunications</td> <td>Raw Cost</td> <td>500.00</td> </tr> </tbody> </table> <ul style="list-style-type: none"> • Amount Types in separate Columns: This option uses the new columns for each Task/Resource combination but only for non-period phased budgets unless you are doing a summarised download. <p>Column layout option example:</p>	PROJECT	BUDGET LINE DETAILS				Project Number	Task Num	Resource	Resource	Amount Type	Amount	Time & Materials	1.0	Financial	Computers	Quantity	1,000.00	Financial	Computers	Raw Cost	1,000.00	People	Miscellaneous	Quantity	1,000.00	People	Miscellaneous	Raw Cost	1,000.00	People	PCN500.PRINCIPAL CONSULTANT	Quantity	20,000.00	People	PCN500.PRINCIPAL CONSULTANT	Raw Cost	20,000.00	People	SCN500.SENIOR CONSULTANT	Quantity	10,000.00	People	SCN500.SENIOR CONSULTANT	Raw Cost	10,000.00	People	SMR400.SENIOR MANAGER	Quantity	5,000.00	People	SMR400.SENIOR MANAGER	Raw Cost	5,000.00	Financial	Telecommunications	Quantity	500.00	Financial	Telecommunications	Raw Cost	500.00
PROJECT	BUDGET LINE DETAILS																																																														
Project Number	Task Num	Resource	Resource	Amount Type	Amount																																																										
Time & Materials	1.0	Financial	Computers	Quantity	1,000.00																																																										
		Financial	Computers	Raw Cost	1,000.00																																																										
		People	Miscellaneous	Quantity	1,000.00																																																										
		People	Miscellaneous	Raw Cost	1,000.00																																																										
		People	PCN500.PRINCIPAL CONSULTANT	Quantity	20,000.00																																																										
		People	PCN500.PRINCIPAL CONSULTANT	Raw Cost	20,000.00																																																										
		People	SCN500.SENIOR CONSULTANT	Quantity	10,000.00																																																										
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13.1.14	12-01-18	<p>Added two profile options to allow control of the new 'Wizard Mode' ribbon option. Names are:</p> <ul style="list-style-type: none"> • More4Apps: BW Disable Workplan editing functionality • More4Apps: BW Disable Budgets & Financial Plans upload functionality 																																																																																										
13.1.01	24-04-17	<p>Added in the Wizard Mode dropdown on the ribbon and right click menu. New Wizard Mode Workplan added to the Wizard ribbon.</p>  <p>Budget Wizard can now load Quantity, Raw Cost, and Burdened Cost values into the Draft Workplan by Task, Resource, and Period.</p> 																																																																																										
13.0.12	02-02-17	<p>New constraint added. By default, Replace mode is not allowed to operate on Forecast Plan Types. Users will get an error message if they tried:</p>																																																																																										

Version	Date	Description
		<p><i>You cannot use Replace mode on a 'Forecast' Plan Type. Profile option 'More4Apps: BW Allow Replace mode on Forecast Plan Types' can be set to override this.</i></p> <p>Added profile option More4Apps: BW Allow Replace mode on Forecast Plan Types to override new constraint.</p>