

Executive Level Process – Budget Targets (Steps 1, 2 and 3)

Create Budget Target at the OBS Level

In the web version of the tool or in SmartView, the Executive user would login to the UCBUD application and open the form 1. Unit – Create Target. For Step 1, users are able to view the information provided from the Budget Office of the Launch numbers, Drivers, and any Adjustments made to the arrive at the Target being provided to them. For Steps 2 and 3, the form also contains a section where they can enter their own drivers and make adjustments to create their own Target at the OBS row level. Lastly there is a column that calculated the difference for them between the Budget Office Target and their Target. This can be performed in the 2 working copies of 1st Draft and 2nd Draft that they have access to work with but is not accessible by the Budget Office. For the Target process, this information is not transferred to the Budget Office but they can access it with SmartView ad-hoc reports.

About the Create Target Form

The form has 2 tabs to allow you to create 2 versions of the Budget at the OBS level. Each form contains the OBS structure on the left side, column headers across the top and an area for data. The areas in gray cannot be changed. They are for viewing purposes only. The white areas are where you may enter data. On this form the Current Year Budget, Prior Year Actual, Current Year Forecast Q2 and the Current Budget Office Target are provided for you. The Budget Office Target includes driver and adjustment data as well, revealing all the data used to obtain their results. You may enter drivers and adjustments for your unit to calculate your own target by OBS Row with the goal of coming to the same bottom line given or negotiating a new one. The gray columns and rows will be calculated when you Save the data button.



Demo: Create Budget Target at the OBS Level

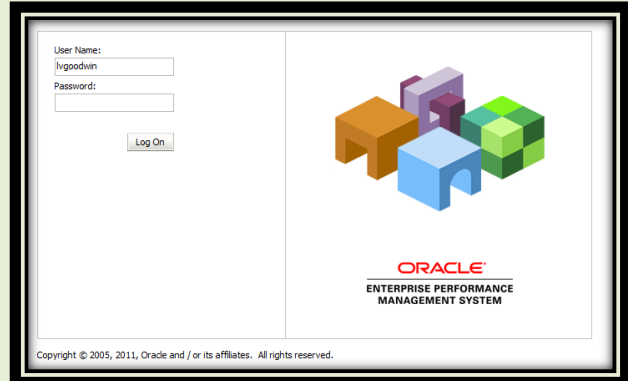


Exercise: Create Budget Target at the OBS Level and Run Target Variance Report

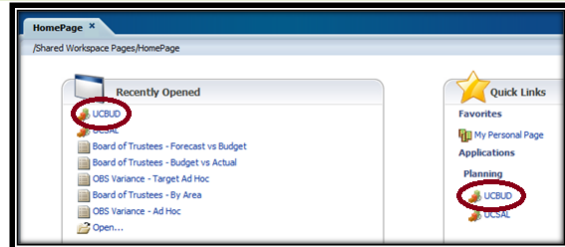
What to do

What you will see

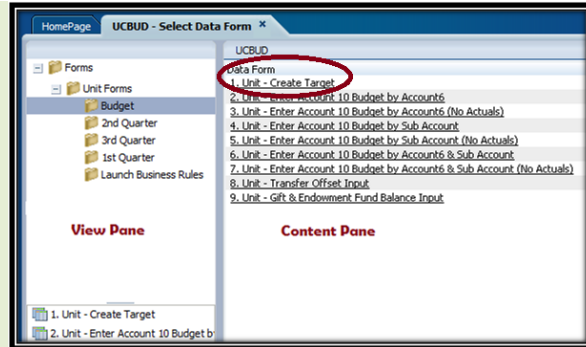
- 1 Login to Delphi Planning:
 - Click on the User Name text box and enter your cnet id for the username.
 - Click in the Password text box and enter your cnet password.
 - Click the Log On button.



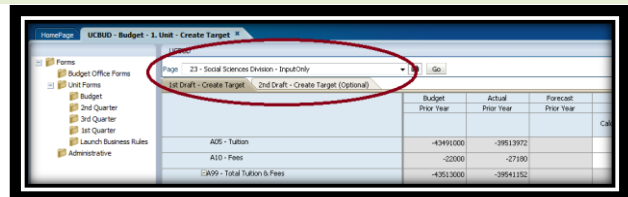
- 2
 - Click the UCBUD link on the Home Page under the Recently Opened or Quick Links section.



- 3
 - Open the Create Target Form:
 - From the View Pane on the left side of the screen, Double Click to expand the Forms folder
 - Double Click to expand the Unit Forms folder
 - Click on the Budget folder
 - From the Content Pane on the right side of the screen, Click the link to open the form named 1. Unit – Create Target



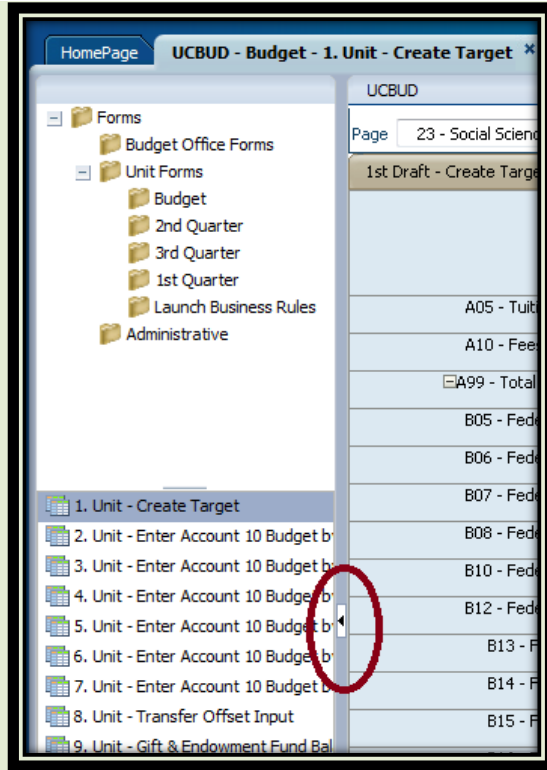
- 4
 - Set the Page Selector for your Unit:
 - Click the arrow on the Page Selector to see a drop down list of units.
 - Type your unit number or name to perform a search on your input.
 - Select it from the list and Click the Go button.
 - They only see their unit, although some



will have multiple for departments and auxiliary portion of unit

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- Close the View Pane
- In between the View Pane and the Content Pane, there is a small arrow selector. Find it.
- Click this selector to close the View Pane and provide more space on the screen for the Content Pane where the form is displayed.



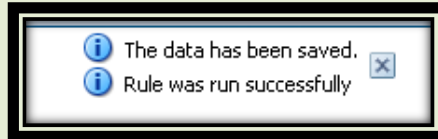
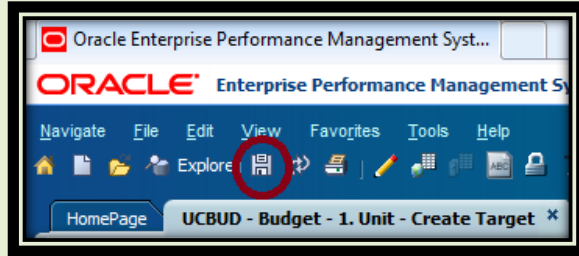
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- Enter the Target Drivers. This is a way to reflect your desired difference and negotiated changes.
- From the tab named 1st Draft – Create Target, scroll to the right using the scroll bar at the bottom of the screen
- For example, Enter 5% for each cell in the Target Driver column, try using copy and paste all the way down or you may use more realistic numbers if you know them, however keep in mind this is just a training exercise.
- **Note:** Some Target Drivers are calculated by the system and should not be changed. Those have a red or pink like background. Any changes made to them, will be overwritten by the system’s calculation. Use the adjustment option to alter the Targets for those rows.

Unit Target 1 2013				
	Target Driver	Calculated Target	Adjustment to Target	Target
5,189)	5.00%			
0	5.00%			
5,189)				
6,915)	5.00%			
5,224)	5.00%			
0,766)	5.00%			
8,059)	5.00%			
0	5.00%			
0	5.00%			
	5.00%			
	5.00%			
4,690)	5.00%			
7,739)	5.00%			
0	5.00%			
0	5.00%			
2,429)				
2,940)	5.00%			
6,334)				
5,040)	5.00%			
5,160)	5.00%			

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- From the Toolbar, Click the Save button



Unit Target 1 2013			
Target Driver	Calculated Target	Adjustment to Target	Target
5.00%	(32,444,181)		(32,444,181)
5.00%	0		0
	(32,444,181)		(32,444,181)
5.00%	(48,295)		(48,295)
5.00%	(448,025)		(448,025)
5.00%	(340,495)		(340,495)
5.00%	(162,708)		(162,708)

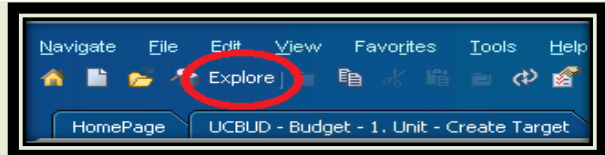
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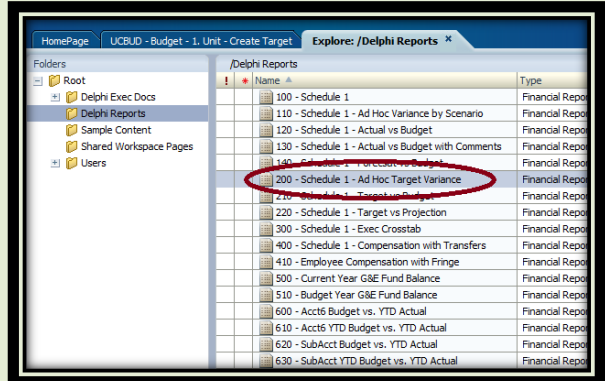
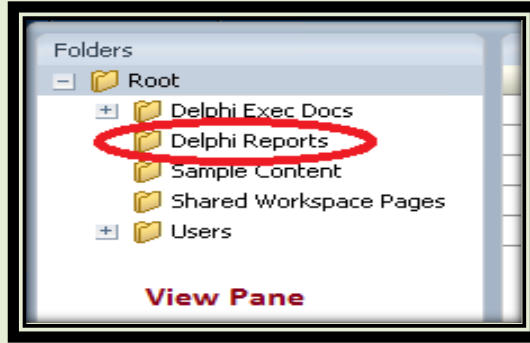
- Enter the Adjustment to the Target and Click the Save button. This is another way, you might enter a negotiated change.
- From the tab named 1st Draft – Create Target, scroll to the right
- For example, Enter 1000 for each cell in the Adjustment to the Target column.
- From the menu, Click the Save button to save these entries
- Keep in mind that, Revenue should be negative

Unit Target 1 2013			
Target Driver	Calculated Target	Adjustment to Target	Target
5.00%	(32,444,181)	1,000	(32,444,181)
5.00%	0	1,000	0
	(32,444,181)		(32,444,181)
5.00%	(48,295)	1,000	(48,295)
5.00%	(448,025)	1,000	(448,025)
5.00%	(340,495)	1,000	(340,495)
5.00%	(162,708)	1,000	(162,708)

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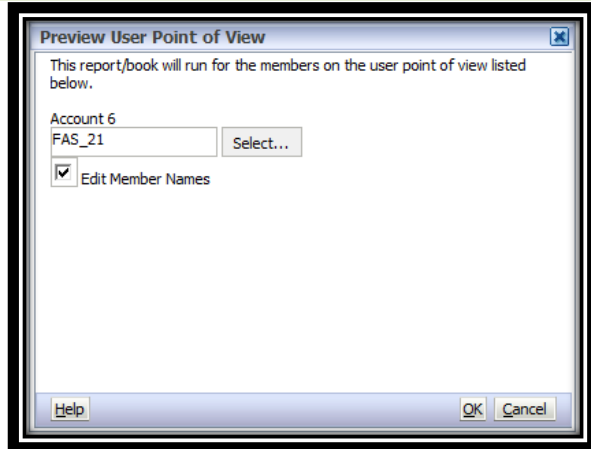
- Now that the form has been saved, run the Report 200 – Schedule 1 – Ad Hoc Target Variance:
- From the menu, Click the Explore button
- From the View Pane, Click the Delphi Reports folder
- From the Content Pane, Double click the report named, OBS Variance – Target Ad Hoc





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- From the Content Pane, Double click the report named, 200 – Schedule 1 – Ad Hoc Target Variance:
- From the Preview Point of View dialog box, Check the box Edit Member Names
- Type in your Account 6 Unit Member Name from the 2nd column in the Unit Member List
- Click OK



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- Complete Respond to Prompts:
- From the Respond to Prompts dialog box, Leave the variable named \$BgtYr in the boxes or Overwrite the variables with FY15 in the first and second text boxes
- Leave Budget Office Target in the third box
- Leave Unit Target 1 in the last box (Other comparisons can be made too, such as Unit Target 1 and Unit Target 2)
- Click OK when done

