Forecaster Question & Answer

Spring Forum 2017

Question	Answer
This is an Allocations question: Can you allocate an entire cost center to another cost center?	Yes, you can use a summary account that represents total expense for your Allocate-from account. You can also use a summary department to allocate budgeted expenses for multiple departments as well.
How do you get the budget "greyed out"?	Budgets are "greyed out" by two primary methods or actions in the application: 1.) When Submitting a budget within Workflow, 2.) Under Tools | Options on the Colors tab you may define colors (background and font) for a variety of items (i.e. locked or calculated rows, line items, etc.)
You showed the employees with their salary in columns by month, combining both the Input tab & the HR tab by cost center. How did you do that?	The Detail Reports allow you to incorporate details (HR, Capital, Revenue, Line Items, and Notes) into your reports. You can refer to the online Help in Forecaster for more information on building detail reports.
I have several questions: 1) Is it possible to use Copy Wizard to copy everything - including tasks - from a previous budget? 2.) How do I change our Actuals into Budgets? For instance, if I have a 3+9 scenario - and I'd like the first three months as Actuals - how do I assign Actual to those first three months?	You can follow the steps below: 1.) The Copy Plan can copy your account balances, details balances (HR, line items, Notes, Rev), detail setup (HR, REV). However, other setup items (Lines, Columns, Calculations, Tasks, and Reports) must be copied or modified individually. 2.) In the example Noah is showing for preparing a forecast, the column set will indicate which periods are visible in the input set - if you want to use a combination of periods (Actual and Forecast). You can also use Copy Plan to copy Actuals to your Forecast periods.
I have a Security question: If you give access to a parent-level in the rollup, are the children included in the security access by default?	Yes, you can give a person access to a single (or multiple) Summary level Center(s) and they will get access to both the summary level (reports only, not data input) and posting level (both reports and data input).
How would I get my CPE credits? Do you issue a certificate?	Recordings for all sessions (and power points and Q&A) will be uploaded to our web site by the end of next week. In addition, an email will be sent to all attendees thanking them for attending, providing web links

	to these recordings along with certificates of attendance for CPE credit
When I go to the Input sets, it shows budget codes instead of actual for those first three months. Why is that?	Remember, your column set will determine which periods are visible/impacted. You can look there.