

## **Rolling Forward Guide**

Axiom Budgeting and  
Performance Reporting  
Version 2022.2

**AXIOM**

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# Rolling forward to a new fiscal year

**IMPORTANT:** Upgrade Axiom to the most current release, and then follow these steps. Also make sure you're not in an active budget cycle.

As part of the implementation process, a Syntellis Implementation Consultant helps you create a budget file group for the current year, as discussed the section "Setting up budget plan files" in the online help.

For the next or subsequent file year, however, there are steps you need to complete to set up next year's file group. These steps include the following:

1. [Archive the current year plan file](#)
2. [Prepare for the next fiscal year](#)
3. [Review other system areas](#)

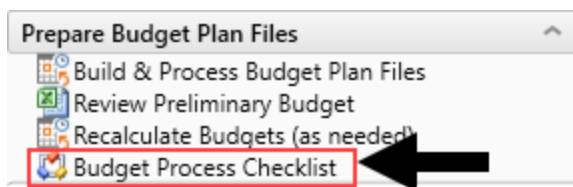
**NOTE:** To populate the Bud\_Pay27 tables with budgeted hours, we recommend that you run the Monthly to Biweekly utility located in the Reports Library > Management Reporting Utilities > Payroll. For more information, see "Payroll utilities" in the online help.

# Running the Budget Checklist process

Use this process to walk you through the steps needed to create plan files for the next budgeting season. The Budget Checklist process displays all of the steps to complete on the left side of the window. Those steps that include sub-steps are indicated with an arrow icon, which you can click to expand or contract the list.

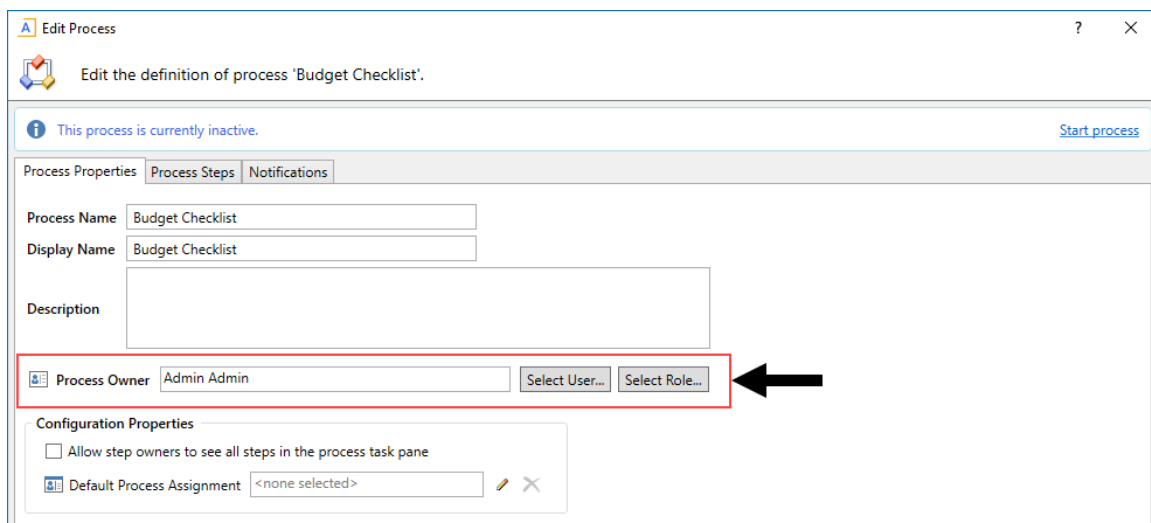
To run the Budget Checklist process:

1. In the Bud Admin task pane, in the **Prepare Budget Plan Files** section, double-click **Budget Checklist**.

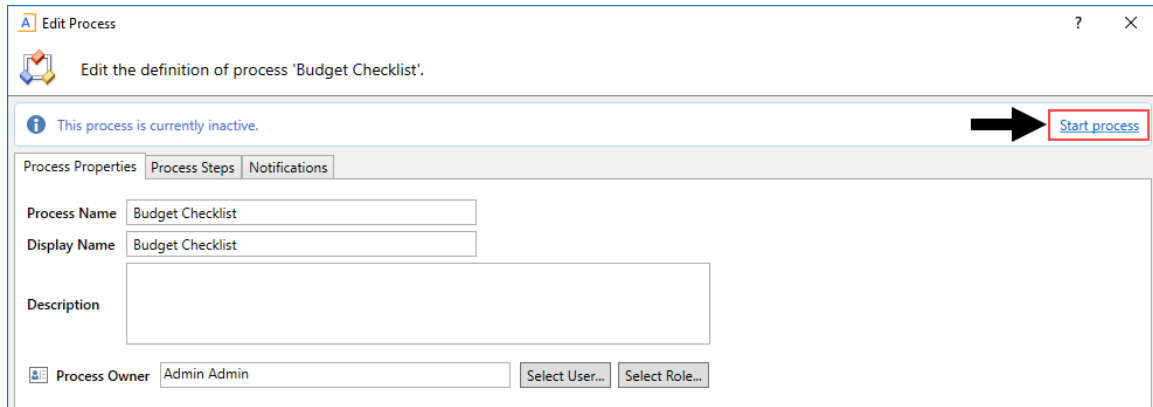


2. In the **Process Owner** field of the Process Properties tab, do one of the following:
  - To assign a specific user as process owner, click **Select User**.
  - To assign users with specific roles as process owners, click **Select Role**.

**NOTE:** You must assign a user or role before you can run this process.



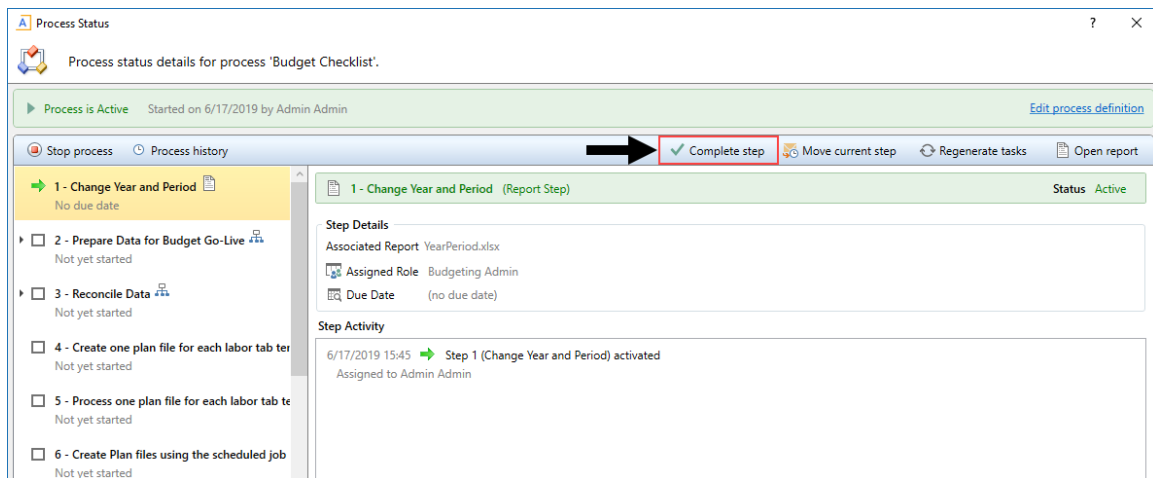
3. Click **Start Process** in the upper right corner of the dialog.



4. At the **Start process 'Budget Checklist'** prompt, click **OK**.
5. As you complete each step, click **Complete step** in the upper right corner of the screen.

**TIP:** An arrow icon displays next to steps that contain sub-steps. Click the icon to expand or contract the list of sub-steps.

**NOTE:** You can skip steps that do not apply to your organization.



6. In the **Process Action** dialog, you can enter any details about the step you performed, and click **OK**.

**TIP:** The dialog also displays the next step in the process.

**Process Action**

Mark process step as completed in process 'Budget Checklist'.

**Current Step**  
 Change Year and Period  
 Admin Admin (admin)

**Next Step**  
 Create one plan file for each labor ta  
 Admin Admin

**Comment** Any comment will be stored with the process and included in notifications to the next step owner.

1000 characters remaining

OK Cancel

- If you need to stop the process as you work on the different steps, click **Stop process** in the upper left corner above the list of steps. This places the process in an inactive status until you are ready to start the process again.

**TIP:** To view a report of the process history, click Process history in the upper left corner above the list of steps.

**Process Status**

Process status details for process 'Budget Checklist'.

Process is Active Started on 6/17/2019 by Admin Admin [Edit process definition](#)

**Stop process** **Process history** [Complete step](#) [Move current step](#) [Regenerate tasks](#) [Open report](#)

**1 - Change Year and Period**  
No due date

**2 - Prepare Data for Budget Go-Live**  
Not yet started

**3 - Reconcile Data**  
Not yet started

**1 - Change Year and Period (Report Step)**  
Status Active

**Step Details**  
Associated Report YearPeriod.xlsx  
Assigned Role Budgeting Admin  
Due Date (no due date)

- At the Are you sure that you want to stop this process? prompt, click OK.

# 1. Archiving current year plan files

The Archive Current Year Plan Files command allows you to convert the current plan files in a file group to static snapshots of the files, for viewing only. This command is intended to be used in cases where planning is finished for the file group, but you still want the ability to view the finalized plan files. However, you do not want the plan files to be updated with new data or save data to the database.

When you run this command, the system first creates a plan file restore point, so that you can restore the plan file if a user accidentally executes it. Then, the system opens each plan file and normal "open processes" occur, including applying default views, hiding sheets, and executing refresh-on-open Axiom queries and data lookups.

**NOTE:** The plan file starts out in the same state it would be in if the user executing the command opened the file normally.

The system then processes each plan file as follows:

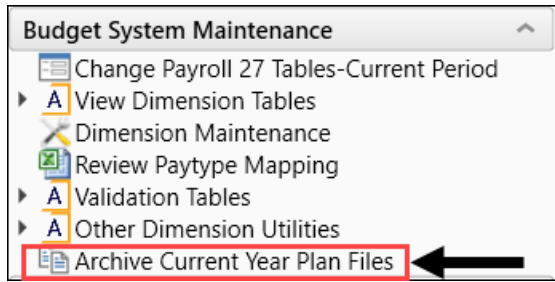
- Converts all formulas in the plan file to values.
- Deletes all control sheets. This disables any process that depends on a control sheet, such as Axiom queries or save-to-database.
- Disables refresh variables, action codes, and data lookups by prefixing the primary tags with an x. For example: [xActionCode].
- Applies workbook and worksheet protection, as configured on the original default Control Sheet.
- Saves the plan file in this static state.

When a plan file is opened after being archived by the command, data queries will not run because there is no longer any Control Sheet, and no formulas are left to be calculated. Manually refreshing the file will have no effect. Users can still save the file if they have read/write access to it, but save-to-database processes will no longer execute because there is no longer any Control Sheet.

**IMPORTANT:** The system processes all plan files using the permissions of the user who is executing the command. This means that the plan files will be opened, refreshed, and then "frozen" based on the permissions of that user. All users who open the archived files will see the plan files in the same state. For example, if the "live" plan file used formulas to dynamically show and hide sheets based on the current user's permissions, this will no longer apply to the archived file.

To archive current year plan files:

1. In the task pane, in the **Budget System Maintenance** section, double-click **Archive Current Year Plan Files**.



2. At the Are you sure you wish to archive file group 'Budget-year' file group? prompt, to continue, click Yes.

**NOTE:** The system determines the budget file group to archive based on the file group associated with the current year's budget plan.

**IMPORTANT:** Confirm your File Group Alias for **Current Year** is pointed to the file group you intend to archive.

## 2. Preparing for the next fiscal year

If you are applying the update, then it is likely you are ready to prepare your system for the next fiscal year. This section includes some of the common steps, but it may not be an exhaustive list so please contact Syntellis Support with any questions.

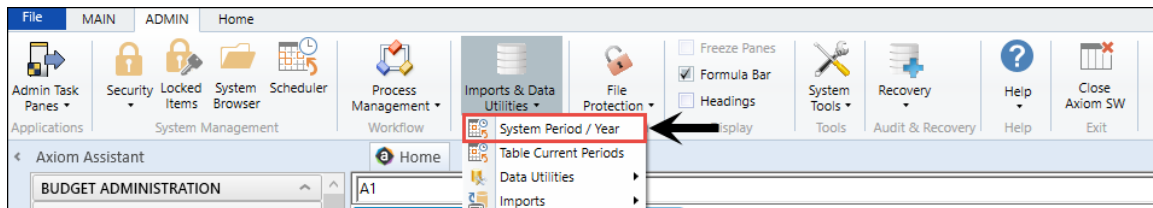
- [Update system periods](#)
- [Update year and period tables](#)
- [Update payroll dates tables](#)
- [Update the current payroll schedule](#)

The new budget file group is now active, but see [3. Reviewing other systems for the new fiscal year](#) to make sure all systems have been reviewed and updated before you begin working with the new budget file group.

## Updating system periods

To update system periods:

1. In the **Admin** ribbon tab, click **Imports & Data Utilities > System Period/Year**.

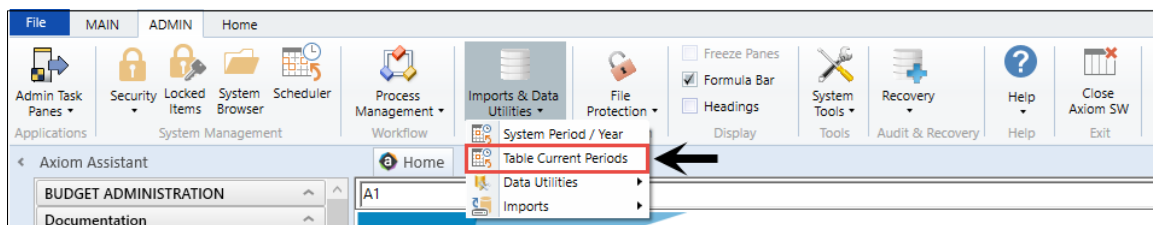


*Click image to view full size*

2. In the **System Current Period** dialog, modify the **System Current Period**, as applicable.

*Click image to view full size*

3. In the **Admin** ribbon tab, click **Import & Data Utilities > Table Current Periods**.



*Click image to view full size*

4. Update the Financial, Payroll, and Provider (if applicable) table periods.

## Setting year and period

Use this table to configure the following for your organization:

- Set the fiscal year and the first month of the fiscal year
- Define the number of work days in the current year, last year, and next year
- Select the standard Full Time Equivalent (FTE) hours worked by employees in a year.
- For Budget Planning, the 02 Budget Labor Configuration driver will use the default FTE scale created in the Year/Period Form but allow for modifications to the default at the Global and Budget Group level.

**NOTE:** The standard FTE hours you select in this worksheet displays as the default FTE Hours in the [Budget Labor Configuration](#).

### Primary Inputs

**Fiscal Year** 2020 ▼

**Fiscal Start Month** July ▼

**Day Type** Calendar Days ▼

**FTE Scale** Weekly ▼

**FTE Hours** 40 Default is 40 hours per week

Save

### Working Days Inputs

Serial	Month	Current Year Working Days 2020	Last Year Working Days 2019	Next Year Working Days 2021
7	July	23	23	23
8	August	23	23	23
9	September	22	22	22
10	October	23	23	23
11	November	22	22	22
12	December	23	23	23
1	January	23	23	23
2	February	20	20	20
3	March	23	23	23
4	April	22	22	22
5	May	23	23	23
6	June	22	22	22
		269	269	269

☐ Check to Hide Year table

☐ Check to Hide Period table

### Year Table

Code	Year	Fiscal Year	Description
CYA	2020	FY20	Actual
CYB	2020	FY20	Budget
CYP	2020	FY20	Projected
FLX	2020	FY20	Flex Budget
L2A	2018	FY18	L2 Actual
LXA	2019	FY19	Last Year
LYB	2019	FY19	LY Budget
NYB	2021	FY21	NY Budget
CYF	2020	FY20	Forecast

### Period Table

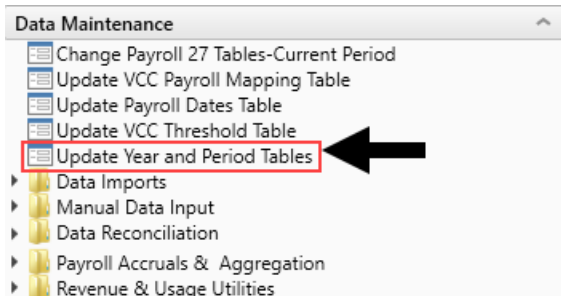
Serial	Month	Quarter	Current Year	Last Year	Next Year	Current Year Month	Last Year Month
7	July	1	2019	2018	2020	Jul-2019	Jul-2018
8	August	1	2019	2018	2020	Aug-2019	Aug-2018
9	September	1	2019	2018	2020	Sep-2019	Sep-2018
10	October	2	2019	2018	2020	Oct-2019	Oct-2018
11	November	2	2019	2018	2020	Nov-2019	Nov-2018
12	December	2	2019	2018	2020	Dec-2019	Dec-2018
1	January	3	2020	2019	2021	Jan-2020	Jan-2019
2	February	3	2020	2019	2021	Feb-2020	Feb-2019
3	March	3	2020	2019	2021	Mar-2020	Mar-2019
4	April	4	2020	2019	2021	Apr-2020	Apr-2019
5	May	4	2020	2019	2021	May-2020	May-2019
6	June	4	2020	2019	2021	Jun-2020	Jun-2019

The FTE Hours you select are reflected on the following tabs in the plan file:

- Expense
- Jobcode
- Staffing
- Employee
- ProviderComp
- altEmployee
- HHLabor

To set year and period:

1. In the [Management Reporting Admin](#) task pane, in the **Data Maintenance** section, double-click **Update Year and Period Tables**.



2. In the **Primary Inputs** section, complete the following options:

Option	Description
<b>Fiscal Year</b>	Select the fiscal year.
<b>Fiscal Start Month</b>	Select the month in which the fiscal year starts.
<b>Day Type</b>	Select Calendar Days or Work Days.
<b>FTE Scale</b>	Select a Daily, Weekly, Monthly, or Yearly scale.
<b>FTE Hours</b>	<p>Use one of the option to input the FTE value associated with the FTE Scale field selected above:</p> <ul style="list-style-type: none"> <li>• To use the standard of the number of days worked multiplied by a 40-hour work week divided by 7, type <b>2086</b>.</li> <li>• To use the standard 40-hour work-week multiplied by 52 weeks, type <b>2080</b>(default).</li> <li>• To use a custom FTE value, type it. To view multiple examples of how to use this field, see the section <a href="#">Examples of custom FTE scales</a> below.</li> </ul>

3. In the **Working Days Inputs** area, enter the number of working days for the current year, last year, and next year for each fiscal month.

**TIP:** To hide the year and/or period tables, click the corresponding check boxes under the Working Days Inputs section.

**NOTE:** When you select Work Days from the Day Type drop-down, Daily is the only available option from the FTE Hours drop-down.

4. After making your changes, click **Save**.

#### ► Examples of custom FTE scales

You can configure the FTE Scale to suit the needs of your organization in a variety of ways, here are some examples:

Yearly

To calculate a full-time equivalent based on the yearly scale, complete the following:

1. In the **Day Type** drop-down, select **Calendar Days**.
2. In the **FTE Scale** drop-down, select **Yearly**.
3. In the **FTE Hours** field, type **2085.714**.

**NOTE:** The default of 2080 hours per year displays next to FTE Hours.

Primary Inputs

Save

Fiscal Year 2020  
Fiscal Start Month July  
Day Type Calendar Days  
FTE Scale Yearly  
FTE Hours 2085.714 Default is 2080 hours per year

The system displays the monthly hours worked based on your configuration in the **Period Table** section.

Primary Inputs

Save

Fiscal Year 2020  
Fiscal Start Month July  
Day Type Calendar Days  
FTE Scale Yearly  
FTE Hours 2085.714 Default is 2080 hours per year

Working Days Inputs

Serial	Month	Current Year Working Days 2020	Last Year Working Days 2019	Next Year Working Days 2021
7	July	23	23	23
8	August	23	23	23
9	September	22	22	22
10	October	23	23	23
11	November	22	22	22
12	December	23	23	23
1	January	23	23	23
2	February	20	20	20
3	March	23	23	23
4	April	22	22	22
5	May	23	23	23
6	June	22	22	22
		269	269	269

Year Table

Code	Year	Fiscal Year	Description
CYA	2020	FY20	Actual
CYB	2020	FY20	Budget
CYP	2020	FY20	Projected
FLX	2020	FY20	Flex Budget
L2A	2018	FY18	L2 Actual
LYA	2019	FY19	Last Year
LYB	2019	FY19	LY Budget
NYB	2021	FY21	NY Budget
CVF	2020	FY20	Forecast

Period Table

Serial	Month	Quarter	Current Year FTE Factor	Last Year FTE Factor	Next Year FTE Factor
7	July	1	177.14	177.14	177.14
8	August	1	177.14	177.14	177.14
9	September	1	171.43	171.43	171.43
10	October	2	177.14	177.14	177.14
11	November	2	171.43	171.43	171.43
12	December	2	177.14	177.14	177.14
1	January	3	177.14	177.14	177.14
2	February	3	168.02	160.00	160.00
3	March	3	177.14	177.14	177.14
4	April	4	171.43	171.43	171.43
5	May	4	177.14	177.14	177.14
6	June	4	171.43	171.43	171.43
			2,093.74	2,085.71	2,085.71

**NOTE:** After you save your changes, the system will display values based on this configuration in the **Period Table** section.

## Daily

To configure a scale for 2080.5 instead of the standard 2086 (2085.71) scale, complete the following:

1. In the **Day Type** drop-down, select **Calendar Days**.
2. In the **FTE Scale** drop-down, select **Daily**.
3. In the **FTE Hours** field, enter **5.700**.

**Primary Inputs**

Fiscal Year: 2020  
 Fiscal Start Month: July  
 Day Type: Calendar Days  
 FTE Scale: Daily  
 FTE Hours: 5.714 (Default is 5.7 hours per day)

**Helpful text showing suggested value**

**Edit box to enter daily hours value**

**Save**

**NOTE:** The FTE Hours default for this configuration is 5.7 hours per day.

**Primary Inputs**

Fiscal Year: 2020  
 Fiscal Start Month: July  
 Day Type: Calendar Days  
 FTE Scale: Daily  
 FTE Hours: 5.7 (Default is 5.7 hours per day)

**Working Days Inputs**

Serial	Month	Current Year Working Days 2020	Last Year Working Days 2019	Next Year Working Days 2021
7	July	23	23	23
8	August	23	23	23
9	September	22	22	22
10	October	23	23	23
11	November	22	22	22
12	December	23	23	23
1	January	23	23	23
2	February	20	23	23
3	March	23	23	23
4	April	22	23	23
5	May	23	23	23
6	June	22	22	22
		269	269	269

**Note: Leap Year hours will be assigned to Feb.**

**Year Table**

Code	Year	Fiscal Year	Description
CYA	2020	FY20	Actual
CYB	2020	FY20	Budget
CYP	2020	FY20	Projected
FLX	2020	FY20	Flex Budget
L2A	2018	FY18	L2 Actual
LVA	2019	FY19	Last Year
LYB	2019	FY19	LY Budget
NYB	2021	FY21	NY Budget
CYF	2020	FY20	Forecast

**Period Table**

Serial	Month	Quarter	Current Year FTE Factor	Last Year FTE Factor	Next Year FTE Factor
7	July	1	176.70	176.70	176.70
8	August	1	176.70	176.70	176.70
9	September	1	171.00	171.00	171.00
10	October	2	176.70	176.70	176.70
11	November	2	171.00	171.00	171.00
12	December	2	176.70	176.70	176.70
1	January	3	176.70	176.70	176.70
2	February	3	165.30	159.60	159.60
3	March	3	176.70	176.70	176.70
4	April	4	171.00	171.00	171.00
5	May	4	176.70	176.70	176.70
6	June	4	171.00	171.00	171.00
			2,086.20	2,080.50	2,080.50

**NOTE:** After you enter your **Primary Inputs**, the **Period Table** section displays the calculated results in real time which allows you to view your configuration before saving data.

## Weekly

To configure an annual FTE of 2085.71 based on a weekly calculation of 40 hours per week, complete the following:

1. In the **Day Type** drop-down, select **Calendar Days**.
2. In the **FTE Scale** drop-down, select **Weekly**.
3. In the **FTE Hours** field, type **40.00**.

### Primary Inputs

Save

Fiscal Year: 2020  
Fiscal Start Month: July  
Day Type: Calendar Days  
FTE Scale: Weekly  
FTE Hours: 40 Default is 40 hours per week

**NOTE:** The default for this configuration is 40 hours per week.

### Primary Inputs

Save

Fiscal Year: 2020  
Fiscal Start Month: July  
Day Type: Calendar Days  
FTE Scale: Weekly  
FTE Hours: 40 Default is 40 hours per week

### Working Days Inputs

Serial	Month	Current Year Working Days 2020	Last Year Working Days 2019	Next Year Working Days 2021
7	July	23	23	23
8	August	23	23	23
9	September	22	22	22
10	October	23	23	23
11	November	22	22	22
12	December	23	23	23
1	January	23	23	23
2	February	20	20	20
3	March	23	23	23
4	April	22	22	22
5	May	23	23	23
6	June	22	22	22
		269	269	269

### Year Table

Code	Year	Fiscal Year	Description
CYA	2020	FY20	Actual
CYB	2020	FY20	Budget
CYP	2020	FY20	Projected
FLX	2020	FY20	Flex Budget
L2A	2018	FY18	L2 Actual
LXA	2019	FY19	Last Year
LYB	2019	FY19	LY Budget
NYB	2021	FY21	NY Budget
CYF	2020	FY20	Forecast

### Period Table

Serial	Month	Quarter	Current Year FTE Factor	Last Year FTE Factor	Next Year FTE Factor
7	July	1	177.14	177.14	177.14
8	August	1	177.14	177.14	177.14
9	September	1	171.43	171.43	171.43
10	October	2	177.14	177.14	177.14
11	November	2	171.43	171.43	171.43
12	December	2	177.14	177.14	177.14
1	January	3	177.14	177.14	177.14
2	February	3	165.71	160.00	160.00
3	March	3	177.14	177.14	177.14
4	April	4	171.43	171.43	171.43
5	May	4	177.14	177.14	177.14
6	June	4	171.43	171.43	171.43
			2,091.43	2,085.71	2,085.71

**NOTE:** After you save your changes, the system will display values based on this configuration in the **Period Table** section.

## Monthly

To configure on a scale where employees work that same number of hours per month, in this example an annual FTE scale set to 2080 hours, where the monthly FTE hours are 173.3333, complete the following:

1. In the **Day Type** drop-down, select **Calendar Days**.
2. In the **FTE Scale** drop-down, select **Monthly**.
3. In the **FTE Hours** text box, type **173.3333**.

### Primary Inputs

Save

Fiscal Year: 2020  
Fiscal Start Month: July  
Day Type: Calendar Days  
FTE Scale: Monthly  
FTE Hours: 173.3333

Default is 160 hours per month (30 day month)

**NOTE:** The default for this configuration is 160 hours per month (for a 30 day month).

### Primary Inputs

Save

Fiscal Year: 2020  
Fiscal Start Month: July  
Day Type: Calendar Days  
FTE Scale: Monthly  
FTE Hours: 173.3333

Default is 160 hours per month (30 day month)

### Working Days Inputs

Serial	Month	Current Year Working Days 2020	Last Year Working Days 2019	Next Year Working Days 2021
7	July	23	23	23
8	August	23	23	23
9	September	22	22	22
10	October	23	23	23
11	November	22	22	22
12	December	23	23	23
1	January	23	23	23
2	February	20	20	20
3	March	23	23	23
4	April	22	22	22
5	May	23	23	23
6	June	22	22	22
		269	269	269

### Year Table

Code	Year	Fiscal Year	Description
CYA	2020	FY20	Actual
CYB	2020	FY20	Budget
CYP	2020	FY20	Projected
FLX	2020	FY20	Flex Budget
L2A	2018	FY18	L2 Actual
LYA	2019	FY19	Last Year
LYB	2019	FY19	LY Budget
NYB	2021	FY21	NY Budget
CYF	2020	FY20	Forecast

### Period Table

Serial	Month	Quarter	Current Year FTE Factor	Last Year FTE Factor	Next Year FTE Factor
7	July	1	173.33	173.33	173.33
8	August	1	173.33	173.33	173.33
9	September	1	173.33	173.33	173.33
10	October	2	173.33	173.33	173.33
11	November	2	173.33	173.33	173.33
12	December	2	173.33	173.33	173.33
1	January	3	173.33	173.33	173.33
			179.11	173.33	173.33
			173.33	173.33	173.33
			173.33	173.33	173.33
			173.33	173.33	173.33
6	June	4	173.33	173.33	173.33
			2,085.78	2,080.00	2,080.00

Note the even spread of hours each month except leap year

**NOTE:** After you save your changes, the system will display values based on this configuration in the **Period Table** section.

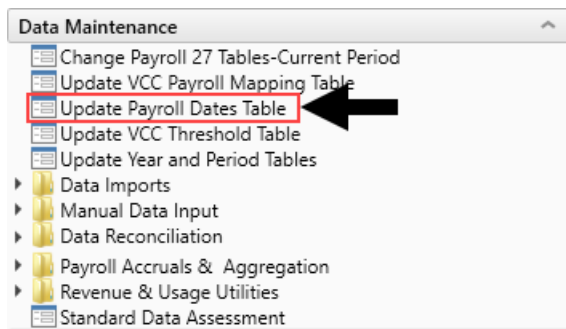
# Setting payroll dates

Use this table to manage your organization's pay period dates. This table is used in many of the productivity and pay period reports.

**IMPORTANT:** If your organization uses more than two cycles, it will not display in this table.

To set payroll dates:

1. In the **Mgmt Admin** task pane, in the **Data Maintenance** section, double-click **Update Payroll Dates Table**.



2. For Cycle 1 and Cycle 2, from the **Select the initial period pay date** drop-down, select the date for Pay Period 1.

**Payroll Dates** Save

**Cycle 1**

7/2/2016 <<< Select the initial period pay date

0 <<< Select the number of days the Pay Date is after the Pay Period End Date

**Cycle 2**

7/9/2016 <<< Select the initial period pay date

0 <<< Select the number of days the Pay Date is after the Pay Period End Date

Pay Period	Current Year			Last Year			Next Year			Current Year			Last Year		
	Pay Period End Date	Current Year Pay Date	Fiscal Month	Pay Period End Date	Last Year Pay Date	Pay Period End Date	Next Year Pay Date	Pay Period End Date 2	Current Year Pay Date 2	Fiscal Month 2	Pay Period End Date 2	Last Year Pay Date 2			
1	7/2/2016	7/2/2016	1	7/4/2015	7/4/2015	7/1/2017	7/1/2017	7/9/2016	7/9/2016	1	7/11/2015	7/11/2015			
2	7/16/2016	7/16/2016	1	7/18/2015	7/18/2015	7/15/2017	7/15/2017	7/23/2016	7/23/2016	1	7/25/2015	7/25/2015			
3	7/30/2016	7/30/2016	1	8/1/2015	8/1/2015	7/29/2017	7/29/2017	8/6/2016	8/6/2016	2	8/8/2015	8/8/2015			
4	8/13/2016	8/13/2016	2	8/15/2015	8/15/2015	8/12/2017	8/12/2017	8/20/2016	8/20/2016	2	8/22/2015	8/22/2015			
5	8/27/2016	8/27/2016	2	8/29/2015	8/29/2015	8/26/2017	8/26/2017	9/3/2016	9/3/2016	3	9/5/2015	9/5/2015			

**TIP:** You can hide or show Cycle 1 and 2 using the toggle under the Save button.

3. From the **Select the number of days the Pay Date is after the Pay Period End Date** drop-down, select the number of days.
4. After you make changes, click **Save** in the upper right corner of the page.

**Payroll Dates**

→ **Save**

Cycle 1:  <<< Select the initial period pay date  
 <<< Select the number of days the Pay Date is after the Pay Period End Date

Cycle 2:  <<< Select the initial period pay date  
 <<< Select the number of days the Pay Date is after the Pay Period End Date

Pay Period	Current Year			Last Year			Next Year			Current Year			Last Year		
	Pay Period End Date	Current Year Pay Date	Fiscal Month	Pay Period End Date	Last Year Pay Date	Pay Period End Date	Next Year Pay Date	Pay Period End Date	Current Year Pay Date	Current Year Pay Date 2	Fiscal Month 2	Pay Period End Date 2	Last Year Pay Date 2		
1	7/2/2016	7/2/2016	1	7/4/2015	7/4/2015	7/1/2017	7/1/2017	7/9/2016	7/9/2016	7/9/2016	1	7/11/2015	7/11/2015		
2	7/16/2016	7/16/2016	1	7/18/2015	7/18/2015	7/15/2017	7/15/2017	7/23/2016	7/23/2016	7/23/2016	1	7/25/2015	7/25/2015		
3	7/30/2016	7/30/2016	1	8/1/2015	8/1/2015	7/29/2017	7/29/2017	8/6/2016	8/6/2016	8/6/2016	2	8/8/2015	8/8/2015		
4	8/13/2016	8/13/2016	2	8/15/2015	8/15/2015	8/12/2017	8/12/2017	8/20/2016	8/20/2016	8/20/2016	2	8/22/2015	8/22/2015		
5	8/27/2016	8/27/2016	2	8/29/2015	8/29/2015	8/26/2017	8/26/2017	9/3/2016	9/3/2016	9/3/2016	3	9/5/2015	9/5/2015		

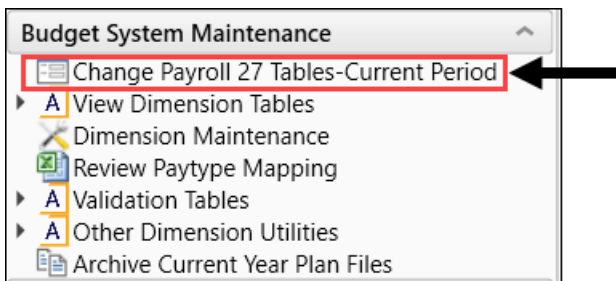
## Configuring the current payroll period

Use the Change Payroll 27 Tables-Current Period utility to change the Payroll 27 tables current period.

**NOTE:** You must have the Administrator role profile to access this utility.

To configure the current payroll period:

1. In the Bud Admin or Management Reporting Admin task pane, in the **Budget System Maintenance** section, double-click **Change Payroll 27 Tables-Current Period**.



**NOTE:** The utility opens in a separate browser window.

2. From the **New Pay Period** drop-down, select the current pay period.

## Set Pay Period

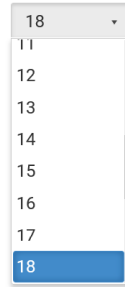
Use this form to change the Current Pay Period.

### Current System Info:

Current Pay Period: 18

### New Pay Period Info:

New Pay Period:

A dropdown menu showing a list of pay periods from 11 to 18. The number 18 is selected and highlighted in blue at the bottom of the list. The menu has a scroll bar on the right side.

18
11
12
13
14
15
16
17
18

3. Click **Submit**.
4. At the **This may take around a minute to save** prompt, click **OK**.
5. At the confirmation prompt, click **OK**.

# 3. Reviewing other systems for the new fiscal year

Refer to the budget checklist and all of the topics related to it. Although the budget file group is now active, there remains a few system areas to review and possibly update.

- Bring data current – Bring the GL and Statistic data current.
- Verify Budget Control columns in the DEPT dimension table – Validate that the DEPT dimension key Budget columns have been reviewed and updated.
- Verify the Budget Control columns in the ACCT, JOBCODE, and PAYTYPE dimension tables
- Load updated employee master data.
- Build 1-5 sample budgets for verification.
- Adjust dimension budget settings and driver information accordingly.