

How to use Budget Wizard functionality in WebAdi (step-by-step) (Doc ID 471044.1)

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Platforms: 1-914CU;

This document is being delivered to you via Oracle Support's Rapid Visibility (RaV) process and therefore has not been subject to an independent technical review.

APPLIES TO:

Oracle Applications Desktop Integrator - Version: 11.5.10.0 to 11.5.10.0 - Release: 11.5 to 11.5
Oracle General Ledger - Version: 11.5.10.0 to 11.5.10.0 [Release: 11.5.10 to 11.5.10]
Oracle Web Applications Desktop Integrator - Version: 11.5.10.0 to 11.5.10.0 [Release: 11.5 to 11.5]
Information in this document applies to any platform.
Checked for relevance on November 2010

Applications Desktop Integrator - Version: 11.5.10 to 11.5.10

GOAL

With the Budget Wizard you can download an existing budget from Oracle General Ledger into Microsoft Excel, modify it in Excel, and then automatically upload your revised budget amounts to General Ledger.

By using Excel to create budget worksheets, you can easily save your worksheets to your local hard disk or floppy disk, making it possible to edit them later, or perform budget analysis work on a different PC, even when you are disconnected from your corporate database.

SOLUTION

Note: The patch for Budget Wizard functionality is released as patch 6898666 on Metalink

Prerequisites:

- Define a budget
- Open one or more years of your budget
- Define a budget organization, then assign a budget entry type of Entered to the accounts for which you want to enter budget amounts

Note: Before you can use Budget Wizard you must set the profile option Budget Wizard: GL: Default Desktop Viewer. Set value according to the version of Excel being used. Please see the steps needed to create the profile option in:

[Note 556280.1](#) How to create profile option GL : Default Desktop Viewer

Creating a Budget Worksheet