

Backup Documentation in AggieBudget

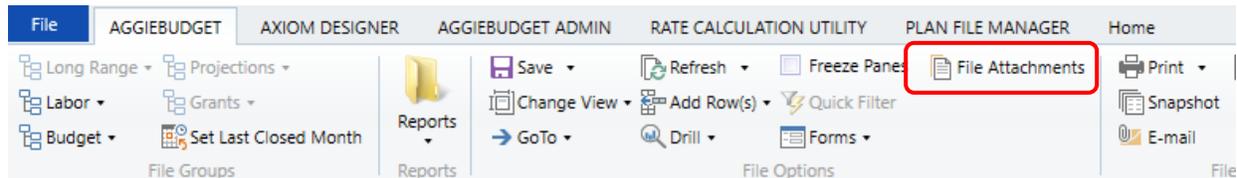
You may want to document how you arrived at budgeted or projected numbers in AggieBudget. This can be useful in case of an audit or in case another user has questions about the budget, projections, or variance to actuals.

Notes and Scratch Pad

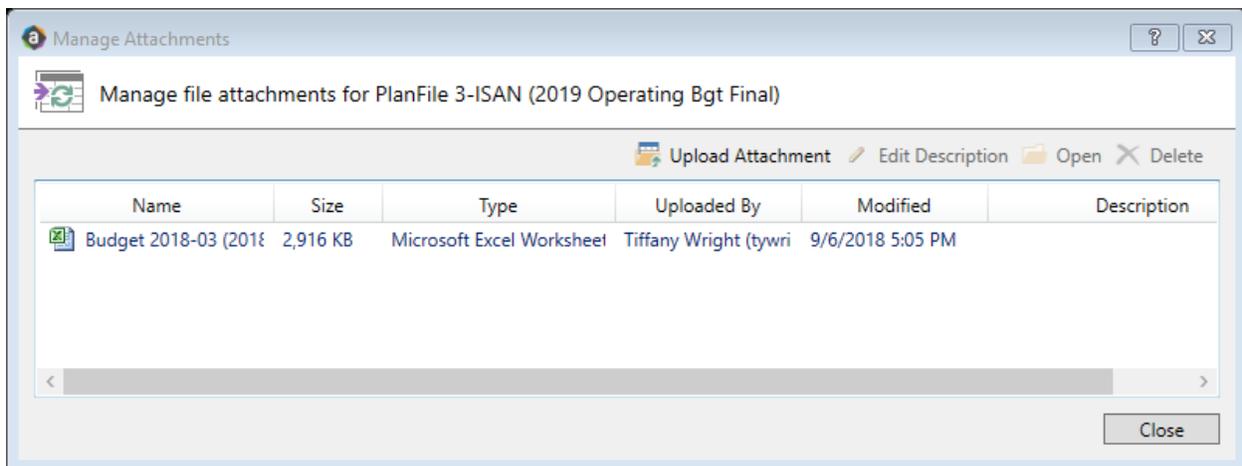
Budget plan files have a “Notes” tab and labor plan files have a “Scratch Pad” tab. However, these tabs are really more useful for doing quick calculations that you will not likely need to reference in the future. One very important thing to note about these tabs is that they are not permanent. Certain system changes may require plan files to be rebuilt. In that case, the “Notes” and “Scratch Pad” tabs will be reset to their default blank state, which would delete any user changes to those tabs.

Best Practice – File Attachments

The recommended best practice for backup documentation is to use the file attachment option available in the AGGIEBUDGET ribbon under File Options.



File Attachments are associated with the active plan file and are stored in the AggieBudget system, but they are not part of the plan file itself. Thus, file attachments will not be deleted if plan files are rebuilt. File Attachments are an option for both budget plan files and labor plan files. Any single plan file is allowed to have more than one file attachment. Common file types, such as Excel, Word, Power Point, and PDF files can be attached to plan files using File Attachments.



All users with access to the plan file can view the list of existing attachments and download those attachments. In order to upload, edit, or delete an attachment, users must have read-write access to the plan file. If you need to edit one of these files, you should save a copy of the file locally and make your edits. You can then delete the existing file attachment in the Axiom Software database, and upload your edited copy.