Corporate Planner: Using Standard Reports
How to enter information into Budget and Forecast reports

How to enter information into Budget and Forecast reports:

1. **Display the report** (refer to the 'How to Run Standard Reports' user guide).

2. **Change the time slider to the budgeting year**, so if entering 2017/18 budget information you would move the slider position to *2017/18.*

3. **Click the *Spreadsheet View* icon at the top left of the toolbar.**

4. This turns the report into a Table Report into which numbers can be entered.

5. To enter a number, **click in the cell you want to enter information in and type the number.**

6. Once entered, **click on the *Layout View* icon at the top left of the toolbar.**

> Numbers can only be entered on lines with black text. Lines with grey text are subtotals of the lines above, and so won't allow information to be entered on them.

> The Table Report can be exported to Excel and then copied back into this screen. This is useful if you have a large amount of data to enter, and allows you to keep an audit trail of information entered. Please refer to the How to copy and paste into CP from Excel user guide.