Using Version A and B

Version A is the official version and is the only version that is in the workflow process for board reporting. Version B can be used to create different budget scenarios. This section reviews how to move between the two versions and other options available in the Copy/Swap Version button.

Note: For Position Layouts, Version A will have data prepopulated in New Budget Year fields based upon Current Year numbers. Version B will NOT have this prepopulated information.

Moving Between Versions

1. Observe the Version currently chosen (default is Version A – the official version for board reporting).

   Note: Both the radio button selected for a Version and the Version listed in some column headings is an indicator of which Version you are using at the current time.

2. To switch between layouts, simply select the radio button beside the Version desired (in this example going from A to B).
3. Review the results and note that the columns like the New Budget Column reference Budget version (in this example now in B).

**Copying or Swapping Versions**

1. Observe the Version currently chosen (default is Version A – the official version for board reporting).

   *Note:* Both the radio button selected for a Version and the Version listed in some column headings is an indicator of which Version you are using at the current time.

2. To copy or swap between Version A and B, click on the Copy/Swap Version button (upper right corner of screen).
3. In the resulting Copy/Swap Version dialog box, choose an option as outlined below:
   - To Copy Version A to Version B, click in the first check box.
     \[\text{Note: The copy function will copy the layout from Version A into the Version B as a starting point to work on scenarios in Version B.}\]
   - To Swap Version A with Version B, click in the second checkbox.
     \[\text{Note: The swap function makes Version A becomes Version B and Version B becomes Version A – the versions “swap” layouts. This is helpful if you have been working in Version B and now want that to become Version A or want to reset Version A to the original state if you have not used Version B yet.}\]

4. Click OK.

5. In the Warning dialog box, read the message indicating you are about to overwrite or swap the Versions and click on the radio button for Yes (or No if this is not your intention).
6. Review the results show that Version A copied into Version B OR Version A swapped with Version B or vice-versa (in this example, Version A with budget data already input was copied into Version B).

7. Remember to click the **Save** in Version A and B as desired to save any copying or swapping of data in the layout versions.