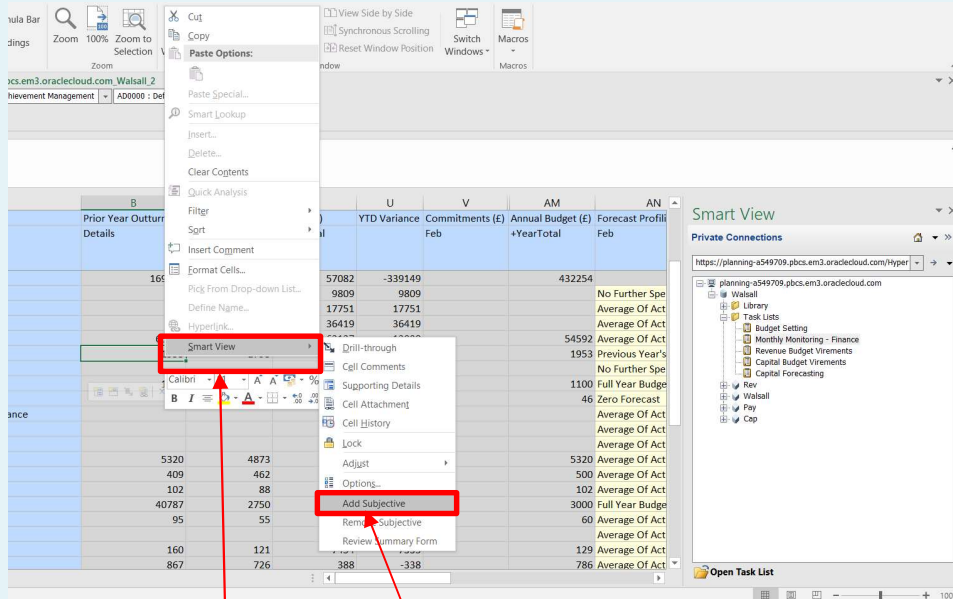


Revenue Monitoring - Adding/Removing a Subjective

1

Adding a subjective

1. Once you have loaded your area in the Revenue Monitoring form in Excel, **right click** on any subjective line.



2. Go to **Smart View** and **Add Subjective**.
3. A Business Rule form will pop up.

2

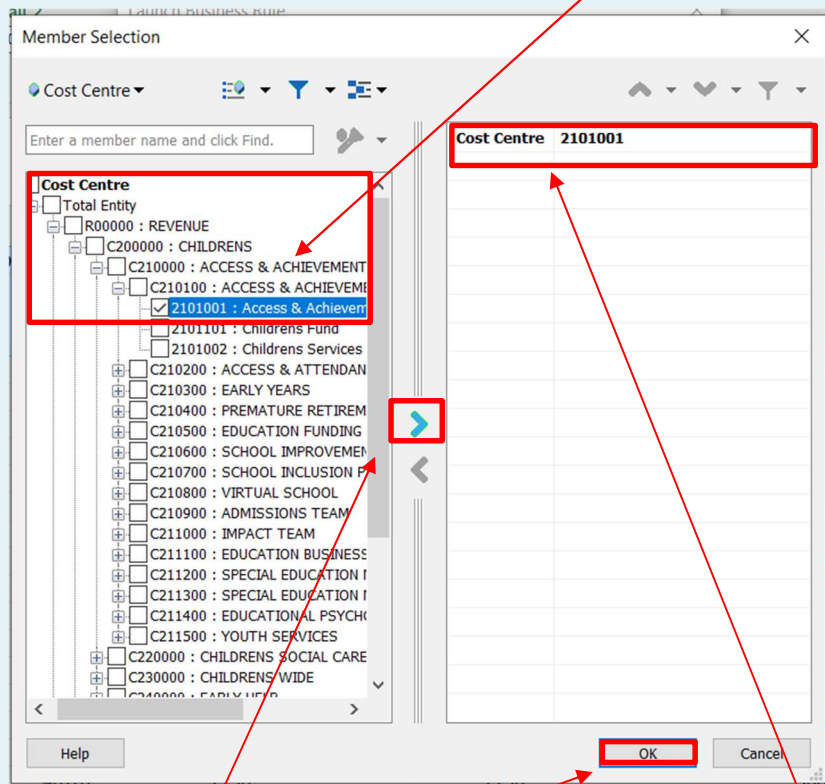
The 'Launch Business Rule' dialog box is shown. The 'Plan Type' is set to 'Rev'. The 'Business Rule' is 'RM02-Add Subjective'. The 'Runtime Prompts' section shows 'Select Cost Centres' with the value '2101001' and 'Enter Manager Forecast' with the value '3404'. A red box highlights the 'Select Cost Centres' field, and a red magnifying glass icon is next to it. A red arrow points from the 'Add Subjective' option in the previous slide to the 'Select Cost Centres' field.

4. Check the **Select Cost Centre** has the correct cost centre number, if so skip to **Step 10**
5. If the cost centre is incorrect, click on the **Magnifying Glass** for Select Cost Centres.

Revenue Monitoring - Adding/Removing a Subjective

3

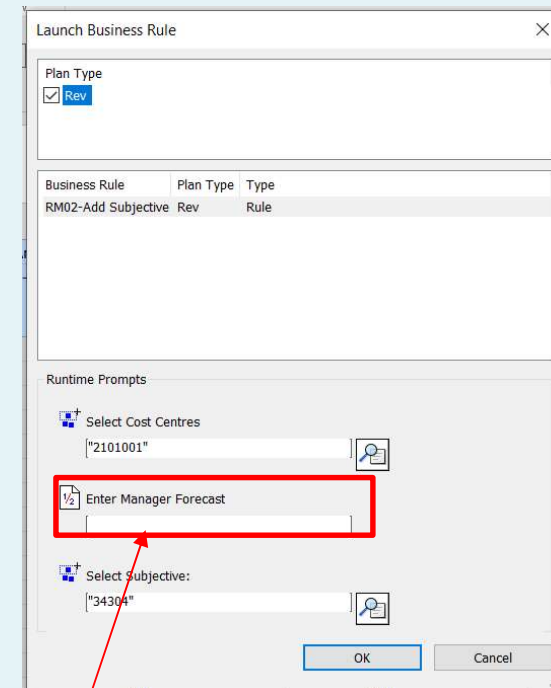
6. Expand [+] **Total Entity** → **Revenue** → Required **Directorate** → Required **Head of Service** → Required **Area** → Tick the required **Cost Centre**



7. Click the **Right Arrow** to bring the cost centre you want to the **right-hand side** as shown.
8. Click **OK**.

4

9. This will take you back to the **Business Rule** screen and the **Select Cost Centre** field will update with the new selection.



10. Manually enter your forecast figure for the subjective in the **Enter Manager Forecast** field. If you do not know the exact figure you can enter 0 and update it once the subjective has been added.

Revenue Monitoring - Adding/Removing a Subjective

5

11. You can manually enter the subjective in the **Select Subjective** field if you know the subjective number. If not, click on the **Magnifying Glass**.

6

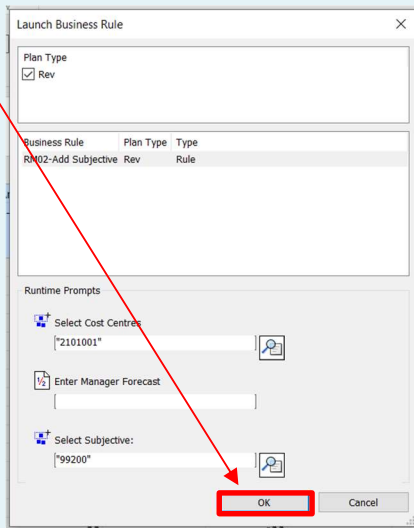
12. You can search the subjective you want in the search bar and press enter, **OR**
 13. click **Expand [+] Total Subjective** → Required **Subjective type** → **Controllable/Non-Controllable** → Required **Category** → Required **Area** → Tick the required **Subjective**

14. Click the **Right Arrow** to bring the cost centre you want to the **right hand side** as shown.
 15. Click **OK**.

Revenue Monitoring - Adding/Removing a Subjective

7

16. This will take you back to the **Business Rule** screen and the **Select Subjective** field will update with the new selection.
17. Click **OK** at the bottom of the Business Rule.
18. A prompt should appear saying Business Rule completed successfully, click **OK** to close it.
19. The spreadsheet will automatically refresh and show the added subjective.

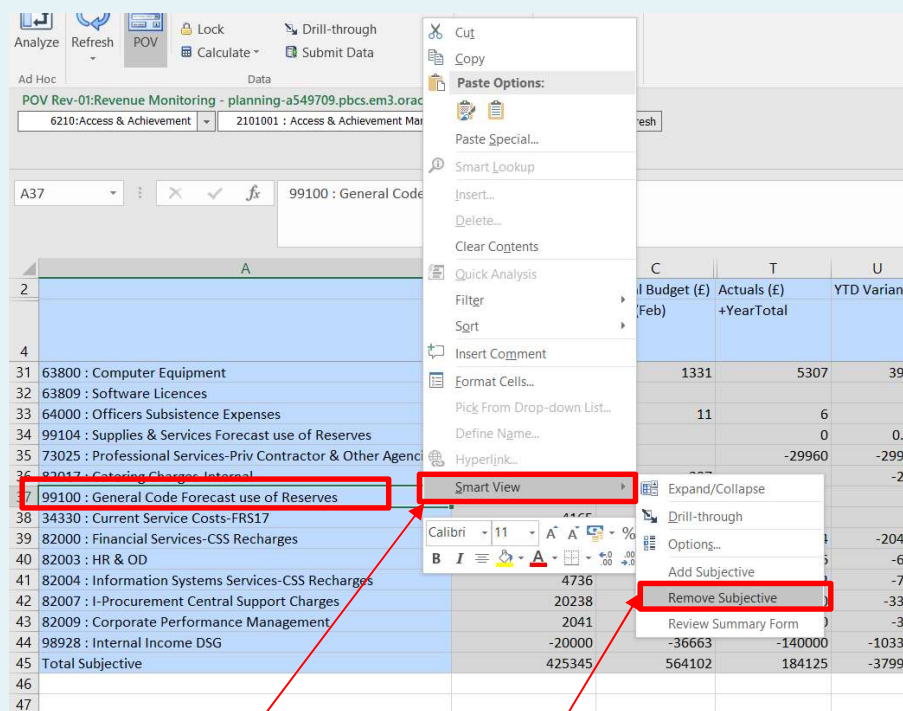


Revenue Monitoring - Adding/Removing a Subjective

8

Removing a subjective

1. Once you have loaded your area in the Revenue Monitoring form in Excel, **right click** on the subjective line you wish to remove.



2. Go to **Smart View** and **Remove Subjective**.

9

3. A prompt should appear saying the Business Rule completed successfully, click **OK** to close it.
4. The spreadsheet will automatically refresh and the Vacancy will have been removed.

To Note

1. You cannot add or remove a subjective when in ADHOC. You will need to generate a new Revenue Monitoring form if you wish to exit ADHOC and add/remove a subjective.
2. You cannot remove an existing subjective which has an actual balance.

Further Support If you have any further queries, please contact the **One Source helpdesk** on **01922 654320**.