

Budget Manager workbench

Version Control

Version	Author Name	Comments	Date
0.2	Jane Allen		08/01/2020
0.3	Jane Allen	Update for CP11	15/07/2021

1. Introduction

This worksheet provides a quick guide to the Budget Manager workbench.

2. Workbench layout

The workbench is the screen shown on first login to Budget Manager. It provides access and navigation to other areas. The finance forms, where data is entered and reviewed, are entered from the workbench.

Throughout Budget Manager, what the user sees is dependent on permissions – as a user, you may not see all the options in this worksheet.

The screenshot shows the Budget Manager workbench interface. The top navigation bar includes 'Home', 'Main Menu', 'Messages', and the user name 'Jane Allen'. The main content area is divided into several sections:

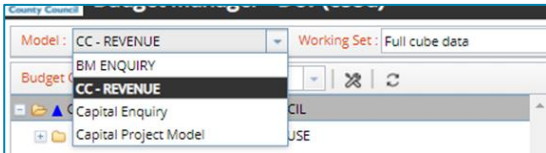
- Navigation options:** A tree view on the left side showing the hierarchy of budget categories, such as 'COUNCIL - CUMBRIA COUNTY COUNCIL' and 'C25 - FINANCE'.
- Menu icons:** A set of icons at the top of the main content area, including 'Actions', 'Dashboard', 'Budget Instructions', 'Responsibility Owners', 'Budget Activity', and 'Workflow Activity'.
- Information and actions control centre:** A central area containing 'Data Entry Options' (with a 'Profile' dropdown and 'Use new Tab' checkbox), 'Responsibility Area Status' (showing 'COUNCIL - CUMBRIA COUNTY COUNCIL' as 'Preparing'), and a table with columns for 'Level', 'Not Started', 'Preparing', 'Submitted', 'Agreed', 'Not Plannable', 'Disabled', and 'Late'.
- Messages:** A 'Recent Messages' panel on the right side, displaying a 'Message Of The Day' and a list of system messages with timestamps and task descriptions.

3. Navigation Options

The navigation options are used to select relevant information and forms. There are three menus but most users have limited access so that there are limited options to select.

3.1 Models

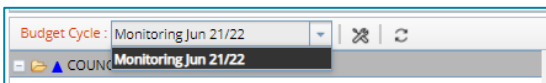
The Council currently uses 4 models (sets of data): CC Revenue, BM Enquiry, Capital Project Model and Capital Enquiry.



A drop down menu allows the model to be selected. Many users will have access to only one or two models. The last Model used is in focus the next time the user logs in.

Details and actions shown in the control centre will be specific to the model selected.

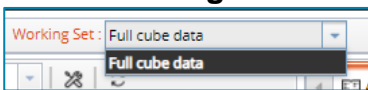
3.2 Budget Cycle



Available Budget Cycles for a model are displayed in the drop down menu.

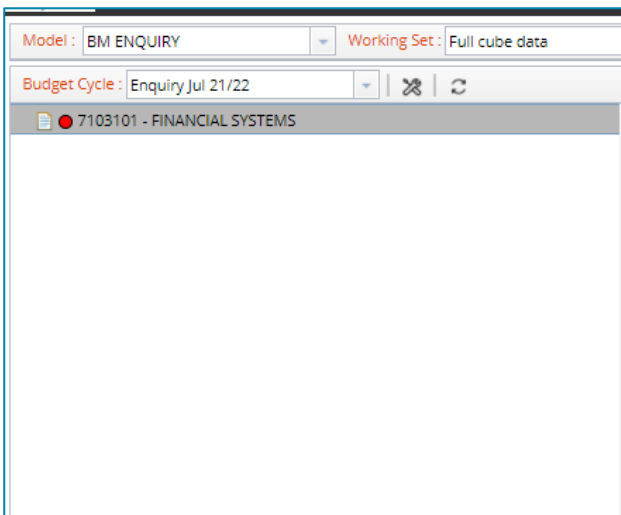
There will only be one Budget Cycle available for each model.

3.3 Working Set



The Working Set is the data set in use. Only the Full cube data option will be available.

3.4 Responsibility Areas



Budget responsibility areas are displayed in a panel on the left.

Once a model and budget cycle has been chosen the navigation panel will update to show the relevant element and cost centre tree.

Users may have access to the full Council or to single cost centres.

Access to cost centres is normally replicated in models ie if you have access to one cost centre in the revenue forecasting model then you would normally have access to the same cost centre in the revenue enquiry model.

4. Information and actions control centre

The central section of the workbench holds the Information and Actions control centre.

Dependent on individual user permissions, not all of the tabs may be available, but the key tabs and functionality are noted below.

4.1 Actions tab

- Profile drop down menu allows user to select the form to be accessed.
- Review Desktop button will access forms through Java.
- Review button will access forms for data entry and amendment.

4.2 Budget Instructions tab

- Links to guidance on Budget Manager.

4.3 Responsibility Owners

- Shows who are the budget holders for the selected responsibility areas

4.4 Budget Activity

- Shows data amendments in the forms in the current budget cycle – details of who input or imported the data and what the changes were.

5. Menu icons

The workbench page acts as a main menu and six icons are displayed at the top right of the page, clicking on each provides access as follows:

- Home - Refreshes the user's home page
- Main Menu – Provides access to the Roles and menu options available to the user through security permissions.
- Messages – Provides access to messages on a separate Communications tab.
- User Name (My Account) – Provides account information for user.
- Help – Launches the Help system
- Log Out – Logs the user out of Budget Manager

5. Messages

The Message panel will display the Message of the day and the last 5 unread incoming system messages. The position of the message panel can be set by the user via Preferences.

Quick notes


To navigate to a form (screen where data is entered and/or reviewed)

1. Use navigation options on the left to select the model, cycle and data.
2. Select the Actions tab in the central panel.
3. Select the profile required, ie which form you want to see.
4. Click Review to launch the form.


To find budget holders from the workbench

1. Use navigation options on the left to select the model, cycle and data.
2. Select the Responsibility Owners tab in the central panel.
3. The panel displays who is assigned to the particular element selected.
4. Use the drop down list to access:
 - Current - The Responsibility owners assigned to the currently highlighted responsibility node.
 - Children - The Responsibility owners assigned to the 'Children' of the currently highlighted responsibility node.
 - Parents - The Responsibility owners assigned to the 'Parents' of the currently highlighted responsibility node.

To access Help

1. Click the Help icon  in the menu at the top of the screen.

To log out

1. Click the Exit icon  in the menu at the top of the screen.