

Setting up new profiles in Budget Manager

Version Control

Version	Author Name	Comments	Date
0.2	Jane Allen	Review content	08/01/2020
0.3	Jane Allen	Update for CP11	02/08/2021

Definitions

Finance Forms in Budget Manager are custom built enquiry and data entry screens. These are the detailed screens resembling Excel spreadsheets accessed from the workbench.

Profiles are customised views of forms. They can be used to make different screen layouts within forms available to users.

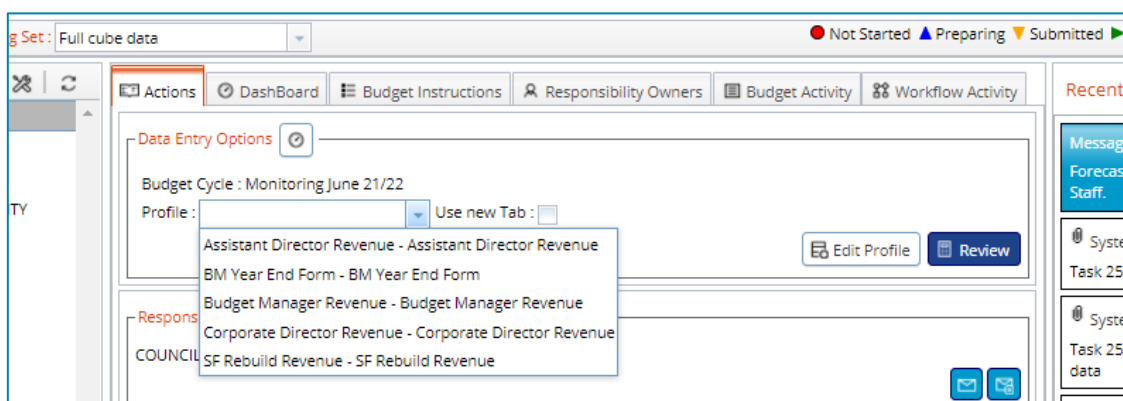
Users normally access default profiles but each profile can be edited to amend display preferences.

Default profiles

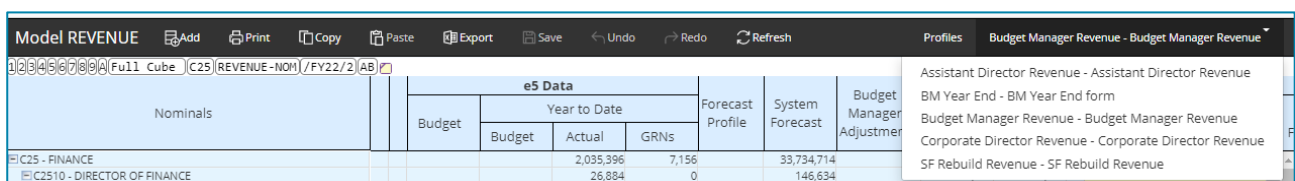
When a new form is created, it is deployed to users and a default profile created. Within the Council, forms have been designed to fit GRNs needs, so that the default settings are retained.

Available profiles

Lists of profiles available within a model can be accessed from the Actions tab in the workbench ...



... or from within finance forms.



To switch between profiles, just highlight and click on the relevant profile name.

Default Profiles

Within each model, profiles may be deployed by default to all users or by exception to designated users.

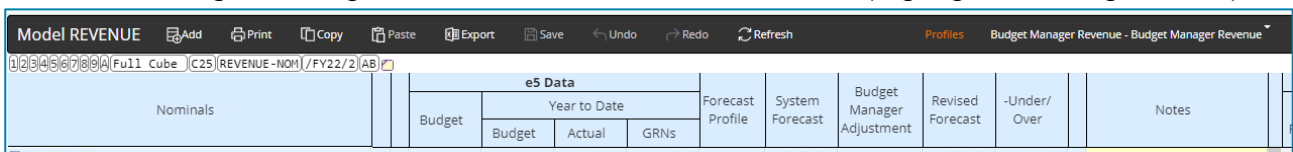
Model	Model Description	Default forms - deployed to all users
REVENUE	Revenue Forecasting	Budget Manager Revenue BM Year End
ZENQUIRY	Revenue Enquiry	Budget Manager Enquiry
ZZCAPTAL	Capital Forecasting	Project Lead Capital Year End
ZZCAPITAL_ENQ	Capital Enquiry	Enquiry_Nom Capital Enquiry Year End

Adding profiles

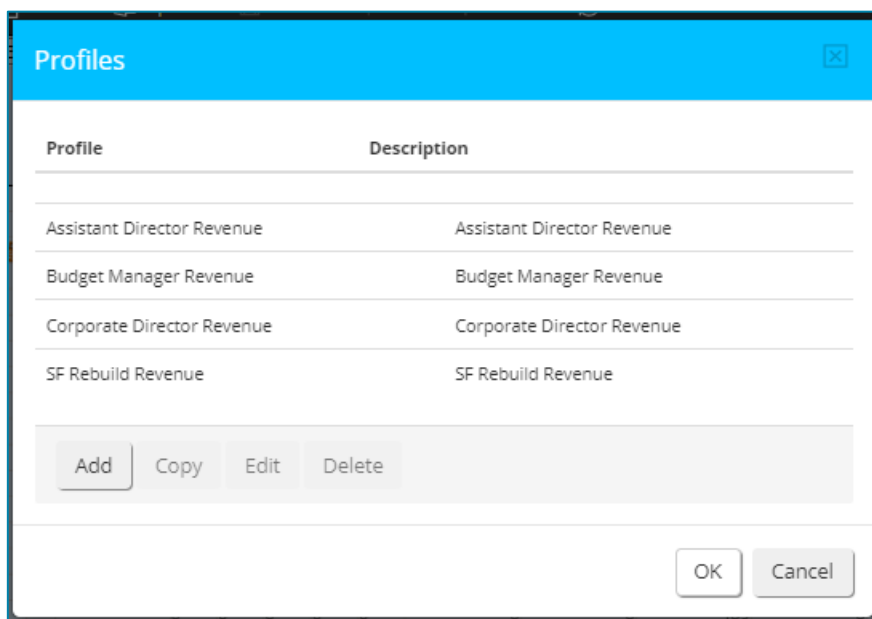
Council users will not normally need to edit profiles but may occasionally need to add a new profile.

This happens most often when no profile is available for a form, so that the user needs to create a profile for a particular form to be able to view the form. Data entry profiles can be accessed from the forms.

Within the Budget Manager form, click on the Profiles button (highlighted orange below).



A new window will open with the current profile selected.

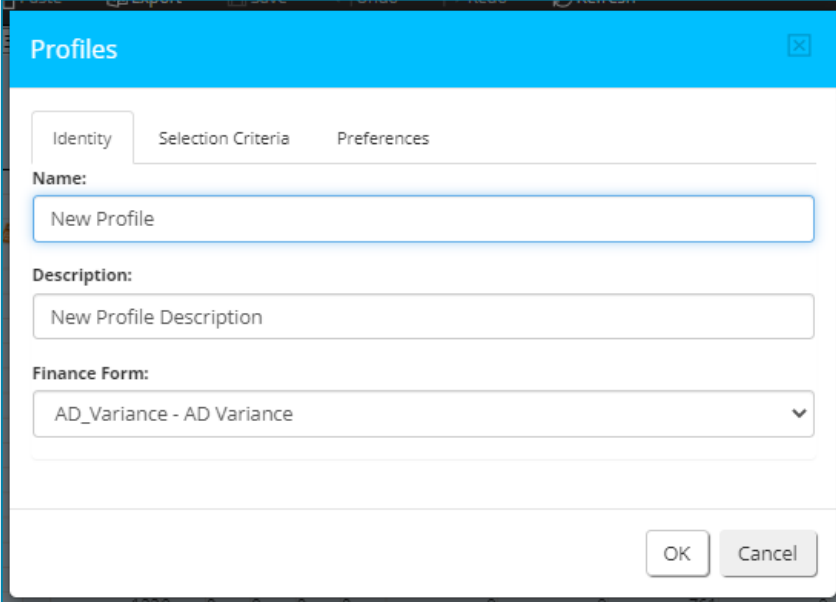


Adding forms

Occasionally the form you wish to see is not in the list of available profiles – as long as your user permissions allow (ie the form has been deployed), you will be able to add a profile to launch the form.

For example, from the screenshot above, there is no profile available for the year end report.

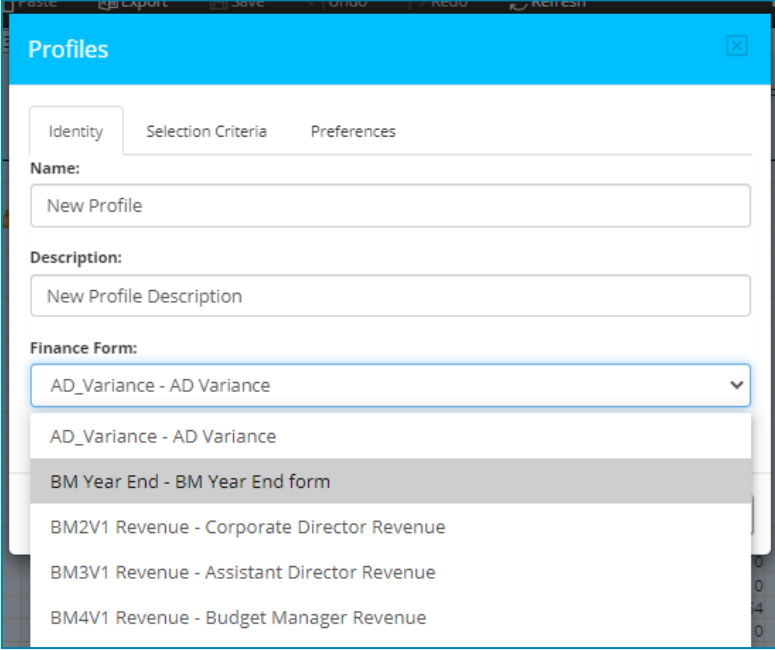
To set up a profile, click on Add to launch the profile definition window. The window has 3 tabs.



The screenshot shows a dialog box titled "Profiles" with a blue header and a close button in the top right. It has three tabs: "Identity", "Selection Criteria", and "Preferences". The "Identity" tab is active. The "Name:" field contains "New Profile". The "Description:" field contains "New Profile Description". The "Finance Form:" dropdown menu is open, showing "AD_Variance - AD Variance" as the selected option. At the bottom right, there are "OK" and "Cancel" buttons.

Identity tab

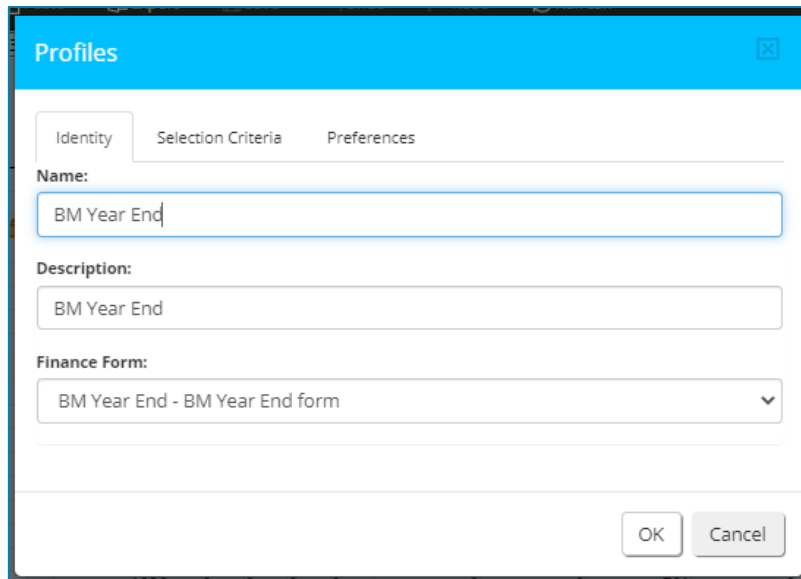
Click on the dropdown menu to select the available form.



This screenshot is similar to the previous one, but the "Finance Form:" dropdown menu is expanded to show a list of available forms. The list includes "AD_Variance - AD Variance", "BM Year End - BM Year End form", "BM2V1 Revenue - Corporate Director Revenue", "BM3V1 Revenue - Assistant Director Revenue", and "BM4V1 Revenue - Budget Manager Revenue". The "BM Year End - BM Year End form" option is highlighted in grey. The "Name:" and "Description:" fields remain "New Profile" and "New Profile Description" respectively. The "OK" and "Cancel" buttons are still visible at the bottom right.

Council users do not normally amend select criteria so that the rule for default forms is to use the form name to complete name and description fields.

- Name – Enter the form name
- Description - Enter the form name



The screenshot shows the 'Profiles' dialog box with the 'Identity' tab selected. The 'Name' field contains 'BM Year End', the 'Description' field contains 'BM Year End', and the 'Finance Form' dropdown menu is set to 'BM Year End - BM Year End form'. There are 'OK' and 'Cancel' buttons at the bottom right.

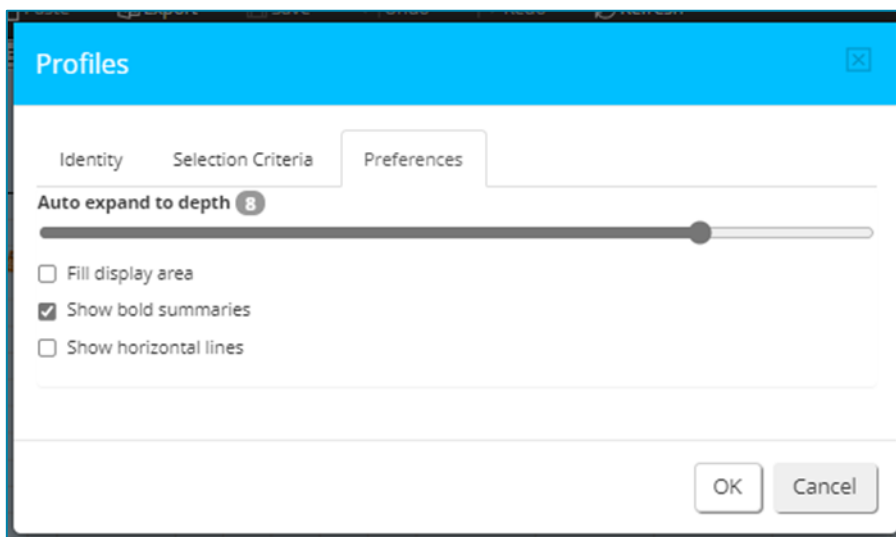
Selection Criteria Tab

This panel displays the dimensions in the model and allows the user to set preferences for the profile e.g. which nominal codes to display or which data type to display etc.

'From Budget Cycle' means that when the profile is used, the defaults from the budget cycle set by the system administrator will apply.

Do not amend selection criteria

Preferences Tab



The screenshot shows the 'Profiles' dialog box with the 'Preferences' tab selected. The 'Auto expand to depth' slider is set to 8. There are three checkboxes: 'Fill display area' (unchecked), 'Show bold summaries' (checked), and 'Show horizontal lines' (unchecked). There are 'OK' and 'Cancel' buttons at the bottom right.

Complete the Preferences as indicated above.

Auto Expand to Depth This indicates the level of the hierarchy that the form will automatically open to when launched in data entry. Drag to depth 8, the nominal or leaf level, which is the default depth.

Fill Display Area Ticking this will mean that the system will try and compress the columns displayed on the form so they are visible on one screen. This is normally left unadjusted.

Show Bold Summaries Tick this to ensure summary totals are displayed in bold type.

Show Horizontal Lines Ticking this will mean totals are shown underlined.

Once the tabs on the data entry profile form have been completed, click OK to close the form.

As shown below, the new profile/form will now be available to run: select the new profile in the list and click OK to launch the form.

