Logging In: At the log in screen, please make sure that you choose the plan entitled “FY17_Budgeting”.

To access your budget by dept id:
SELECT 'Entities (Master)' (or ‘SOA_Dept_Hierarchy_10222015 if you have rollup units) from the ‘Starting View’ drop down box, and continue to click the triangle in the left-hand margin until you come to your unit(s). If you wish to access your budget by another category (i.e. account, program, etc), you can also choose these options from the ‘Starting View’ drop down box.

HIGHLIGHT the department you want to see and click the colored box to the right of the department list that you would like to work on (typically either ‘sales (income)’ or ‘operating expenses’)
This will display the entire budget for that department and the category you selected (revenue or expense)

To compare the FY16 budget to the new FY17 budget, you can go to the ‘details’ box on the bottom half of the page. From the ‘Compare to’ drop down, select FY16_OrigBudg. From the ‘FY’ drop down, select 2017. You can also format this section as you wish. The Budget Maestro default is to show budgets by period (P). If you prefer to view only the annual budget information, unclick the ‘P’ box and click the ‘Y’ box, etc.
Once you have chosen a department and formatted the details box to the view you prefer, click ‘Views’ in the upper left hand corner, and click the thumbtack in the right corner of the views box. This will allow your departments to appear on the left hand side of the data screen so that you can move through them without having to go back to the welcome page.

**To add a NEW budget request (this should only be done during a new, open budget cycle):**
While in the data box for a particular department, if you would like to make a new request, click ADD on the upper left hand of your screen; you will see a new line inserted (most likely at the very bottom of the data box). Add the data to all fields applicable to your request.

- In the ‘Name’ section, please specify charge line AND some sort of unique descriptor (i.e. new program coordinator, new software, etc)
- Be sure to fill in all fields accordingly, even if there’s a default already filled in; this will ensure that the new line is included on the reports
- For each NEW initiative you MUST include a detailed description of the request and why it is needed. Please follow the methodology below:
  - ‘DESCRIPTION 1’: Include here what the new request is and why it is needed
  - ‘DESCRIPTION 2’: Continuation of Description 1, as needed
  - ‘DESCRIPTION 3’: Include here whether the request is permanent or one-time/non-recurring
  - ‘DESCRIPTION 4’: Include here your request type:
    - Regulatory (If your request is regulatory based, indicate this and define the regulation the area is required for)
    - Operational (needed to manage the operational, normal activities of the area)
    - Other (if a request does not fall in to one of the two categories above)

**INCREASING EXISTING BUDGETS:**

To make a change to an EXISTING budget (i.e. funds for increased travel or supplies, etc), please include a new line, mirroring the process above.

**To REALLOCATE existing budgets within charge lines:**
While in the data box for a particular department, if you would like to reallocate between dept ids and/or the same budget categories (i.e. from supplies to purchased services), click on the amount in the ‘Expense (Input)’ column that you would like to increase/decrease; a box will appear where you can
change the budget by typing a new amount in the ‘spread amount’ field. If you are reallocating between you can choose a new department from the ‘Views’ box to input the other side of the entry.

Simply click outside of the box to exit back to the data screen when you are done changing the amount. Do NOT click on the ‘X’ at the lower right-hand corner to exit the box; the changes will not save if you do this.

RUNNING REPORTS

- Go to Financial / Operational by either clicking reports on the tool bar or returning to the Welcome Page and clicking the red ‘Financial/Operations’ box.

- In ‘Reports’ go to the bottom left-hand corner and choose a report option within the ‘Report Profile’ box
- Click on the ‘Filters’ tab, which is the last option included in the tabs located on the upper left-hand side of the screen
- Choose how you would like to run your report:
  - Entities: this will allow you to choose specific department ids or your entire group. You can view this either as one collective unit (the view will likely default this way, showing ‘Entities – Master’ in the ‘Views’ box at the top), or you can choose groups of departments (if applicable) by choosing ‘SOA_DEPT_HIERARCHY’ from the ‘Views’ box and clicking the boxes next to the departments/units you wish to run
  - Accounts: this will allow you to choose specific account codes if you wish to view portions of your overall budget separately
- Click ‘Drill Down Report’ in the lower right-hand corner of your screen
- When your report has completed running, click on the triangle to the left of the results to expand the results to the view you would like. Similarly, clicking on
the +/- will completely expand the results, while clicking on the single + sign will expand by groupings.

- You can then export the report to excel by clicking ‘Export to Excel’ in the top right hand section of the data box. Note that only the information showing in the report will export to excel; underlying data will not be exported if it is compressed in the report in Budget Maestro.