TeamBudget

www.multco.us/budget/teambudget

Basics

Training Handout

Version 1.1

TeamBudget Basics

TRAINING HANDOUT

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SECTION A: GETTING INTO TEAMBUDGET

Logging In

1. Go to **https://www4.multco.us/teambudget**
   ↑ (remember to type the "s")

2. Enter County network User Name & Password[1]

QUICK TIPS
Having trouble logging in?

- ✓ Check with your business manager or Budget Office analyst to make sure you are on the user list
- ✓ Double-check the web address you typed

Optimizing your Browser

Google Chrome is the best browser to use with TeamBudget. Configure Chrome to work with TeamBudget:

1. **Allow Pop-Ups for TeamBudget**
   1. Open Google Chrome
   2. Click the Chrome menu button ( ) on the browser toolbar.
   3. Select Settings
   4. Click on Show advanced settings…
   5. Scroll down to the Privacy section and click on Content Settings
   6. Scroll down to the Pop-ups section and click on Manage Exceptions
   7. In the box below "Hostname pattern" type: https://www4.multco.us
   8. Make sure "Allow" is selected under "Behavior" and click Done

2. **Add Extension to Automatically Open New Windows and Pop-Ups As New Tabs in Current Window *(optional setting)***
   1. Open Google Chrome
   2. Go to this link: https://chrome.google.com/webstore/detail/one-window/papnlnnbddhckngcblfljaelgceffobn?hl=en
   3. Click on the button that says: **+ FREE**
   4. Click **Add** in the resulting pop-up
   5. Close Chrome and reopen it

[1] What you use to log onto your computer in the morning (do not include a domain, *e.g.* multforest)

Note: To disable Extension to Automatically Open New Windows and Pop-Ups As New Tabs in Current Window:

1. Click the Chrome menu ( ) on the browser toolbar.
2. Select Tools
3. Click on Extensions
4. Find the "One Window" extension, and click the checkmark in the box next to "Enabled" (i.e. uncheck the box).

QUICK TIP If you're having trouble viewing reports, try emptying your cache. Users who used TeamBudget before July 2014 may have need to clear their cache.

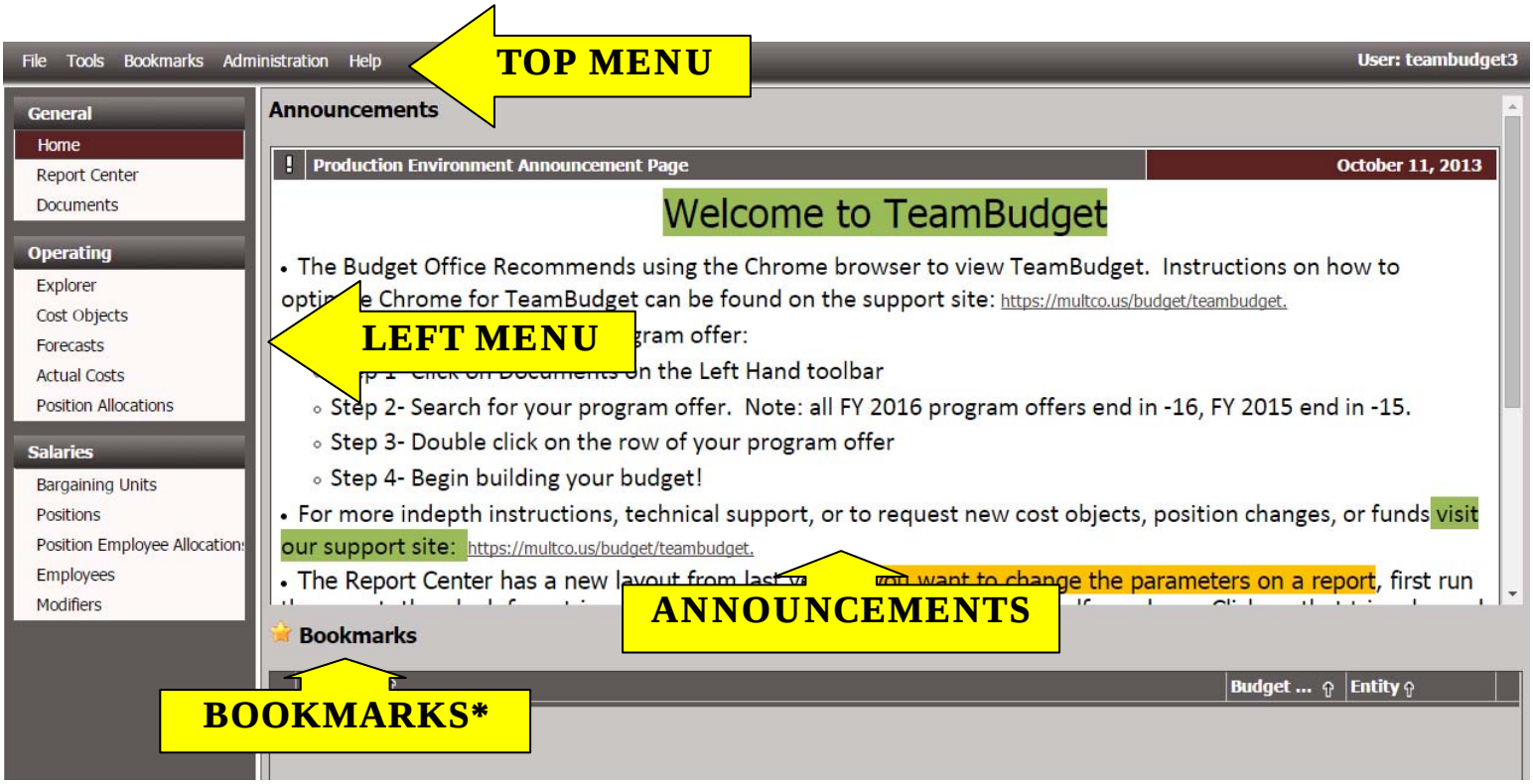
How to Clear your Cache

1. Open Google Chrome
2. Click the Chrome menu ( ) on the browser toolbar.
3. Select Settings
4. Scroll down and click on Show advanced settings...
5. Scroll down to the Privacy section and click on Clear browsing data
6. A pop-up window will appear
7. Choose "from the beginning of time" from the dropdown menu box to the right of "Obliterate the following items from"
8. Check the box for "Cached images and files"
9. Click on Clear browsing data
10. Close your Settings tab

SECTION B: NAVIGATING THE TEAMBUDGET HOME SCREEN

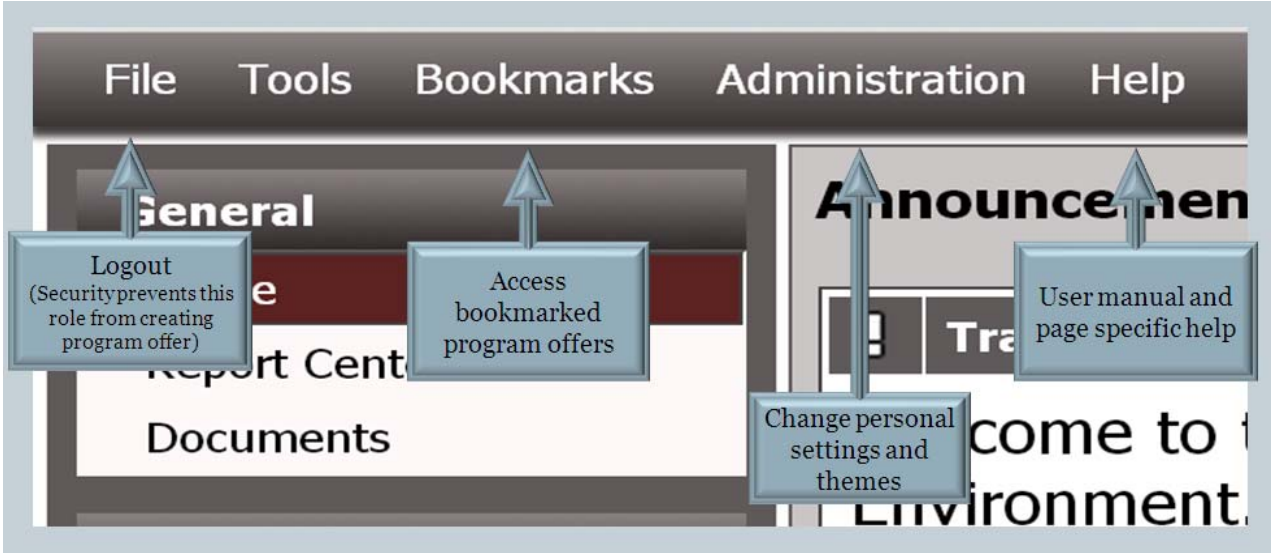
- The TeamBudget Home Screen **must stay open.**
- The Home Screen is the first tab you open; it will remain the left-most TeamBudget tab.
- If you accidentally close this tab, you will need to log in again to get it back.

TeamBudget Home Screen

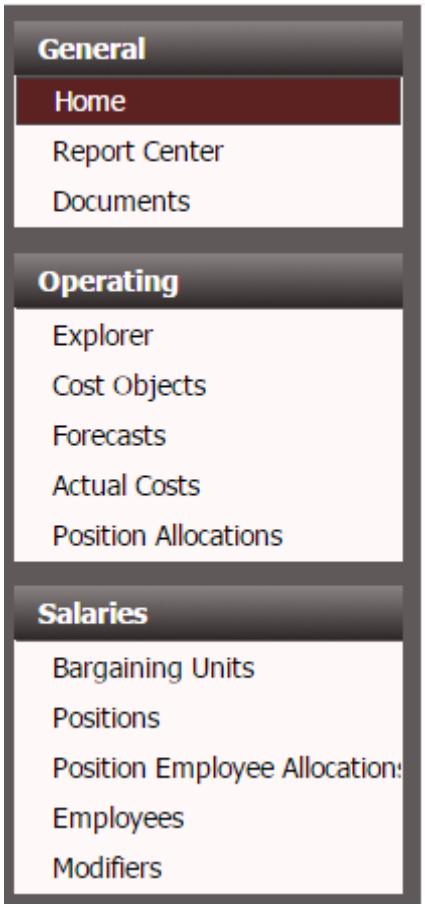


*Information on how to create a bookmark available on pg. 9.

TeamBudget Home Screen – Top Menu



TeamBudget Home Screen – Left Menu



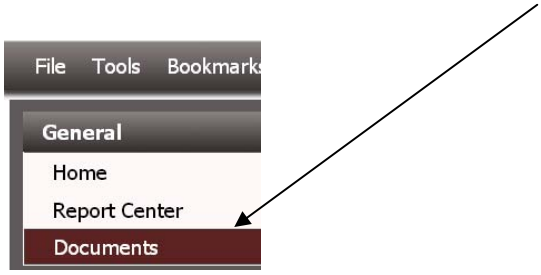
General: Report Center allows you to view reports; Documents allows you to search for program offers, budget adjustments, amendments, and modifications.

Operating: This section is useful for post-adoption budget monitoring.

Salaries: View positions, employees, positions allocations, wage table, benefits and insurance costs.

FIND/OPEN A PROGRAM OFFER

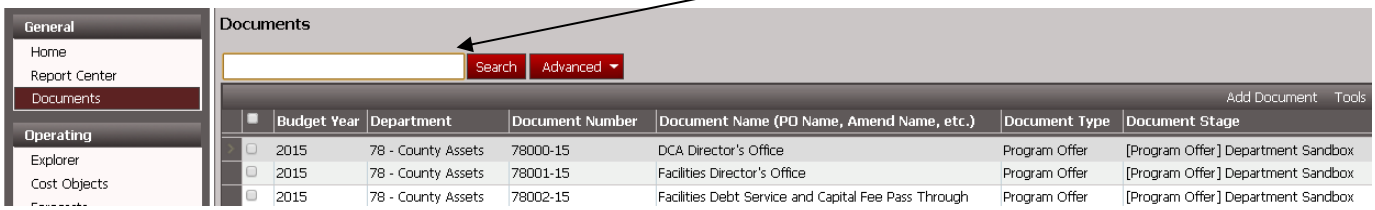
1. From the Home Screen, click on "Documents" in the left menu.



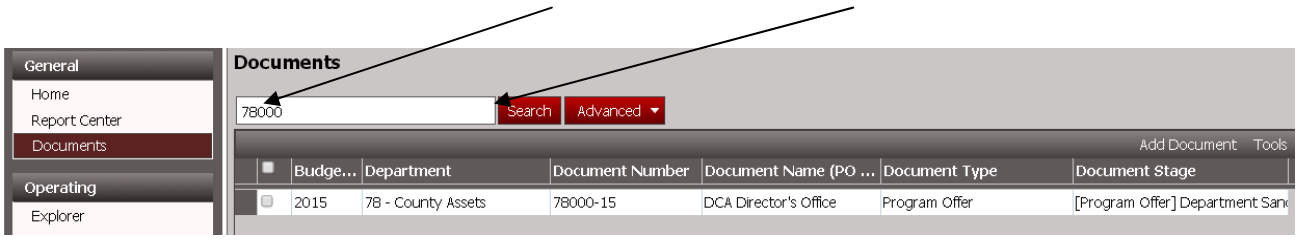
2. The appearance of your left-most TeamBudget tab will change to the Documents Screen.

To Search:

1. To pull up all program offers for your department, click "Search" without typing anything.



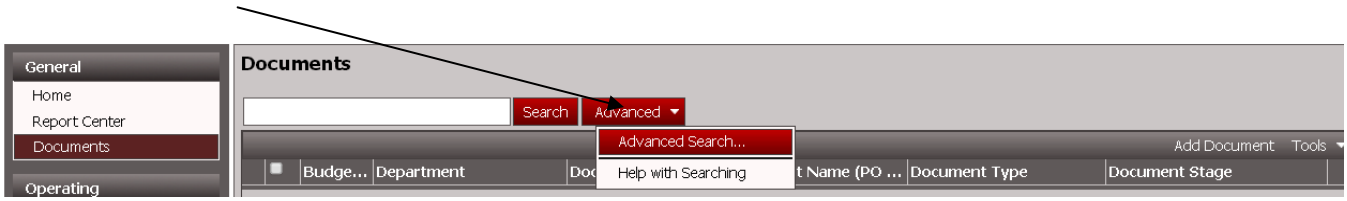
2. To pull up a specific program offer, type the program offer number or relevant word(s) into the blank box – then click "Search."



3. In the resulting grid, double-click the row of the document you want to view. The document will open either in a new tab or in a separate window (depending on how you have your browser configured; see p.3 for options).

Advanced Search:

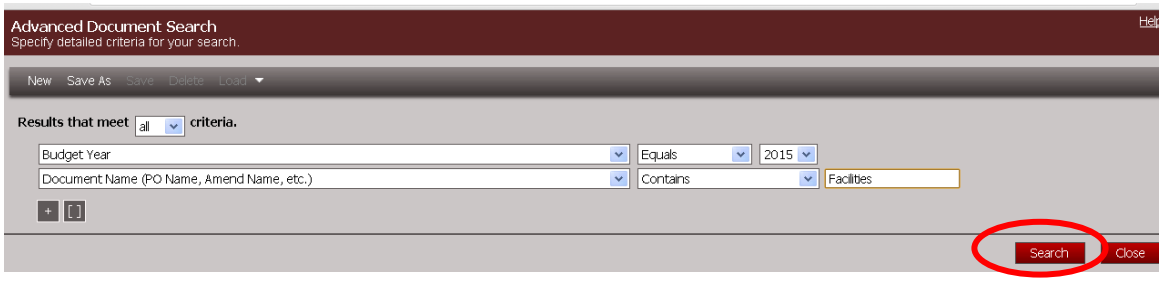
1. To conduct more complex searches, click "Advanced" and select "Advanced Search..." from the dropdown.



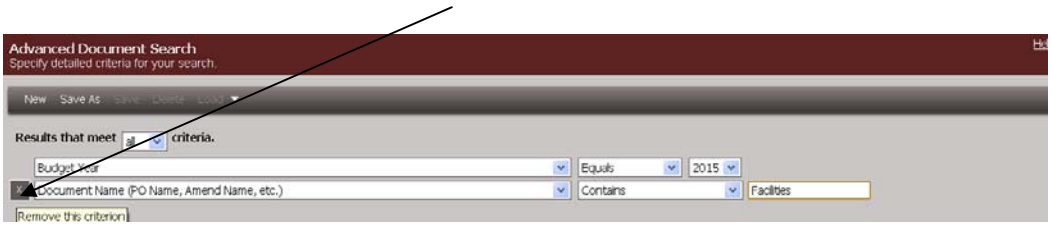
2. This will take you to the Advanced Document Search screen where you can create your advanced search. Click on the plus sign to add parameters.

3. Click on "Search" to run your advanced search.

The example below will search for all FY 2015 documents with the word "Facilities" in their title.

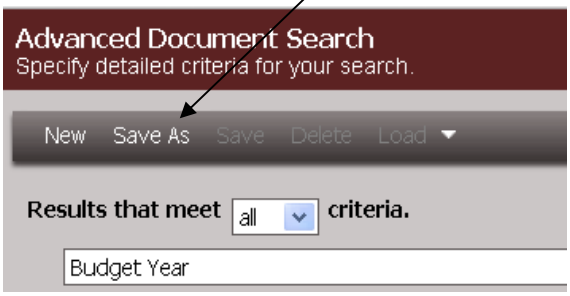


Note: To delete a search parameter, hover your cursor to the left of it and click on the "x" that appears.

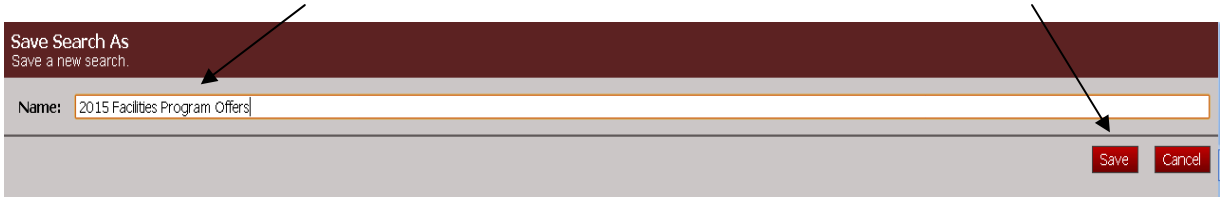


To save your advanced search:

1. Open TeamBudget in Mozilla Firefox or Internet Explorer.[2] Create your advance search. Click on "Save As"



2. Type a name for your search in the new screen, then click "Save"



3. The next time you go to the Documents Screen and click on "Advanced," your saved search will appear in the dropdown list

Reminder: in the search results grid, double-click the row of the document you want to view.

[2] The current version (2014) of TeamBudget does not save searches in Chrome. Once you save the advanced search in another browser, you can view it in any browser.

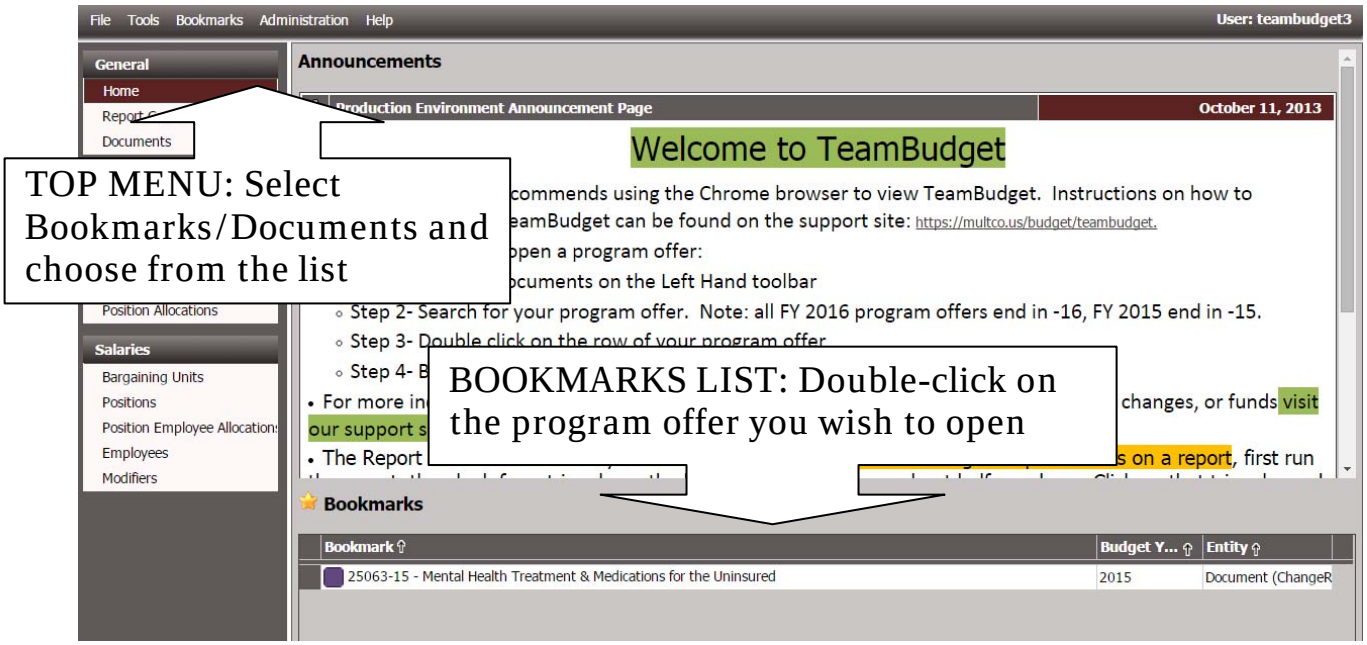
BOOKMARK A PROGRAM OFFER

1. Open a program offer.

2. Click on the star in the upper right corner. (The star will change color to indicate the program offer has been bookmarked.)

FIND A BOOKMARKED PROGRAM OFFER

Bookmarks are available in two places. Go to TeamBudget Home Screen and choose from either the Top Menu or Bookmarks List.

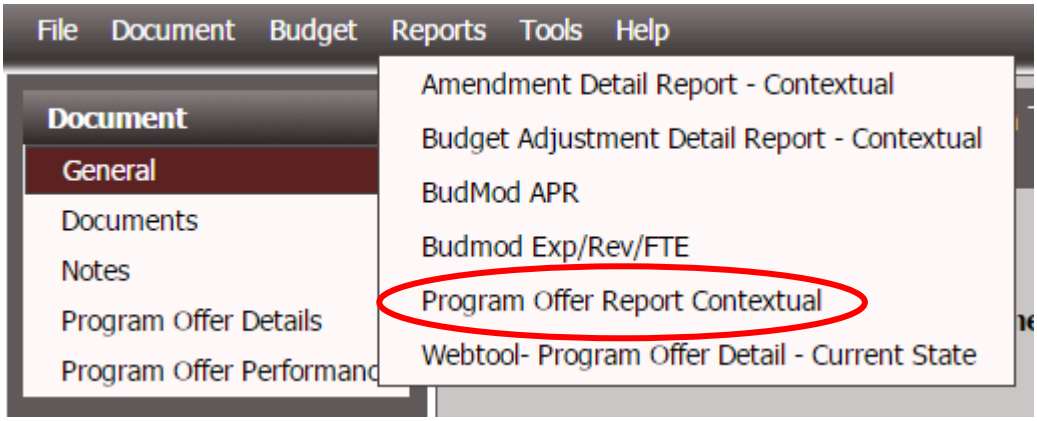


VIEW/PRINT A PROGRAM OFFER

1. Open a program offer (see p. 6 for how to search for a program offer).

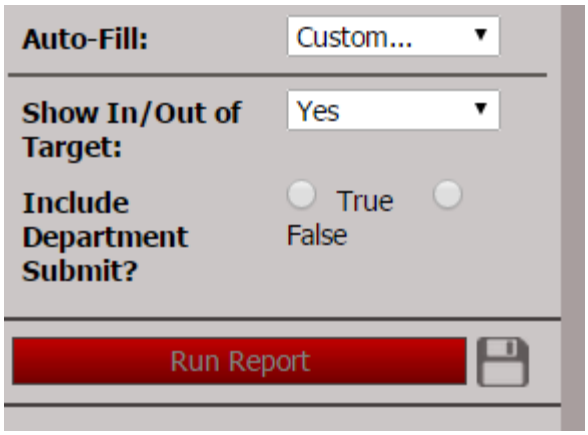
2. Click on "Reports" in the top toolbar.

3. Select "Program Offer Report Contextual" from dropdown.



4. Next, select your parameters for the report.

   To view the parameters sidebar if not visible, click the dark grey arrow ( ) midway down the leftside of the report screen.

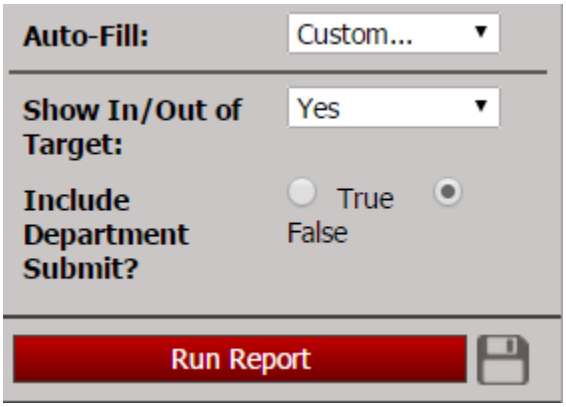


   a) Select "Yes" or "No" for "Show In/Out of Target:" (this determines whether in/out of target will appear or not on the printed document).

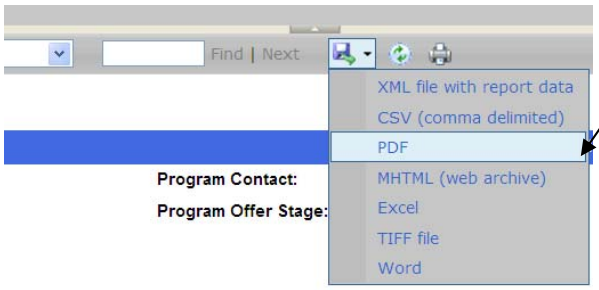
   b) Select "True" or "False" for "Include Department Submit?" (select "False" while building Department Requested budget – use the true option to view the impact of changes to

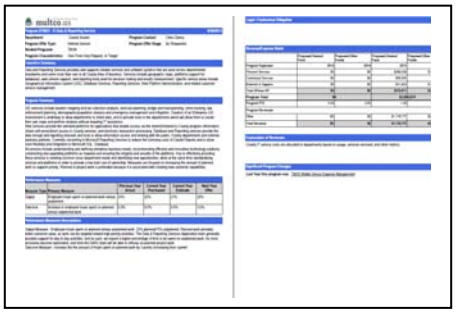
the budget in the Proposed, Adopted, or Revised stages of the Budget before submitting them to the Budget Office.[3]

5. Click "Run Report."



6. Click on floppy disc icon ( ) and select "PDF" to see the program offer as it would appear online or in the printed budget book



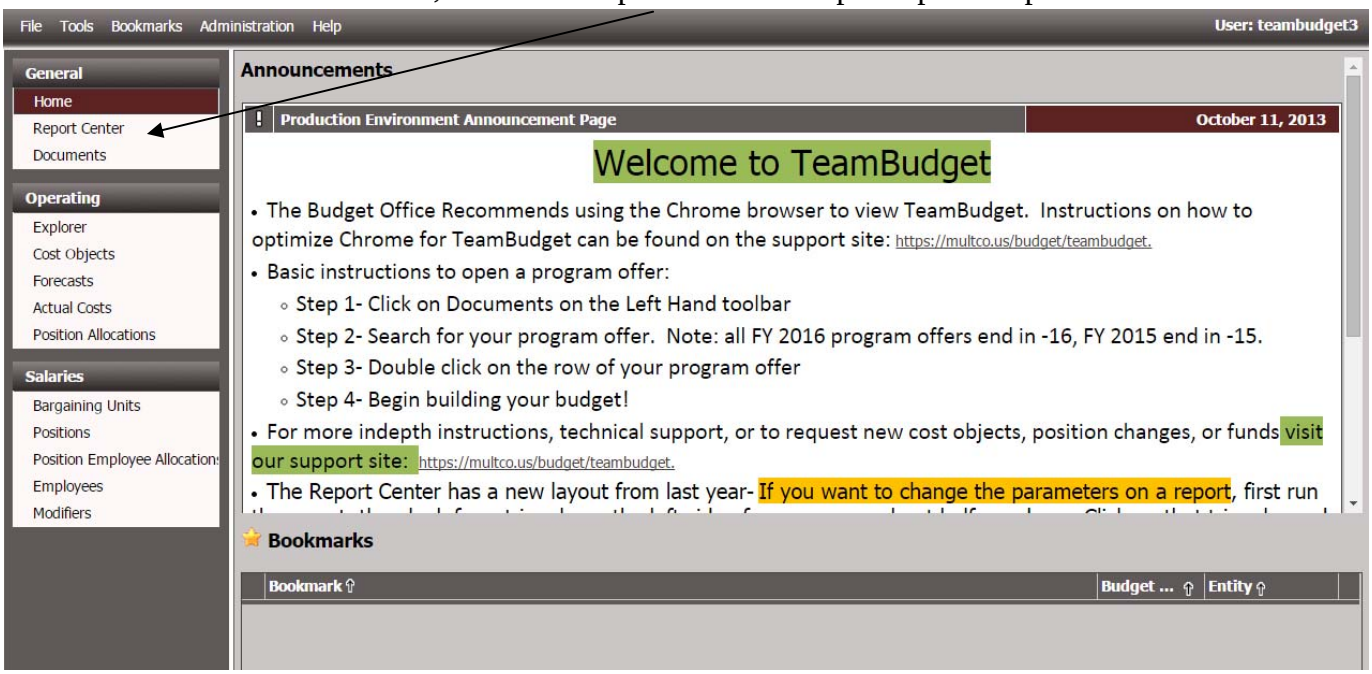


[3] Note: For details on the budget process and the stages of the budget, please see the Budget Manual, available at www.multco.us/budget.

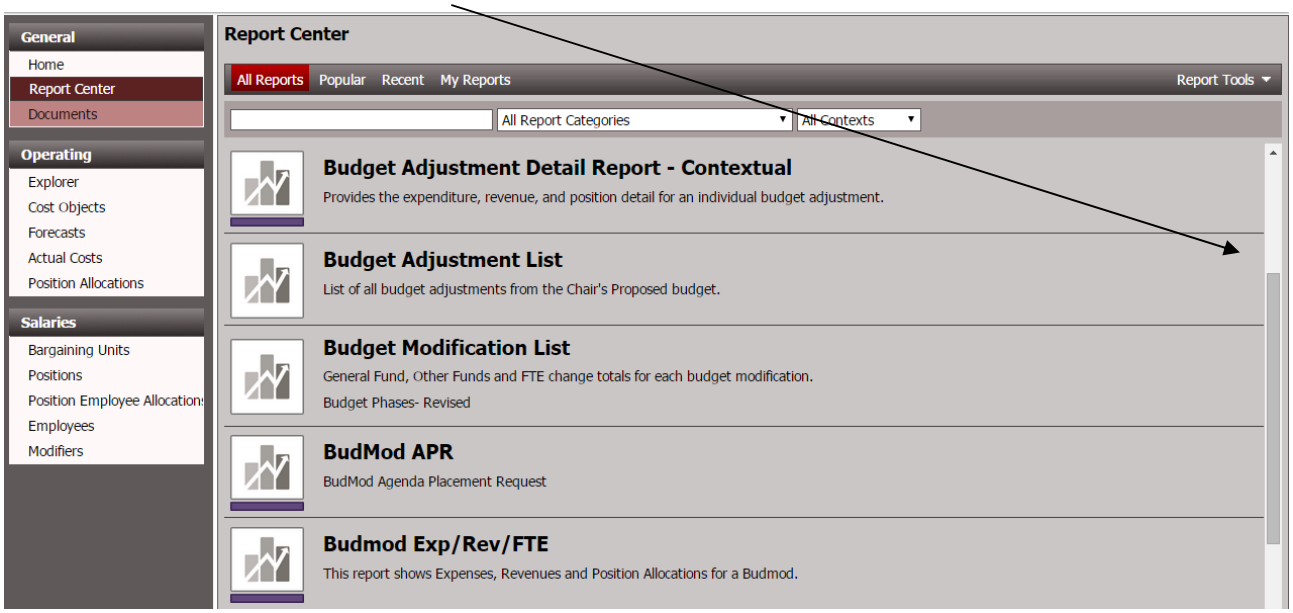
REPORT CENTER

How to Open a Report

1. From the Home Screen, click on "Report Center" to pull up the report list.



2. Use the inner vertical scroll bar to scroll to the desired report.



QUICK TIPS You can navigate reports with the toolbar at the top of the report list: select All Reports, Popular, Recent, or My Reports (bookmarked reports).

3. Highlight the report you would like to view and left click. (This will expand the section to display report information – see example below.)

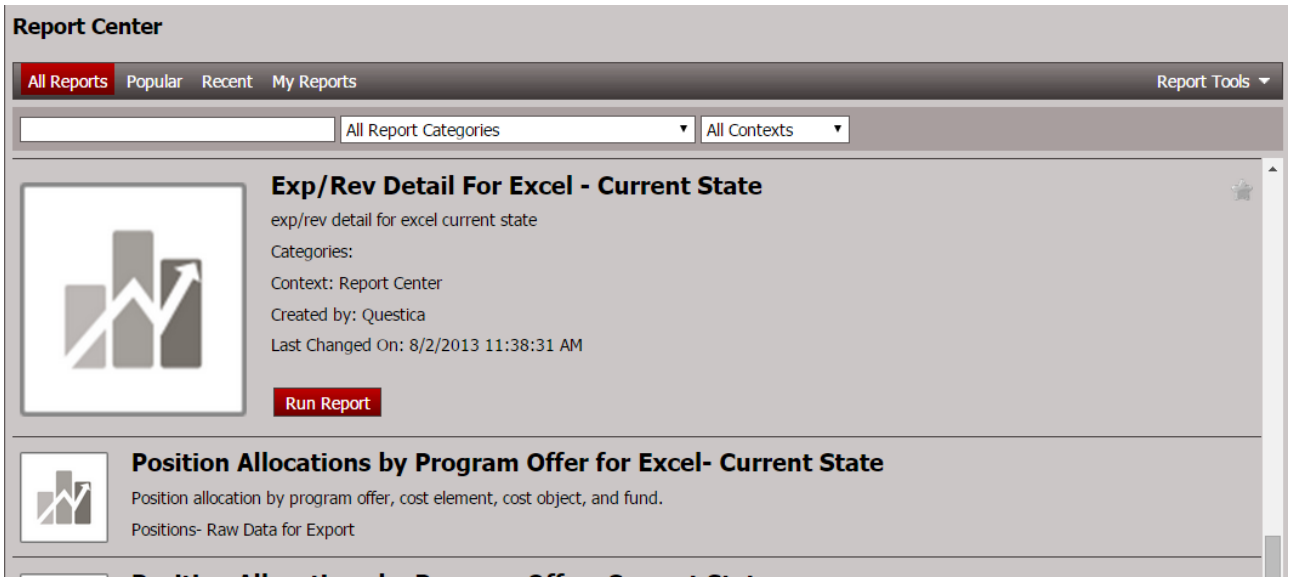
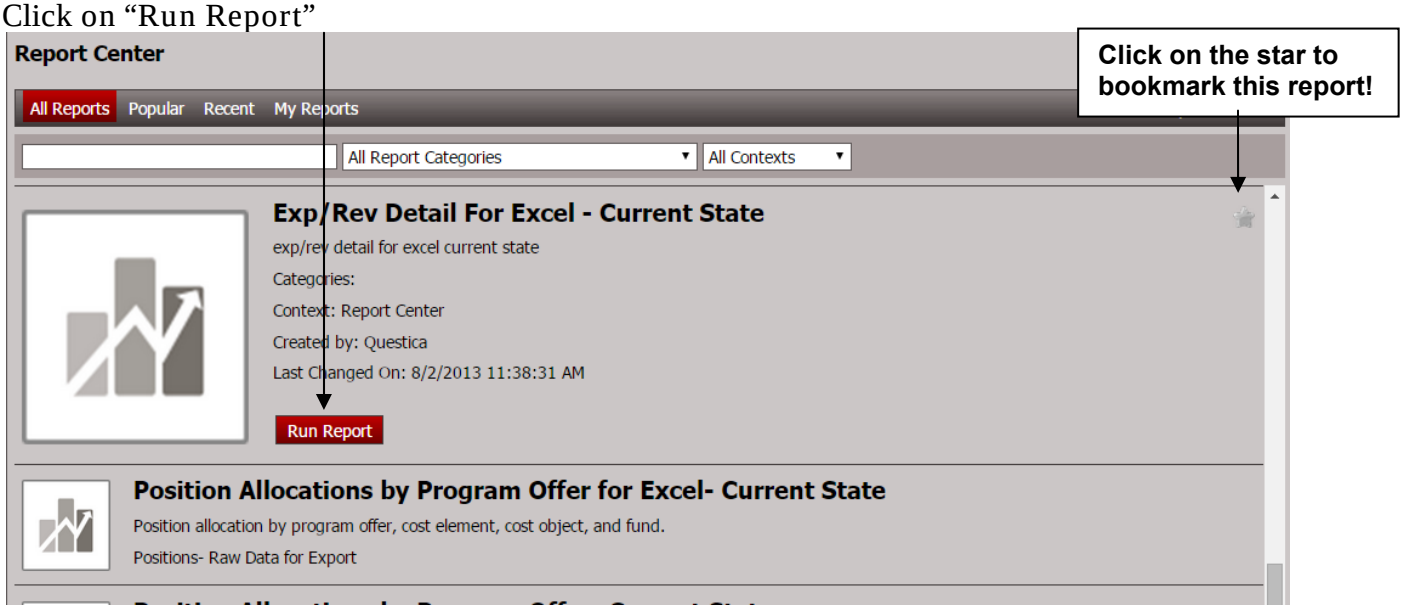


Image above shows report list with Exp/Rev Detail for Excel – Current State report selected.

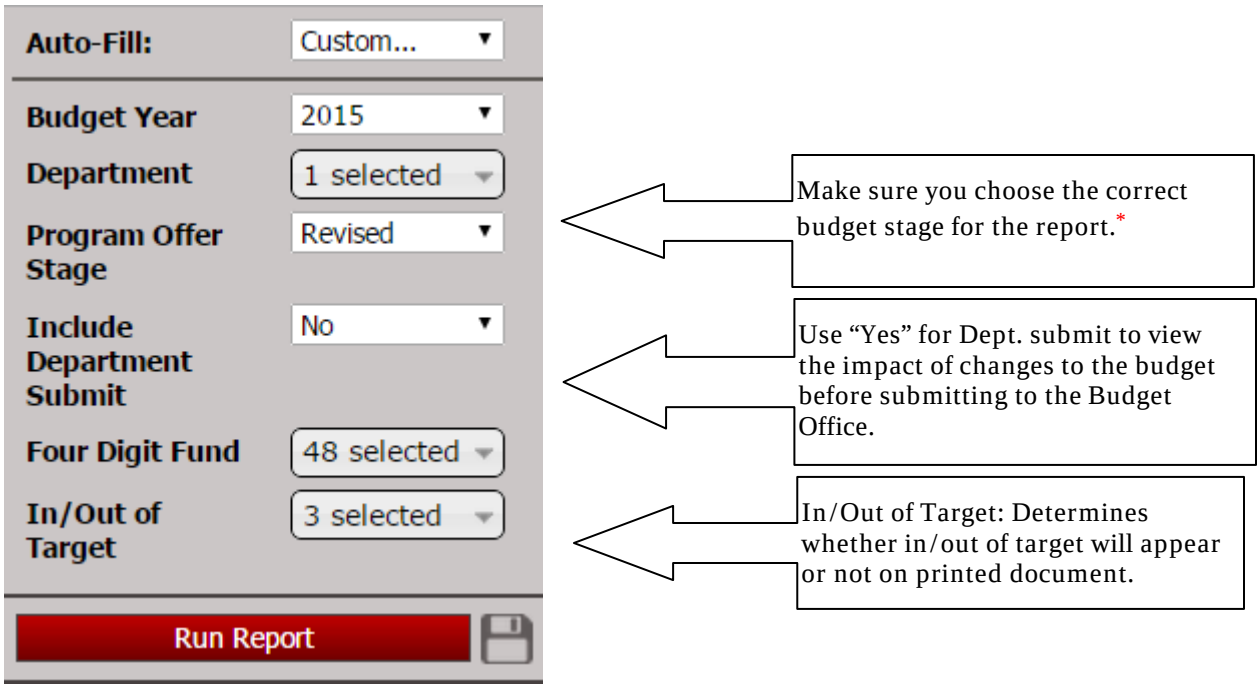
4. Click on "Run Report"



QUICK TIPS

If you have run a report before, you can use a shortcut to quickly run it again. Click the arrow beside "Run Report" and select "Last Run".

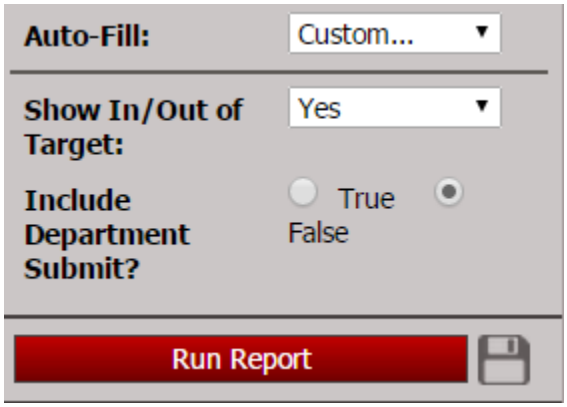
5. Next, select your parameters for the report. *Note: The parameters box may look slightly different for different reports.*



* Note: For details on the budget process and the stages of the budget, please see the Budget Manual, available at www.multco.us/budget.

QUICK TIPS To view the parameters sidebar if not visible, click the dark grey arrow ( ) midway down the leftside of the report screen.

6. Click "Run Report."

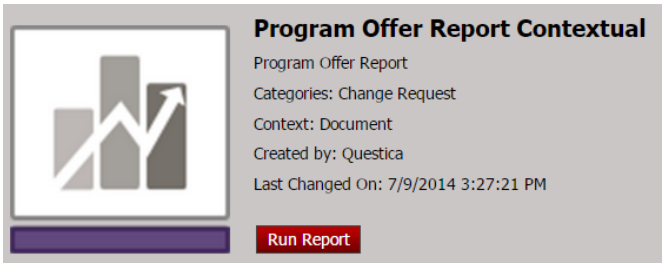


COMMONLY VIEWED REPORTS

This next section will highlight a few commonly used reports. For additional information on reports, please review TeamBudget training materials for Positions and Expenditures and Revenues,.

Program Offer Report

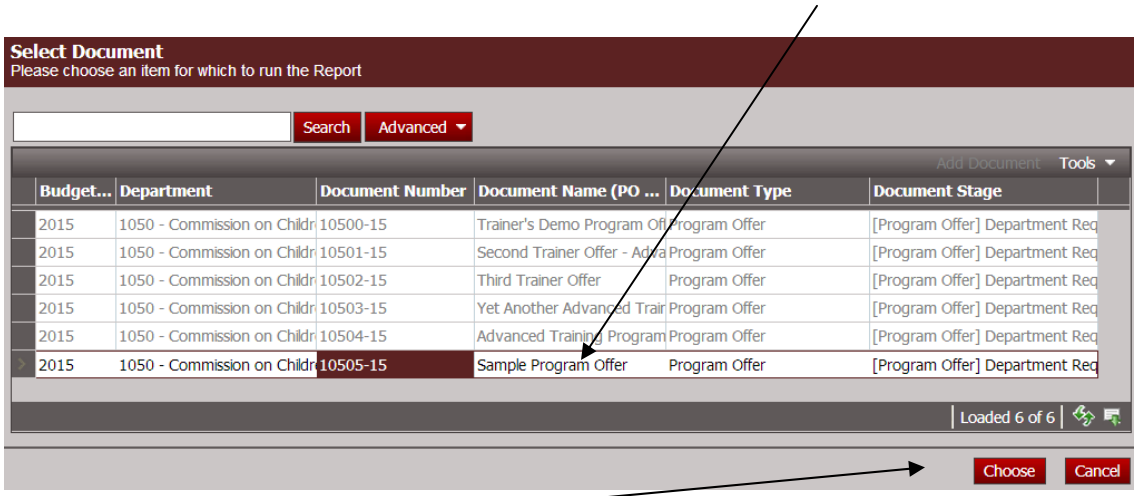
This report is another way to print a single program offer report (without having to open the program offer itself).



1. From the Report Center, click "Run Report." This will open up a dialogue box to use to select the desired program offer.

2. Use the instructions on pages 6-7 for searching for a program offer to pull up a list of offers that contains the desired offer.

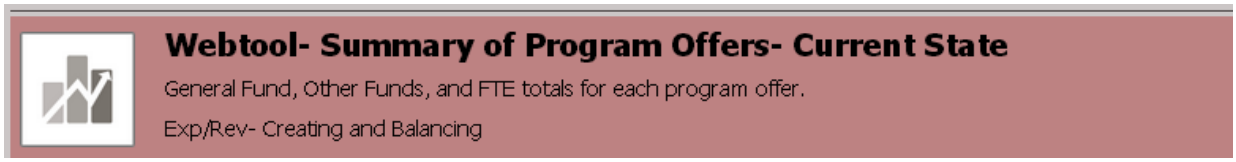
3. Once you have pulled up your list, click on the row of the desired offer to highlight it.



4. Click on "Choose." This will open a new window or tab with parameters to select on the left-hand side of the window (See "How to Open a Report" for details on choosing parameters).

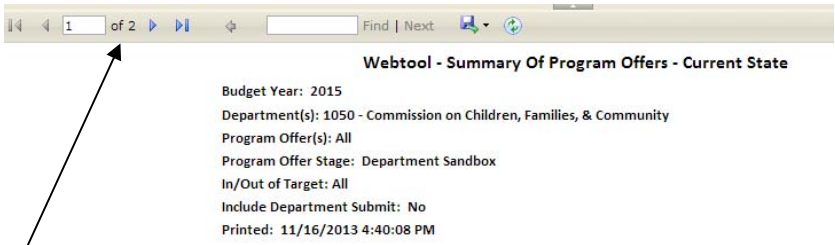
Webtool – Summary of Program Offers – Current State

Shows General and Other Fund expenses and FTE totals by program offer.

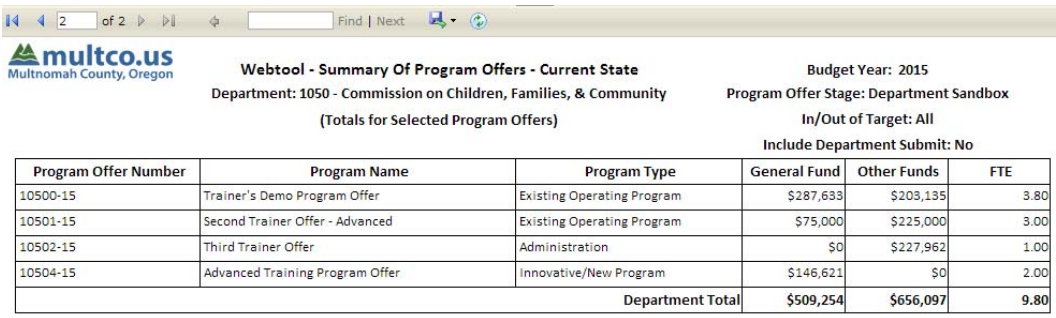


1. From the Report Center, click "Run Report." See "How to Open a Report" for details on how to adjust parameters and view the report.

2. The first page will summarize your chosen parameters.



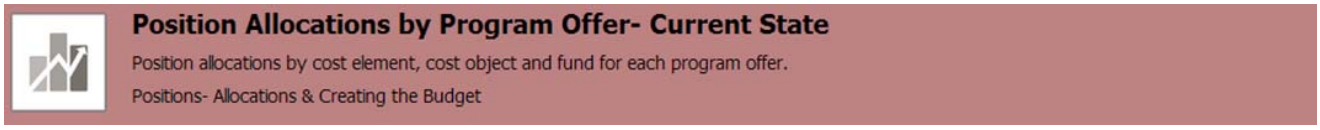
3. Click the "next page" arrow to see the list of program offers.



Program Offer Number	Program Name	Program Type	General Fund	Other Funds	FTE
10500-15	Trainer's Demo Program Offer	Existing Operating Program	$287,633	$203,135	3.80
10501-15	Second Trainer Offer - Advanced	Existing Operating Program	$75,000	$225,000	3.00
10502-15	Third Trainer Offer	Administration	$0	$227,962	1.00
10504-15	Advanced Training Program Offer	Innovative/New Program	$146,621	$0	2.00
		Department Total	**$509,254**	**$656,097**	**9.80**

Position Allocations by Program Offer – Current State

Shows positions by cost object, cost element, and fund for each program offer



4. From the Report Center, click "Run Report."
5. Adjust paramaters as desired. (See "How to Open a Report" for details on how to adjust parameters and view the report.)
    a. Select whether you want the report to include in target offers, out of target offers, undesignated program offers, or a combination of the three.
    b. For this report, you can select a program offer or the complete list of program offers.
6. Click "Run Report"

multco.us
Multnomah County, Oregon

Position Allocations by Program Offer - Current State

Budget Year: 2015

Department: 1050 - Commission on Children, Families, & Community

Four Digit Fund(s): All

Program Offer: 10500-15 - Trainer's Demo Program Offer

Program Offer Stage: Department Sandbox
In/Out of Target: All
Include Department Submit: No

Position Number	JCN	Employee	Position FTE	Four Digit Fund	Cost Object	Allocated FTE	Cost Element	Total
790003	6000 - Office Assistant 1	29000 - CCFCEmployee Name0	1.00	1505 - Fed/State Fund	TRNGWBS1	1.00	60000	$27,974
							60130	$9,273
							60140	$16,110
		Position Total:	**1.00**			**1.00**		**$53,357**
790007	9336 - Finance Manager	29009 - CCFCEmployee Name9	0.80	1000 - General Fund	190001	0.80	60000	$76,032
							60130	$25,965
							60140	$19,474
		Position Total:	**0.80**			**0.80**		**$121,471**
790012	6029 - Finance Specialist 1	29003 - CCFCEmployee Name3	1.00	1000 - General Fund	190001	1.00	60000	$53,292
							60130	$17,666
							60140	$17,882
		Position Total:	**1.00**			**1.00**		**$88,840**
790018	6001 - Office Assistant 2	29001 - CCFCEmployee Name1	1.00	1505 - Fed/State Fund	TRNGWBS1	1.00	60000	$33,652
							60130	$11,156
							60140	$16,508
		Position Total:	**1.00**			**1.00**		**$61,316**
		Program Offer Total:	**3.80**			**3.80**		**$324,984**