

TeamBudget

www.multco.us/budget/teambudget

Basics

Training Handout

Version 1.0

TeamBudget Basics

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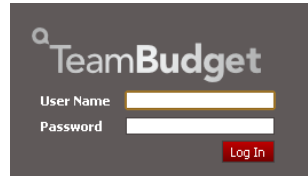
TeamBudget Basics

GETTING INTO TEAMBUDGET

- Web-based application
- Hosted on Multnomah County Servers
- Budget Office recommends that you use it in Google Chrome
- Accessible outside the firewall
- **LOGGING IN:**

1. Go to web address

- **https://www4.multco.us/teambudget**
↑ (remember to type the “s”)



2. Enter User Name & Password – these are the same as your County network user i.d. and password (what you use to log onto your computer in the morning; do not include a domain, e.g. multforest)

- Having trouble logging in?
 1. Check with your business manager to make sure you are on the user list (users are designated by departments and added by the Budget Office)
 2. Double-check the web address you typed

- **BROWSER SETTINGS**

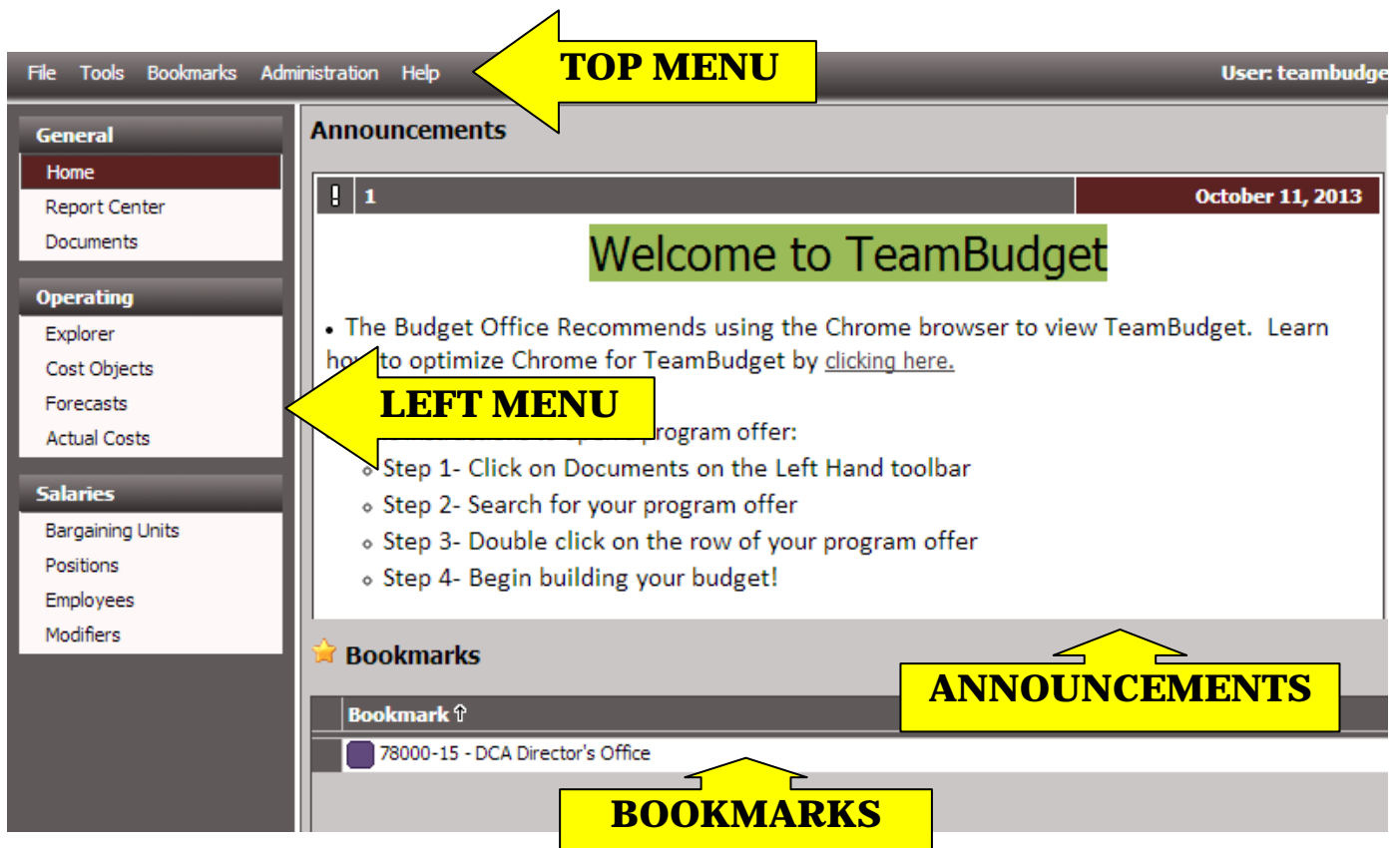
For instructions, go to **http://web.multco.us/budget/teambudget** (or call the Budget Office and we'll help you get set up)

- Allowing popups
- Opening screens in new tabs instead of new windows

TeamBudget Basics

TEAMBUDGET HOME SCREEN

- What you see when you first log in
- Will always be left-most TeamBudget tab
- **This tab must stay open.** If you accidentally close this tab, you will need to log in again to get it back.



The screenshot shows the TeamBudget Home Screen interface. The top menu bar includes 'File', 'Tools', 'Bookmarks', 'Administration', and 'Help'. The user is identified as 'User: teambudg'. The left sidebar contains a 'General' section with 'Home', 'Report Center', and 'Documents'; an 'Operating' section with 'Explorer', 'Cost Objects', 'Forecasts', and 'Actual Costs'; and a 'Salaries' section with 'Bargaining Units', 'Positions', 'Employees', and 'Modifiers'. The main content area is titled 'Announcements' and features a 'Welcome to TeamBudget' message. A list of announcements includes a recommendation to use the Chrome browser and a list of steps for building a budget. The bottom section shows a 'Bookmarks' area with a bookmark for '78000-15 - DCA Director's Office'. Yellow callout boxes with arrows point to the 'TOP MENU', 'LEFT MENU', 'ANNOUNCEMENTS', and 'BOOKMARKS' sections.

TOP MENU

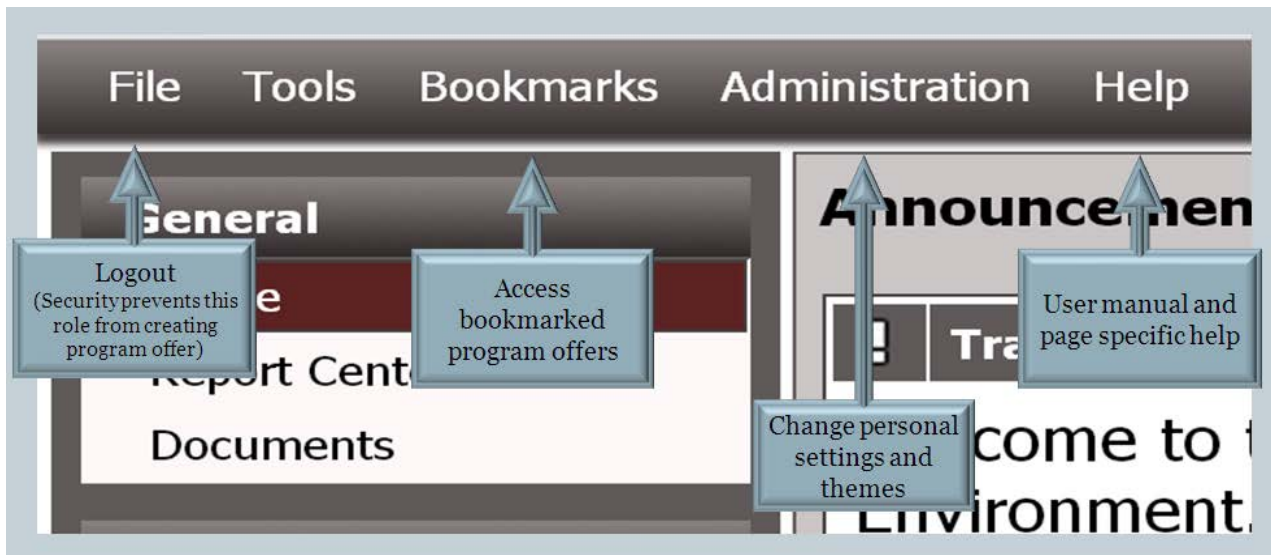
LEFT MENU

ANNOUNCEMENTS

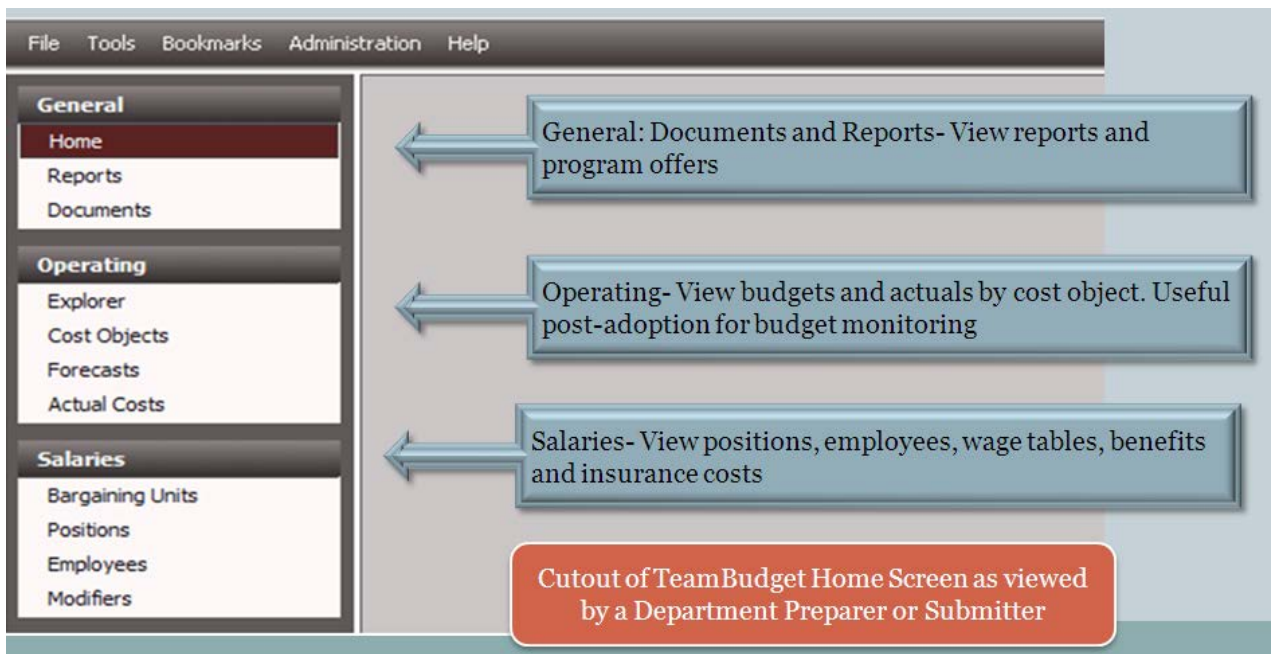
BOOKMARKS

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TEAMBUDGET HOME SCREEN – TOP MENU



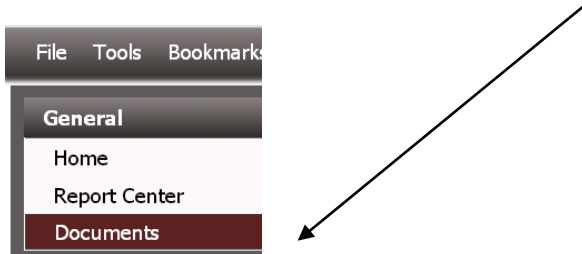
TEAMBUDGET HOME SCREEN – LEFT MENU



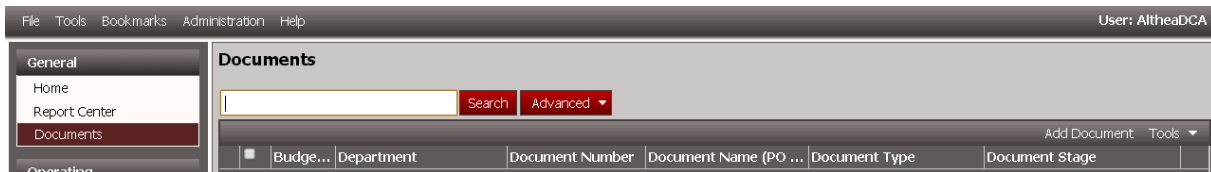
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FIND/OPEN A PROGRAM OFFER

- From the Home Screen, click on “Documents” in the left menu.

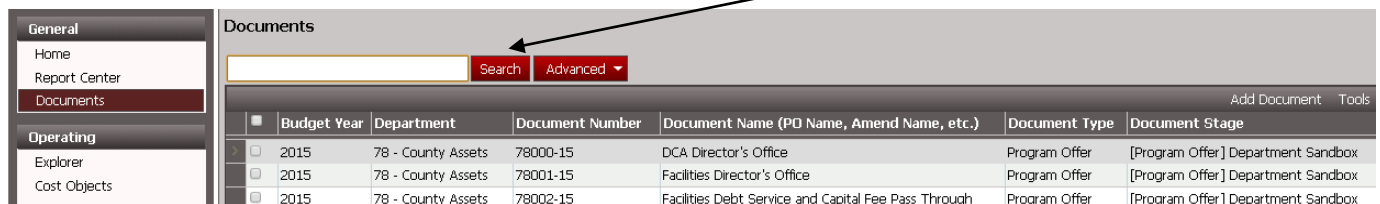


- The appearance of your left-most TeamBudget tab will change to the Documents Screen.

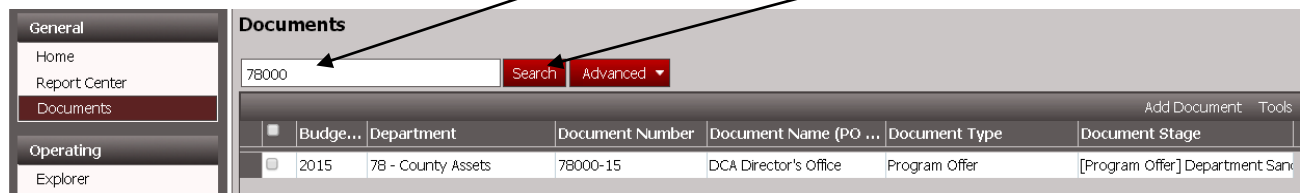


Search:

- To pull up all program offers for your department, click “Search” without typing anything.



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



- In the resulting grid, double-click the row of the document you want to view.

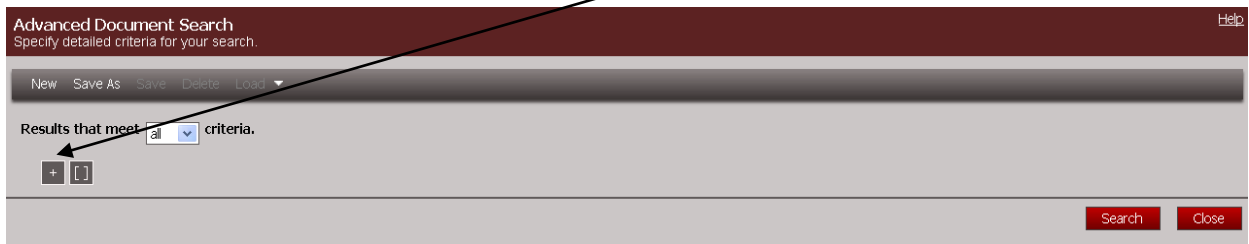
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Advanced Search:

- To conduct more complex searches, click “Advanced” and select “Advanced Search...” from the dropdown.



- 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.



- 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.



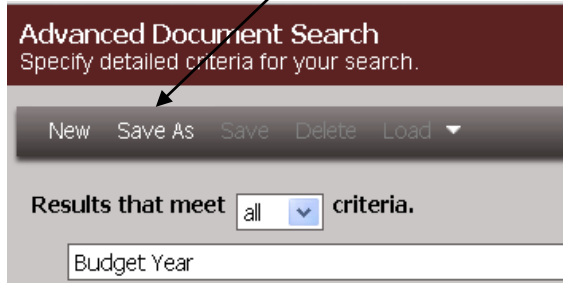
- Note: To delete a search parameter, place your cursor to the left of it and click on the “x” that appears.



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- To save your advanced search

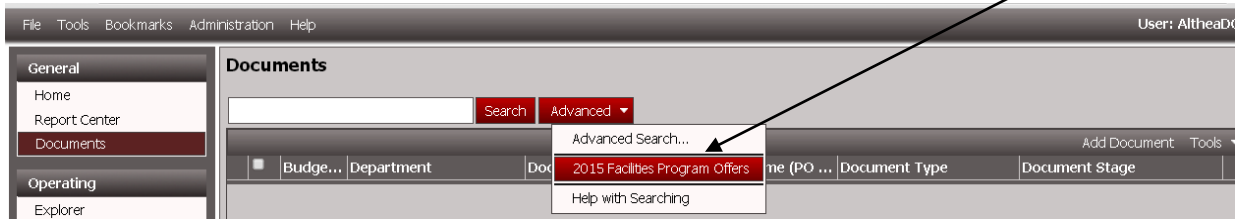
1. Click on “Save As”



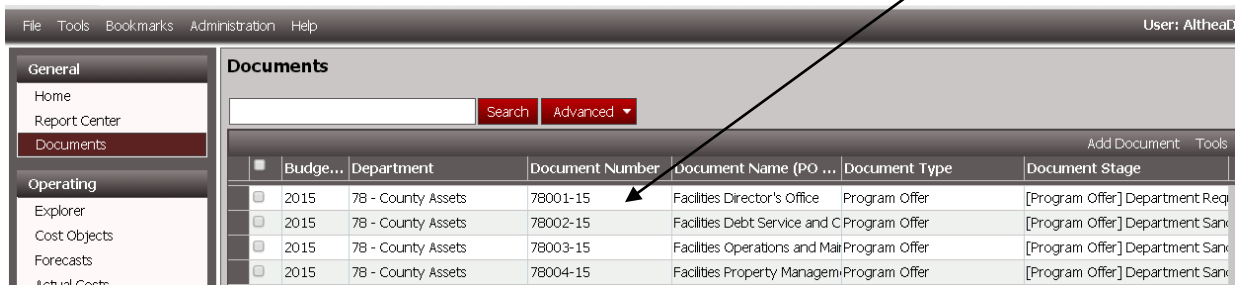
2. Type a name for your search in the new screen, then click “Save”



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 resulting grid, double-click the row of the document you want to view



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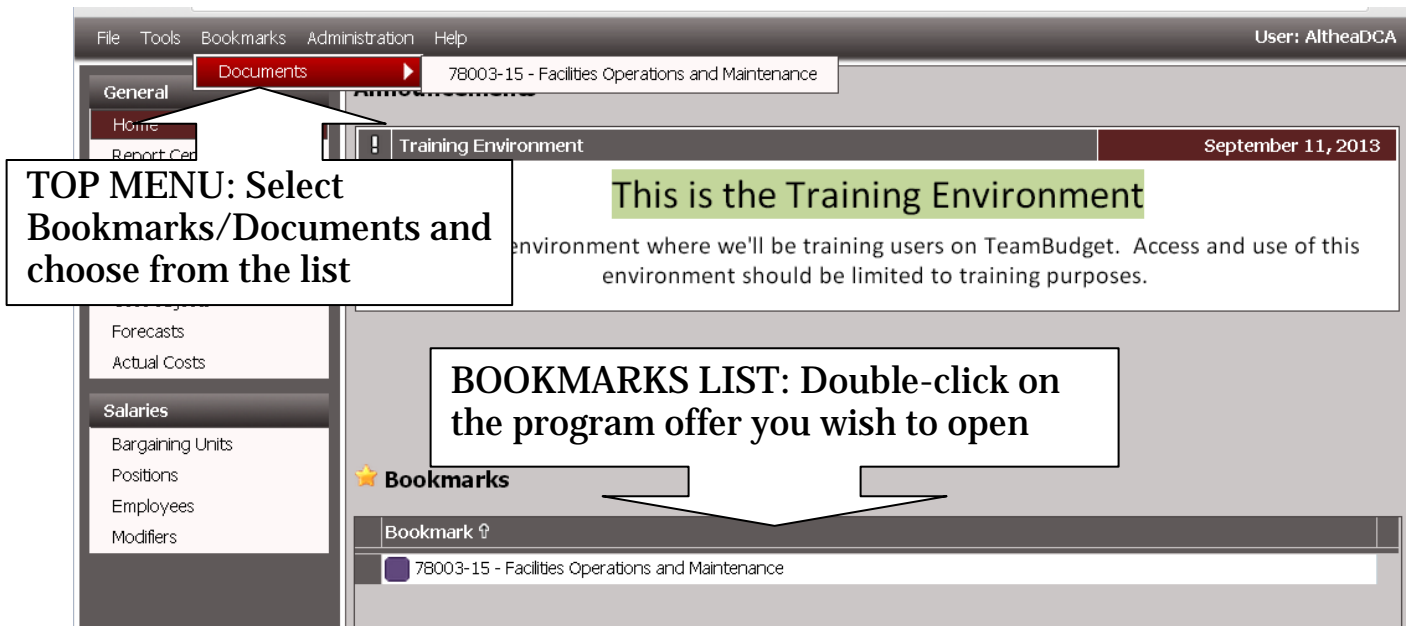
BOOKMARK A PROGRAM OFFER

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

3. Go to the TeamBudget Home Screen and choose from the Top Menu or Bookmarks List



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VIEW/PRINT A PROGRAM OFFER

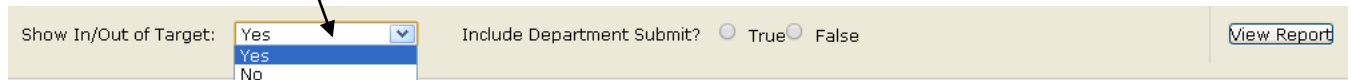
1. Open a program offer.
2. Click on “Reports” in the top toolbar.



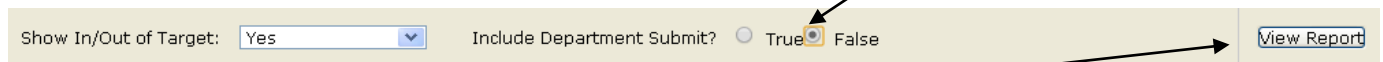
3. Select “Program Offer Report” from dropdown.



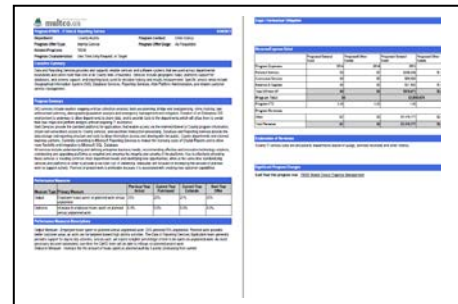
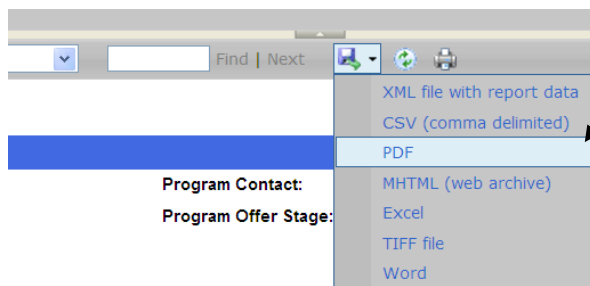
4. Select “Yes” or “No” for “Show In/Out of Target:” (this determines whether in/out of target will appear or not on the printed document).



5. Select “True” or “False” for “Include Department Submit?” (select “False” while building Department Requested budget – this parameter will be covered in later trainings when it becomes relevant).



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

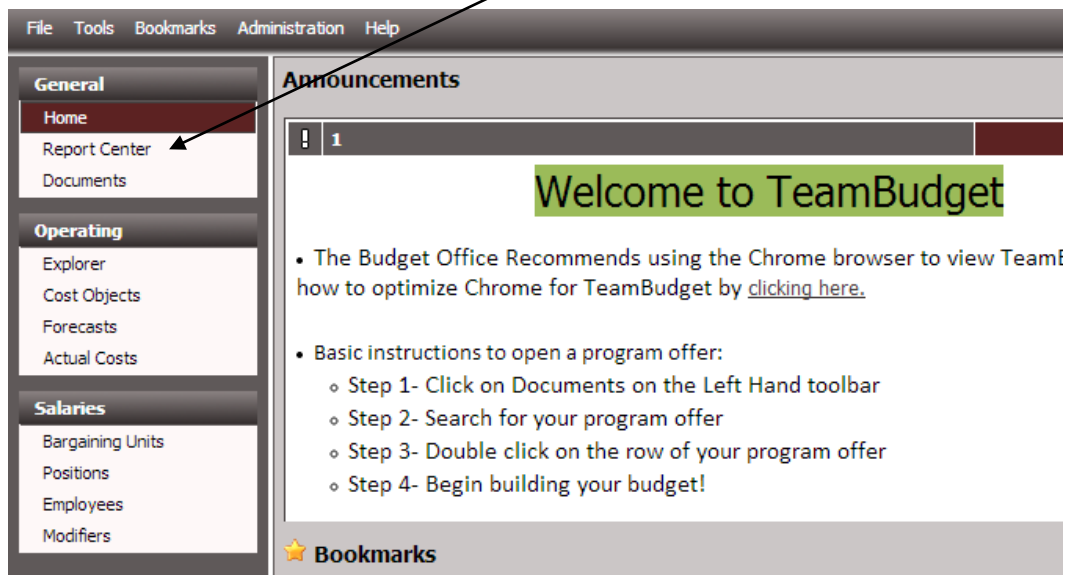


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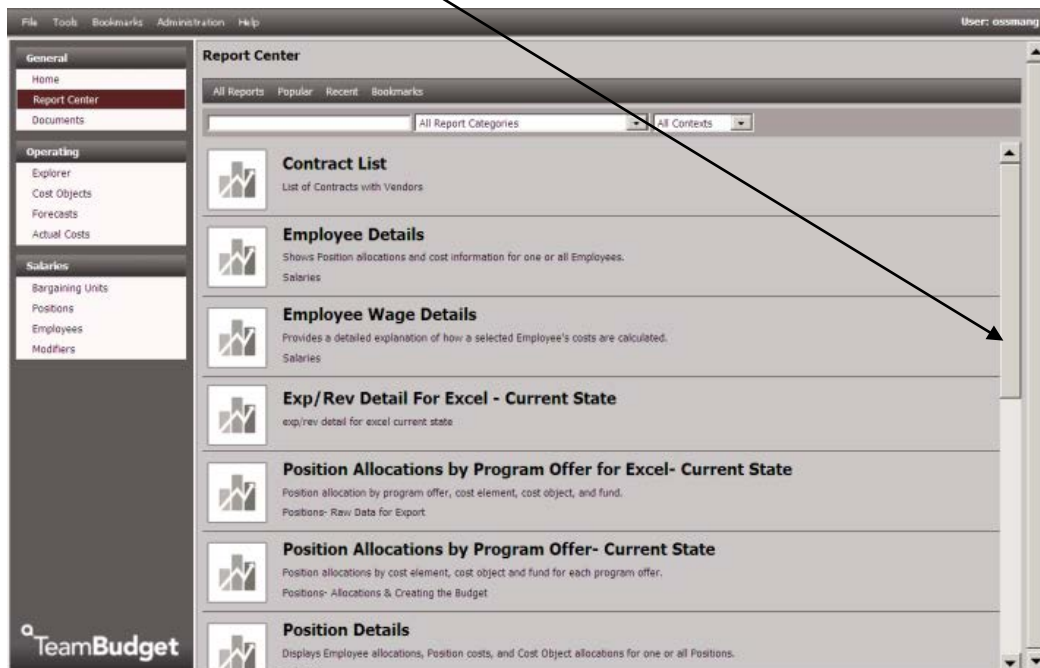
REPORT CENTER

How to Open a Report

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

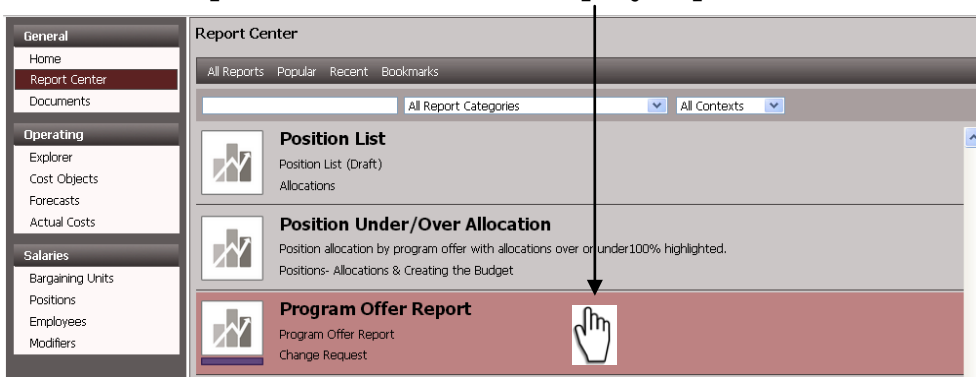


2. Use the inner vertical scroll bar to scroll to the desired report.

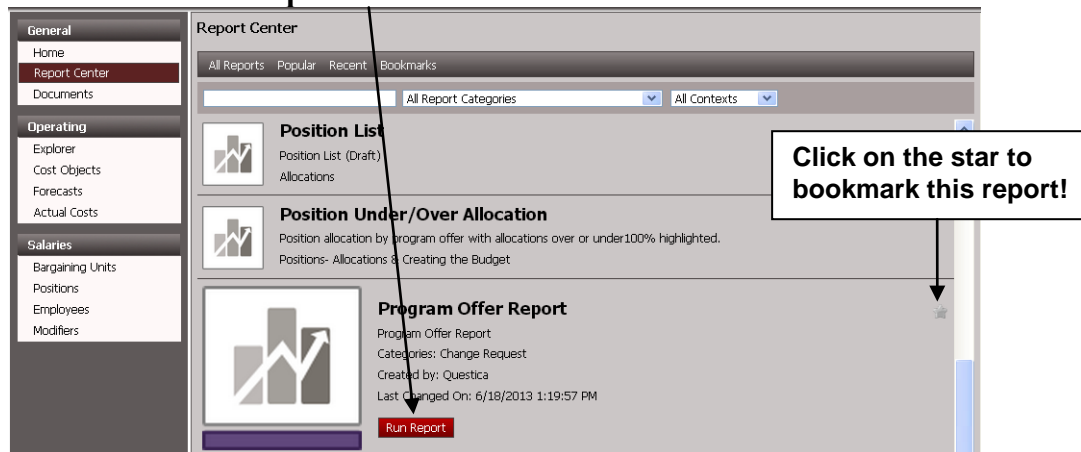


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- Put the mouse pointer over the section with the target report and left click. (This will expand the section to display report information.)



- Click on “Run Report”



Running Select Reports - Note

As a beginning user, select “Department Sandbox” for “Stage” where asked and “False” for “Include Department Submit” where asked when selecting the parameters for your report.

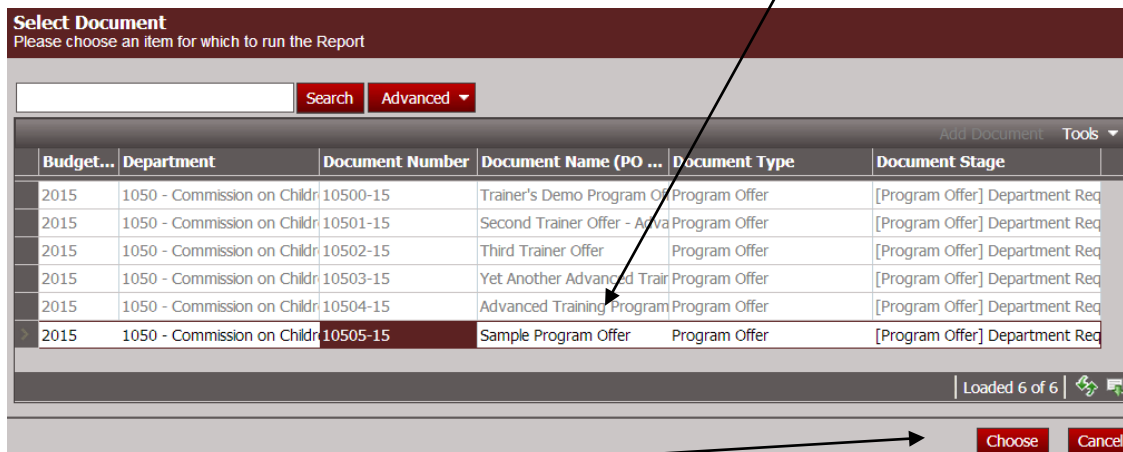
TeamBudget Basics

Program Offer Report

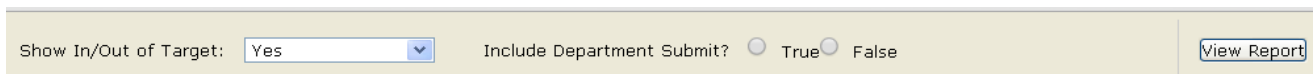
This report is another way to print a single program offer report (without having to open the program offer itself).



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 5-6 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.




5. Select “Yes” or “No” for “Show In/Out of Target:”; select “True” or “False” for “Include Department Submit”; and then click “View Report.” (The standard Program Offer Report should display.)

TeamBudget Basics

Webtool – Summary of Program Offers – Current State

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



Webtool- Summary of Program Offers- Current State

General Fund, Other Funds, and FTE totals for each program offer.
Exp/Rev- Creating and Balancing

1. From the Report Center, click “Run Report.” This will open a new screen or tab with parameters to select and may run the report for a default set of parameters.
2. Adjust the parameters if desired.

Budget Year	2015	Program Offer Stage	Department Sandbox	View Report
Department	1050 - Commission on Children,	Include Department Submit	No	
Program Offer	10500-15 - Trainer's Demo Prog	In/Out of Target	Not Specified, In Target, Out of	

3. Click “View Report.”
4. The first page will summarize your chosen parameters.

Webtool - Summary Of Program Offers - Current State

Budget Year: 2015
 Department(s): 1050 - Commission on Children, Families, & Community
 Program Offer(s): All
 Program Offer Stage: Department Sandbox
 In/Out of Target: All
 Include Department Submit: No
 Printed: 11/16/2013 4:40:08 PM

5. Click the “next page” arrow to see the list of program offers.

Webtool - Summary Of Program Offers - Current State

Department: 1050 - Commission on Children, Families, & Community
 (Totals for Selected Program Offers)

Budget Year: 2015
 Program Offer Stage: Department Sandbox
 In/Out of Target: All
 Include Department Submit: No

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

TeamBudget Basics

Position Allocations by Program Offer – Current State

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



Position Allocations by Program Offer- Current State

Position allocations by cost element, cost object and fund for each program offer.

Positions - Allocations & Creating the Budget

1. From the Report Center, click “Run Report.” This will open a new screen or tab with parameters to select and may run the report for a default set of parameters. Clicking “Run Report” opens a new screen or tab with parameters to select.

Budget Year	2015	Program Offer Stage	Department Sandbox	View Report
Department	1000 - Nondepartmental - All Ot	In/Out of Target	Not Specified, In Target, Out of	
Four Digit Fund	1000 - General Fund, 1500 - Sta	Include Department Submit	No	
Program Offer	10500-15 - Trainer's Demo Prog			

2. Select the desired budget year.
3. Select a stage (in the beginning, you’ll want to select “[Program Offer] Department Sandbox”).
4. Select your department.
5. Select whether you want the report to include in target offers, out of target offers, undesignated program offers, or a combination of the three.
6. Select the desired four digit fund(s).
7. Select “Yes” or “No” for “Include Department Submit” (in the beginning you’ll want to select “No”).
8. Select a program offer or the complete list of program offers.
9. Click “View Report” (the report will appear below the parameter selections).



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	TRNGWB51	1.00	60000	\$27,974
							60130	\$9,273
							60140	\$16,110
				Position Total:			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	\$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	\$88,840
790018	6001 - Office Assistant 2	29001 - CCFCEmployee Name1	1.00	1505 - Fed/State Fund	TRNGWB51	1.00	60000	\$33,652
							60130	\$11,156
							60140	\$16,508
				Position Total:			1.00	\$61,316
			Program Offer Total:			3.80	\$324,984	