## <u>SRB – SCHOOL ADMINISTRATOR</u> BUDGET INQUIRY TRAINING GUIDE

Once logged in, your user menu will provide you with a "Budget Inquiry" tab. Note that not all users have the same menu options, as these are determined according to your user profile.

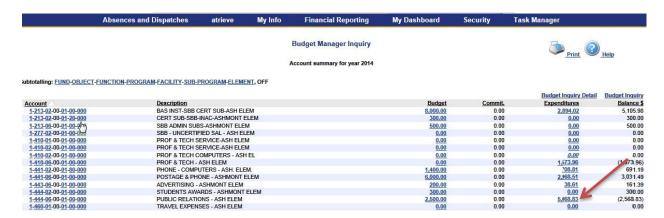


Selecting this menu, will bring you to the "Budget Manager Inquiry" Screen. This screen will provide you with access to all budgets under your control.

Use the "selection criteria" drop down menu to choose the area you wish to view.



Once you have selected the area you wish to review, you may click on the "balance available" blue text to access more detailed information.

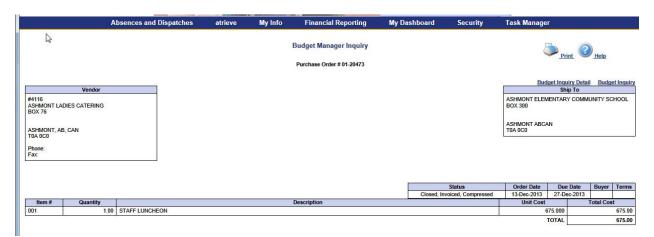


Any text that is "blue" can be clicked and drilled down for additional information.

Clicking on the blue text will drill down to another level of detail.



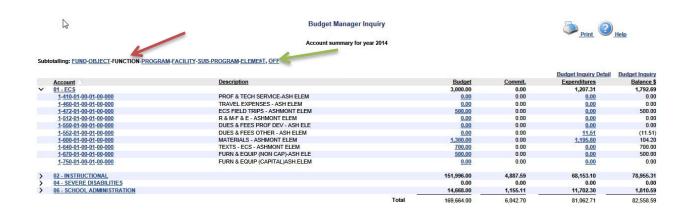
Clicking on the PO number, will provide you with additional information on the transaction.



Clicking on the invoice number will provide you with different information on the transaction.



Clicking on any of the account number string components will sort the data according to that description. In the example below, the data is sorted according to "function". You can also sort according to object, program, sub-program etc, to make it easier to view your data in whatever view your prefer. To revert to the unsorted view, click the "off" button.



You can go back one screen at any time by pressing the "back" arrow on your browser. The information you are seeing is real time and is updated as new information is entered. "Real-time" however means that it is only as real as the data that is entered i.e. it may take some time for a purchase order to be entered and likewise for an invoice to be received, approved and entered. Likewise there may be journal entries relating to interdivision billings or currency conversion that can affect your budget and these do not get posted immediately.

As a result of school access to "Budget Manager Inquiry" we will no longer be sending monthly budget reports. Schools may view or print their reports on as needed basis.

Remember to logout of your session at the end of the day.



If you have any questions, please contact Ruby at 780-645-3323.

Note that the program is not compatible with all browsers.

From the web portal, if you click on "browser compatibility" to the left of your name, it lists all the details:



## Internet Explorer

Windows 7 - IE 7.0 to IE 9.0 (IE 8 and 9 must turn on compatibility view for this or all sites) Windows Vista - IE 7.0 to IE 9.0 (IE 8 and 9 must turn on compatibility view for this or all sites) Windows XP - IE 7.0 to IE 9.0 (IE 8 and 9 must turn on compatibility view for this or all sites)

## Firefox

Windows 7 - Firefox 2.0 to 16.0.2 (Note: Clearing your browser cache after an upgrade may be required) Windows Vista - Firefox 2.0 to 16.0.2 (Note: Clearing your browser cache after an upgrade may be required)

Windows XP - Firefox 2.0 to 16.0.2 (Note: Clearing your browser cache after an upgrade may be required)

## Safari

Windows XP, Vista and Windows 7 - Safari 3.X to 5.0.5 Macintosh OSX 10.6 - Safari 3.x to 5.0.5