View and manage budgets
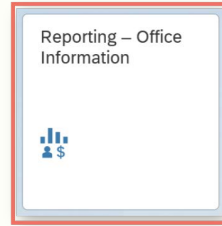
1 Open budget usage details

To view budget details:
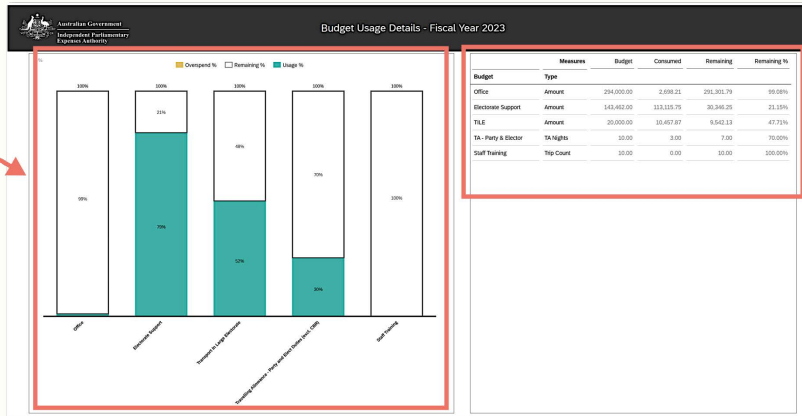- Select Reporting - Office Information tile.

Reporting – Office Information

2 Summary of budget usage

View the opened Budget Usage Details screen. The screen displays the current financial year.
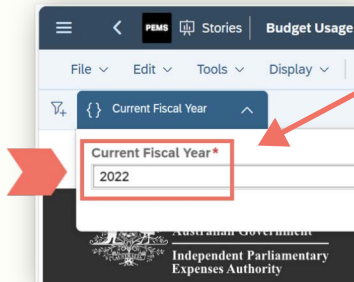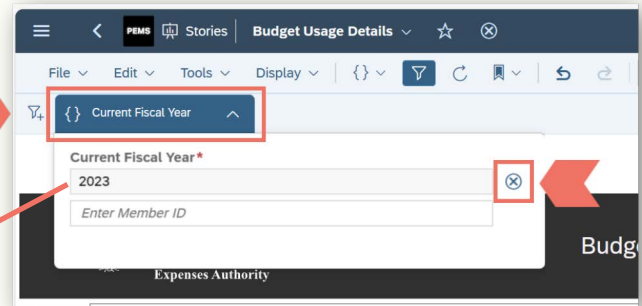
Budget Consumption Chart

Current Usage

3 View previous financial year/s budget usage

To view the summary for a previous financial year:

- Select current Fiscal Year
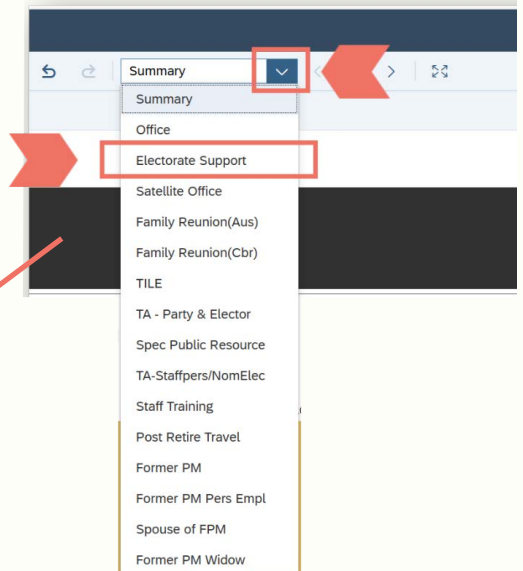- Delete the current selection using the X button.

• Type the four digit Fiscal Year date in the Enter Member ID field e.g. For the Fiscal Year July 2021 to June 2022, type '2022'

• Click anywhere on the main screen to refresh the summary details.

4 View details of expenses against a budget

To view details of expenses against a budget:
- Click the Summary drop-down menu
- Select required budget.

All certified expenses for the selected budget are shown.

View and manage budgets

5   Exporting budget details

To export budget details:

- Select any section of data from the table you want to export
- Click on the menu button (three dots)
- Select Export.

To finalise your export file:

- Type the name of your export.
- Choose the filetype (XLSX for use in Excel)
- Select Include Formatting and Indent Hierarchy
- Select the OK button.

Note:

The Electorate Support Budget has two separate tables of data. Each table needs to be exported separately. Open and save the exported Excel file using your browser's download function.
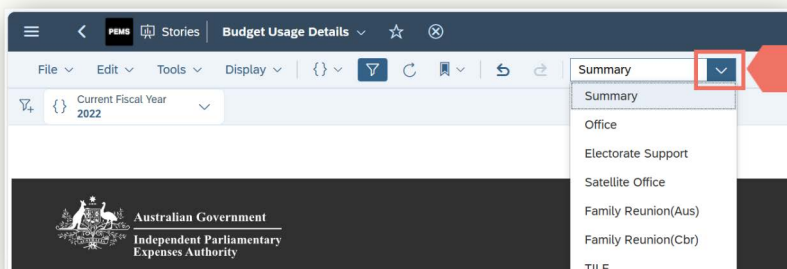

6   Viewing the Summary, other budgets and exiting

To view and process other budgets, choose Summary or one of the budgets from the drop-down menu.

When you have completed your budget review, exit by closing the tab in the browser window.