

# Simply Personnel Training Manager

## Setting Up Your Budget

## **Simply Training: Setting up your training budget.**

This document provides step-by-step guide for users to give an easy understanding on how to set up your training budget.

If at any time you need help or just need some questions answered please use our on-line helpdesk at [www.simplypersonnel.co.uk](http://www.simplypersonnel.co.uk) where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

When you are inputting training course information you may need to keep track of you costs. You costs can be added to the course maintenance under the costs tab.

Each cost you input against the training course can then be matched up to your training budget.

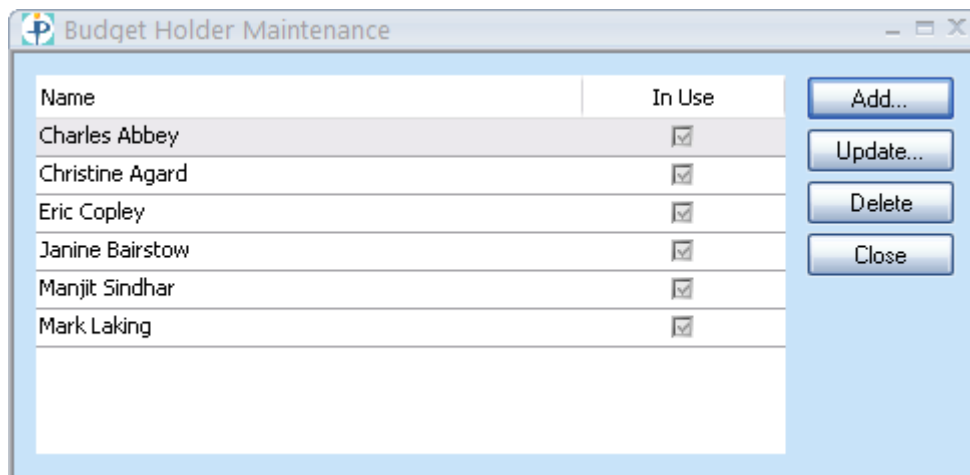
To enter your training budget you need to access the system setup. Select the tab marked Budgeting this will then open up the budgeting menu.

 **Budgeting**  
Define and manage your training budgets

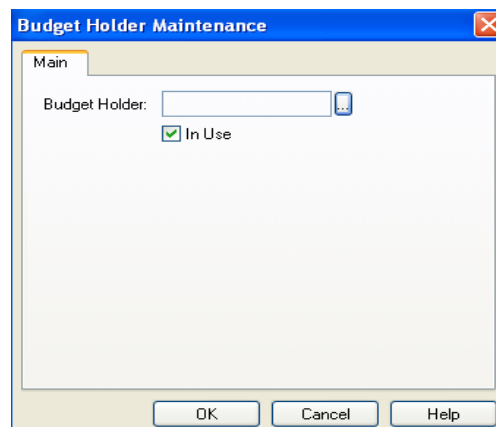
### Budget Holder Maintenance

 **Budget Holder Maintenance**  
Manage your budget holder

This will open up the following window.



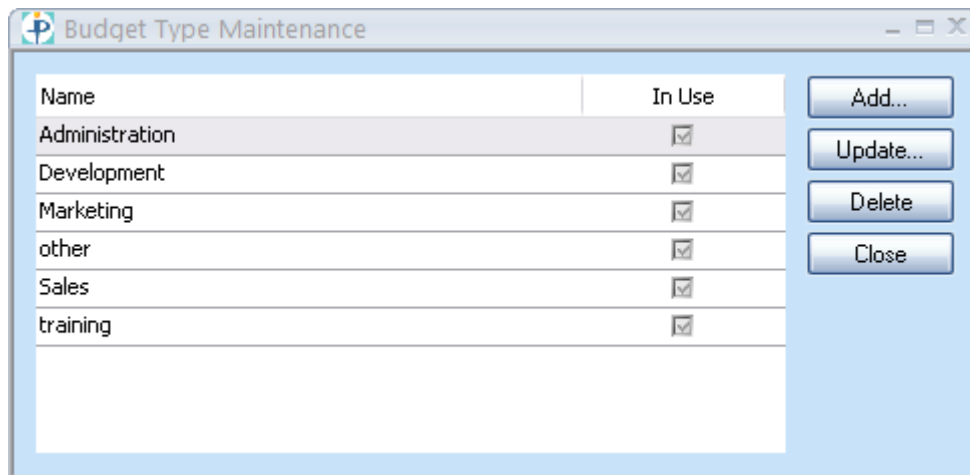
Click on **Add...** and a further window will appear click on the small gray box to the right of the window and select the budget holder.



## Budget Type Maintenance



This will open up the following window.

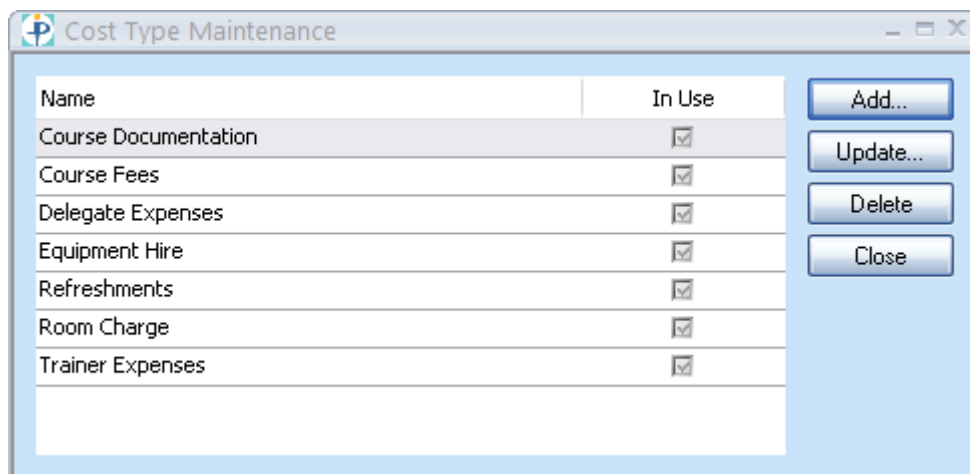


Click on **Add...** and enter the type in the text box then save.

## Cost Type Maintenance



This will open up the following window.



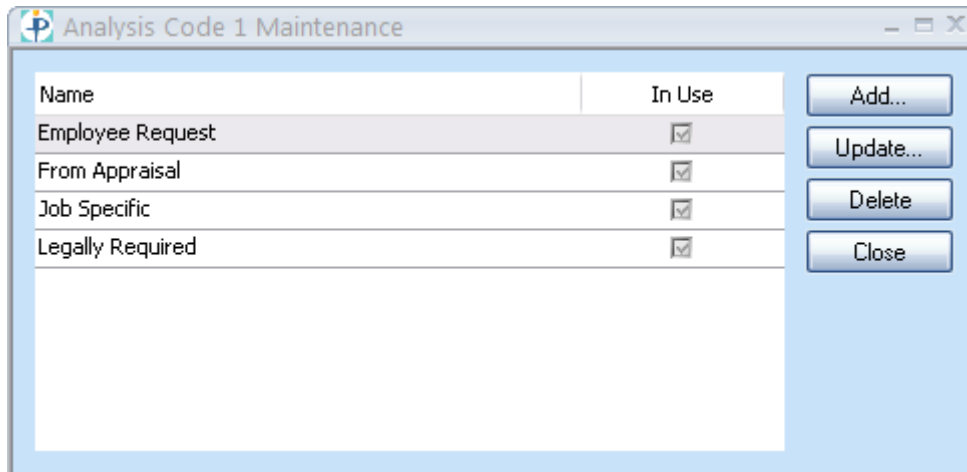
Click on **Add...** and enter the cost type in the text box then save.

You also have the option to add the cost type at the system set up stage.

### Analysis Code 1 Maintenance



This will open up the following window.



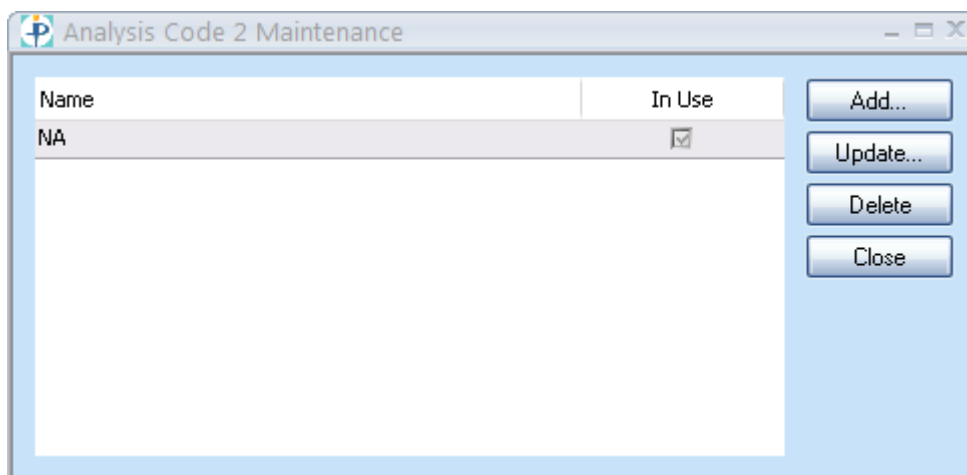
Click on **Add...** and enter the analysis code in the text box then save.

You also have the option to add the cost type at the system set up stage.

### Analysis Code 2 Maintenance



This will open up the following window.



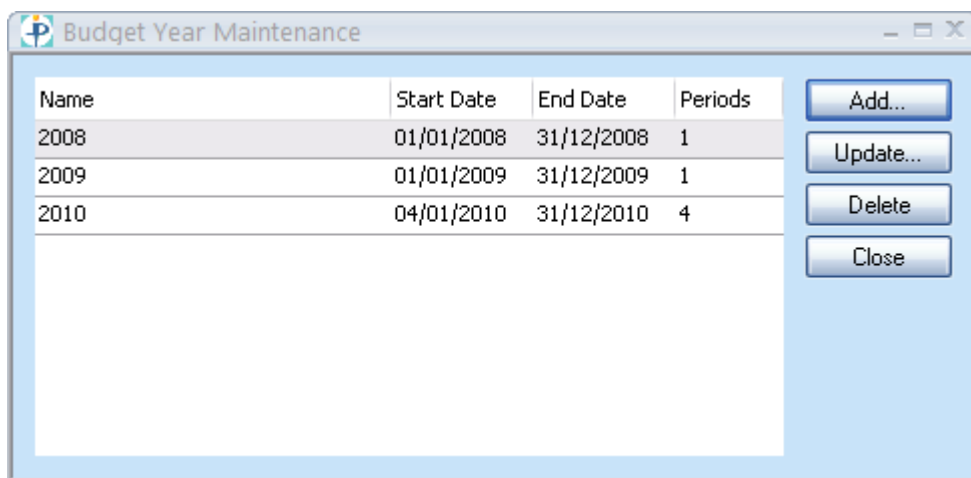
Click on **Add...** and enter the analysis code in the text box then save.

You also have the option to add the cost type at the system set up stage.

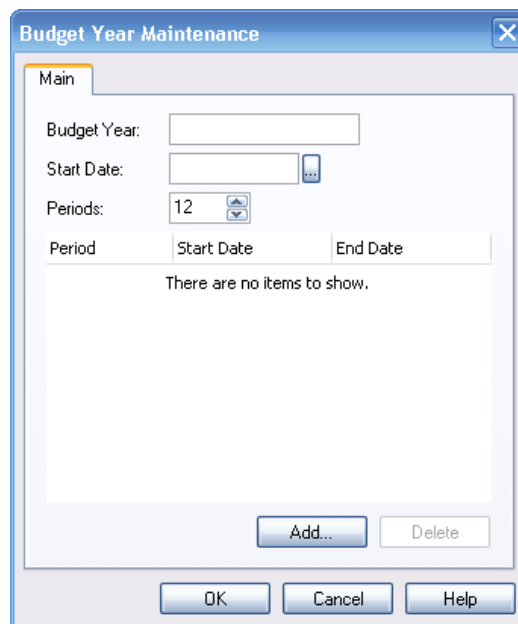
## Budget Year Maintenance



This will open up the following window.

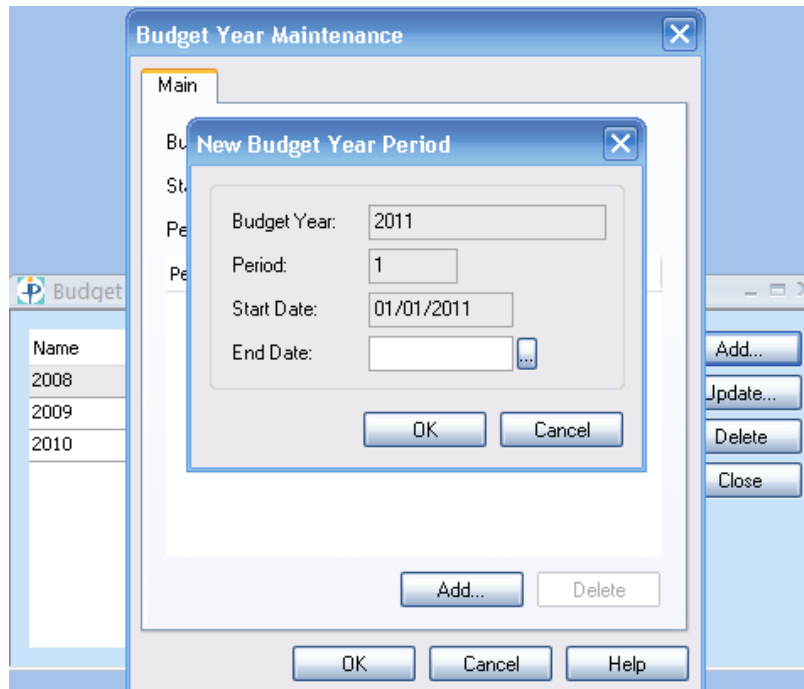


Click on **Add...** and a further window will appear.



Enter the budget year and the start date and the number of periods that it will be broken up in to. Then select the second tab (Periods). This is used to establish how many periods the budget is split up into. For example, if the budget is issued

quarterly, then 4 needs to be entered in the periods tab. After this, hit the 'add' button. The following screen will appear. Here you need to put the start and end date of each period.



## Training Budget Maintenance



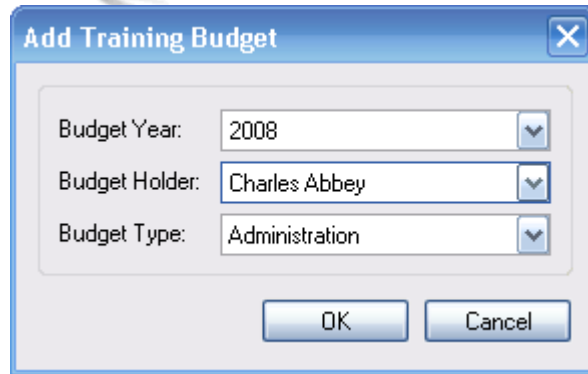
This will open up the following window.

The screenshot shows the 'Training Budget Maintenance' window. It contains a table with the following data:

| Budget Holder   | Budget Type    | Budget Year | Training Budget |
|-----------------|----------------|-------------|-----------------|
| Charles Abbey   | Administration | 2009        | 5000.00         |
| Charles Abbey   | Administration | 2010        | 25000.00        |
| Christine Agard | Administration | 2009        | 5000.00         |
| Christine Agard | training       | 2008        | 10000.00        |
| Manjit Sindhar  | Administration | 2009        | 20000.00        |

Buttons for 'Add...', 'Update...', 'Delete', and 'Close' are visible on the right side of the window.

Click on **Add...** and a further window will appear.



**Add Training Budget**

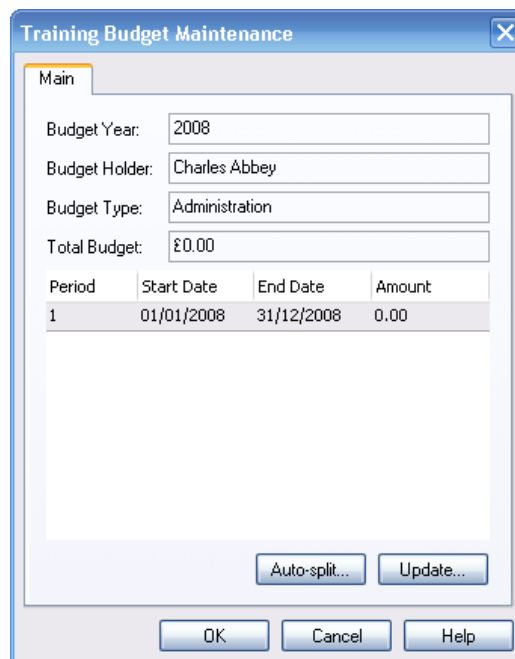
Budget Year: 2008

Budget Holder: Charles Abbey

Budget Type: Administration

OK Cancel

Select your budget year, budget holder and budget type and click ok. This will then open up another window,



**Training Budget Maintenance**

Main

Budget Year: 2008

Budget Holder: Charles Abbey

Budget Type: Administration

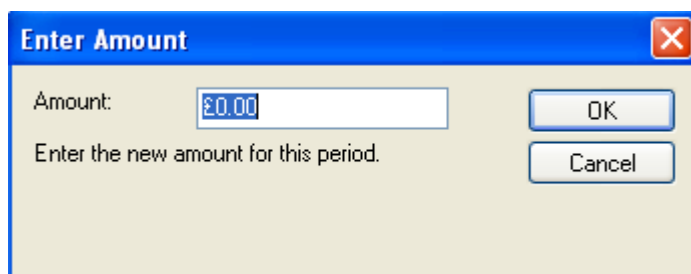
Total Budget: £0.00

| Period | Start Date | End Date   | Amount |
|--------|------------|------------|--------|
| 1      | 01/01/2008 | 31/12/2008 | 0.00   |

Auto-split... Update...

OK Cancel Help

You can enter the amount individually for each period



**Enter Amount**

Amount: £0.00

Enter the new amount for this period.

OK Cancel

Enter the amount click on OK the amount will then show next to that particular period.

Alternatively hit 'Auto-split' to evenly spread the total budget amount over the amount of periods.

