IT Budget

Manual

V1.3 R1

Contents

System Requirements

IT Budget requires a PC running Windows 2000 or later, we recommend a modern processor, at least 256MB memory (preferably 512MB) and 50MB of free hard disk space.

Licence

The licence distributed with this product permits you to use IT Budget on an unlimited number of computers within your organisation. However should you choose to run IT Budget across your network it will only allow one concurrent connection, hence only one person can use IT Budget at any one time. Please refer to our full Terms & Conditions available on our website for further information.

Installation

Before you can use IT Budget you need to install the software on your computer. This can be done either on a stand alone computer or on your server and run across your network.

Stand Alone Computer Installation
Should you choose to install IT Budget on a single computer this will be the only computer that can access the data you enter. Please insert the CD into your CD/DVD Drive and follow onscreen instructions during the quick installation process. We recommend installing using default options, once complete you will be able to launch IT Budget from a shortcut in the Start Menu located within a 'Bransoft' program group.

Network Installation
IT Budget can be installed on your network server and then accessed by any number of computers within your organisation (providing they can access your server). In order to perform the installation on your server you need to physically be at your server and install as per 'Stand Alone Computer'. When you are prompted for an installation directory it is important you consider the following points:

- You need to install IT Budget into a folder that is, or can be, shared out across your network so that your workstations can access the program directory, your users need to have full read/write access permissions to this folder.
- We recommend your workstations access the above shared area via a mapped drive letter on their workstation as this will allow the program to perform faster.
- We strongly recommend backing up the IT Budget program directory on a regular basis, you may choose to install IT Budget within a shared area that is regularly backed up or add the IT Budget program directory to your backup selection.

Once IT Budget has been installed on your server you need to visit each of your workstations and browse to the IT Budget program directory on the server (via your mapped drive letter). Run '_Workstation Setup.exe' from within the program directory, this will create the 'Bransoft' program group and a shortcut to IT Budget.

If required, please seek further advice from your network administrator.

Running IT Budget

To run the program click on the IT Budget shortcut in the Start Menu located within a 'Bransoft' program group.

The first time you run IT Budget you will see the following box.

Please enter your name in this box, perhaps in the form 'Mr J Smith'. This is only used when you print out from IT Budget. The system will print this name along with the date and the time it was printed.

Please be patient when you run IT Budget for the first time as loading the program for the first time takes a few moments longer.

IT Budget is designed to run best using a screen resolution of 1024 x 768, the product will work correctly if you are using a different screen resolution however, if you are using a smaller screen resolution such as 800 x 600 you may need to use the scrollbars to see the whole screen.

Every two weeks you will see a message reminding you to backup your data, if your server automatically backs up the program directory you can click 'Ignore' to this message. Please refer to the online support for more information about backing up.

Using IT Budget

IT Budget is designed to meet the needs of a varied range of users, therefore you can choose whether or not to record certain types of information.

Fields used to Hold Information

The boxes within IT Budget that are used to contain information are called fields, each field is labelled to show what type of information should be stored within that particular field. Often similar fields are grouped together into sections. Within your IT Budget database you have 5 records created for you, each record represents a school financial year, you can create more records when required. We recommend keeping budget records from previous years for historical purposes, this will also enable you to see trends in your spending to help plan your budget for future years.

Income
The green income section allows you to enter the amounts of available money you have for this financial year from different sources, for each source you can also record the period in which the money must be spent as some sources do not follow the school financial year of April to March. When you use IT Budget the blue estimated and red actual amounts automatically update to show you how much money you have left from each source.

Notes
The notes box allows you to record any other relevant information relating to Income.

Expenditure
This is split into 4 tabs which allow you to see different information, the 5th tab (preferences) allows you to customise IT Budget.

Support and Maintenance A & B

This section (split over 2 tabs) is designed to collect information about all the varied areas of Support and Maintenance which need to be taken into account. Not all areas may be relevant. At the beginning of the year we recommend you complete the estimated cost (where possible) for each area along with selecting which budget you will use the money from. When you spend the money you can enter the actual cost as and when you spend it. There are two ways you can do this; you can simply type in to Actual cost the new total which involves adding on the previous actual cost to the new additional actual cost and typing in the new total. Alternatively you can click on the plus sign and enter the new additional cost, the program will now add this onto the existing actual cost. It is very important you select the budget to be used as until you do this the blue and red sections at the top of the screen will not update.

Leases

This section is designed to record details of any equipment you lease. At the beginning of the year we recommend you complete all the details of your ongoing leases, again it is important you select which budget will be used in order for the blue and red areas to update.

Capital Expenditure

This section is designed to record details of any other items you purchase during the year. At the beginning of the year we recommend you complete the details of any expected purchases and continually update them, again it is important you select which budget will be used in order for the blue and red areas to update. Like Support and Maintenance there are two ways you can enter the actual cost; you can simply type in to Actual cost the new total which involves adding on the previous actual cost to the new additional actual cost and typing in the new total. Alternatively you can click on the plus sign and enter the new additional cost, the program will now add this onto the existing actual cost.

Preferences

This section allows you to configure IT Budget. You are able to Create and Delete financial years, please note that the first 5 years from April 2007 have already been created for you. When you create new years you can enter the year that it starts (in April) and the year in which it ends (March), in most cases the end year will be 1 after the start year. You can also select one financial year to be the current one by clicking on the 'Current' checkbox, please ensure only 1 year is selected current at a time. When IT Budget starts it automatically goes to the current financial year. Finally you can clear all the information from the financial year you are looking at, please note that this cannot be un-done. You also have the option to turn on "Add Detail to Notes for Additional Information" when you are using the plus button to add an additional amount onto the actual cost. When this is set to yes information is added to the notes box and you can also add further information for detailed record keeping.

Standard Tools

Print

You are able to Print out the information from the financial year you are viewing. Please note that you will see 4 print boxes, these 4 separate print outs are as follows:

    Income details including summary of Estimated and Actual costs.
    Support and Maintenance
    Leases
    Capital Expenditure

Navigation

At the top of the screen the financial year being viewed will be described, the arrows at each side scroll back and forward through your financial years.

<u>About</u>
The about button takes you to the About screen where you can see contact details for Bransoft along with the version number of the software you are using.

<u>Exit</u>
The Exit button closes down the program, alternatively the standard windows cross in the top right corner of the screen can be used. All information is saved automatically, a save button is not required.

Additional Support

Please refer to our website (www.bransoft.co.uk) for online support, you can also go directly to our support website by clicking on the orange 'Online Support' button which can be found on the 'About' screen.

Alternatively please contact Bransoft directly by email (info@bransoft.co.uk) or telephone (01457 821212) for further support.

If you have any comments or suggestions to improve this product we would like to hear from you.