Navigating Through enVisage

Once you have logged into enVisage you need to select the budget elements with which you would like to create a budget. Budgeting and planning within enVisage is dependent upon two fundamental elements:

- Budget versions
- Organisation Units (typically your organisation hierarchy)

Within the Navigate options of the main menu you can select both the budgets that you wish to work on as well as the units.

To Select a Budget

1. Click on Navigate in the main menu

This will display the Navigate menu options.

2. Click on Select Budget and this will display the operational budgets that are available to you.

3. Click on the Budget title that you wish to use. This will move you in to the Select Unit options and display the units that make up the budget.
! IMPORTANT!

It is important that your data is entered into the correct budget, it is a good idea to regularly check that the budget that you have selected is the right one. (Although the Systems Team try to limit the occurrence of this, there may be occasion when it is necessary to have more than one budget environment open).

4. Click on the Units to drill down into the budget structure

Depending on the level of detail in your organisational structure (how the elements roll up) will depend on how many steps will need to be taken to select the required unit to budget on.

You select each level then drill down to the next level (top down) until you arrive at the posting level for that budget version (where you can create the budgets and plans). Once you select the posting unit level, enVisage will navigate you to the Enter Budget screen where you can:

5. Start creating your budgets and plans.
The main menu (above) allows a wildcard search by using the Find Project button.

You are able to search for projects if you:

6. Type in some numbers accompanied by a question mark and click on the Find Project button.
7. Select the projects that you require by clicking on them.

8. Click the Submit button.