



15 Logging in to Budget Manager

To log in, you will need to enter a valid username (this is an email address) and password in the screen below.

If your login attempt is not successful, your username and password can be reset by a user with administrator permissions, or by calling the shop4support Helpdesk on 01942 614 088.

A screenshot of the Budget Manager login interface. The page has a header with the 'shop 4 support' logo on the left and a 'Home | Help' link on the right. Below the header is a grey navigation bar. The main content area is white and contains a login form titled 'Valueworks © Budget Manager™ Login'. The form has two input fields: 'Username' and 'Password', and a 'Login' button. At the bottom right of the page, there is a small link for 'Terms of Use Powered by Valueworks'.

If you are logging in for the first time, you will be asked to confirm that you are happy to comply with Budget Manager's Terms and Conditions, before continuing. You will also be asked to confirm your personal details.

When you have successfully logged in, you will see the Budget Manager News page below.

Fig.2 Default News page

Wherever you are within Budget Manager, you will always be given the option of logging out, using the Logout link at the top of the page, as shown above. However you must remember that any data will be lost if you log out before saving it and that any filters will return to their default settings.

Using business view

Business view allows business organisations to have multiple roles within Budget Manager, according to their needs. Each business user can have multiple roles and subsequently, multiple business views.

There are three business views within Budget Manager:

- Budget manager
- Local authority
- Service provider

A 'budget manager' business view will be assigned to a user as soon as they are selected as a Personal Budget Manager for at least one individual.

If an organisation has been set up as a budget manager organisation, any users working for this organisation will automatically view the budget manager business view.

A 'local authority' business view will be assigned to a user as soon as a local authority role is assigned to their organisation.

A 'service provider' business view will be assigned to a user as soon as a service provider role is assigned to their organisation.

Should none of the three business views be available to the user, if an individual requires access to Budget Manager for example, then the user will act with no role.

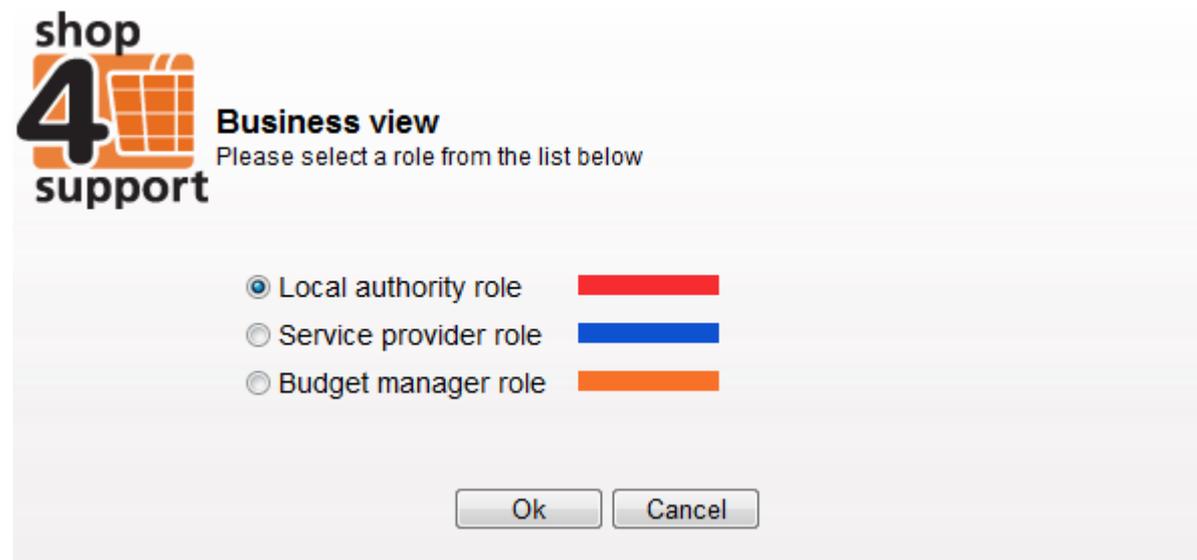
Switching between business views

If a user has more than one business view, they can swap between these using the Change button at the top of the screen, as shown below.



The colour of the Change button and other key parts of the screen will correspond with the user's current business view, making it easy to quickly identify which business view they are using.

Upon clicking on the Change button a pop-up dialog window will appear, as below, allowing the user to select a new business view.



It is also possible to select a default business view for a user, using the administration section of Budget Manager.