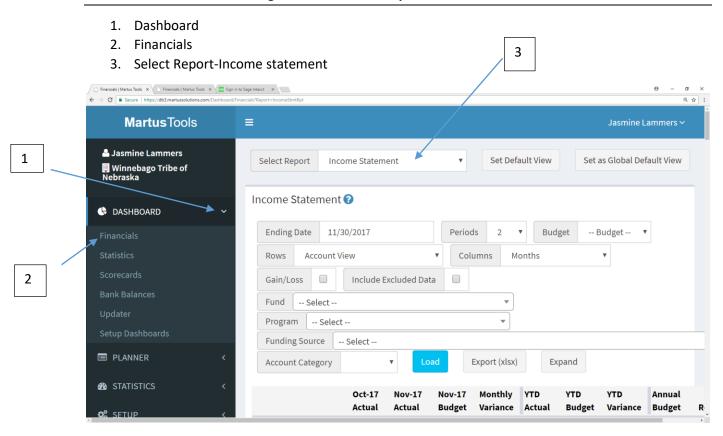
Logging in to Martus Tools

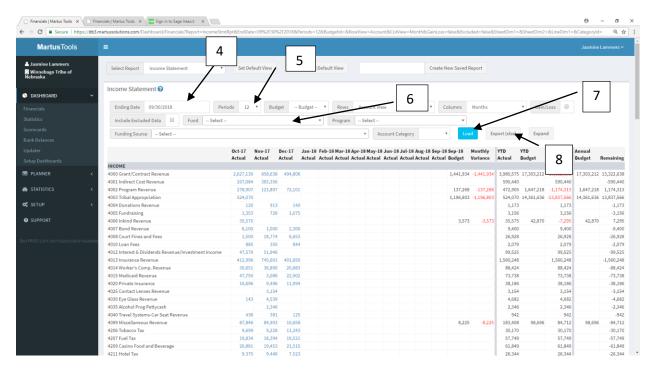
- 1. Open google chrome go to https://db3.martussolutions.com/Login
- 2. Username is your email address
- 3. You will receive an email prompting to change your password once Finance resets all the passwords
- 4. Enter your new password
- 5. Select Sign In
 - a. **Note**-If you enter your password incorrectly two times select the "I forgot my Password" link to the left of the sign in



Recommended 12 month Budget Verse Actual Comparisons



- 4. Ending Date-Set for last day of the grant or fiscal year
- 5. Periods-12
- 6. Fund-enter the fund you are trying to report on
- 7. When finished select load

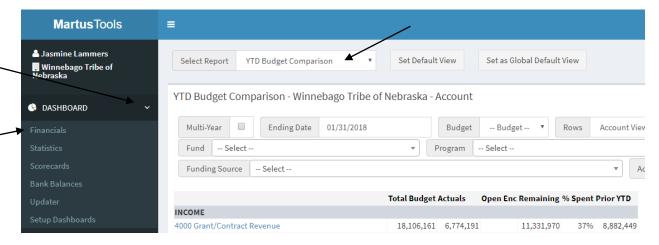


Notes- this will give you a budget verse actual for twelve months but you will be able to report on shorter periods if needed by changing the ending date and periods. Numbers listed in blue have the drill down capability that will show exactly what makes up the total number. If a user has the Director Assistant Role they will not be able to drill down on identified restricted accounts.

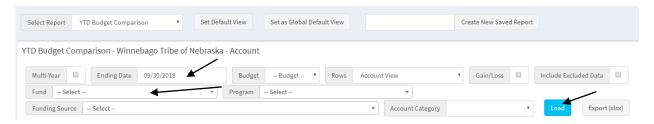
8. If the information on the screen is correct you will be able to export the budget to excel by selecting export (xlsx)

Recommended Budget Verse Actual Comparisons for Budgets on the Tribe's Fiscal Year

- 1. Dashboard
- 2. Financials
- 3. Select Report- YTD Budget Comparison



- 4. Ending Date-Last day of the fiscal year
- 5. Fund-The fund you are trying to report on
- 6. Load

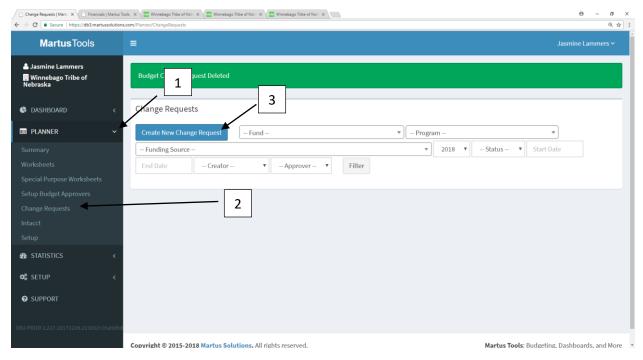


Note- This gives a consolidated budget verse actual comparison that show the gain/loss at the bottom of the report.

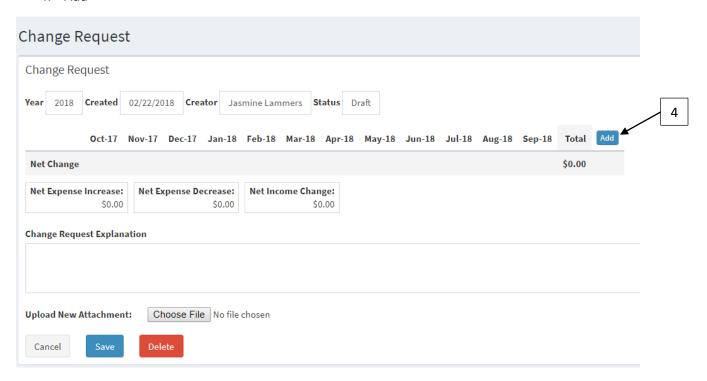
Total Expense	37,059,263 14,258,636	22,800,627 38% 16,039,850
Net Gain/Loss	-2,466,152 -996,140	-1,470,012 0% 613,297

Entering Budget Modifications

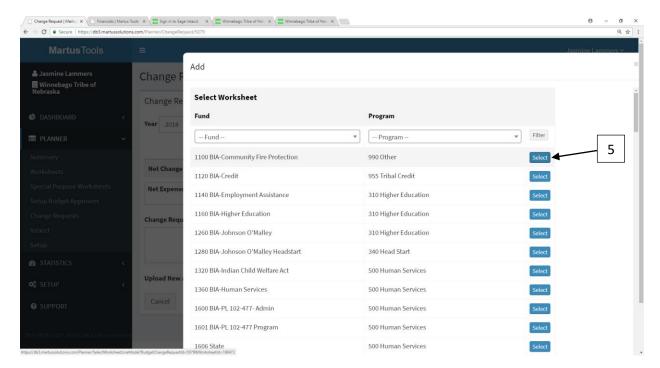
- 1. Planner Dropdown
- 2. Change Requests
- 3. Create New Change Request



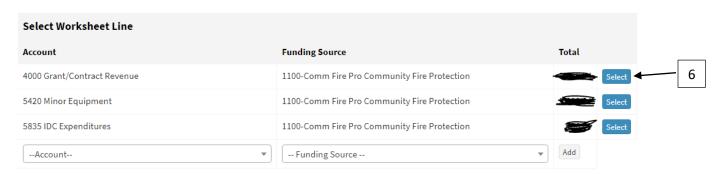
4. Add



5. Find the fund you are requesting to change and press select

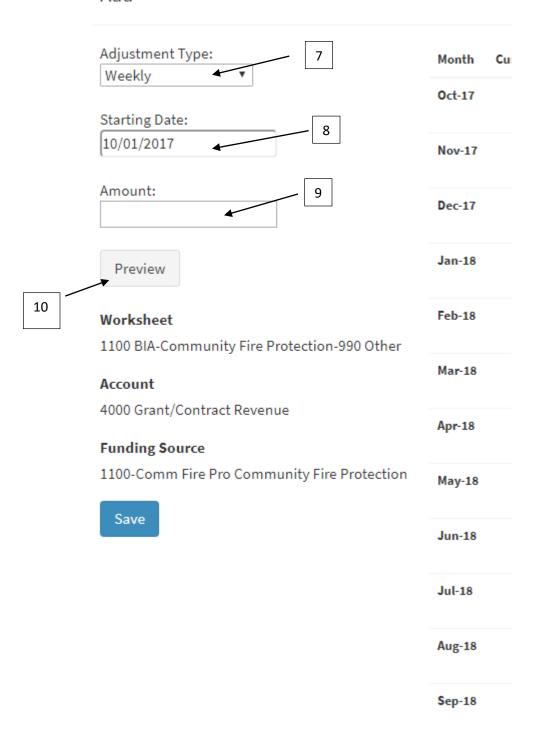


6. Select Which account you are requesting to change



- 7. Enter the Adjustment Type: weekly, bi-weekly, monthly, annual
- 8. Add a starting Date of the request
- 9. Add an amount

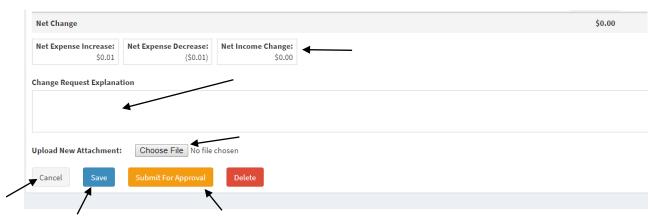
Add



- 10. Select Preview (make sure the amount is correct in the revised line before you save)
- 11. Repeat Steps 4-10 until you are finished entering your budget modification.

NOTE-The net change should be 0! An Explanation can be added as why the change request is happening. Also, items can be attached. If the granting agency approved the budget modification this would be a good item to attach.

12. When finished either Save to work on it later, Cancel to not save your changes, or Submit for Approval.



Approval Flows

- 1. Worksheet Approver-There can be as many worksheet approvers as needed and these can be setup by fund.
- 2. Planning Office- Either Joy Johnson or Esther Mercer has to approve.
- 3. Finance Office- Either Cheryl Painter or Jasmine Lammers has to approve.
- 4. CFO Alan Post or CEO Sharon Frenchman has to approve.
- 5. Budget becomes active in Martus and Intacct!