

User Instructions

Budget Master

By Matrix Digital Services

Prerequisite:

Budget Master is built as an extension of EDA (Education Data Architecture). This means that the latest version of EDA (v1.122 or later) should already be installed, and EDA should have been in use for some time. Specifically:

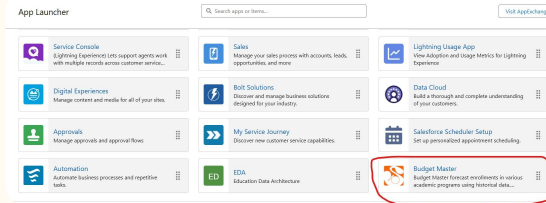
- a) The EDA feature for the record type of the standard object "Account" should already be enabled. The "Academic Program" record type is required to define the Academic Program Plan.
- b) The EDA feature for the record type of the custom object "Course Connection" should already be enabled. Course connections with the "Student" record type are necessary to identify enrollments.
- c) There should be a sufficient number of Course Connection records to experience the power of Budget Master.

Budget Master does make some assumptions:

- a) As is commonly practiced, "Course Offerings" should be available for at least 5 future terms beyond the completed term.
- b) Term names should be defined in a standard format, such as "Winter 2024," "Summer 2025," etc.

Operation:

How to access Budget Master?



1. Launch Budget Master App

2. Budget Master Tab

Budget Master Enrollment Forecast

Step-A: Define Academic Program Plan

Select Academic Program

Select an Option

Next

Step-B: Verify your Program Plan from Step-A

Academic Program	First time Program Offered	Latest Terms when Program Offered	Courses: New Students Enrollment	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step	Courses: Next Step

Populate Rollo Confirm

Step-C: Enrollment Forecast

Forecast will be generated for the following terms:

1.
2.
3.
4.
5.

Populate Rollo Generate

Courses / Terms

Launch App

Operation:

How to input my requirements in Budget Master?

I want to generate enrollment forecast for a fictitious Academic Program - "Professional Program" which has only 2 steps - Course "A_Space" followed by course "B_Space".

This program is first offered in "Winter 2024".

Until now, the program has completed 4 terms - (Winter 2024, Spring 2024, Summer 2024 & Fall 2024).

Step-A: Define Plan

Step-A: Define Academic Program Plan

Select Academic Program

Select an Option

Next

1. Step-A: Fill up questionnaire

Step-A: Define Academic Program Plan

Select Academic Program

Professional Program

Next

2. Select Academic Program for which enrollment forecast to be generated

Step-A: Define Academic Program Plan

Select Term: This Academic Program was first offered

Winter 24

Next

3. Select Term

Step-A: Define Academic Program Plan

Select latest Terms (Min 4 & Max 12): Till now, this Academic Program has been offered over all these Terms

Move selection to Selected Terms

Available Terms

Winter 25
Spring 25
Summer 25
Fall 25
Winter 26

Selected Terms

Winter 24
Spring 24
Summer 24
Fall 24

Next

4. Select latest 4 Terms for which enrollment history is available

Select All Possible Courses (Max 12): As STEP 1, New Student to this Academic Program can enroll in these courses

Move selection to Selected Courses

Available Courses

B_Space

Selected Courses

A_Space

5. Select "A_Space" for step-1 of the program

Operation:

*How to save my
program plan in
Budget Master?*

enroll in these courses

Available Courses

A_Space

Selected Courses

B_Space

Click to Submit

6. Select course "B_Space" as a next step of the program.

As this program has only 2 steps, click Skip to Submit.

Step-A: Define Academic Program Plan

Thank you for completing the questionnaire!
Go ahead and Submit Now!

Submit

7. Click Submit to save the program plan. This is end of Step-A. Pop-up will be displayed to instruct the user to move to Step-B.



Step-A: Define Plan

How do I know if my program plan is correctly saved in Budget Master?

[illegible]

Step-B: Verify your Program Plan from Step-A

	Academic Program	First time Program Offered	Latest Terms when Program Offered	Courses: New Students Enrollment	Courses: Next Step	Courses: Next Step
Name	Professional Program					
Started		Winter 24				
List of Terms			Winter 24, Spring 24, Summer 24, Fall 24			
Step1				A_Space		
Step2					B_Space	
Step3						

Step-B: Review Plan

✓ **Success**
Data is analyzed. Move to Step-C

For which terms and courses, the enrollment forecast will be generated by Budget Master?

Budget Master by Matrix Digital Services

1. Click Populate to display the 5 upcoming terms for which forecast will be generated for all the courses which will be offered in upcoming terms.

2. If displayed upcoming Terms and Courses looks ok, click Generate to generate forecast else Redo. Redo will take back to Step-A.

3. For our sample academic program plan which has 2 steps, course "A_Space" followed by course "B_Space", Enrollment forecast is generated for 5 upcoming terms.

Ready to use Budget Master for another Academic Program? Refresh the tab and start at Step-A.

Success

Thank you for using Budget Master. Happy Budegeting!

