

# Locality Budget Application User Guide

April 2023 - Version 2.0

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Click on a heading to go to that topic

# Important Information

From April 2023 submitting requests for your Locality budget should be made using our purpose-built Locality Budget Application [\[Insert Link When Published\]](#).

This app has been designed to be used on a Colchester City Council provided laptop or a tablet, such as an iPad. You may find that if you run this application on a different type of device, for example a phone, you may not be able to access all of its features.

You will need your Office 365 log in credentials and your mobile device to authenticate your log in.

Information, advice, and details on how to get help from ICT is held here: [Supporting Councillors with ICT \(sharepoint.com\)](#).

# Logging In to the Application

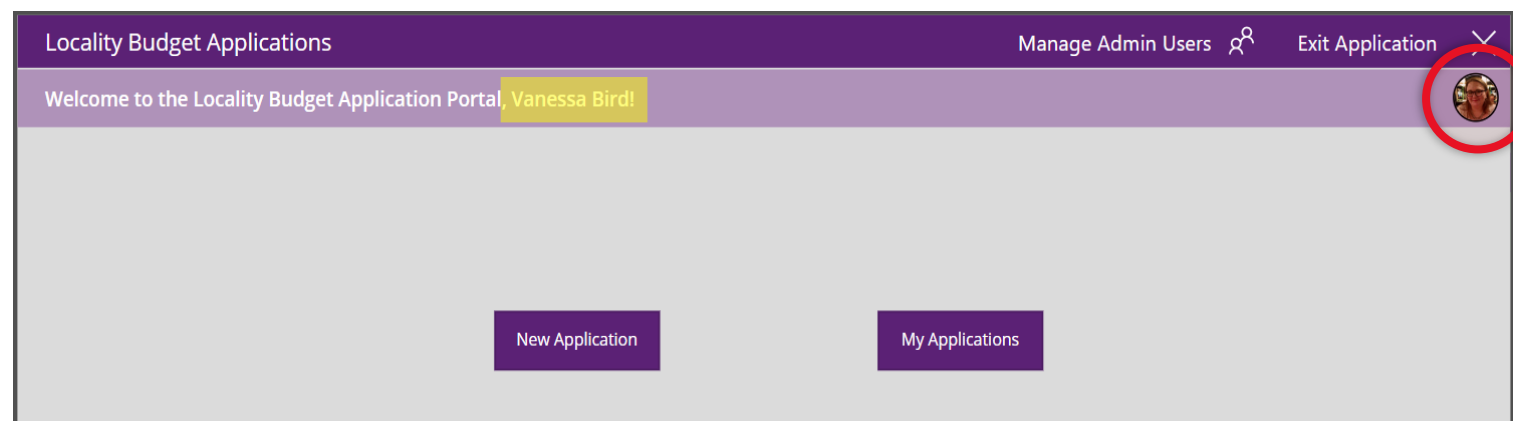
To allow easy access to the application we suggest that you favourite or bookmark the app when you access this for the first time.

However, we will also be adding links to the following locations;

1. Mark Healy will have a link to the application in his email signature.
2. A link to the App will be added to the Councillors dedicated COLIN page: [Councillors Homepage - Home \(sharepoint.com\)](#)
3. A link will also be added to the Councillor ICT page: [Supporting Councillors with ICT \(sharepoint.com\)](#)

When you log in to the application it will recognise that it is you.

You can see this as your name will appear at the top of the screen and your image (if you have set one) or your initials will appear in the top right of the screen.

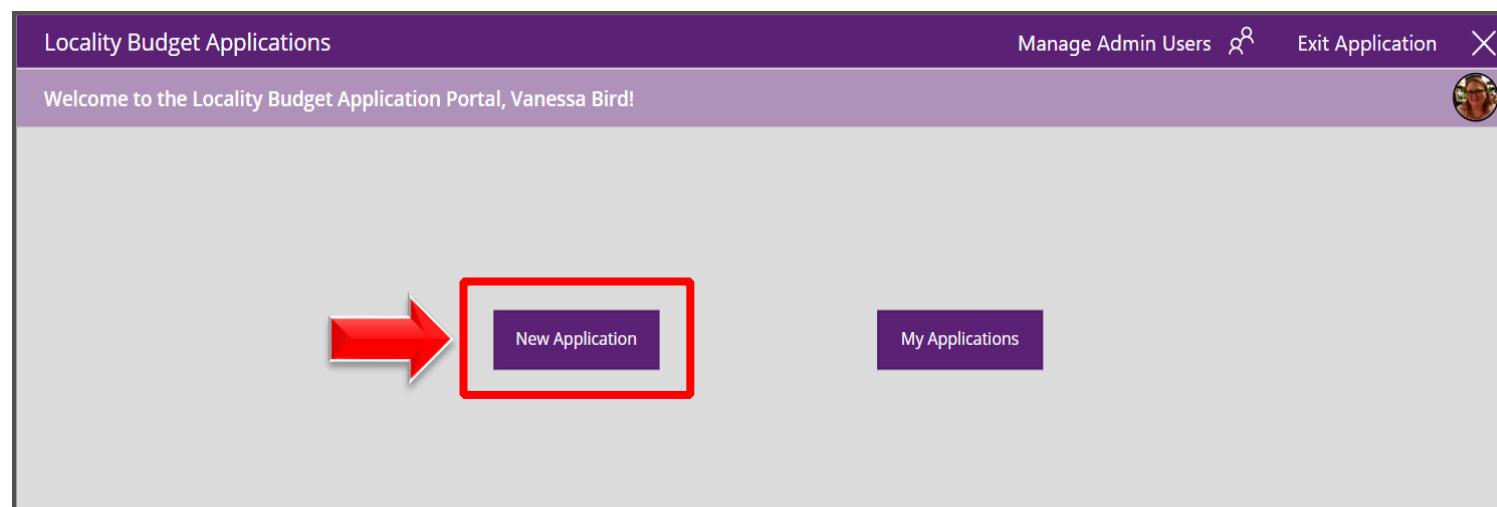


# Making a New Application

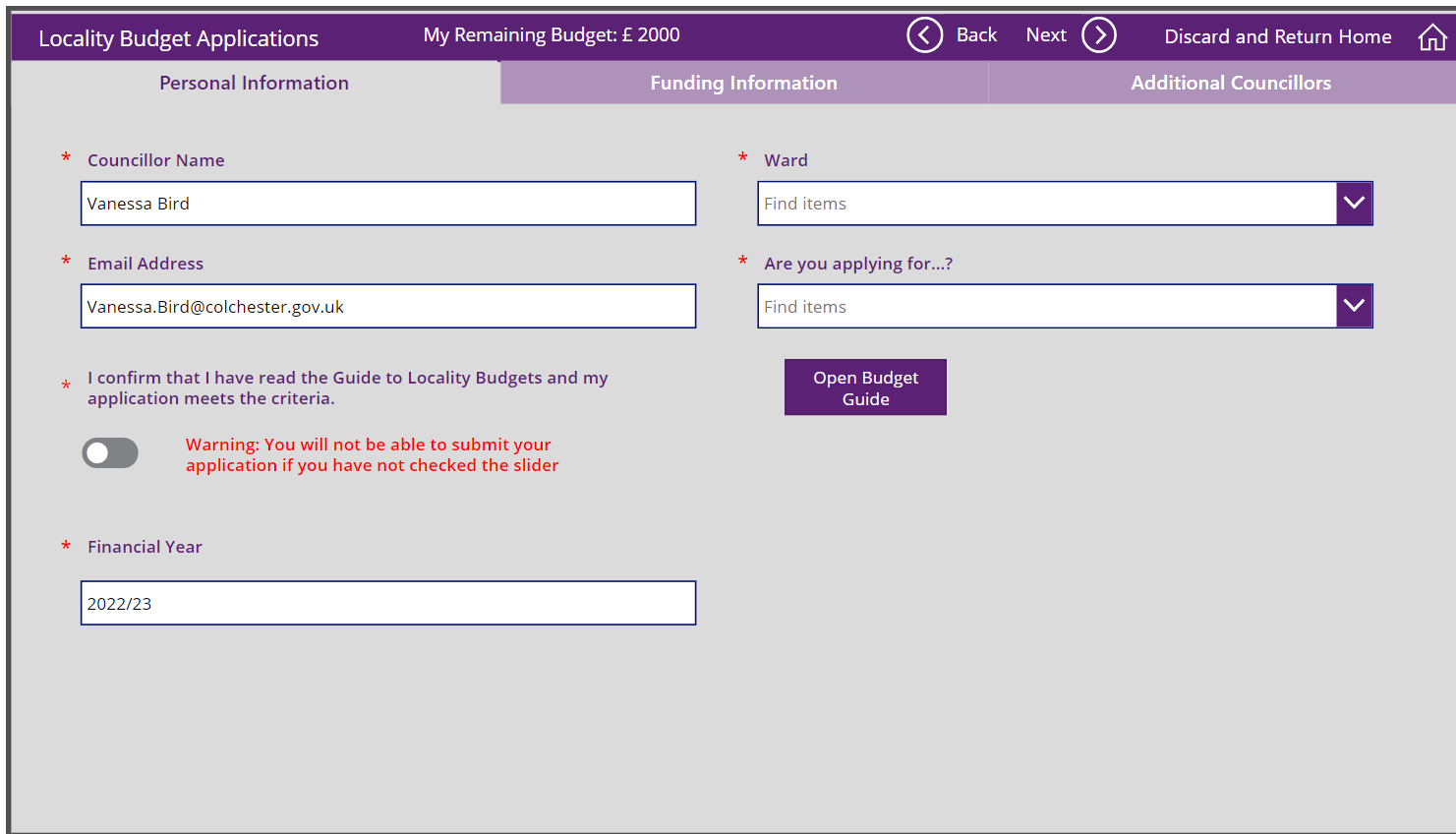
Once you have logged in to the app it is time to make a new Locality Budget Application.

**Step 1:** Click on the button New Application.

This will open a new screen where you can begin to enter your application details.



**Step 2:** You will be directed to the **Personal Information** screen. This is the first of three screens for you to complete.



The screenshot shows the 'Personal Information' screen of the 'Locality Budget Applications' system. The page has a purple header with the title 'Locality Budget Applications' and 'My Remaining Budget: £ 2000'. Navigation buttons for 'Back', 'Next', and 'Discard and Return Home' are visible. The main content area is divided into three tabs: 'Personal Information' (active), 'Funding Information', and 'Additional Councillors'. The 'Personal Information' tab contains several mandatory fields marked with a red asterisk (\*):

- Councillor Name:** Text input field containing 'Vanessa Bird'.
- Email Address:** Text input field containing 'Vanessa.Bird@colchester.gov.uk'.
- Ward:** Dropdown menu with 'Find items' selected.
- Are you applying for...?:** Dropdown menu with 'Find items' selected.
- Financial Year:** Text input field containing '2022/23'.

There is a confirmation statement: '\* I confirm that I have read the Guide to Locality Budgets and my application meets the criteria.' with a toggle switch currently turned off. A warning message below it reads: 'Warning: You will not be able to submit your application if you have not checked the slider'. A purple button labeled 'Open Budget Guide' is also present.

All of the fields on this screen are mandatory, you will not be able to submit an application without these being completed.

Mandatory fields are marked by a **red asterisk \***

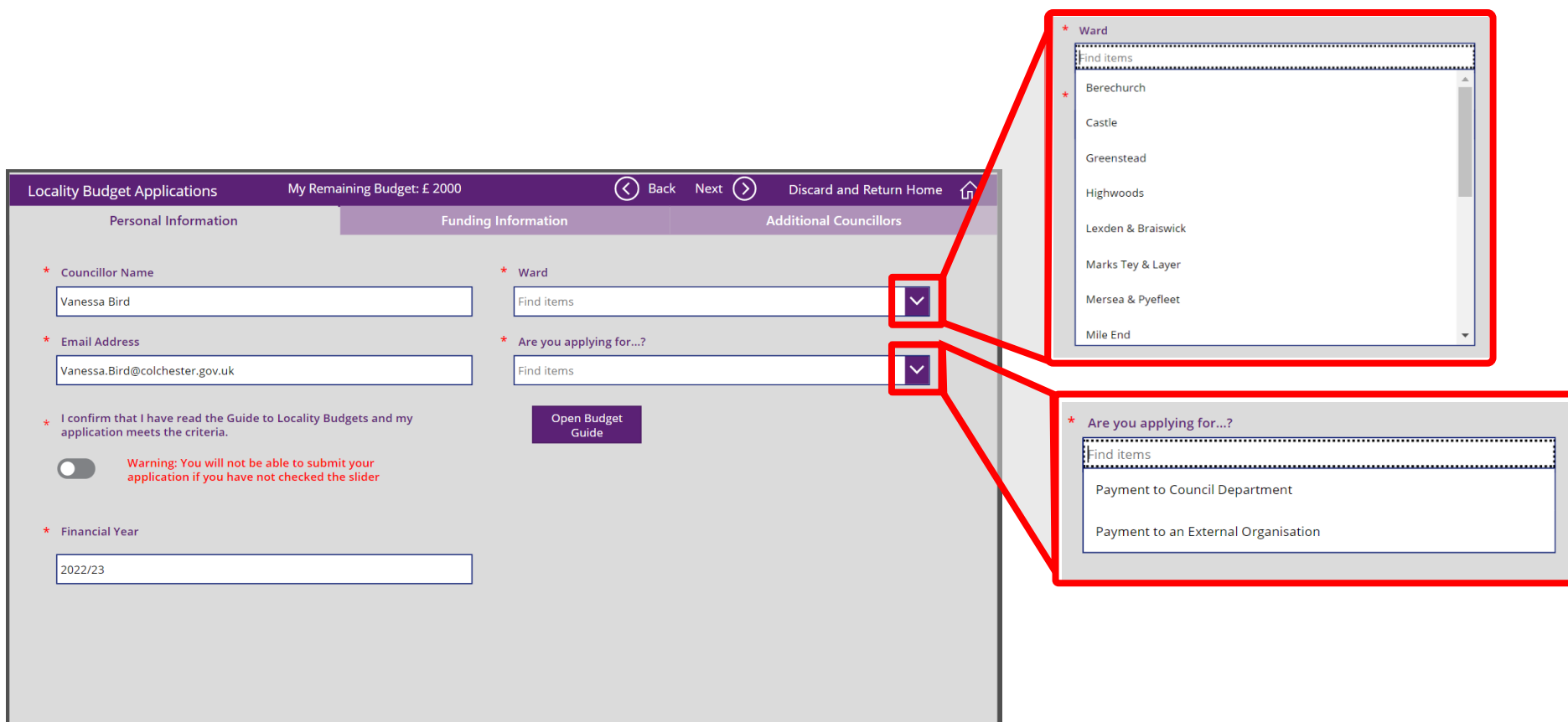
Some information will be prepopulated for you, including your name, email address and the financial year.

### Step 3: Complete **Personal Information** Screen.

Select your **Ward** from the drop-down box, these appear in alphabetical order.

Use the drop-down to select if you are applying for **Payment to a Council Department** or to an **External Organisation**.

Depending on your selection you will be asked for different information on the next screen.

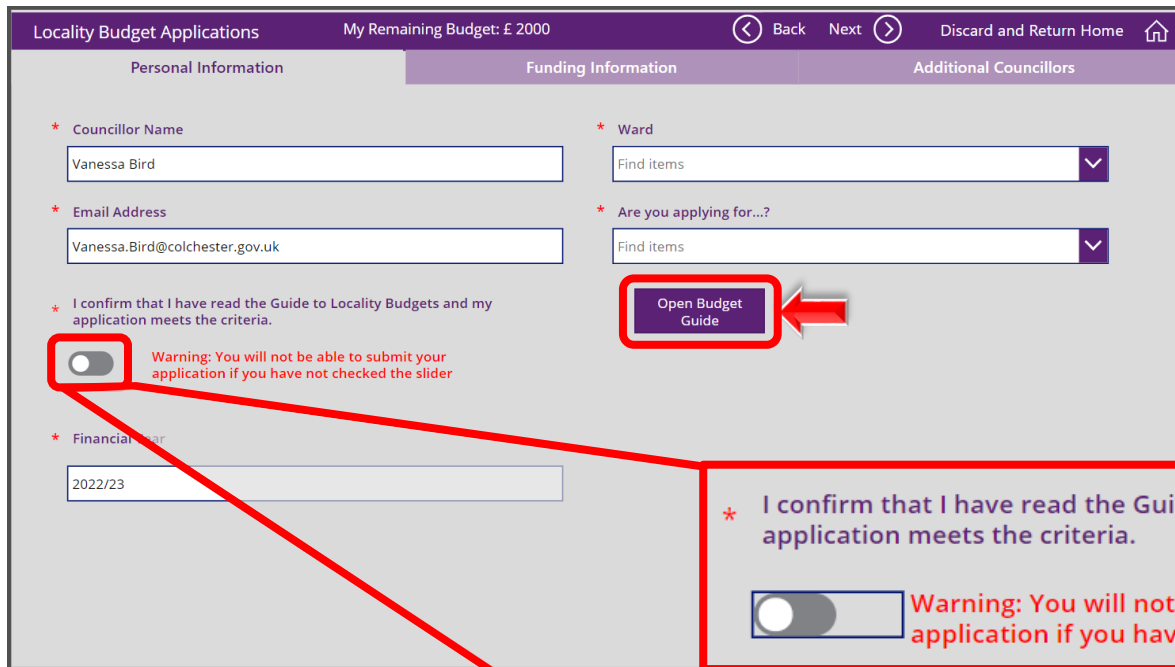


The screenshot shows the 'Personal Information' section of the 'Locality Budget Applications' form. The form is titled 'My Remaining Budget: £ 2000' and includes navigation buttons for 'Back', 'Next', and 'Discard and Return Home'. The 'Personal Information' section contains the following fields:

- Councillor Name:** Vanessa Bird
- Email Address:** Vanessa.Bird@colchester.gov.uk
- Confirmation:** I confirm that I have read the Guide to Locality Budgets and my application meets the criteria. (Warning: You will not be able to submit your application if you have not checked the slider)
- Financial Year:** 2022/23
- Ward:** Find items (dropdown menu)
- Are you applying for...?:** Find items (dropdown menu)

Two callouts are shown:

- The top callout shows the 'Ward' dropdown menu with the following options: Berechurch, Castle, Greenstead, Highwoods, Lexden & Braiswick, Marks Tey & Layer, Mersea & Pyefleet, and Mile End.
- The bottom callout shows the 'Are you applying for...?' dropdown menu with the following options: Payment to Council Department and Payment to an External Organisation.



Locality Budget Applications My Remaining Budget: £ 2000 Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* Councillor Name Vanessa Bird

\* Email Address Vanessa.Bird@colchester.gov.uk

\* I confirm that I have read the Guide to Locality Budgets and my application meets the criteria.

Warning: You will not be able to submit your application if you have not checked the slider

\* Financial Year 2022/23

\* Ward Find items

\* Are you applying for...? Find items

Open Budget Guide

You will be asked to confirm you have read the **Guide to Locality Budgets**.

If you have not read this prior to making your application you can click the button to **Open Budget Guide**, this will open the guide in a web browser at the top of your screen.

\* I confirm that I have read the Guide to Locality Budgets and my application meets the criteria.

Warning: You will not be able to submit your application if you have not checked the slider

\* I confirm that I have read the Guide to Locality Budgets and my application meets the criteria.

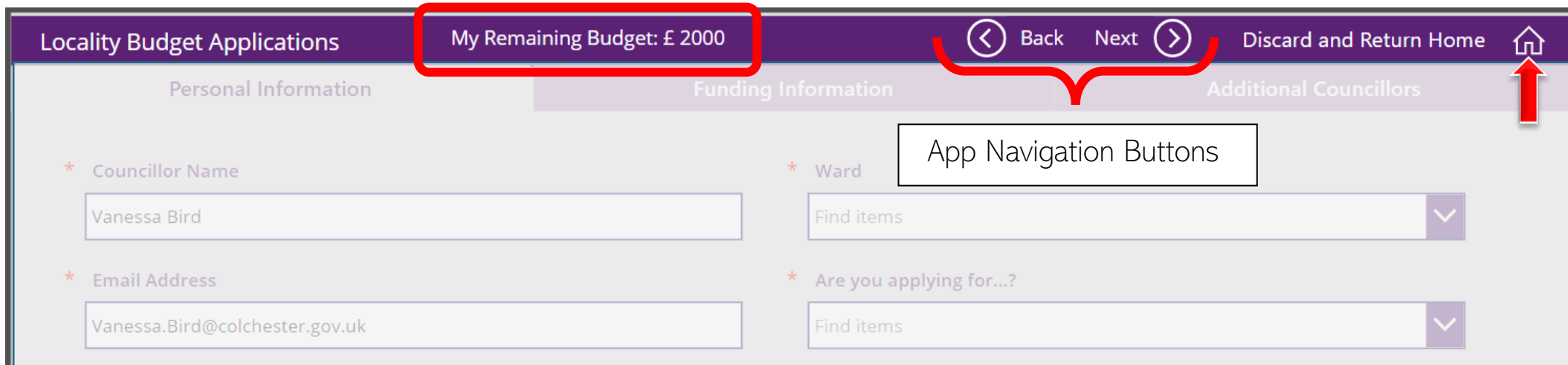
You can read the guidelines here: [A guide to Colchester Councillors' Locality Budgets · Colchester City Council](#)

When you toggle the button to confirm you have read the Guide to Locality Budgets, the button will turn purple and the warning that appears in red will disappear.

**Step 4:** Navigate to the **Funding Information** Screen.

Once you are happy that you have completed all of the fields click **Next** from the top of the screen.

The bar at the top is not only used for navigation. You will find a display of how much remaining budget you have to spend. You can also cancel your application by selecting the **Home**  button in the top right corner.



Locality Budget Applications

My Remaining Budget: £ 2000

Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* Councillor Name  
Vanessa Bird

\* Email Address  
Vanessa.Bird@colchester.gov.uk

\* Ward  
Find items

\* Are you applying for...?  
Find items

App Navigation Buttons

The next section to complete is the funding information page. The information you need to include on this screen will vary depending on if you are making a payment internally (to a Council department) or externally.

[Payment to a Council Department](#)

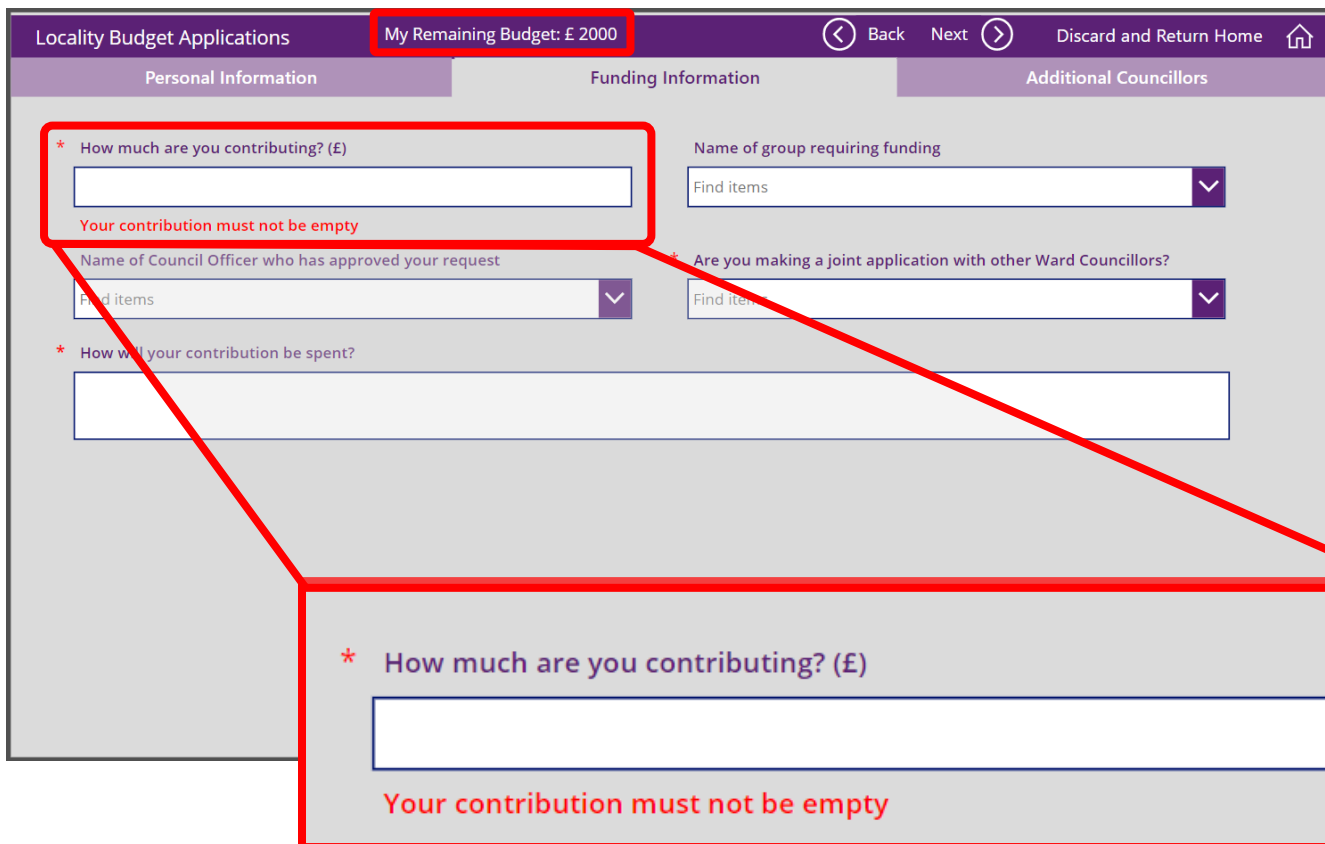
[Payment to External Organisation](#)



# Payment to a Council Department

The funding information page will be different depending on if you are making a payment internally or externally.

**Step 5:** Enter how much you wish to contribute, there is no need to add a £ sign.



Locality Budget Applications **My Remaining Budget: £ 2000** Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* How much are you contributing? (£)  
  
Your contribution must not be empty

Name of Council Officer who has approved your request

Name of group requiring funding

\* Are you making a joint application with other Ward Councillors?

\* How will your contribution be spent?

\* How much are you contributing? (£)  
  
Your contribution must not be empty

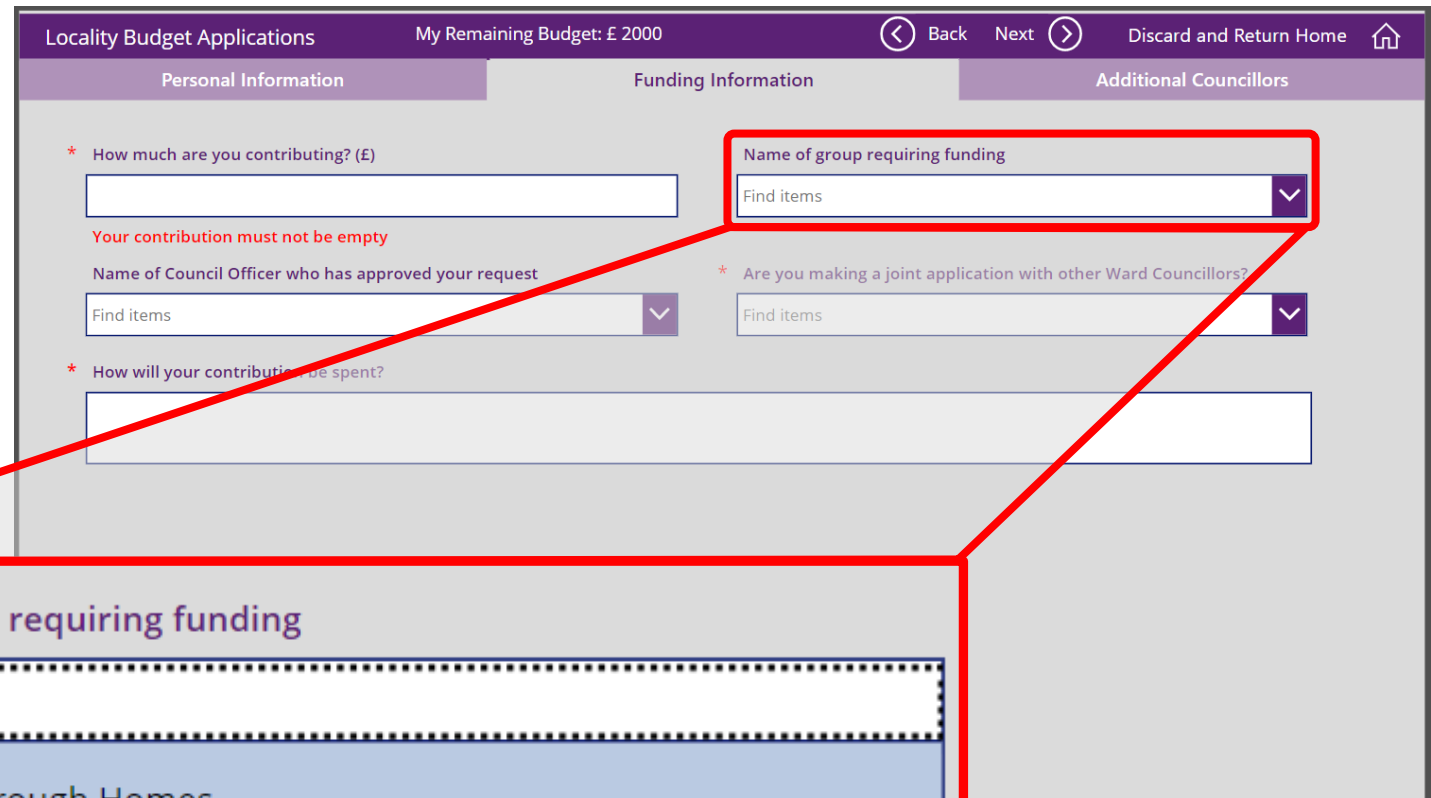
In the contribution field you will see a warning message, you will not be able to complete this application without information in this box.

You are also not able to contribute more than your remaining locality budget.

You can check how much is remaining at the top of the screen.

**Step 6:** Enter the name of the group requiring funding.

When you are making a payment to a council department, you are able to use the drop-down to select which department you need to pay.



Locality Budget Applications My Remaining Budget: £ 2000

Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

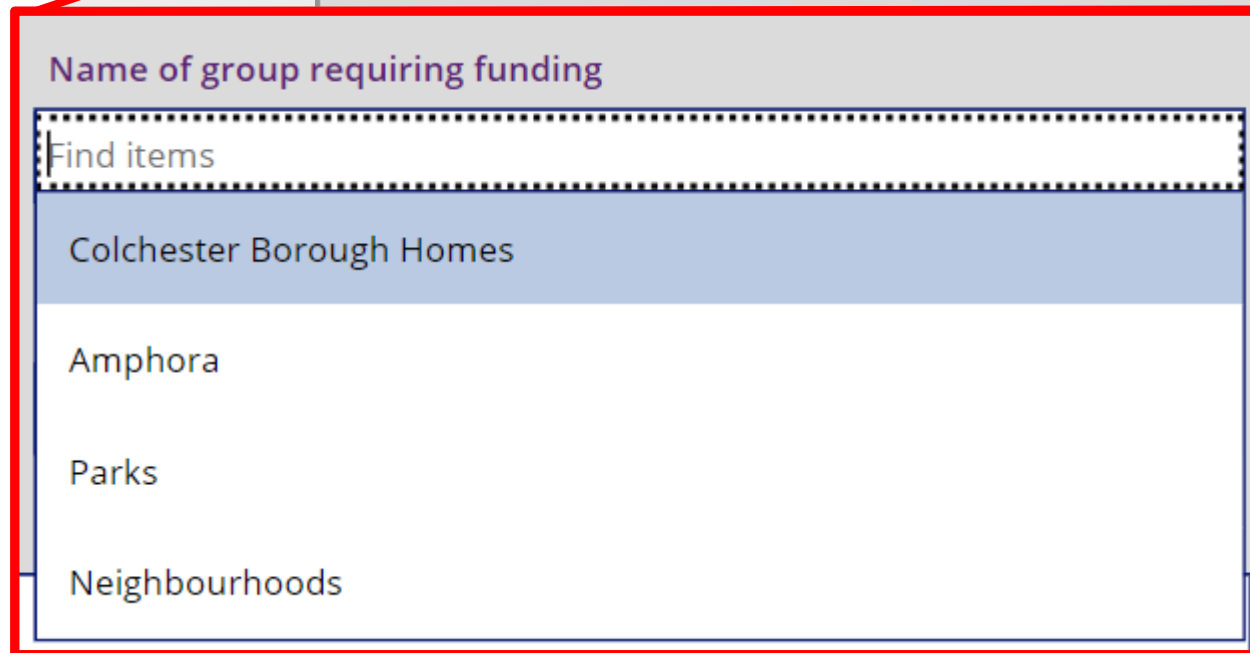
\* How much are you contributing? (£)

Your contribution must not be empty

Name of Council Officer who has approved your request

\* Are you making a joint application with other Ward Councillors?

\* How will your contribution be spent?



Name of group requiring funding

Find items

Colchester Borough Homes

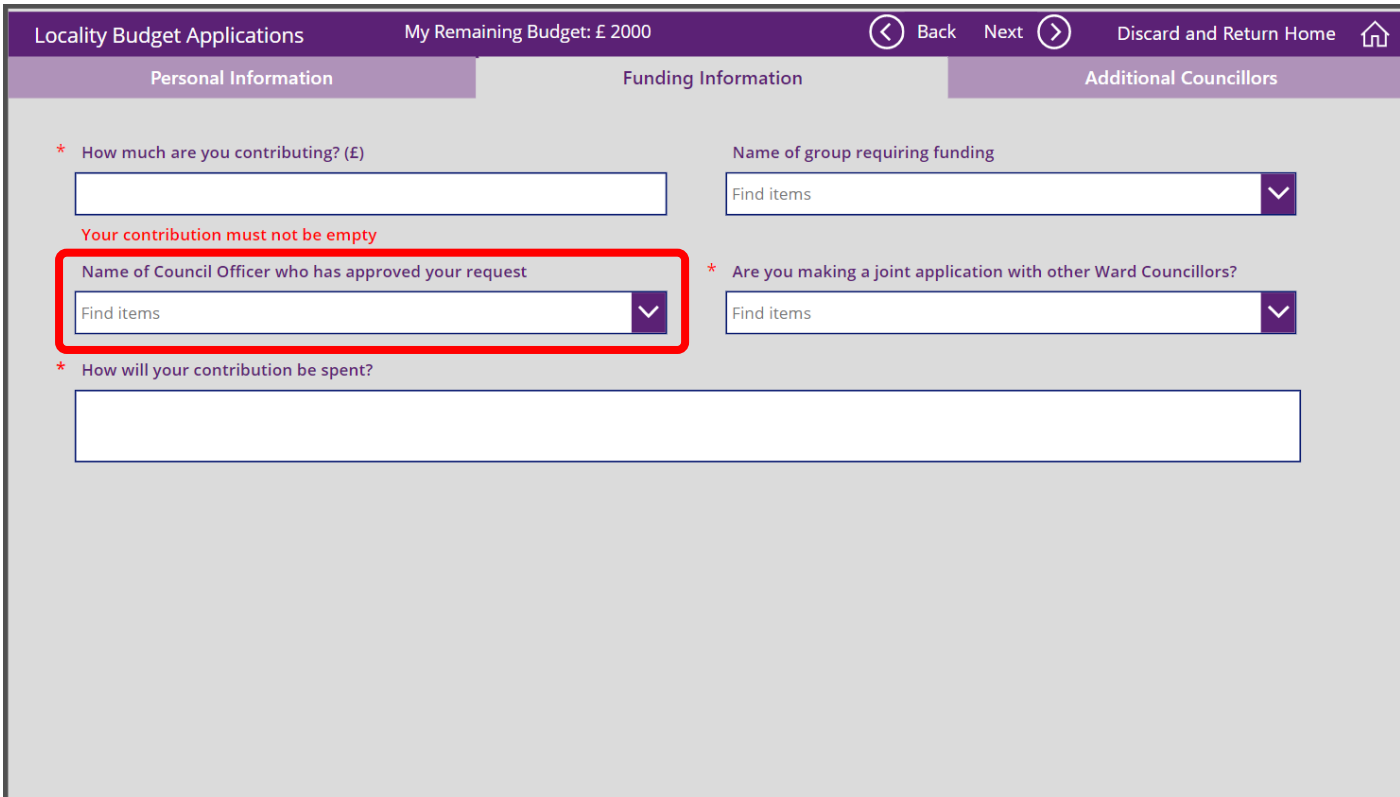
Amphora

Parks

Neighbourhoods

**Step 7:** In the Name of Council Officer who has approved your request field, the locality budget email address will be prepopulated.

When you submit your application, it will go through the following steps;



The screenshot shows the 'Funding Information' tab of the 'Locality Budget Applications' form. The form includes the following fields:

- How much are you contributing? (£)**: A text input field with a red asterisk and a red error message below it: "Your contribution must not be empty".
- Name of group requiring funding**: A dropdown menu with "Find items" selected.
- Name of Council Officer who has approved your request**: A dropdown menu with "Find items" selected, highlighted by a red rectangular box.
- Are you making a joint application with other Ward Councillors?**: A dropdown menu with "Find items" selected, marked with a red asterisk.
- How will your contribution be spent?**: A large text input field with a red asterisk.

Navigation buttons at the top include "Back", "Next", "Discard and Return Home", and a home icon. The remaining budget is shown as "My Remaining Budget: £ 2000".

- 1. Mark Healy/Tom Tayler** will receive a notification about the application. They will check the application.
- Once checked and confirmed the application will be sent to an **Approver**.
- If the Approver is satisfied with the application the details will then be sent to the **Accounts Payable Team** who will make arrangements for the application to be paid.

**Step 8:** Complete the remaining fields.

The remaining fields are;

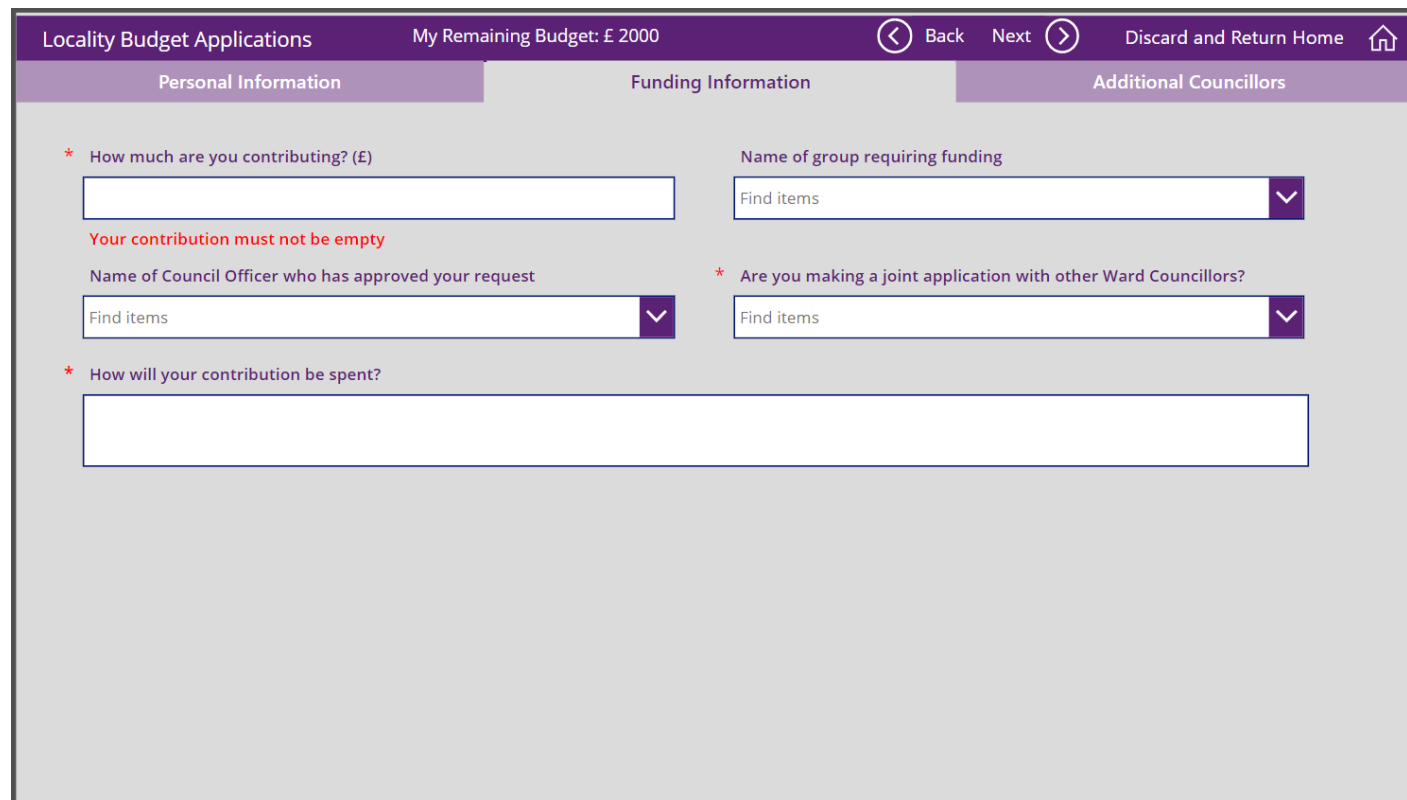
### Are you making a joint application with other ward councillors?

This is a simply yes or no drop-down field.

By selecting yes to this you will be able to add details of additional councillors in the next screen on the form.

### How will your contribution be spent?

This mandatory field is a simple text box where you should provide more details about your contribution.

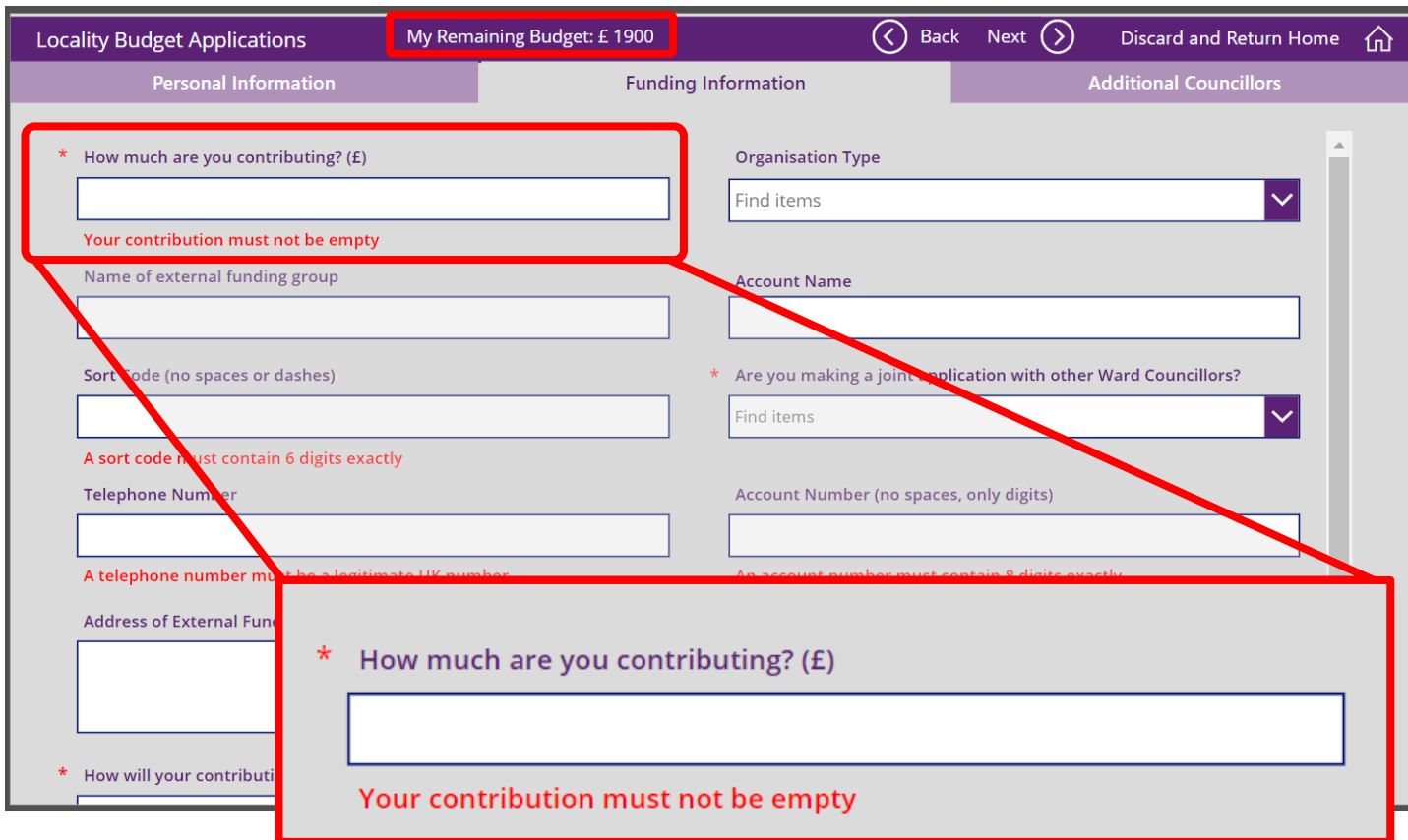


The screenshot shows the 'Funding Information' tab of the 'Locality Budget Applications' form. The page title is 'My Remaining Budget: £ 2000'. The navigation bar includes 'Back', 'Next', and 'Discard and Return Home' buttons. The form is divided into three sections: 'Personal Information', 'Funding Information', and 'Additional Councillors'. The 'Funding Information' section contains the following fields:

- \* How much are you contributing? (£)**: A text input field with a red error message below it: "Your contribution must not be empty".
- Name of group requiring funding**: A dropdown menu with "Find items" and a downward arrow.
- Name of Council Officer who has approved your request**: A dropdown menu with "Find items" and a downward arrow.
- \* Are you making a joint application with other Ward Councillors?**: A dropdown menu with "Find items" and a downward arrow.
- \* How will your contribution be spent?**: A large text input field.

# Payment to an External Organisation

For a payment to an external organisation, you need more information to ensure the payment is made correctly. This is represented in the form as you will see there are more fields to complete.



Locality Budget Applications **My Remaining Budget: £ 1900** Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* How much are you contributing? (£)  
  
Your contribution must not be empty

Name of external funding group

Sort code (no spaces or dashes)  
  
A sort code must contain 6 digits exactly

Telephone Number  
  
A telephone number must be a legitimate UK number

Address of External Funding Organisation

\* How will your contribution be used?

Organisation Type  
Find items

Account Name

\* Are you making a joint application with other Ward Councillors?  
Find items

Account Number (no spaces, only digits)  
  
An account number must contain 8 digits exactly

\* How much are you contributing? (£)  
  
Your contribution must not be empty

**Step 5:** Enter how much you wish to contribute.

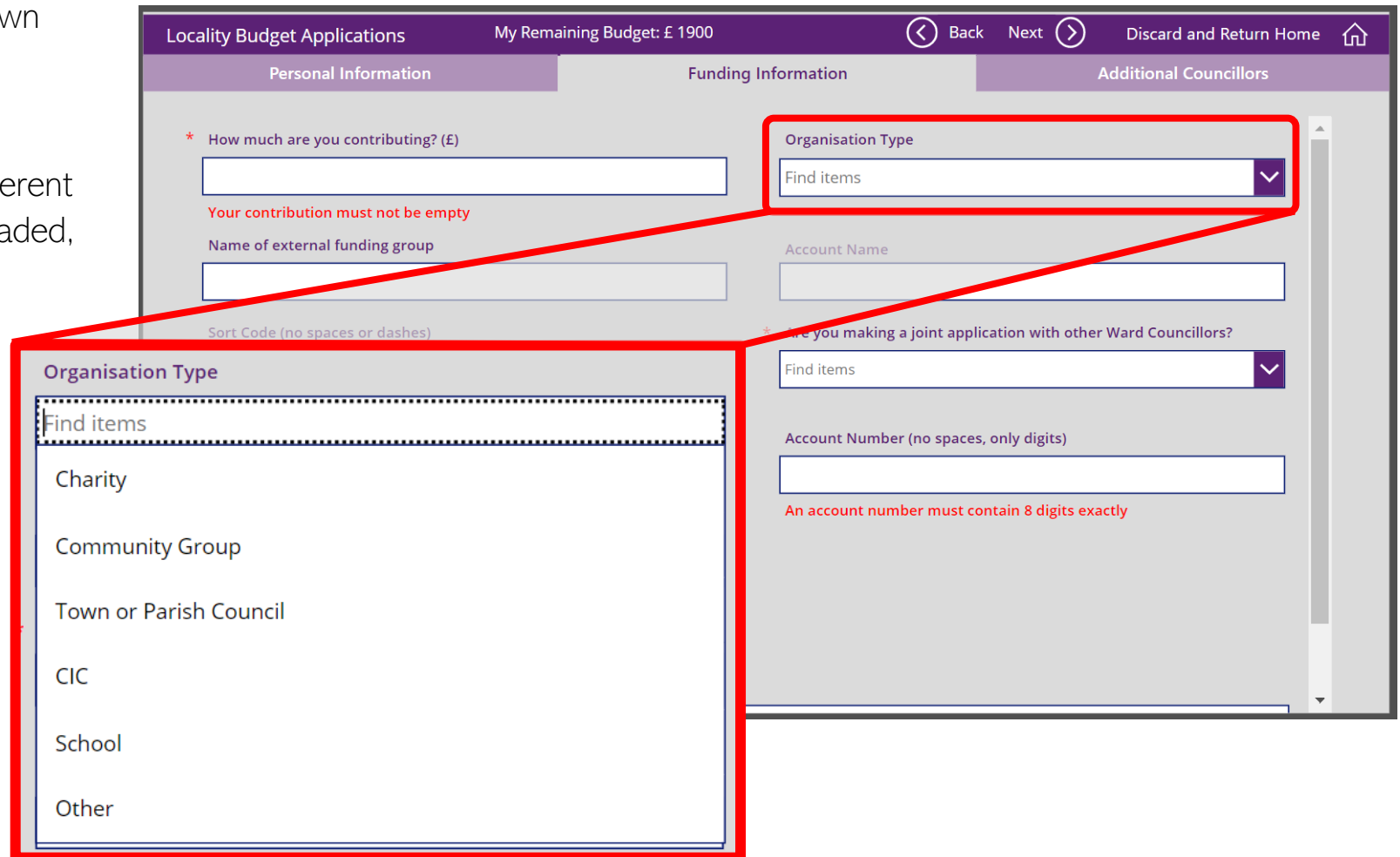
In the contribution field you will see a warning message, you will not be able to complete this application without information in this box.

You are also not able to contribute more than your remaining locality budget.

You can check how much is remaining at the top of the screen.

**Step 6:** Use the drop-down menu to select the **Organisation Type**.

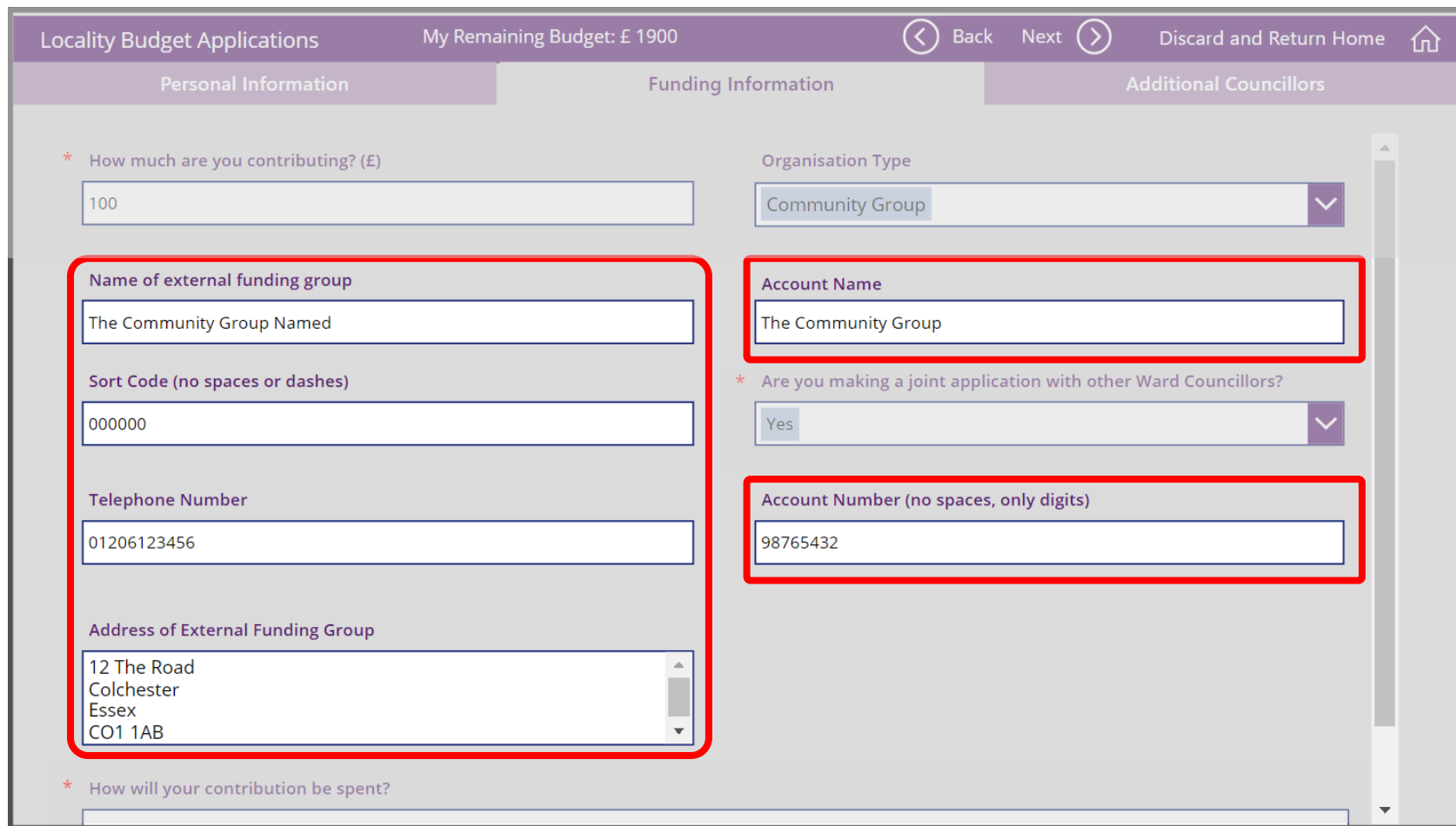
There are a variety of different organisation types pre-loaded, however in the event that the organisation does not fit these, there is an option for other at the bottom of the list.



The screenshot displays the 'Locality Budget Applications' form with a purple header bar. The header includes 'My Remaining Budget: £ 1900' and navigation buttons for 'Back', 'Next', and 'Discard and Return Home'. The form is divided into three tabs: 'Personal Information', 'Funding Information', and 'Additional Councillors'. The 'Funding Information' tab is active. A red box highlights the 'Organisation Type' dropdown menu, which is currently set to 'Find items'. A larger red box shows the expanded dropdown menu with the following options: 'Charity', 'Community Group', 'Town or Parish Council', 'CIC', 'School', and 'Other'. Other form fields visible include 'How much are you contributing? (£)', 'Name of external funding group', 'Sort Code (no spaces or dashes)', 'Account Name', and 'Account Number (no spaces, only digits)'. A red error message states 'Your contribution must not be empty' and another states 'An account number must contain 8 digits exactly'.

## Step 7: Add the Organisation details.

There are six fields for adding the details of the organisation. This information is important to ensure that any money goes to the correct account, please check the details carefully before submitting your application.



Locality Budget Applications My Remaining Budget: £ 1900

Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* How much are you contributing? (£)  
100

Organisation Type  
Community Group

Name of external funding group  
The Community Group Named

Sort Code (no spaces or dashes)  
000000

Telephone Number  
01206123456

Address of External Funding Group  
12 The Road  
Colchester  
Essex  
CO1 1AB

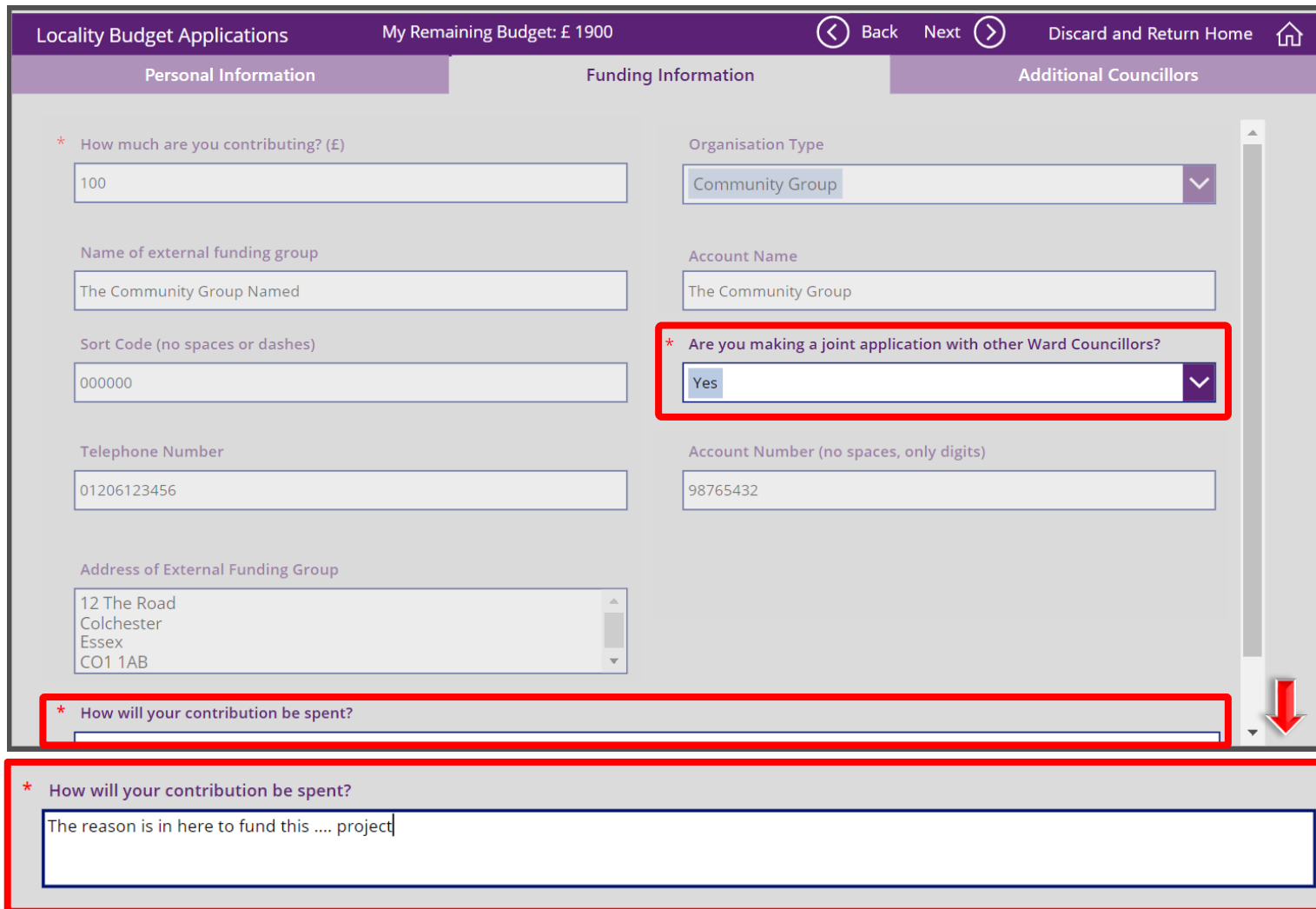
Account Name  
The Community Group

\* Are you making a joint application with other Ward Councillors?  
Yes

Account Number (no spaces, only digits)  
98765432

\* How will your contribution be spent?

**Step 8:** Complete the remaining fields. The remaining fields are;



Locality Budget Applications My Remaining Budget: £ 1900 Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* How much are you contributing? (£)  
100

Name of external funding group  
The Community Group Named

Sort Code (no spaces or dashes)  
000000

Telephone Number  
01206123456

Address of External Funding Group  
12 The Road  
Colchester  
Essex  
CO1 1AB

Organisation Type  
Community Group

Account Name  
The Community Group

\* Are you making a joint application with other Ward Councillors?  
Yes

Account Number (no spaces, only digits)  
98765432

\* How will your contribution be spent?  
The reason is in here to fund this .... project

### Are you making a joint application with other ward councillors?

This is a simple yes or no drop-down field. By selecting yes to this you will be able to add details of additional councillors in the next screen on the form.

### How will your contribution be spent?

This mandatory field is a simple text box where you should provide more details about your contribution.

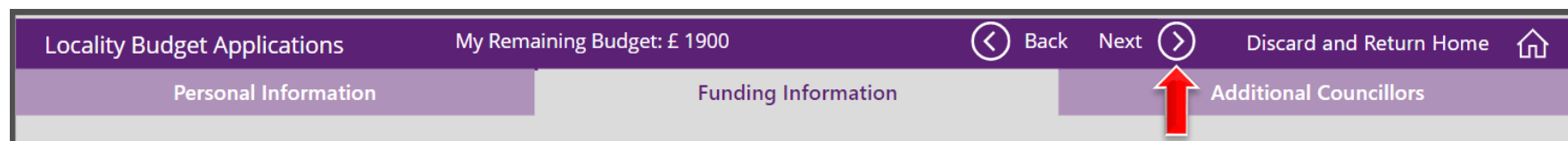
You will need to scroll down the screen using the scroll bar to view the whole field.



# Additional Councillors

**Step 9:** Move to the **Additional Councillors** Screen

When you have completed the **Funding Information Screen** use the navigation button at the top of the screen and select next. This will take you to the **Additional Councillors** screen.



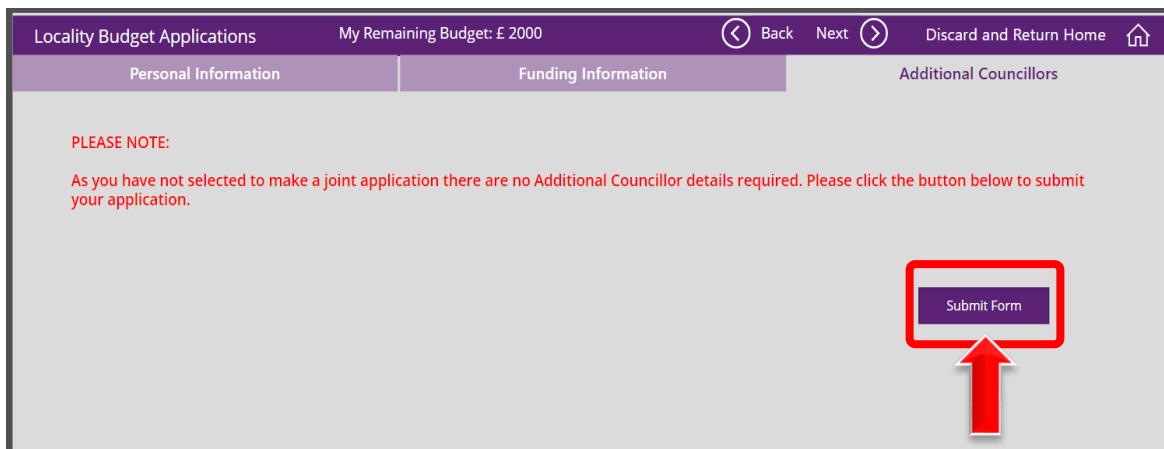
The Additional Councillors screen will change depending on your answer to the question '**Are you making a joint application with other ward councillors?**'

[No – Not a Joint Application](#)

[Yes – Joint Application with other Councillors](#)

# No Additional Councillors

If you have answered, no to the question ‘**Are you making a joint application with other ward councillors?**’ you will not need to add any additional information to the Additional Councillors screen.



Locality Budget Applications My Remaining Budget: £ 2000 Back Next Discard and Return Home


Personal Information Funding Information Additional Councillors

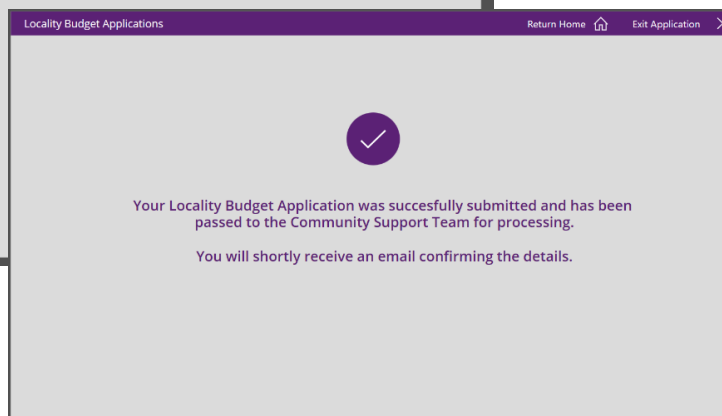
**PLEASE NOTE:**  
As you have not selected to make a joint application there are no Additional Councillor details required. Please click the button below to submit your application.

Submit Form


You are now able to submit your application by selecting the **Submit Form** button.

You will receive a pop up on your screen to confirm this has been successful.

You can choose to select **Return Home**  to make another application, or close the app.



Locality Budget Applications Return Home Exit Application



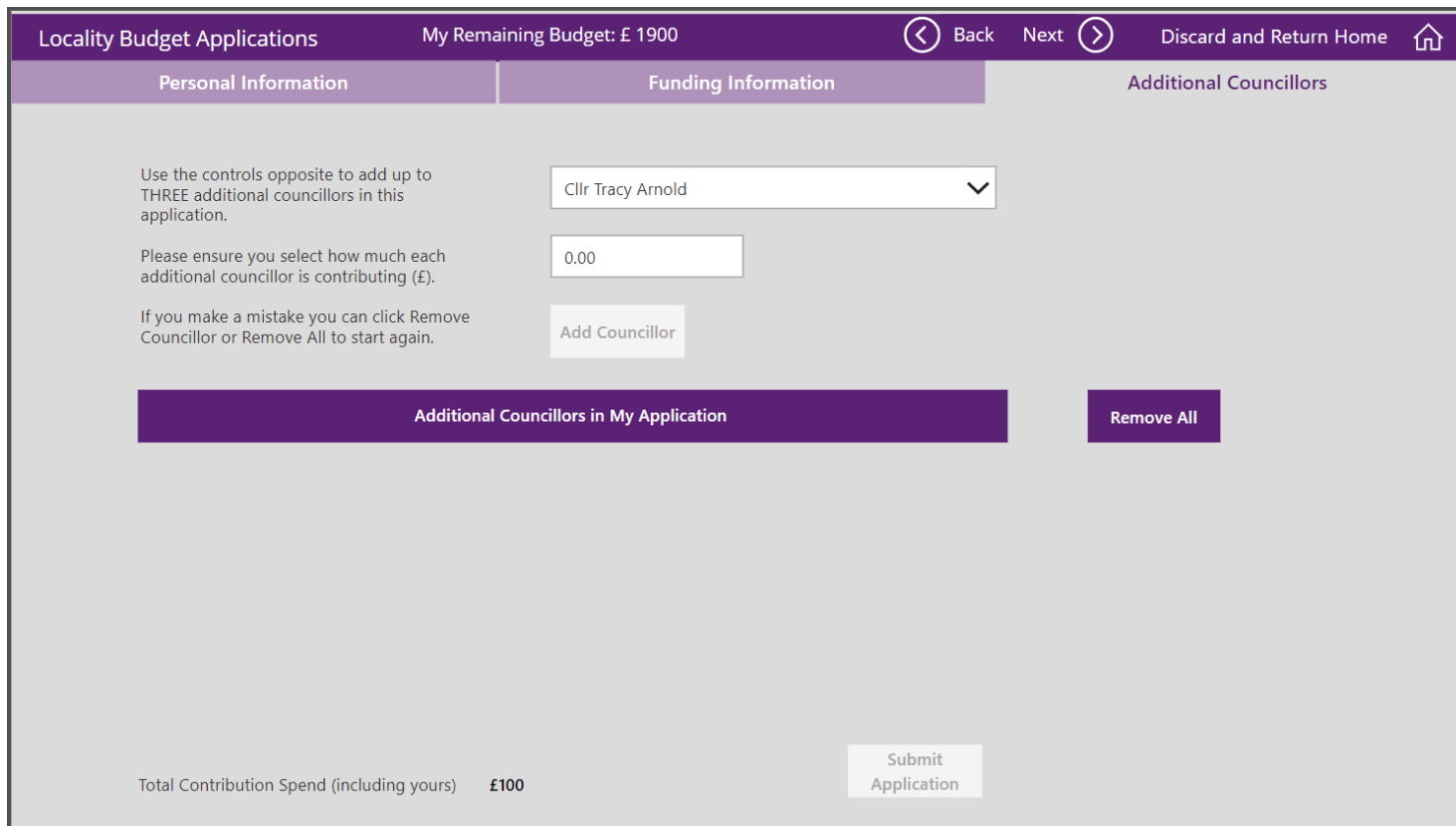
Your Locality Budget Application was successfully submitted and has been passed to the Community Support Team for processing.

You will shortly receive an email confirming the details.

# Joint Application

If you have answered, yes to the question ‘**Are you making a joint application with other ward councillors?**’ you will

need to add more information on the Additional Councillors screen.

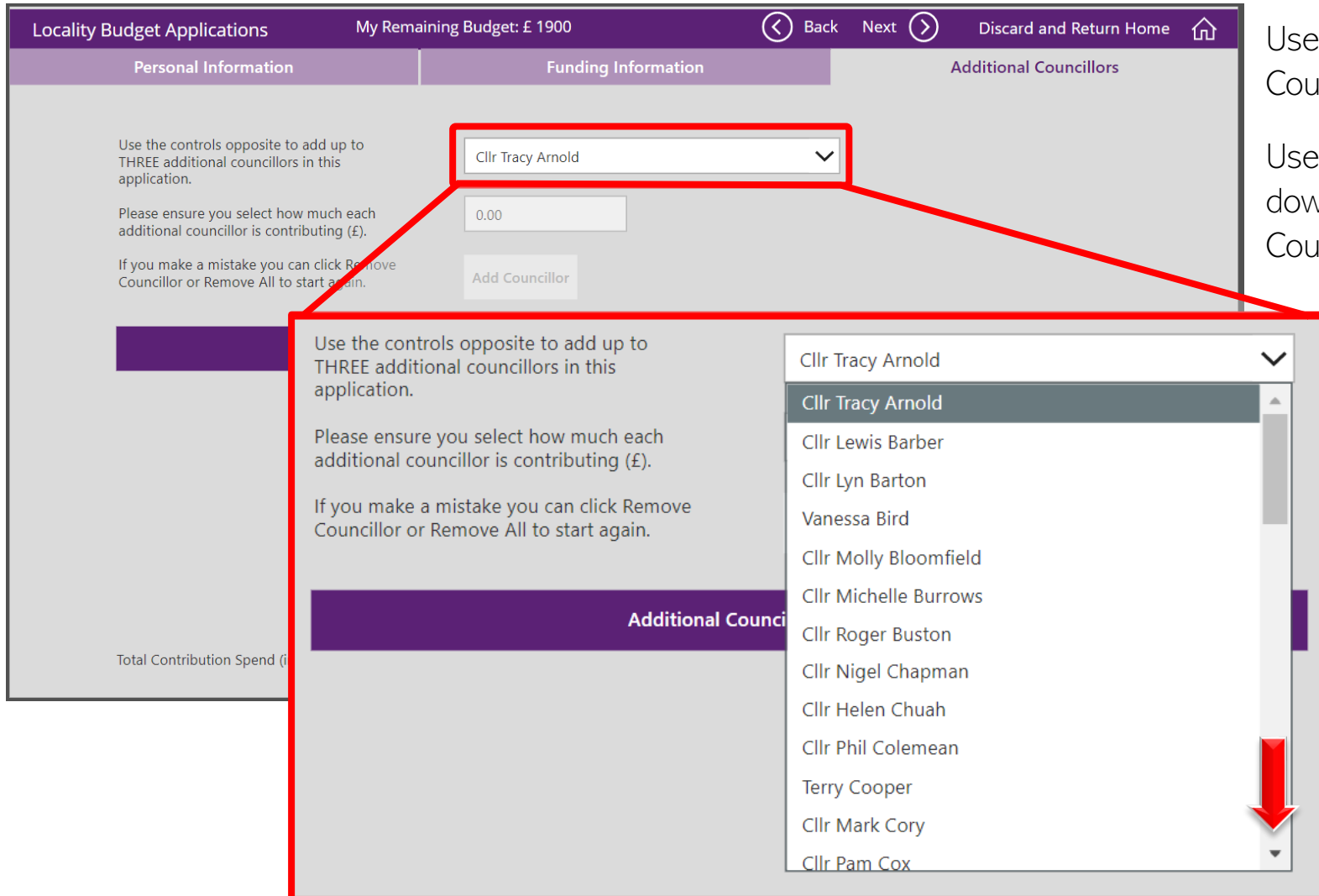


The screenshot shows the 'Additional Councillors' screen within the 'Locality Budget Applications' system. The page has a purple header with navigation options: 'Back', 'Next', and 'Discard and Return Home'. Below the header, there are three tabs: 'Personal Information', 'Funding Information', and 'Additional Councillors'. The 'Additional Councillors' tab is active. The main content area contains instructions: 'Use the controls opposite to add up to THREE additional councillors in this application.', 'Please ensure you select how much each additional councillor is contributing (£).', and 'If you make a mistake you can click Remove Councillor or Remove All to start again.' There is a dropdown menu with 'Cllr Tracy Arnold' selected, a text input field with '0.00', and an 'Add Councillor' button. Below these is a purple bar labeled 'Additional Councillors in My Application' and a 'Remove All' button. At the bottom, there is a 'Submit Application' button and a total contribution spend of £100.

You are able to add **Three** additional councillors to an application.

The list of Councillors appears alphabetically by surname and will default to the first councillor in the list.

**To note:** You are not able to accidentally add a councillor to the application. Users need to actively choose to add a councillor using a button attach them to the application.

**Step 10:** Add any additional councillors.

Locality Budget Applications My Remaining Budget: £ 1900 Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

Use the controls opposite to add up to THREE additional councillors in this application.

Please ensure you select how much each additional councillor is contributing (£).

If you make a mistake you can click Remove Councillor or Remove All to start again.

0.00

Add Councillor

Use the controls opposite to add up to THREE additional councillors in this application.

Please ensure you select how much each additional councillor is contributing (£).

If you make a mistake you can click Remove Councillor or Remove All to start again.

Additional Councillors

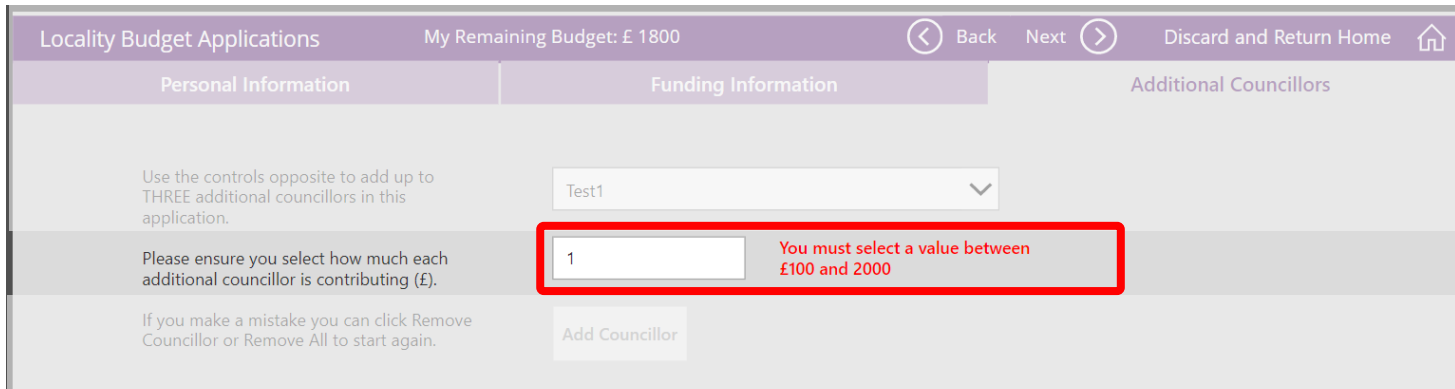
Total Contribution Spend (€)

- Cllr Tracy Arnold
- Cllr Tracy Arnold
- Cllr Lewis Barber
- Cllr Lyn Barton
- Vanessa Bird
- Cllr Molly Bloomfield
- Cllr Michelle Burrows
- Cllr Roger Buston
- Cllr Nigel Chapman
- Cllr Helen Chuah
- Cllr Phil Colemean
- Terry Cooper
- Cllr Mark Cory
- Cllr Pam Cox

Use the drop-down list to add a Councillor to the application.

Use the scroll bar in the drop-down box to see the full list of Councillors.

## Step 11: Add the amount of additional contribution.



Locality Budget Applications My Remaining Budget: £ 1800

Personal Information Funding Information Additional Councillors

Use the controls opposite to add up to THREE additional councillors in this application.

Please ensure you select how much each additional councillor is contributing (£).

If you make a mistake you can click Remove Councillor or Remove All to start again.

Test1

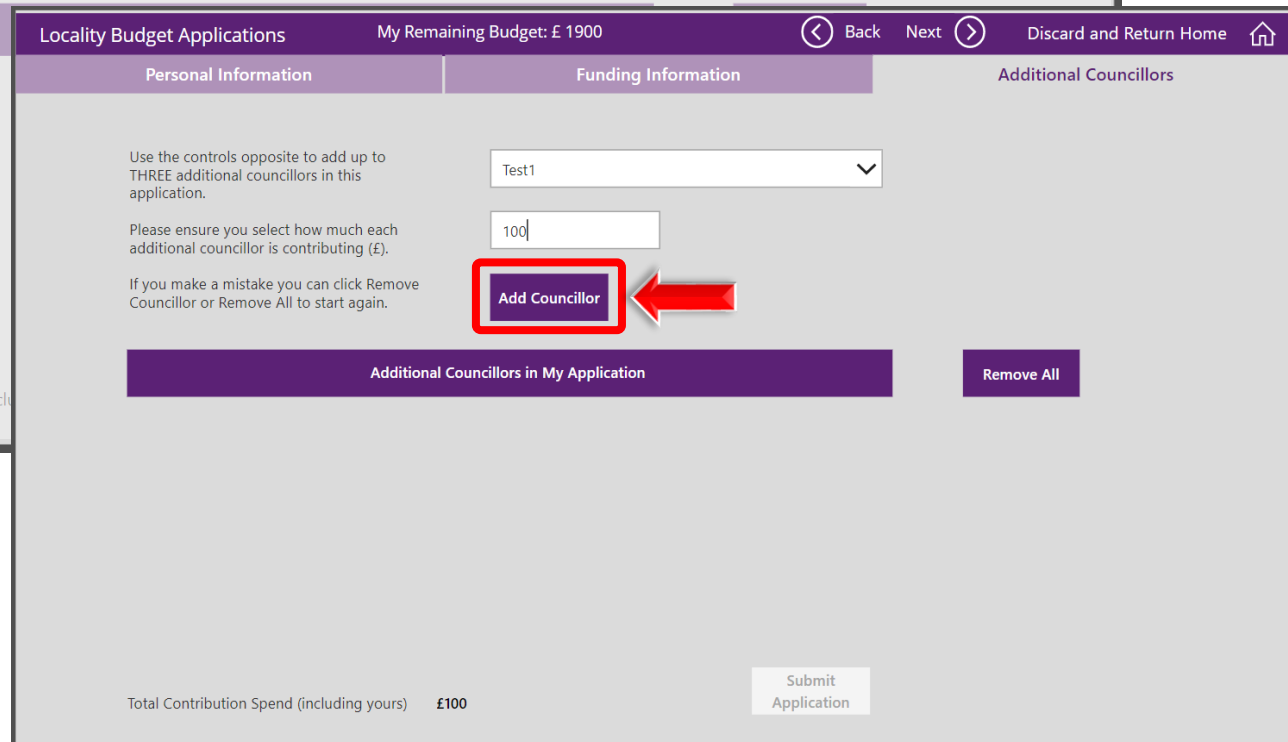
1

You must select a value between £100 and 2000

Add Councillor

You are required to enter an amount between £100 and £2000.

A message will be displayed in **red** if the amount you have entered is not valid, and you will not be able to attach them to the application.



Locality Budget Applications My Remaining Budget: £ 1900

Personal Information Funding Information Additional Councillors

Use the controls opposite to add up to THREE additional councillors in this application.

Please ensure you select how much each additional councillor is contributing (£).

If you make a mistake you can click Remove Councillor or Remove All to start again.

Test1

100

Add Councillor

Additional Councillors in My Application Remove All

Total Contribution Spend (including yours) £100

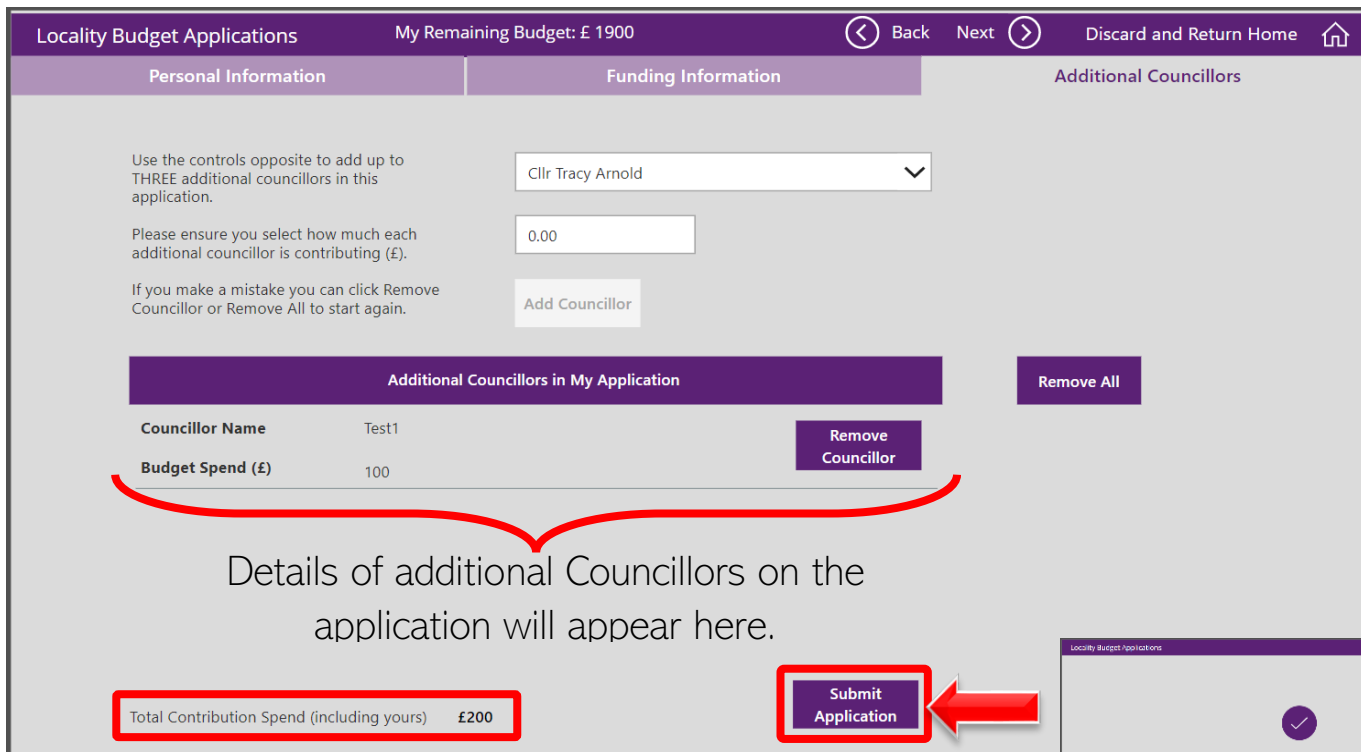
Submit Application

Once a valid amount has been added to the contribution field the **Add Councillor** button will become active.

Click **Add Councillor**.

## Step 12: Review application and submit.

Any additional Councillors you have added to the application can be seen in the **'Additional Councillors in My Application'** area of your screen. You can repeat Step 11 to add two further councillors if you wish to do so.



Locality Budget Applications My Remaining Budget: £ 1900 Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

Use the controls opposite to add up to THREE additional councillors in this application.

Please ensure you select how much each additional councillor is contributing (£).

If you make a mistake you can click Remove Councillor or Remove All to start again.

Clr Tracy Arnold

0.00

Add Councillor

Remove All

Additional Councillors in My Application	
Councillor Name	Test1
Budget Spend (£)	100

Remove Councillor

Details of additional Councillors on the application will appear here.

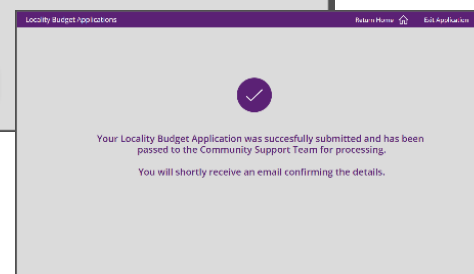
Total Contribution Spend (including yours) £200

Submit Application

A total of the locality budget contributions will appear at the bottom of this screen.

If you have added a Councillor or the wrong contribution amount by mistake you can press the **Remove Councillor button**.

You are now able to submit your application by selecting the **Submit Form** button.



You will receive a pop up on your screen to confirm this has been successful.

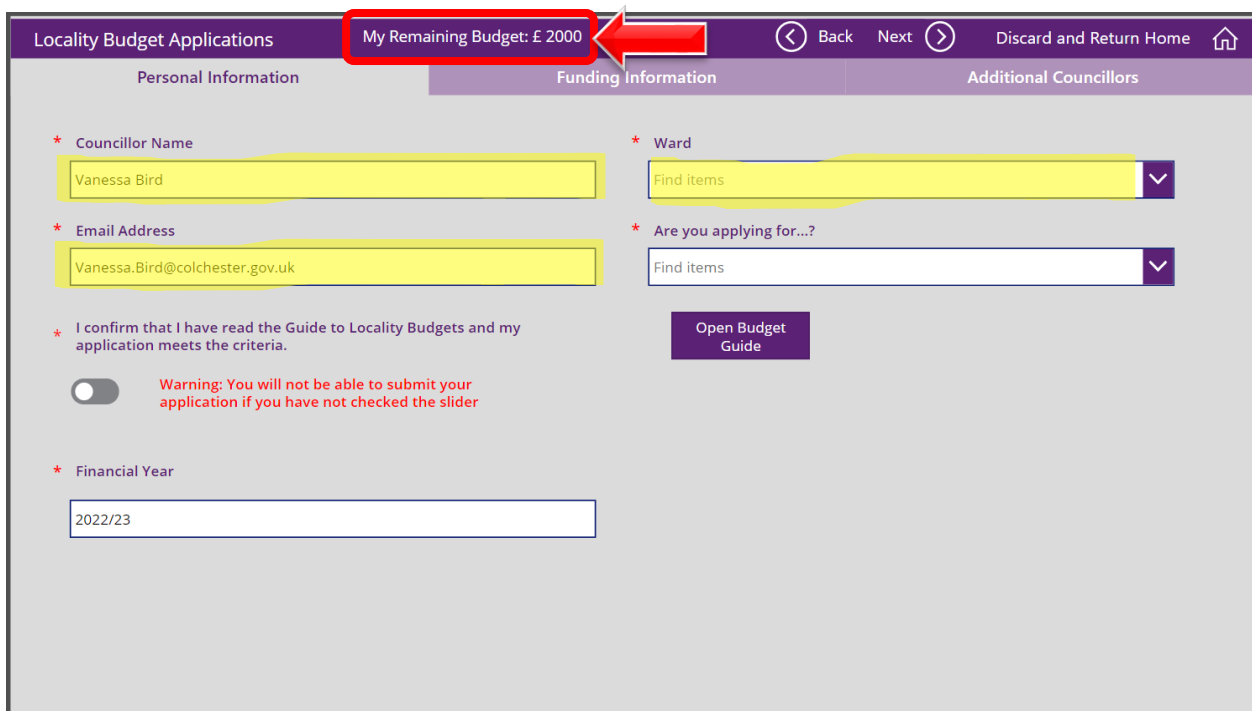
You can choose to select **Return Home**  to make another application, or close the app.

# Applications for Other Councillors

There may be occasions when you may need to assist other Councillors and submit a locality budget application on their behalf.

There are some important points to remember when submitting an application for someone else.

1. Make sure the details entered on the **Personal Information** screen are related to the councillor making the



Locality Budget Applications

My Remaining Budget: £ 2000

Back Next Discard and Return Home

Personal Information Funding Information Additional Councillors

\* Councillor Name  
Vanessa Bird

\* Ward  
Find items

\* Email Address  
Vanessa.Bird@colchester.gov.uk

\* Are you applying for...?  
Find items

\* I confirm that I have read the Guide to Locality Budgets and my application meets the criteria.  
 Warning: You will not be able to submit your application if you have not checked the slider

\* Financial Year  
2022/23

Open Budget Guide

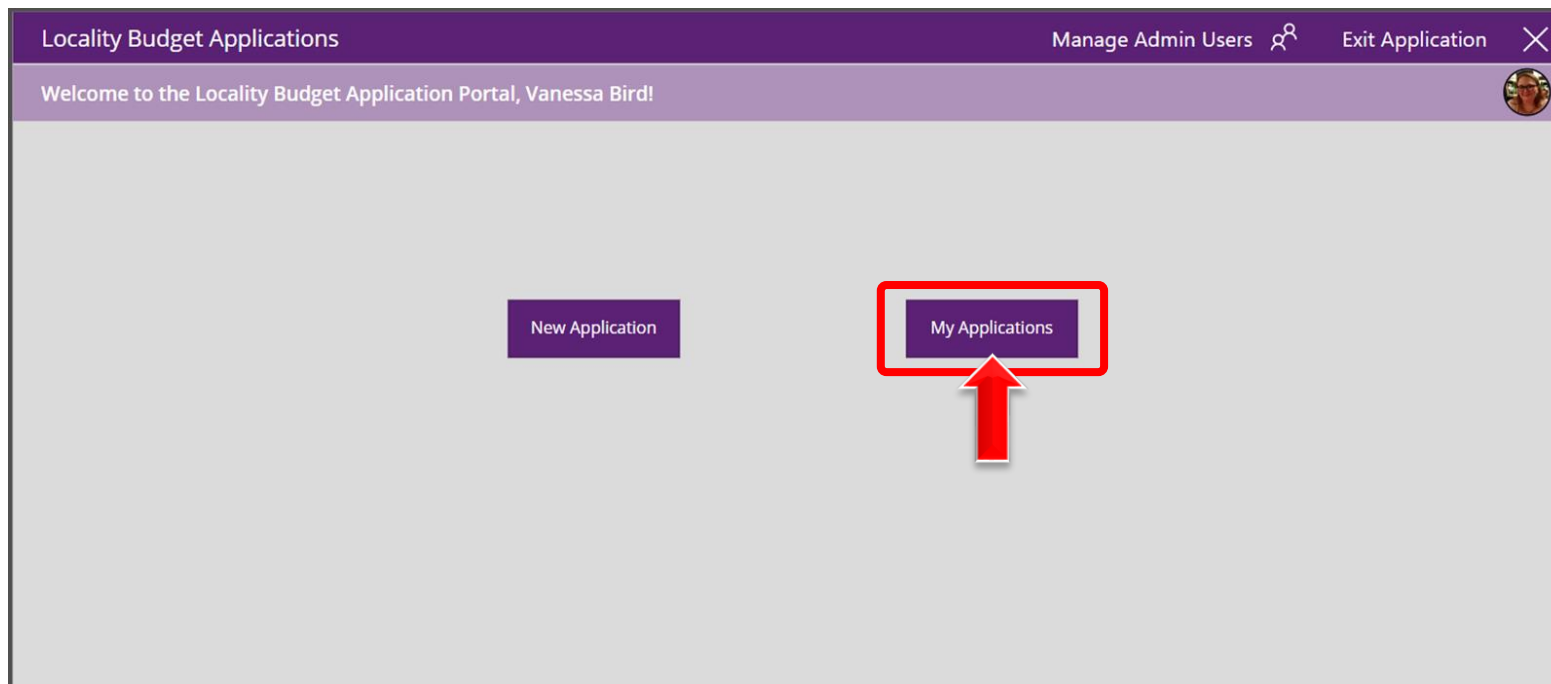
application, not you. Although these will have your details entered automatically, you can override this with the details of a colleague when making an application on their behalf.

2. The **Remaining Budget** information at the top of the app screen, is the amount remaining for the logged in user, not the name entered into the Councillor Name field.

If you are logged in and are completing an application for a colleague, this is **YOUR** remaining budget not theirs.

# Viewing your applications

Once you have submitted an application you can view all of your applications and check your remaining locality budget by selecting **My Applications**.






Your existing applications will be shown in a list, with details of your current spend against your budget and remaining amount available appearing at the top of the screen.



Incident Reporting - My Reports & Investigations

Return to Home Screen  Exit Application 

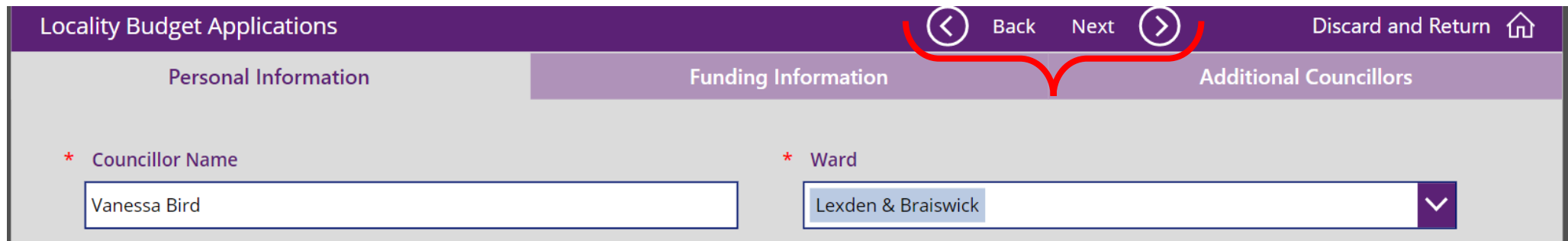
All of your previously submitted applications can be seen in the list below 

**Total spend in the current financial year : £ 200** **Remaining Budget : £ 1800**




ID	Year	Application Type	Funding Group	Contribution	Application Date	Status
31	2022/23	Payment to Council Department	Neighbourhoods	£ 100	14/03/2023 14:08	In Progress >
32	2022/23	Payment to an External Organisation	The Community Group Named	£ 100	14/03/2023 14:21	In Progress >

To view your application in more detail, click the arrow button at the end of the list item you wish to view.

The application will then open, and you can use the **Next** and **Back** buttons to view the details in full.



Locality Budget Applications

 Back  Discard and Return 

Personal Information Funding Information Additional Councillors

\* Councillor Name

\* Ward