

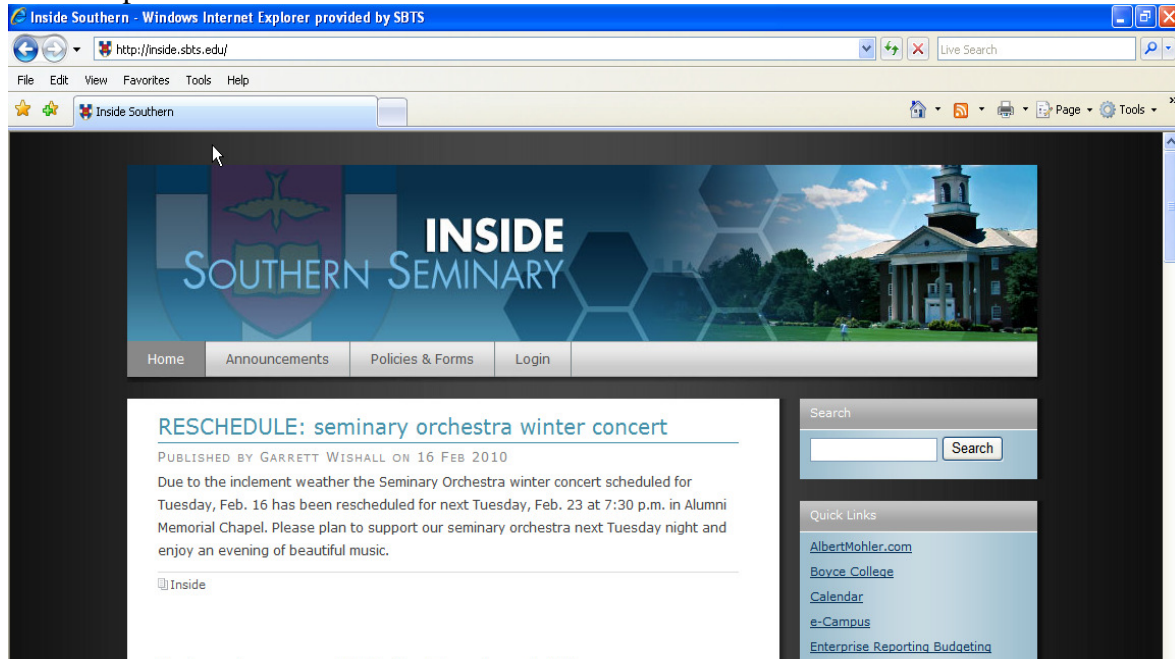


# **The Southern Baptist Theological Seminary**

## **Enterprise Reporting User Guide For Viewing and Printing Budget Reports**

## LINK TO ENTERPRISE REPORTING

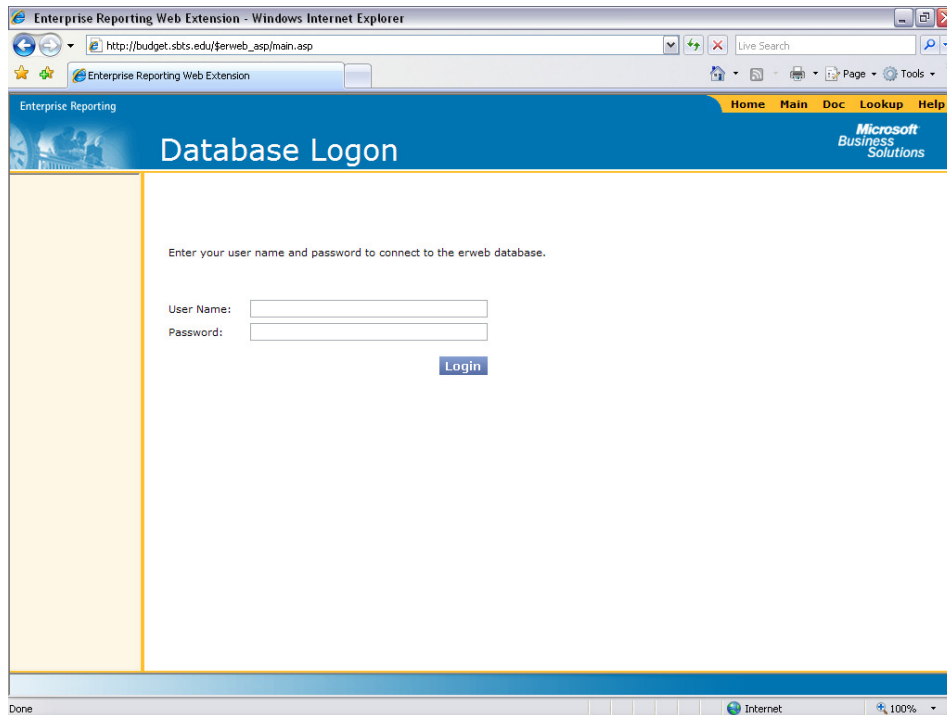
Go to <http://inside.sbts.edu>



Click Enterprise Reporting Budgeting in the Quick Links.

## LOGGING IN

Enter your user name and password to log into Enterprise Reporting.



**NOTE: The Enterprise Reporting Web Extension will automatically log you out after 20 minutes of inactivity.**

## **SET DISPLAY SETTINGS**

Check to make sure your display settings are set up properly...select Options – Display Settings, and store each of the settings to those shown below.

**NOTE: This will need to be done the first time you log into Enterprise Reporting from your personal computer. Also, if you log into Enterprise Reporting from another computer, the display settings will need to be set again because they are computer-specific.**

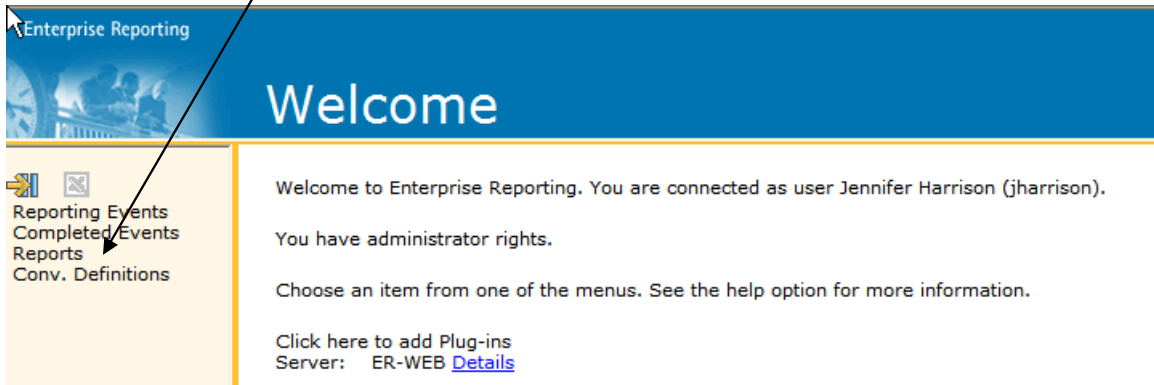
The screenshot shows the 'Options' page in the Enterprise Reporting web application. The page title is 'Options' and the user is identified as 'Jennifer Harrison (jharrison)'. The settings are displayed in a table-like format with various controls like dropdown menus, checkboxes, and a 'Store' button. A navigation menu on the left includes 'Reporting Events', 'Completed Events', 'Reports', 'Conv. Definitions', 'Statistics', 'Options', 'Display Settings', 'Change Password', 'User Management', 'Applic. Settings', 'Plug-Ins', 'Reset logon', 'E-mail', and 'Exit'. A black arrow points from the text above to the 'Display Settings' link in the left navigation menu.

The display settings you need to change are listed below.

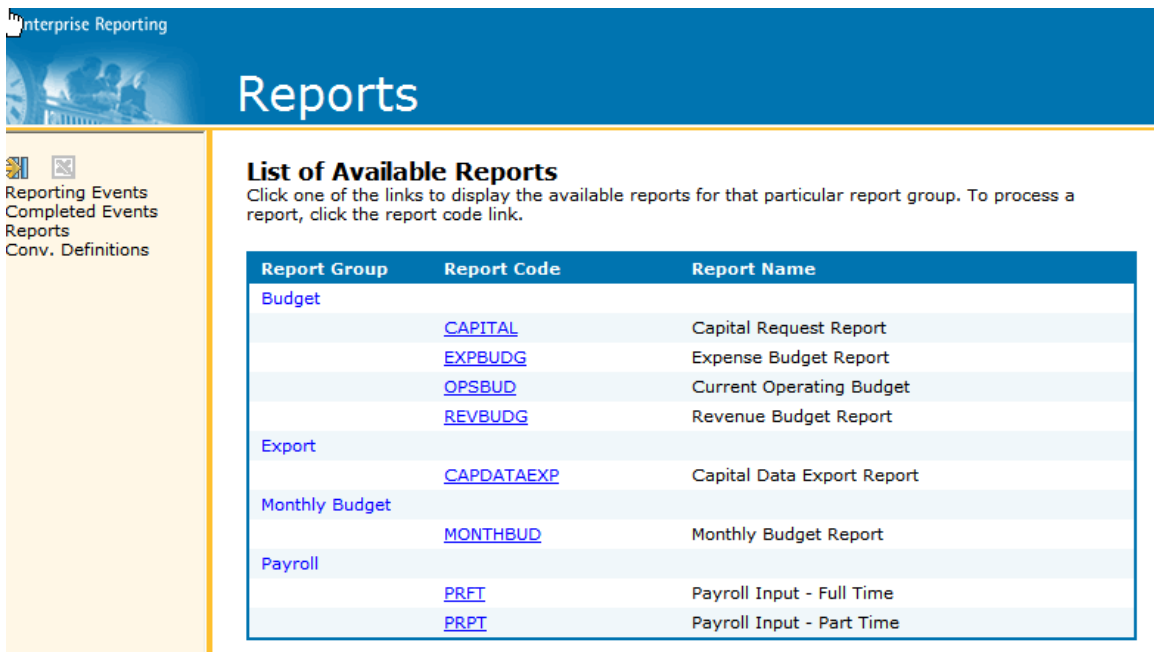
- Make sure the Integrated box is not checked.
- Lookup for Variables: Sorted, Code and Name
- Date/Time Format: mm/dd/yyyy, AM/PM
- Form/Report Numeric Format: 1,000.00
- Error Messages: Default
  
- Click the **Store** button to save the changes to your display settings!

## TO VIEW REPORTS

Choose the Reports selection on the left hand side of the browser.



You will be presented with a list of reports that have been made accessible via the web.



Purpose of each report:

- **CAPITAL – Capital Request Report**  
This report displays all capital requests and the approval given for each request.
- **EXPBUDG – Expense Budget Report**  
This report displays all expenses (other than salaries) within a particular department. You can view all requested increases or decreases, the approval given for each request, and the monthly allocation.

- **MONTHBUD – Monthly Budget Report**  
This report displays month-to-date and year-to-date actual amounts spent and budget amounts, the total annual budget amounts, and the remaining budget amounts for each revenue and expense account within the selected department.
- **REVBUDG – Revenue Budget Report**  
This report displays all revenue within a particular department. You can view all requested increases or decreases, the approval given for each request, and the monthly allocation.
- **OPSBUD – Current Operating Budget**  
This report displays the entire operating budget for the selected department...each revenue and expense account, and the resulting net operating budget.
- **PRFT – Payroll Input – Full Time**  
This report displays all existing and potential new full-time salaried and hourly employees, salary amounts included.
- **PRPT – Payroll Input – Part Time**  
This report displays existing part time salaries in total (by account number), any requested increases or decreases, and any monthly allocations specified. If no monthly allocation is displayed, the total amount will be allocated evenly per month.

Select the report you wish to view. When prompted to enter values, make the following selections, and click the Process button:

- Enter Budget Year – 1001 (August 2010)
- Enter Budget Version – B1 (Budget v1)
- Enter Dept/Cost Center – Enter the department you wish to view.

The screenshot shows the 'Enterprise Reporting' interface. At the top, there is a blue header with the text 'Enterprise Reporting' and 'Reports'. Below this, on the left, is a navigation pane with icons and the text 'Reporting Events', 'Completed Events', 'Reports', and 'Conv. Definitions'. The main area displays a 'Variable Dialog for Report 'EXPBUDG'' with the message 'The selected report requires values for the following variables.' Below this message is a form with three dropdown menus: 'Enter Budget Year' set to '1001 (August 2010)', 'Enter Budget Version' set to 'B1 (Budget v1)', and 'Enter Dept/Cost Center' set to '0310 (Accounting)'. A 'Process' button is located at the bottom right of the form. An arrow from the text above points to the 'Process' button.

**NOTE:** The MONTHBUD report requires selections different than that above. When prompted to enter values for this report, make the following selections, and click the Process button:

- Enter Dept/Cost Center – Enter the department you wish to view.
- Enter Current Actual – Enter the month from the current fiscal year that you wish to view.
- Enter Budget Version – B1 (Budget v1) – for current fiscal year figures
- Enter Fund – 01 (Current Unrestricted Funds) or 02 (Current Restricted Funds)

The screenshot shows the 'Enterprise Reporting' interface. At the top, there is a blue header with the text 'Enterprise Reporting' and 'Reports'. Below the header, on the left, is a navigation menu with icons and the following text: 'Reporting Events', 'Completed Events', 'Reports', and 'Conv. Definitions'. The main content area is titled 'Variable Dialog for Report MONTHBUD' and includes the instruction 'The selected report requires values for the following variables.' Below this, there is a form with four rows of input fields, each with a dropdown arrow:

Please enter values	
Enter Department/Cost Center	0310 (Accounting)
Enter Current Actual	0906 (January 2010)
Enter Budget Version	B (Budget EX)
Enter Fund	01 (Current Unrestricted Funds)

At the bottom right of the form is a blue button labeled 'Process'.

A printable version of each report is available. Select the Printable Version button located on the lower left-hand corner of each report.

Be sure to log out of ER Web when you have finished printing/reviewing your reports. Click on Exit, located in the lower left-hand corner, to log off.