

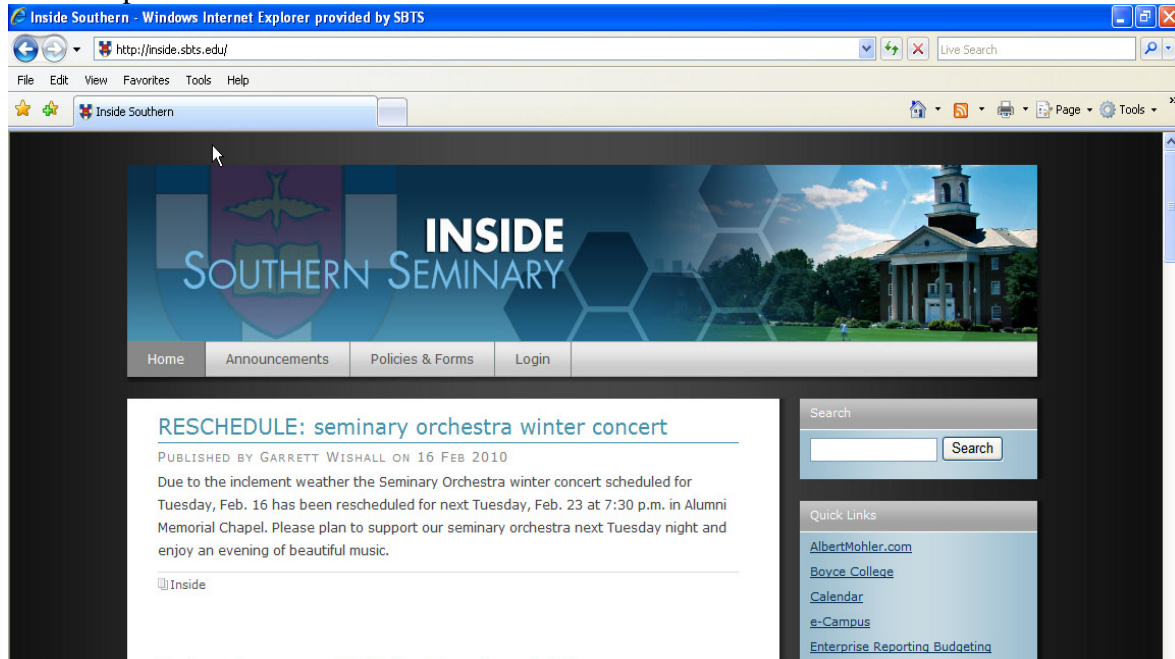


# **The Southern Baptist Theological Seminary**

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

## LINK TO ENTERPRISE REPORTING

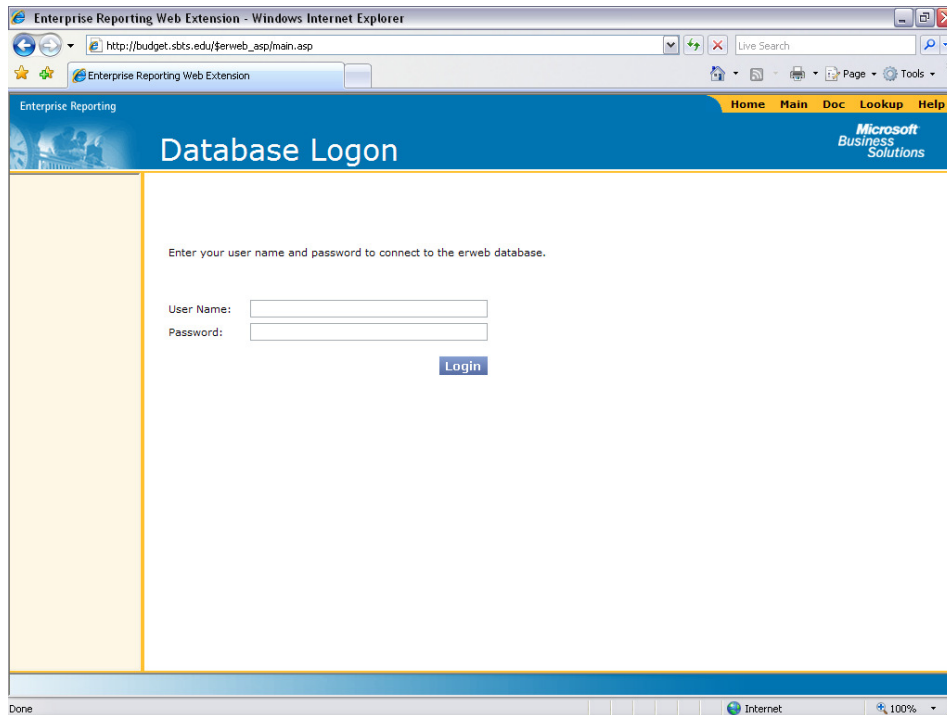
Go to <http://inside.sbts.edu>



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.**

Enterprise Reporting Home Main Doc. Lookup Help

### Options

Microsoft Business Solutions

#### Display Settings for Jennifer Harrison (jharrison)

These settings are saved on your hard disk and are applied each time this computer is used to log on to the Web Extension.

Border Width in Forms:	0
Input Cell Width in Forms:	8 (number) 16 (text)
Include Empty Option in Lookup Cells:	<input type="checkbox"/> Integrated 6 (lookup) Always
Freeze Panes:	Disabled
Image Set:	(Default)
Open Help in New Window:	Yes
Pixel Accuracy in Forms:	No
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

Store

Reporting Events  
Completed Events  
Reports  
Conv. Definitions

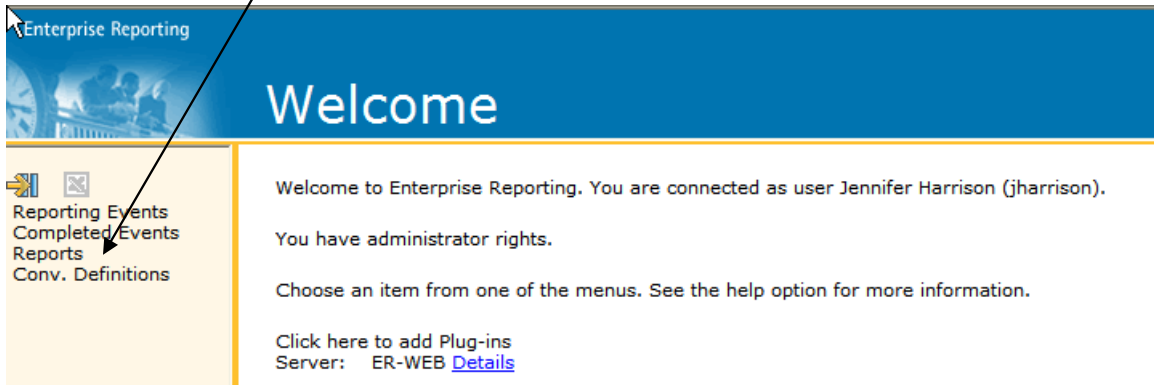
Statistics  
Options  
- Display Settings  
- Change Password  
- User Management  
- Applic. Settings  
- Plug-Ins  
- Reset logon  
E-mail  
Exit

The display settings you need to change are listed below.

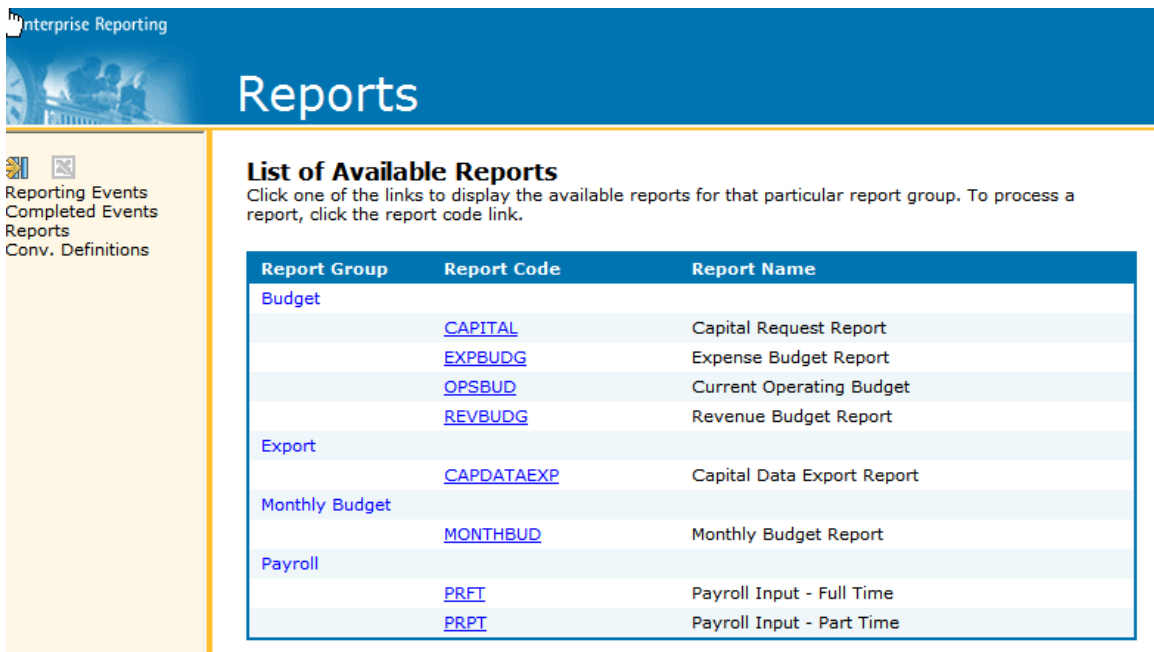
- Make sure the Integrated box is not checked.
- Lookup for Variables: Sorted, Code and Name
- Date/Time Format: mm/dd/yyyy, AM/PM
- Form/Report Numeric Format: 1,000.00
- Error Messages: Default
- Click the **Store** button to save the changes to your display settings!

## 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 following text: 'Reporting Events', 'Completed Events', 'Reports', and 'Conv. Definitions'. The main area displays a dialog box titled 'Variable Dialog for Report 'EXPBUDG'' with the subtitle 'The selected report requires values for the following variables.' The dialog box contains three input fields: 'Enter Budget Year' with a dropdown menu showing '1001 (August 2010)', 'Enter Budget Version' with a dropdown menu showing 'B1 (Budget v1)', and 'Enter Dept/Cost Center' with a dropdown menu showing '0310 (Accounting)'. Below these fields is a 'Process' button. 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 this, 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 instruction 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.