enVisage - Refresher Course Training Manual

Student Guide
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Housekeeping

Course Duration

Facilities

Evacuation procedure

Evaluation Process
Course Objectives

Overview of ECU budget process

Main elements of enVisage

Current system enhancements

Questions and queries

This course is aimed at staff who have used enVisage previously and would like to reinforce their knowledge and find out about recent system enhancements.

The enVisage structure reflects the structure of the Oracle chart of accounts.
The ECU Budget Process

ECU Budget process is made up of two activities:

1) Annual Budget

2) Reforecast Budget

The Annual Budget process is the activity that creates the financial budget for ECU for the next financial year.

The Reforecast Budget process is the activity that analyses and adjusts the annual budget to take into account the actual results achieved up to the time at which the reforecast process is performed.

Analysing the actual results achieved and using them to update the annual budget is intended to create a budget that is a truer representation of the expected results for the remainder of the financial year.
Annual Budget Process

• Income:
  - DEST income
  - Income that is generated solely by Business Unit

• Expenses:
  - Fixed Costs v Variable Cost

• Staffing costs

Annual Budget Process

• There are two broad categories of income:
  1. Centrally allocated income from Dept of Education Science and Training "DEST". This income flows from the faculties through to the schools.
  2. Income generated solely by the business units such as consultancy fees, licences and self funded activities.

• Variable costs vary with the level of activity – an example being student related costs that vary with the number of students enrolled. Fixed costs do not vary with the level of activity – examples are rent and insurance as these cost stays the same regardless of the level of student activity.

• It is important to identify the costs that fall into each category so that we can understand to what extent they will vary with changes i.e. changes to student numbers.

• Data from Alesco the ECU payroll system is uploaded into enVisage prior to the annual budget process. This data is also used for the reforecast budget process as it is not updated prior to this process starting. It is important to check and review salary information because it is the main costs to the University and therefore a crucial part of the budget.
Other Items

USSC: University Services & Support Charge

USC: University Service Charge

Capital purchases

• University Service and Support Charge “USSC” is calculated as a percentage of the faculties’ Equivalent Full Time Student Load “EFTSL” driven revenue and is charged so that the University can fund capital projects, strategic initiatives and administration & support services.

• The University Service Charge “USC” is levied on non-teaching related income and enables business units to contribute to the funding of University overheads. Activities attracting the USC include: research income from other public sector organisations and industry and other commercial activities.

• Faculties can apply via a formal process for an exemption from the USC for up to three years.

• Items considered to be capital generally will be expected to have a value of $5,000 or more and a useful life of greater than one year. Some examples of capital items that may be budgeted – furniture, research equipment, photocopiers and printers.

• To provide supporting information for these budgeted items, a Capital Expenditure Summary Worksheet needs to prepared and submitted.
Reforecast Budget Process

- Revisions to the annual budget
- The budget is updated to recognise the effect of actual results
- Changes to the amount and the phasing of items
- Other movements - changes in Government funding or student numbers
Budget Documentation

- **Budget Guidelines**
- **Budget Timetable**
- **Budget Validation Worksheet**

**Budget Documentation**

- The budget guidelines provide guidance for the ECU budget process, the preparation of individual budgets and the required supporting documentation.

- The budget timetable is issued via the Faculty Accountant and facilitates planning within the faculty. The timeframes are usually tight so planning is very important.

- The budget information must be delivered to the University committees for review and approval so it is crucial that these dates are all met.

- The budget validation worksheets form the basis of the analysis and review work performed by the Budget Team. They contain an analysis of the movements between the current budget being prepared and the previous budget. Full instructions on the use of the budget validation worksheets are provided in the budget guidelines.
Budget Fundamentals - Exercise

FINANCE AND BUSINESS SERVICES CENTRE

Refer to the Exercise sheet

Create an Original and a Reforecast budget for the Business Unit given the parameters
Who to Approach?

- Faculties – Faculty Accountant
- Service Centres – Business Manager
- Budget Team

The University Budget information can be accessed from:
enVisage Basics

Access via ECU website

Security profile

General menu

enVisage Basics

• There are two relevant areas of the FBSC Online Financial Applications web page:
  1. enVisage
     - this area provides links to training materials and documentation that can assist you in using enVisage.
  2. enVisage (budget management system)
     - This links directly to the enVisage system and enables you to log on.

• The System Administrator will have assigned you with a security profile that controls your access to functions and modules. If you are not able to access or view certain areas of the system that you feel you should, contact in the first instance your Faculty Accountant or Business Centre Manager whose approval is required for levels of system access.

• The General section of the enVisage menu contains:
    - System News that describes the current status of the system.
    - User Details that show the registered details of the user
    - Problem Reporting that allows users to email the System Administrator with system issues
The Main Menu

• If you know the Project Number that you require you can enter this into the *Find Project* field and click on the button.

• There is also a wild card search facility within the *Find Project* field.

  If you have some idea of the project number you can type in the first two digits and the percent symbol for example “10%”. Click the button and all project numbers beginning with “10” will be displayed.
Navigate – Select Budget

• Using the Navigate - Select Budget screen, you will be able to select and amend the appropriate Budget version. Operational budgets provides you access to the operating budgets, where you can utilise budget entry, calculation and salary calculations to create a budget.

• Ensure that you select the appropriate budget environment, as there may be two or three different environments to choose from.
Navigate – Select Unit

The level of detail in your Organisational Structure (i.e. how the elements; Management Group, Division/Faculty, Branch/School, Cost Centre, Project roll up) will determine how many steps will need to be taken to select the required unit on which to budget.

The high level Organisation Unit will already be a default based upon your security group profile.
Budget – Choose Accounts

• The range of accounts available to view in this screen can be altered by using the drop down lists **Account Level** and **Account Category**. Selecting “Totals” in the Account Level field will enable you to view all of the accounts. The Account Categories available then will be: Income less Expenses, Net assets and Equity.

• However if you select “Category” in the Account Level field, you will only be able to view the range of accounts available in the category chosen in the Account Category field.

• To manually select which accounts you would like to budget, move down the list of accounts and place a tick in the box(es) on the far right column headed **Profile Y/N**.

• You cannot remove an account if it already has a budgeted amount allocated against it. If you attempt to do this, a warning message will be displayed. If you want to remove accounts with budget values, return to the Enter Budget screen and remove the dollar amount, then press the Save button. Return to the Choose Accounts screen and then remove the tick on the line of that account.

• You must then click on the Save button, if you don’t the changes you have made will not be saved.
Navigate - Projects

FINANCE AND BUSINESS SERVICES CENTRE

- Budgets can be prepared simply on the basis of a project code eg. 28151
- Budgets can be prepared on the basis of a project number, activity code and location code e.g. 28151.RA.04
- There can be separate projects based on these combinations 12345 vs 12345.CA.04 vs 12345.CA.06
Choose Accounts - Methods

There are three methods for choosing accounts:

1) Select individual accounts

2) Apply a budget template

3) Copy a project profile

Choose Accounts - Methods

Select Individual Accounts

• Click on Choose Accounts and make selections in the Account Level and Account Category fields - this will display the accounts that you can select.

• Place a tick in the Profile Y/N column at the right of the account details to manually select these accounts

• Once you have selected all the accounts you require, click on the Save button at the top of the page. If you do not, you will lose any changes you have made. Once you have clicked on the Save button a message will be displayed to confirm that the changes have been saved.

Apply a Predefined Budget Template

(Appplies a predefined chart structure to the budget project).

• Use the Budget Template pull down list to select the budget template you would like to apply to this unit.

• Click the Apply button (on the same line). Clicking the Apply button will apply the budget template and save the changes. A message will appear to confirm that the changes have been saved.
• Also, you can Copy a Project (which applies the charts used in another project to your project to budget against).

Copy a Project Profile
(Copies a list of existing accounts from another project for which you have previously defined a profile).

• Use the Copy Project pull down list to select the profile you would like to copy to this project.
• Click the Apply button (on the same line). Clicking the Apply button will display the project profile on the screen.
• Click on the Copy project button to copy this existing profile. A message will appear to confirm that the changes have been saved.
Budget – Enter Budget

- The Enter Budget screen will, in addition to the current budget column, have two additional columns depending on which budgeting cycle is being completed. For example if the 2007 Reforecast Budget is being used, data from the 2007 Original Budget and 2006 Actual will be available.

- Enter in all the Total Budgets, and then click on the Save Budget button. Enter only whole numbers. Depending upon the set-up for the specific chart you may be able to enter negative amounts (refer to your Faculty Accountant or Business Manager in the first instance to determine if negative amounts are appropriate).

- Rather than entering small amounts into several accounts, you can enter amounts less than $5,000 in aggregate into the appropriate account code. This will save you time in entering and reviewing budget data.

- If you navigate to another project from the drop down list box, or Phasing Button [...] you will be warned that unsaved changes will be lost.
• Select Yes to save changes and progress to the next screen or No to continue without saving or Cancel to cancel the navigation.

• If you move from the Enter Budget screen for whatever reason you will lose any modifications to the budget since the last time you saved the information.
Budget Phasing

- Once you have selected the phasing method you would like to apply to this chart, click on the button at the end of the line with the two dots on it [...]. This will take you to the phasing screen where you can check the phasing option, fine tune the phasing option or manually enter the phased amounts.

- You will not be able to change any amounts in the phasing table unless the Phasing Method is ‘Manual’. Whatever amounts are in the Value column will remain if you change the Phasing Method to ‘Manual’ – the difference is now you can edit the amounts.

- The phasing of both budgeted income and budgeted expenses is very important. The way in which these items are entered into the budget should accurately represent the pattern in which you expect these items to occur. Care should be taken not to simply place a lump sum in one month.

- Phasing is important because:

  1. The timing of the budgeted amounts will be reflected in your monthly finance reports and may provide a significant variance from the actuals reported in that month which would require explanation
  2. It allows ECU to accurately forecast cash flows and therefore effectively manage the investment of funds.
Online Planning and Notes

The paper clip symbol 🔄 indicates that supplementary information may be entered or attached

This information will assist you in further explaining how your budget data has been derived

Online Planning and Notes

• Throughout enVisage, the paper clip symbol indicates that supplementary information may be attached to that particular section of the system.

• The information that can be attached will document your assumptions and decisions and build up a commentary of the planning process from which the budget data is derived.

• To enter planning information, click on the planning information symbol next to the budgeted item to which you wish to add further information.
Online Planning and Notes (cont’d)

• A planning window will appear, with an individual text box for each note or planning item to be collected.

• This process will also allow attachments to be made i.e. Word, Excel or PDF documents that provide further information.

• To attach a document:
  > Select Attach
  > Enter a title (which will be displayed on the noted screen)
  > Select Browse
  > Determine the file location
  > Select the appropriate file
  > Select Open
  > Then select Add (the document is now attached to the Planning Information Page)
  > Then click on the Save button
Practice - Budget Entry and Information

Overview

In this practice, you will do the following:

- Use the Find Project Wildcard Project Search function to find the project that you require.
- Select the accounts that you wish to use.
- Enter budget values.
- Attach online planning information.

Assumptions

- You must have access to the enVisage system to complete this practice.

Tasks

1. Use the Find Project Wildcard Search function to find the project that you require.
2. Select the accounts that you wish to use.
3. Enter budget values of $2,000 in each account within each month.
4. Enter online planning notes and attach a file.
Solution – Budget Entry and Information

Wildcard Project Search

1. Type in an abbreviated project number ending with a % sign in the Find Project field above the main menu.

2. (B) Click on the Find Project button.

3. (B) Select the project that you require by clicking on it.

4. (B) Click on the Submit button.

Select Accounts

5. (B) Click on the Account Level drop down list.

6. (B) Select Totals (this will display the accounts available to you).

7. (B) Select the accounts you require by placing a tick in the box in the Profile Y/N column adjacent to the account title.

8. (B) Click on the Save button to save the selections.

Enter Budget

9. (N) Click on Budget within the main menu.

10. (N) Click on Enter Budget

11. Select any account at random.

12. Click on the total field and enter 15,000.

13. (B) Click on the Save button.

14. (B) Click on the phasing button [..] next to the Phasing column.

15. (B) From the Phasing Method drop down list select Manual and enter $2,000 in each month.

16. (B) Click on the Save button.

Note: If the phasing type is not manually changed, the item will be phasing using the default system setting.
Solution – Budget Entry and Information

**Attach Planning Notes**

1. (N) Click on Budget within the main menu.
2. (N) Click on Enter Budget.
3. (I) Click on the paperclip symbol.
4. Within the Account Notes area, type some descriptive text to explain and support the budget values for example – “These are test planning notes”.
5. (B) Click on the Save button.

**Attach a Planning Document**

6. (N) Click on Budget within the main menu.
7. (N) Click on Enter Budget.
8. (I) Click on the paperclip symbol to open the Notes box.
9. (B) Within the Notes box, click on the Attach button
10. (B) Click on the Browse button and navigate to the required document.
11. (B) Click on the Open button.
12. (B) Click on the Add button.
13. Type a description in the Title field.
14. (B) Click on the Save button.
15. (B) Click on the Return button to continue.
Staffing

The Staffing module allows changes to and calculation of salaries and on-costs

Staff salary data should be uploaded into enVisage prior to the annual budget process

Staffing

• Calculations are in accordance with awards (where applicable) and automatically upload into your Budget. The module also calculates budgeted FTE (for permanent and contract staff) or budgeted session/hours (for sessional casual staff).

• The original budget contains staff costs uploaded from Alesco (the ECU HR management system). The reforecast budget contains staff costs from the original budget.

• The module has been configured to take into account:
  1. Agreed pay rises,
  2. The pay periods in the coming year (2 or 3 per month),
  3. Accrual of salary expenses at year end and
  4. Relevant on costs and salary options
While calculating staff costs you now have two options:

1. Save - this saves any variables you have entered, however it does not calculate new salary totals. This option allows you to make numerous changes quickly performing one calculation once completed.

2. Calculate - this option saves all current changes and submits a salary calculation job. The calculation will be performed in the background and you will be notified by email and on screen messages accordingly. The background calculation allows you to continue working on other budgets while the system performs these calculations.
Staffing - Security Levels

Each User has a particular security level

Your security level will determine the degree of your access to staffing costs data

Staffing - Security Levels

• When access is granted to enVisage, a security level is assigned to you. The security level controls your access to salary rates, the staff list and staff allocations.

• Once your profile has Edit access and also has salary access, then the security level will come into effect.
Staffing – Selecting Staff

- To calculate individual staff salaries you first need to select the required staff from the staff list. Where these have already been loaded by your Systems Administrator you would see their names and some details.

- Select the Staff List button to display a screen that will allow you to search for the staff members for which you need to budget in this project.

- If you see this screen, and you’ve picked the wrong project you can change it by using the Project List pull down list. To change Budget or Cost Centre you will have to choose the Select Budget or the Select Unit option from the Navigate menu on the side. You will be brought back to this screen once you have made the appropriate change.

- Use the above screen to search for a specific type of staff member:
  1. All Types
  2. Academic Permanent
  3. Academic Contract
  4. Academic Sessional
5. General Permanent
6. General Contract
7. General Casual
8. Or to search for the surname of a staff member.
Staffing – Selecting Staff

- You will notice that at the right hand side of the staff list is the column Y/N, this column allows you to select the staff members for which you need to budget by putting a tick (✓) in this field.

- Next to this column is the Add # column. This column allows you to select a staff member more than once, by putting a number in this field. For example, a General Permanent staff member is going to start sessional lecturing, therefore you need two instances of the same staff member.

- To achieve this type the number ‘2’ in the Add # field for that staff member’s record. You can edit the staff member record, which we will cover later.

- Access to records in the staff list is dependent upon the staff security levels in the specific budget version in which you are operating. A user will only be able to see a staff record with a security level the same or lower than their security level from their User security profile.

- Once you have selected all the staff members, you need to click the Save button. A message will be displayed confirming that the staff list for the selected project has been updated.
Staffing - Calculate

- Use the screen shown above to input the salary variables (such as FTE%, rate of pay, increment date, Superannuation contribution and allowances) against the staff and the way in which salaries are phased.

- A Salary is generated for a staff member once the Calculate button is pressed on the Calculate screen.

- Once completed, you will receive an email notifying you of completion, so there is no need to keep clicking the Refresh button unless you need to see the impact straight away.

- Prior to the completion of the salary calculation, all budget screens and reports will advise that a calculation is in progress or there are unsaved changes to alert you to the possibility that the budget totals may not be fully calculated.

- A Salary Budget is only generated by pressing the Calculate button. Pressing the Save button will save the current variable changes only and will not generate a salary budget (i.e. the total
salary will not alter if you only save the changes).

- Once the *Calculate* button is pressed a message is displayed on the screen indicating that a calculation has been submitted. The *Calculate* button will also save any changes prior to generating a calculation.
Staffing – Salary Phasing

- Once you have selected the phasing method you would like to apply to this staff member, click on the button at the end of the line with the two dots on it [...]. This will take you to the phasing screen where you can check the results of the phasing option you chose, fine tune the results of the phasing option you chose, or manually enter the dollar amounts to calculate the phased amounts.

- If you elect to manually phase a staff member's salary use dollar amounts, not percentages of budget.

- In staff phasing you enter a dollar amount to reflect the proportion of time an employee will be budgeted for in a given month. That is, if:
  
  i. An employee will only be present for half the month then enter a phasing for that month of half the normal dollar amount.
  
  ii. No budget is required at all for a month then enter a phasing of 0 dollars.
iii. A full month is required, enter a phasing of the full dollar amount.

• In any month the staff phasing will combine with the FTE and number of pays to give a net budget amount for the month. For example, if a staff member is working half time (50% FTE) for February, (2 pays are predefined) and will only be paid for the half of February, (a manual phasing of half the normal dollar amount) they will be budgeted as one quarter of a normal pay (50% times 2 times half the normal dollar amount).

• You will not be able to save any amounts in the phasing table unless the Phasing Method is ‘Manual’. Whatever amounts are in the Value column will remain if you change the Phasing Method to ‘Manual’ – the difference is now you can edit and save the amounts. If the Phasing method is not manual then all phasing values will be generated at the next salary calculation based on the Salary variables you have selected.
Exercise – Selecting Staff and Salary Phasing

FINANCE AND BUSINESS SERVICES CENTRE

Practice
Practice - Select Staff and Salary Phasing

Overview

In this practice, you will do the following:

- Select a staff member to include within your budget.
- Add a new staff member to your budget.
- Change some of the staff cost data.
- Adjust the phasing (timing) of staff costs within your budget.

Assumptions

- You must have access to the enVisage system to complete this practice.

Tasks

Select Staff and Salary Phasing

1. Search for staff to include within the budget.
2. Select an existing staff member.
3. Add a new staff member – use the name “Jane Smith”.
4. Select FTE as 100% and Full Super of 17% for the existing staff member and FTE as 50% and Full Super of 17% for the new staff member.
5. Enter staff costs of $60,000 within your budget for both staff members, spread equally over all the months of the year.
Solution – Select Staff and Salary Phasing

Search for Staff

1. (N) Click on Staffing within the main menu.
2. (N) Click on Select Staff.
3. (B) Click on the Staff Lists button.
4. (B) Click on the Staff Type drop down list and select the type of staff required or alternatively select “All Types”.
5. Type in a name or a portion of a name to refine your search.
6. (B) Click on the Search button.

Selecting Staff

7. (B) Select an existing staff member by clicking on the box adjacent to their details.
8. (B) Click on “All Types” within the Staff Type field.
9. (B) Click on Other in the Staff Name search on this basis.
10. Place a tick in the Y/N box against Other Academic Permanent.
11. (B) Click on the button [...] at the end of the row to edit the new staff member’s details and add the name “Jane Smith”.
12. (B) Click on the calculate button and enter details in - fte(%), Rate, Super and Phasing.
13. (B) Click on the Save button.
14. Note the blue message indicating that your selections have been saved: Staff lists saved

Salary Phasing

15. (N) Click on Staffing within the main menu.
16. (N) Click on Calculate.
17. (B) Click on the Super button and select the appropriate type/percentage.
18. (B) Click on the Phasing drop down list and select the Manual method of phasing.
19. (B) Click on the Phasing [...] button.
20. When the message appears “Do you wish to save changes” click on Yes.
21. Enter $5,000 in all months January through to December.
22. (B) Click on the Save button.
Solution – Select Staff and Salary Phasing

23. When the message appears “The Total Salary $60,000 does not match the Phasing Total $0.” click on OK.

24. Note that the total salary should now equal $60,000.
Staffing – Salary Summary

This screen provides summary information by type of salary calculation and lists the individual staff variables and base salary as well as the total on cost for that type of salary.

The screen provides more salary details than the Enter Budget screen where only the total salaries against specific charts are displayed.

However to calculate salaries you will still need to navigate to the salary calculate screen by either the navigation button [...] or by the main menu item.
Staffing – Budget Tips

To include an employee in a salary profile only – reduce their FTE to 0%

An employee’s increment date will allow their salary to be included from the correct date

To budget an employee across more than one project - select them in each project

Staffing - Budget Tips

• To include an employee in a salary profile but not a salary budget, reduce their FTE to 0% and recalculate.

• Knowing an employee’s increment date will allow the salary module to correctly calculate exactly when an incremental payment should begin to be included.

• To budget an employee across more than one Unit select them in both Units but split their cost by using the FTE option (e.g. 40% in one Unit and 60% in another)
Reports – Budget Reports

• From the Reports submenu you can elect to run *Budget Reports* or *Budget Downloads* to Excel.

• Use the screen above to view the different types of budget reports to see how the budget is spread across the different levels. The available reports include any combination of the following:

1. Report Type
   a) Totals – provides the total for the year for each budget item
   b) Phased – provides the detail for each month during the year
2. Report Level – Project, Cost Centre, Branch/School, Division/Faculty, Management Group, Executive Group, University,
3. Chart Level – Account, Sub Category, Major Category 2, Major Category 1, Totals

• The reports will display the information currently saved and calculated for the respective levels you have selected. Where there have been salary changes which have not been saved, this will be highlighted on the report as the salary totals may not be current.

• The reports will be prepared according to the user’s respective security permissions. If you report on a cost centre and there are projects within that cost centre you do not have view
access to, those projects will be excluded from the report results.

• Planning Reports - Use these reports to view all planning notes for any level from Project up to University level
Reports – Budget Downloads

- Use the screen above to view the different types of download reports to see how the budget is spread across the different levels.

- As discussed in previous sections, the top quarter of the screen displays the elements that are currently selected. You are able to change all elements from this screen within that budget version.

- Downloads are also handled by the enVisage job queue. Once a download report has been submitted you will receive an email with the attached Excel report upon completion of the download.

- Care should be taken with requesting downloads. Downloads are resource intensive and overuse of downloads can impact upon the timeliness of the job queue processing.

- Once completed, the download will be emailed directly to your email address in CSV format, which you can open by clicking on the link - this will open it within Excel.
• Once completed, the download will be emailed directly to your email address in CSV format.

• You can open this report by simply clicking on the link - this will open it within Excel. If you select the save option, you can save the file within an appropriate folder for future reference.

• This is a useful feature for creating reports in Excel enabling the analysis budget data.

• Sometimes the link in the email is incorrect. If they open the link in the browser and put a full stop before the csv at the end it should be fine (example: link can sometimes read “filetobedownloadedcsv” where it should read “filetobedownloaded.csv”).
Guided Demonstration - Budget Download

In this Guided Demonstration, the instructor will demonstrate to the class how to produce a Budget Download from the system.

**Budget Download**

1. (N) Click on Reports within the main menu.
2. (N) Click on Budget Downloads.
3. (B) Review the budget structure in the navigation area of the screen and click on the buttons to perform any required changes.
4. In the Download Parameters area of the screen:
5. (B) Click on the Download Type drop down list and select Budget Download.
6. (B) Click on the Organisation Level button and select Project.
7. Don’t select any History to be included.
8. (B) Click on the Submit Download button.

---

**Download Parameters**

- **Download Type**: Budget Download
- **Organisation Level**: Project
- **Include History?**:
  - 2006 Actual
  - 2007 Original Budget
From: Petryshyn@ecu.edu.au
To: Timothy WRIGHT
Cc: 
Subject: enVisage Budget Download-Completed

Dear Tim,

Budget Download for Project E999 M999 D999 E999 M999 TRAINING has completed.

To download the file to your PC please click this link.

Job ID: 416
Date Submitted: 15/06/2007 2:48:52 PM
Date Job Started: 15/06/2007 2:49:20 PM
Date Completed: 15/06/2007 2:49:22 PM

Regards; Budget 2007
Utilities

Recalculation

• Use the Recalculation utility to generate salary budgets. Recalculations only effect salary budget calculations. Recalculation is very useful once you have completed several salary changes and would like to see the global effect of all your changes without having to navigate to each individual project, or where an underlying on cost rate has been changed, a recalculation will provide new budget salary totals in one step.
• You will also receive a system generated email indicating that the recalculation has been completed.
• A weekly Global Recalculation is performed by the System Administrator (usually on Friday evenings) to ensure that the calculations within the budget system are regularly updated.

Job Queue

• Input Queue - allows you to view jobs which are yet to be submitted for processing and even delete those jobs you no longer require to be processed (by selecting the delete option).
• History Queue - by navigating to the history queue (using the onscreen drop down list) you can see all jobs that have been processed, the status (successful or failed) and the time each job was submitted, started and finished processing.
Enhancements

- Dashboard has been reinstated
- Budget reports – wildcard search
- Planning reports – attachment icon
- History data removed from salary download
- Salary downloads phased
- Account Reports and Downloads

Enhancements

- Dashboard Reinstated
  The dashboard will be reinstated.
  This function provides you with access to create user specific graphs that can summarise relevant budget information.

- Phased Salary Downloads
  Within salary downloads, the details of your budgeted salary information will now be displayed on a phased basis.
  (Showing the way in which the staff costs will occur during each month of the budget year).
Enhancement - Wildcard Search

- A Wildcard search can now be used when searching for projects when submitting Budget Reports or Budget Downloads.

- The Wildcard search facility is available within the report parameters section of the Budget Reports/Downloads screen. Type in your selection criteria and click on the Submit Report button.
Enhancement – Planning Reports Icon

Enhancement – Planning Reports Icon

FINANCE AND BUSINESS SERVICES CENTRE

Enhancement – Planning Report

• The Planning Report function now includes an icon to indicate that there is a file attachment.

• There will also be a link that will enable you to access any attachments (illustrated in the next slide).

• Also, within the Enter Budget screen, the paper clip symbol will change colour to blue to indicate that an attachment exists.
Enhancement – Planning Reports Icon

FINANCE AND BUSINESS SERVICES CENTRE

enVisage Planning Report
2007/08 Balanced Budget
E999.0999.0999.0999.0999.TRANING: Training Purposes Only

ORGANISATION NOTES
- Revised E999.0999.0999.0999.0999.TRANING: Training Purposes Only
- Account 2009: DEPT Base Operating Draft and NDCS

EMBARGO ATTACHMENTS
- This report contains planning information relating to the Faculty/Institute for Timetabling

Link to the attachment
Enhancement – Salary Download

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DOWNLOADS

Budget:

Executive Group:

Management Group:

Division/Faculty:

Intrac/Extrac:

Cost Centre:

Project:

NOTE: It is recommended to run a report before a download to ensure all calculations are complete.

**Footnote:** Running downloads during peak periods may result in processing delays for other calculations.

Download Parameters

Download Type:

Organisation Level:

Project/WWId:

No history available
Enhancement – Account Reports

Account reports are now available to users and can be found under Reports in the main menu. The user has the option to report at any combination of organisation and chart level. User can only report on chart information for projects that they have view access to.

- Under the Report Type drop down list, users are also able to select a phased report.

- This new feature is also available in download format for those with access to downloads.
Questions and Queries

Any questions or queries?

Any enVisage tips or tricks?