# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housekeeping</td>
<td>0-3</td>
</tr>
<tr>
<td>Course Objectives</td>
<td>0-4</td>
</tr>
<tr>
<td>Outcomes</td>
<td>0-5</td>
</tr>
<tr>
<td>What is a Budget?</td>
<td>0-6</td>
</tr>
<tr>
<td>Why Budget?</td>
<td>0-7</td>
</tr>
<tr>
<td>The ECU Budget Process</td>
<td>0-8</td>
</tr>
<tr>
<td>Annual Budget Process</td>
<td>0-9</td>
</tr>
<tr>
<td>Other Costs</td>
<td>0-12</td>
</tr>
<tr>
<td>Capital Purchases</td>
<td>0-13</td>
</tr>
<tr>
<td>Reforecast Budget Process</td>
<td>0-14</td>
</tr>
<tr>
<td>Finance Terminology</td>
<td>0-15</td>
</tr>
<tr>
<td>Budget Considerations</td>
<td>0-16</td>
</tr>
<tr>
<td>Budget Phasing</td>
<td>0-17</td>
</tr>
<tr>
<td>Budget Documentation</td>
<td>0-18</td>
</tr>
<tr>
<td>Budget Fundamentals - Exercise</td>
<td>0-19</td>
</tr>
<tr>
<td>Who to Approach?</td>
<td>0-20</td>
</tr>
<tr>
<td>Summary</td>
<td>0-21</td>
</tr>
<tr>
<td>Accessing enVisage</td>
<td>0-22</td>
</tr>
<tr>
<td>Logging On to enVisage</td>
<td>0-24</td>
</tr>
<tr>
<td>General - News</td>
<td>0-26</td>
</tr>
<tr>
<td>General - User Details</td>
<td>0-27</td>
</tr>
<tr>
<td>Exercise – Change Password</td>
<td>0-28</td>
</tr>
<tr>
<td>Practice – Change enVisage System Logon Password</td>
<td>0-29</td>
</tr>
<tr>
<td>Solution – Change enVisage System Logon Password</td>
<td>0-30</td>
</tr>
<tr>
<td>General - Problem Reporting</td>
<td>0-31</td>
</tr>
<tr>
<td>The Main Menu</td>
<td>0-32</td>
</tr>
<tr>
<td>Navigate – Select Budget</td>
<td>0-33</td>
</tr>
<tr>
<td>Exercise – Select Training Budget</td>
<td>0-34</td>
</tr>
<tr>
<td>Practice – Select Training Budget</td>
<td>0-35</td>
</tr>
<tr>
<td>Solution – Select Training Budget</td>
<td>0-36</td>
</tr>
<tr>
<td>Navigate – Select Unit</td>
<td>0-37</td>
</tr>
<tr>
<td>Navigate - Projects</td>
<td>0-39</td>
</tr>
<tr>
<td>Exercise – Wild Card Project Search</td>
<td>0-40</td>
</tr>
<tr>
<td>Practice – Wild Card Project Search</td>
<td>0-41</td>
</tr>
<tr>
<td>Solution – Wild Card Project Search</td>
<td>0-42</td>
</tr>
<tr>
<td>Budget – Choose Accounts</td>
<td>0-43</td>
</tr>
<tr>
<td>Choose Accounts - Methods</td>
<td>0-44</td>
</tr>
<tr>
<td>Practice – Select Individual Accounts</td>
<td>0-47</td>
</tr>
<tr>
<td>Solution – Select Individual Accounts</td>
<td>0-48</td>
</tr>
<tr>
<td>Exercise – Apply Budget Template</td>
<td>0-49</td>
</tr>
<tr>
<td>Practice – Apply Budget Template</td>
<td>0-50</td>
</tr>
<tr>
<td>Solution – Apply Budget Template</td>
<td>0-51</td>
</tr>
<tr>
<td>Exercise – Copy Project Profile</td>
<td>0-52</td>
</tr>
<tr>
<td>Practice – Copy Project Profile</td>
<td>0-53</td>
</tr>
<tr>
<td>Solution – Copy Project Profile</td>
<td>0-54</td>
</tr>
<tr>
<td>Budget – Enter Budget</td>
<td>0-55</td>
</tr>
<tr>
<td>Budget Phasing</td>
<td>0-57</td>
</tr>
<tr>
<td>Practice – Enter Budget</td>
<td>0-60</td>
</tr>
<tr>
<td>Solution – Enter Budget</td>
<td>0-61</td>
</tr>
<tr>
<td>Online Planning and Notes</td>
<td>0-62</td>
</tr>
<tr>
<td>Online Planning and Notes (cont’d)</td>
<td>0-63</td>
</tr>
<tr>
<td>Guided Demonstration – Online Planning</td>
<td>0-65</td>
</tr>
<tr>
<td>Staffing</td>
<td>0-67</td>
</tr>
<tr>
<td>Staffing - Security Levels</td>
<td>0-69</td>
</tr>
<tr>
<td>Staffing – Selecting Staff</td>
<td>0-71</td>
</tr>
<tr>
<td>Guided Demonstration – Selecting Staff</td>
<td>0-75</td>
</tr>
<tr>
<td>Staffing - Calculate</td>
<td>0-77</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Staffing – Salary Phasing</td>
<td>0-79</td>
</tr>
<tr>
<td>Guided Demonstration – Salary Phasing</td>
<td>0-82</td>
</tr>
<tr>
<td>Staffing – Salary Summary</td>
<td>0-83</td>
</tr>
<tr>
<td>Staffing – Budget Tips</td>
<td>0-84</td>
</tr>
<tr>
<td>Reports – Budget Reports</td>
<td>0-85</td>
</tr>
<tr>
<td>Practice – Budget Report</td>
<td>0-88</td>
</tr>
<tr>
<td>Solution – Budget Report</td>
<td>0-89</td>
</tr>
<tr>
<td>Reports – Budget Downloads</td>
<td>0-90</td>
</tr>
<tr>
<td>Demonstration – Budget Downloads</td>
<td>0-93</td>
</tr>
<tr>
<td>Guided Demonstration – Budget Download</td>
<td>0-94</td>
</tr>
<tr>
<td>Utilities – Recalculation</td>
<td>0-96</td>
</tr>
<tr>
<td>Guided Demonstration – Recalculation</td>
<td>0-98</td>
</tr>
<tr>
<td>Utilities – Job Queue</td>
<td>0-100</td>
</tr>
<tr>
<td>Practice – Job Queues</td>
<td>0-103</td>
</tr>
<tr>
<td>Solution – Job Queues</td>
<td>0-104</td>
</tr>
<tr>
<td>Review of Outcomes</td>
<td>0-105</td>
</tr>
<tr>
<td>Conclusion</td>
<td>0-106</td>
</tr>
</tbody>
</table>
enVisage - An Introduction
Housekeeping

- Course Duration
- Facilities
- Evacuation procedure
- Evaluation Process
Course Objectives

• Overview of Budgeting

• Overview of enVisage system

• Preparing Budgets using enVisage

This course is aimed at staff who have not used enVisage previously.

enVisage is the Edith Cowan University (“ECU”) online budgeting system.

It is accessed through the ECU website.

Operational revenue and expense data is entered directly into the fields within enVisage and progress can be reviewed at any stage.

The enVisage structure reflects the structure of the Oracle chart of accounts.
Outcomes

- A basic understanding of budgeting
- An understanding of ECU budget process
- An understanding of the main elements of enVisage
- The ability to enter your budget data into enVisage
- The ability to run budget reports and downloads from enVisage
What is a Budget?

- Plan that facilitates the ECU strategy
- Process that coordinates all ECU activities
- Document that estimates future income and expenses

What is a Budget?

- A financial plan that enables Faculties, Schools and Administrative Centres to facilitate the University’s strategy.

- A coordination of activities and a consideration of the resource requirements for the year to operate effectively and deliver the required outcomes.

- A document that contains all of the future sources of income and the values expected to be received as well as the nature and value of the expenditure during the year. The difference between the value of the income and the value of the expenditure will be the operating result.
Why Budget?

• Breaks down major objectives into smaller goals

• Clearly sets out expected performance

• Allows comparison of actual results against estimated results

Why Budget?

• The way in which major objectives will be achieved can be considered. The steps in achieving these objectives can be devised and planned for the coming year.

• The financial effect of the activities during the year can be documented and recorded and these can be combined to represent the overall expected result for the year. The expected results can then be assessed, if these are not initially considered to be acceptable, then plans can be revised or altered to produce different results.

• During the year, the budgeted results can be compared to the actual results obtained. The explanations for significant variances can be documented and these can be used to manage future activities and used in improving the development of future budgets.
The ECU Budget Process

ECU Budget process is made up of two activities:

1) Annual Budget -
   July to November creates budget for the next financial year

2) Reforecast Budget -
   April to June each year which reviews and updates existing annual 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

The Annual Budget Process

The first item considered is income. This is because it is the driver of the operations of the University and its business units.

The level of income generated determines:
1. the amount of growth of the University and its financial success.
2. the resources required and the resources available to run and sustain operations.

Income is difficult to estimate because:
1. we are not able to completely control it.
2. we cannot predict it with certainty.

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.
Annual Budget Process

Expenses estimated next:

• Costs of operations

• Limits on spending

• Two types of costs:
  1) Variable costs
  2) Fixed costs

Annual Budget Process

• It is important to identify and accurately estimate the costs expected.

• There may be limits on the amount of costs that can be incurred so these must be considered.

• 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 and understand each type of cost so that the relationships between student numbers and University activities and costs can be used to create a meaningful budget.
Annual Budget Process

Determine payroll costs of each business unit:

• Data from Alesco is uploaded into the budget system prior to annual (original) budget process

• Staff on-costs calculated automatically by budget system

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.

Accuracy in estimating staff costs is important, so we must consider:
1. New positions
2. Vacant positions
3. Movements in staff
4. Staff allowances
Other Costs

- **USSC:** University Services & Support Charge

- **USC:** University Service Charge

- 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.
Capital Purchases

• ECU Policy on acquisition of capital assets

• $5,000 threshold before capitalising

• Useful life greater than one year

Capital Purchases

• Items considered to be capital generally will be expected to have 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 be prepared and submitted.
Refocus Budget Process

Refocus 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 (timing) of expenses
- Other changes can be the movement in Government funding or student numbers

Refocus Budget Process

- This process is performed during the period of April to July each year.

- The reforecast process alters and updates the annual/original budget during the current year. This process creates a more accurate and relevant budget as it also incorporates the actual results for the first few months of the year.

- The phasing (timing) of items is amended to reduce or remove timing variances between the budget and actuals by incorporating the actual results to the end of March or April.
Finance Terminology

- Revenue – money received
- Expense – money paid
- Operating statement - summary of all revenue & expense items
- Operating result - difference between total revenues and total expenses
Budget Considerations

• Current activities ending
• New activities starting
• Changes to staffing requirements
• Changes in the value or timing of income
• Changes in the value or timing of expenses

Income
• Budgets need to record as accurately as possible the income that is expected to be received.

• Budgets should as accurately as possible, record the timing or pattern of the way in which income is expected to be received i.e. lump sums of income in one or two months should be avoided if it is known in advance that the income will be received progressively throughout the year.

Expenditure
• Budgets need to record as accurately as possible the value of expenditure items and when these expenses are expected to be incurred / paid.

• Minimise the use of an extensive list of accounts especially where amounts of less than $5,000 or less are concerned. Further guidance on this approach will be contained in the budget 2008 guidelines.
Budget Phasing

• “Phasing” means the timing or pattern of income and expenses during the year

• Relates the timing of an activity to its income and expenses

• Crucial as it allows for effective management of resources

• Accuracy of phasing reduces the amount of variance reporting

Budget Phasing

• In compiling a budget that as accurately as possible records the expected pattern of income and expenditure during the year, the timing or “phasing” of these items must be carefully considered.

• As there is often a direct relationship between items of income and expenditure and the related activities, accurate phasing allows for more effective management of resources. During times of greater activity more resources can be used and during times of reduced activity fewer resources can be used.

• During the internal reporting processes, the actual results achieved are compared to the budgeted results. The significant differences between actual items and budget items need to be identified and explained so that there is an understanding of the factors that produced these variances. Therefore the greater the accuracy of the phasing of the budgeted income and expenditure items, the greater the likelihood that there will be fewer differences to the actual items.
Budget Documentation

• Budget Guidelines

• Budget Timetable

• Budget Validation Worksheet

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 allows the planning of the faculty budget preparation. The timeframes are usually tight so planning delivery dates is very important.

The budget and supporting information must be delivered to the University committees for review and approval on their scheduled meeting dates 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

• Refer to the Exercise sheet

• Create a budget for the Business Unit given the parameters

• Create a reforecast budget given the parameters

The exercise and solution is provided in a separate handout.
Who to Approach?

How to access the budget for the work team?
- Faculties – Faculty Accountant
- Service Centres – Business Manager
- Resource Planning

The University’s 2007 Original Budget can be downloaded from:
Summary

- ECU budget process consists of Annual Budget and Reforecast Budget

- Care must be taken in estimating income and expenses, including phasing of items
Accessing enVisage

To start enVisage you will need to find the correct section of the Edith Cowan University ("ECU") website http://139.230.193.62/login.asp

It can also be accessed through the Finance and Business Services Centre ("FBSC") Financial Applications webpage at the following link http://www.fbsc.ecu.edu.au/sys/html/applications.cfm

Alternatively open Internet Explorer and use the links as follows:

From the ECU Website click on:

- Administrative Centres
- Finance and Business Services Centre
- Online Financial Applications
- enVisage (budget management system)

There are two relevant areas of the FBSC Online Financial Applications web page (circled on the slide above) :
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.
Logging On to enVisage

• To enter the enVisage system you will need a Logon ID and a Password. Your Logon ID will usually be your ADS user name and your Password will usually be welcome initially.

• If you are not sure of these details contact the FBSC Systems team on telephone extension 2772 or fbcsystems@ecu.edu.au
• The System Administrator will have assigned you with a security profile group that controls your access to functions and modules and your ability to view or edit organisational areas and charts.

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.
Once logged on this is the first screen that will be displayed.

This screen - enVisage News will display any system news that may be of interest to users.

This page is designed to let you know of any system changes, news or events that will affect the use of enVisage. The news is listed in date order beginning with the latest news.

To read a particular System News article, simply click on the title of the news article of interest.
• This screen will show current user contact details (e-mail, phone, location, etc).

• Users are able to update their personal contact details by selecting Update Details. Once updated select Save to keep the changes.

• It is important that a valid email address is entered as the system job queue now uses emails to notify users about salary calculations and download requests.

• enVisage also includes online messages and emails that notify you of the calculation status of your budgets and also completion of background processing jobs.

• **Dashboard** - the enVisage dashboard provides you access to create user specific graphical reports summarising information relevant to your budgeting requirements.
  Each user is able to set up their own dashboard displaying information they wish to see (dependent upon access granted through your security profile).
Exercise – Change Password

Practice

Exercise – Change Password
Practice – Change enVisage System Logon Password

Overview

In this practice, you will do the following:

- Change your enVisage system logon password.

Assumptions

- You must have access to both the training environment and the enVisage system to complete this practice.

Tasks

Change enVisage logon password

1. Change your enVisage system logon password.

Please note the following:

- Ensure that you remember the updated password so that you are able to logon to the system in the future.
Solution – Change enVisage System Logon Password

**Change enVisage logon password**

1. (N) Click on the General option within the main menu.
2. (N) Click on User Details
3. (B) Click on the Update Details button.
4. Type your new password into the Password field and confirm it by typing it into the Confirm Password field.
5. (B) Click on the Save button to save the password change.
6. Note the blue system message that states:
   
   User detail changes saved

**Please note the following:**

   Ensure that you remember the updated password so that you are able to logon to the system in the future.
If you encounter a problem using the system (for example, with the interface, or a calculation etc) use the problem reporting screen to notify the Systems Administrator.

When reporting the problem, attached a screen shot and/or include a detailed description of the issue so that the system administrator can clearly understand the problem and therefore provide a permanent resolution.

As noted on the screen, please check the System News articles before reporting a problem as it may have already been reported and/or resolved.
The Main Menu

enVisage has a main menu that is available on every screen.

This means that all items on that menu can be accessed regardless of which screen you are on in the enVisage environment.

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

- This is the first step in creating your budget.

- Using the Navigate - Select Budget screen, you will be able to select and amend the appropriate Budget version.

- Click on the appropriate budget to select and move to the next step of the selection process.

- Ensure that you select the appropriate budget environment, as there may be two or three different environments to choose from.

- Operational budgets provide you access to the operating budgets, where you can utilise budget entry, calculation and salary calculations to create a budget.
Exercise – Select Training Budget

Practice

Exercise - Select Training Budget
Practice – Select Training Budget

Overview

In this practice, you will do the following:

- Select the Training Budget environment.

Assumptions

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

Tasks

Select Training Budget

1. Navigate to the Training Budget environment within the enVisage system.
Solution – Select Training Budget

Select Training Budget

1. (N) Click on the Navigate option within the main menu.

2. (N) Click on Select Budget.

3. (H) Select the Training Budget by clicking on the red Training Budget link in the Select Budget listing.

4. The Select Unit screen will appear which will display the name of the budget selected as well as a list of units.

5. (H) The units can be further drilled down into by clicking on the red link.
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 be a default based upon your security group profile.

You select each level by clicking on the red codes, then drill down to the next level (top down) until you arrive at the data entry level for that budget version (where you can create the budgets and plans). This process is an alternative to using the project search functions as it allows you to drill down through the chart structure and select the code you require at each level.

Once you select the data entry level organisation unit, enVisage will navigate you to the Budget Entry screen where you can start creating your budgets and plans.

The most recent navigation selection for your Organisational Unit and Budget Version are maintained for your Operational Budget. So if you move to a reporting screen those defaults will be carried to that screen, saving you having to re-enter the details again.
• Once you log back into enVisage, those last selections will be redisplayed, so there is no need to reselect those values (as long as you are using the same desktop).
• Budgets can be prepared simply on the basis of a project code e.g. 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 e.g. 12345 vs. 12345.CA.04 vs. 12345.CA.06
Exercise – Wild Card Project Search

Practice

Exercise – Wild Card Project Search
Practice – Wild Card Project Search

Overview

In this practice, you will do the following:

- Use the Find Project search function to find the project that you require.

Assumptions

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

Tasks

Wild Card Project Search

1. Use the Find Project search function to find the project that you require.
Wild Card 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.
Once you have selected the budget elements you would like to work with, you will need to select the relevant accounts. This is performed by clicking on Budget in the main menu and then clicking on Choose Accounts.

On this screen you can also change the Project List, Account Level and Account Category by using the drop down lists within the navigation area. 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.

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.
Choose Accounts - Methods

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 this will display the accounts that you can select.
• Click on the Account Level drop down list and select Totals, this will display your available accounts.
• 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.
Exercise – Select Individual Accounts

Practice

Exercise – Select Individual Accounts
Practice – Select Individual Accounts

Overview

In this practice, you will do the following:

- Choose the accounts with which you want to budget by using the select individual accounts method.

Assumptions

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

Tasks

Select Individual Accounts

- Choose the accounts with which you want to budget by using the select individual accounts method.
Solution – Select Individual Accounts

Select Individual Accounts

1. (N) Click on the Budget option within the main menu.

2. (N) Click on Choose Accounts.

3. (B) To select the project that you require, type the project number into the Find Project field and click on the Find Project button.

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

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

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

7. (B) Click on the Save button to save the selections.
Exercise – Apply Budget Template

Practice

Exercise – Apply Budget Template
Practice – Apply Budget Template

Overview

In this practice, you will do the following:

- Choose the accounts with which you want to budget by using the apply budget template method.

Assumptions

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

Tasks

Apply Budget Template

1. Choose the accounts with which you want to budget by using the apply budget template method.
Solution – Apply Budget Template

Apply Budget Template

1. (N) Click on the Budget option within the main menu.
2. (N) Click on Choose Accounts.
3. (B) To select the project that you require, type the project number into the Find Project field and click on the Find Project button.
4. (B) Click on the Account Category drop down list and select the category you require.
5. (B) Click on the Budget Template drop down list and click on the required template.
6. (B) Click on the Apply button.
7. (B) Click on the Save button to save the selections.
Exercise – Copy Project Profile

Practice
Practice – Copy Project Profile

Overview

In this practice, you will do the following:

- Choose the accounts with which you want to budget by using the copy project profile method.

Assumptions

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

Tasks

Apply Budget Template

1. Choose the accounts with which you want to budget by using the copy project profile method.
Solution – Copy Project Profile

Copy Project Profile

1. (N) Click on the Budget option within the main menu.
2. (N) Click on Choose Accounts.
3. (B) To select the project that you require, type the project number into the Find Project field and click on the Find Project button.
4. (B) Click on the Copy Project Profile drop down list and click on the required project.
5. (B) Click on the Apply button.
6. (B) Click on the Copy Project button.
7. (B) Click on the Save button to save the selections.
Budget – Enter Budget

- The Enter Budget screen is where Operational budgets are created and consolidated.

- 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.

- To enter a budget amount, click in the current budget column of the account you want and enter the total amount.

- Press TAB or use the mouse to move into the Phasing column. Use the pull down list to select the type of phasing required.

- 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. Refer to the budget 2008 guidelines for more specific information.

• 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 without saving changes you will lose any modifications to the budget since the last time you saved the information.
Budget Phasing

For each budget entry, you need to define the phasing during the budget period. Phasing refers to the pattern of the occurrence of the item during the period.

Types of Phasing:
1. January – June phases the total amount evenly over the months January - June.
2. July – December phases the total amount evenly over the months July - December.
3. Monthly phases the total amount evenly over all months.
5. Historic will phase budget amounts based on the pattern of actual values from the previous two years.

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.

- As discussed earlier, 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.
Exercise – Enter Budget

Practice
Practice – Enter Budget

Overview

In this practice, you will do the following:

- Enter a value within a selected account in the budget.
- Define the phasing (timing) of the budget item.

Assumptions

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

Tasks

Enter Budget

1. Enter a total of $15,000 within a selected account in the budget.

2. Define the phasing of this item by placing an equal amount in the first three months of the year.
Solution – Enter Budget

Enter Budget

1.  (N) Click on Budget within the main menu.
2.  (N) Click on Enter Budget
3.  Select any account at random.
4.  Click on the total field and enter 15,000.
5.  (B) Click on the Save button.
6.  (B) Click on the phasing button [...] next to the Phasing column.
7.  (B) From the Phasing Method drop down list select Manual and enter $5,000 in January, February and March.
8.  (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.
If the total value of the budget account does not match the value of the total of the phased amounts, the system will create a message reporting this error.
The options at this point are to:
   1. Press OK and the system will change the budget total to match the total of the phased amounts or
   2. Press cancel which enables you to edit the phased amounts.
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.
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)
Demonstration – Online Planning

Practice

Demonstration – Online Planning
Guided Demonstration – Online Planning

In this Guided Demonstration, you will guide the class through the exercise showing them how to incorporate Online Planning into the budget system.

**Online Planning - Notes**

1. (N) Click on Budget within the main menu.
2. (N) Click on Enter Budget.
3. (I) Click on the paperclip symbol to open the Notes box.
4. Within the Account Notes: section type in “Budget notes for exercise purposes”.
5. (B) Click on the Save button.
Online Planning - Attachment

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

2. (N) Click on Enter Budget.

3. (I) Click on the paperclip symbol to open the Notes box.

5. (B) Within the Notes box, click on the Attach button.

6. (B) Click on the Browse button and navigate to the required document.

7. (B) Click on the Open button.

8. Enter the word “Test” in the Title field in the enVisage Notes box.

9. (B) Click on the Save button.
Staffing

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

Staff salary data will be uploaded into enVisage prior to the annual (original) budget process.

- The staffing module of enVisage allows for the comprehensive calculation of salaries and on costs.
- 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 rolled over from the original budget process.
- 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.
• Once you have selected the staff members you need to include in your budget, enter the required details against each employee within that salary profile.

• 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

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.

The effect of the security level is that:
1. You will only be able to see salary rates of staff that have a security level equal to or less than your security level.
2. Any salary rates with a higher security level than your level will not be displayed in the rates selection boxes.
3. Any staff records or staff allocation with a security level equal to or lower than yours will be displayed and can be selected.
4. Any staff records or staff allocations with a security level higher than your level will not be visible to you.
5. Any staff records or staff allocation that have a salary rate whose security level is higher than yours will not be visible to you.
6. Where you are not able to see the staff allocation, the totals associated with that hidden staff member’s salary will be excluded from the salary calculation screen total and from the summary calculation screen totals.

7. The security level does not affect your ability to see the budget accounts, so to prevent you from seeing a restricted salary amount it would usually be posted to a separate chart (to which you would not have view access).

Note: Each enVisage user has an individual security profile. The degree of access that you will have to staffing details and data will depend on your security profile. The security levels are based on a numeric system of values from 0 – 99. 99 is the lowest level of security and users in the profile can only see staff or salary rates with a security of 99. 0 is the highest level of security and users in the profile can see all staff and salary rates.
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

To prepare a staffing budget - the first step is to select the staff required.
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.
Demonstration – Selecting Staff

Practice

Demonstration – Selecting Staff
Guided Demonstration – Selecting Staff

In this Guided Demonstration, you will guide the class through the exercise showing them how to select staff in the budget system.

Selecting 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.
5. Type in a name or a portion of a name to refine your search.
6. (B) Click on the Search button.

7. (B) Select the staff member required by clicking on the box adjacent to their details.
8. (B) Click on the Save button.

Note the blue message indicating that your selections have been saved:

Staff lists saved
Note: Access to staff and staff data in the system is dictated by users’ security profiles. Users will not have access to staff that have a security profile higher than their own. If there is a need to change the security profile to alter the degree of access you have, contact the Faculty Accountant or Centre Manager to obtain authorisation for this change.
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.

- As discussed in previous sections, the top quarter of the screen displays the elements that are currently selected. On this screen you can change the project 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 under the Navigate menu on the side. You will be brought back to this screen once you have made the appropriate changes.

- 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

- This sets the timing of the payments and is used in the calculation of the base salary. The phasing options are very similar to those used in the account budgeting screens.

- 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.
Guided Demonstration – Salary Phasing

In this Guided Demonstration, you will guide the class through the exercise showing them how to complete the phasing of staff costs.

**Salary Phasing**

1. (N) Click on Staffing within the main menu.
2. (N) Click on Calculate.
3. (B) Click on the Super button and select the appropriate type/percentage.
4. (B) Click on the Phasing drop down list and select the Manual method of phasing.
5. (B) Click on the Phasing [...] button.
6. When the message appears “Do you wish to save changes” click on Yes.
7. Enter $5,000 in January, February and March.
8. (B) Click on the Save button.
9. When the message appears “The Total Salary $15,000 does not match the Phasing Total $0.” click on OK.
10. Note that the total salary should now equal $15,000.

**CALCULATE**

<table>
<thead>
<tr>
<th>Budget:</th>
<th>2007 Reforecast Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Group:</td>
<td>$5999 - COGNOS CUBE</td>
</tr>
<tr>
<td>Management Group:</td>
<td>$6999 - COGNOS CUBE</td>
</tr>
<tr>
<td>Division/Faculty:</td>
<td>$6999 - COGNOS CUBE</td>
</tr>
<tr>
<td>Branch/School:</td>
<td>$9999 - COGNOS CUBE</td>
</tr>
<tr>
<td>Cost Centre:</td>
<td>$9999 - COGNOS CUBE</td>
</tr>
<tr>
<td>Project List:</td>
<td>TRA0000 - Training Purposes Only</td>
</tr>
<tr>
<td>Salary Record:</td>
<td>T [Academic Permanent]; ALD0001 [Kenneth] (000402)</td>
</tr>
<tr>
<td>Salary phasing changes saved</td>
<td>Save</td>
</tr>
</tbody>
</table>

**Warning** Calculation of salaries is required to include the last saved changes.

**Academic Permanent**

<table>
<thead>
<tr>
<th>Staff</th>
<th>Name</th>
<th>Academic Type</th>
<th>Rate</th>
<th>Basic</th>
<th>Super</th>
<th>Academic Super</th>
<th>Total Salary</th>
<th>Phasing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>000402 - ALD0001 [Kenneth]</td>
<td></td>
<td>0.5</td>
<td>ALEC-1000</td>
<td>Full Super (27%)</td>
<td>$15,000</td>
<td>Manual</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE**

This column displays salary information relating to the Security Privileges for Tim Hitchen.

Salary Last saved: 18/04/2007 3:37:05 PM - Hitchen
Salary Last calculated: 18/04/2007 3:37:05 AM - Hitchen
Staffing – Salary Summary

- **Provides summary information of budgeted staffing costs**

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

• There are several different reports available to view. You can run budget reports online or select to download budgets and salary budgets to Excel.

• 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
Exercise – Budget Report

Practice
Practice – Budget Report

Overview

In this practice, you will do the following:

- Produce a Budget Report from the system at Project level.
- Produce a Budget Report from the system at University level.

Assumptions

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

Tasks

Budget Report

1. Produce a Budget Report from the system at Project level.
2. Produce a Budget Report from the system at University level.
Solution – Budget Report

Budget Report

1. (N) Click on Reports within the main menu.

2. (N) Click on Budget Reports.

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 Report Parameters area of the screen:

5. (B) Click on the Report Type drop down list and select a Totals report.

   Perform following steps to produce a Project level report:

6. (B) Click on the Organisation Level button and select Project level.

7. (B) Click on the Account Level button and select Account level.

8. (B) Click on the 2007 Original Budget details in the Include History? area.

9. (B) Once the elements of the report are all selected, click on the Submit Report button.

   Perform the following steps to produce a University level report:

10. (B) Click on the Organisation Level button and select Project level.

11. (B) Click on the Account Level button and select Account level.

12. (B) Click on the 2007 Original Budget details in the Include History? area.

13. (B) Once the elements of the report are all selected, click on the Submit Report button

   For all level reports:

14. The report will then be displayed on screen.

15. This report can be copied to Excel by (M) Edit > Select All > Edit > Copy and then paste this into a blank worksheet.
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.
Reports – Budget Downloads

• Once completed, the download will be emailed directly to your email address in CSV format. Simply clicking on the link will open the file as a CSV file.

• If you select the File, Save As… option, you can save the file in Excel by changing the file type. It is suggested that it is saved within an appropriate folder for future reference.

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

In this Guided Demonstration, you 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.
Dear Tim,

Budget Download for Project D999.M999.D999.B999.9999 TRAINING has completed.

To Download the file to your PC please click this [link](http://example.com).

Job ID: 416
Date Submitted: 15/06/2007 2:48:57 PM
Date Job Started: 15/06/2007 2:49:20 PM
Date Completed: 15/06/2007 2:49:22 PM

Regards,
Budget 2007

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Utilities – Recalculation

Utilities - Recalculation

- Use the Recalculation utility to generate salary budgets. Recalculations only effect salary budget calculations.

- You can generate salary budgets at any level of the organisation hierarchy to which you have security access

- 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.

- Click on the refresh button on screen until the recalculation message disappears, the recalculation should then be complete.

- 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.
Demonstration – Recalculation

FINANCE AND BUSINESS SERVICES CENTRE

Practice

Demonstration - Recalculation
Guided Demonstration – Recalculation

In this Guided Demonstration, you will demonstrate to the class how to produce a Recalculation.

Note: Only those users that have relevant access can perform recalculations. A weekly recalculation is performed by the System Administrator each Friday at 4.00pm.

Recalculation

1. (N) Click on Utilities within the main menu.
2. (N) Click on Recalculation.
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 Recalculation Parameters area of the screen, select the Organisation Level as Project.
5. (B) Click on the Submit Recalculation button.
From: Budget 2007 [Budget2007@ecu.edu.au]
To: Timothy MINTON
Cc:
Subject: EnVisage Salary Recalculation Completed

Dear Tim,


You can now check the results on-line in EnVisage.

Job ID: 417
Date Submitted: 15/06/2007 03:30:01 PM
Date Job Started: 15/06/2007 13:31:15 PM
Date Completed: 15/06/2007 13:35:57 PM

Regards
Budget 2007
Utilities – Job Queue

The job queue consists of two parts, an input queue and a history queue. All salary calculations, report downloads, dashboard generation and recalculations are processed by the job queue.

The job queue lists the jobs in order of submission and once it reaches the processor, reports will be calculated based on their currently saved variables. For instance if you submit a job for calculating, and then make another change (i.e. change the salary rate) and save this change prior to the job commencing its calculation (still in the input queue), then these new changes will be included in the calculation.

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).

The refresh button will refresh the screen and show any movements in the job queue.

Where no records appear in the Input Queue, all your jobs have either been processed or are currently being processed.
• 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.
Exercise – Job Queue

Practice

Exercise - Job Queue
Practice – Job Queues

Overview
In this practice, you will do the following:

- View job queues within the system.

Assumptions

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

Tasks

Job Queue

1. View the Input Job Queue within the system.
2. View the History Job Queue within the system.
Solution – Job Queues

Input Job Queue

1. (N) Click on Utilities within the main menu.
2. (N) Click on Job Queue.
3. (B) Click on the drop down list and select Input Queue.
4. (B) Click on the Refresh button.
   
   Note: The Input Queue shows jobs that have been submitted but not yet completed. Users will only see their own jobs, so if there seems to be significant delays in processing contact the System Administrator.

History Job Queue

5. (N) Click on Utilities within the main menu.
6. (N) Click on Job Queue.
7. (B) Click on the drop down list and select History Queue.
8. (B) Click on the Refresh button.
   
   Note: The History Queue shows jobs that have been completed or deleted.
Review of Outcomes

- Basic understanding of budgeting
- Understanding of ECU budget process
- Understand main elements
- Enter budget data into enVisage
- Run reports and downloads
Conclusion

Any questions or queries?

Thank you for attending!