

Budget

Manage Your Budget with an Integrated, Collaborative Approach

With an integrated and collaborative approach to budget creation and consolidation, Jenzabar EX Budget makes it easier than ever to manage your budget. Now you can leverage an expedited process that allows you to enter and share budget data quickly—so you can create, submit, review, distribute, update, and approve budgets in a secure environment. Working within a familiar spreadsheet environment that's typical of financial applications, you can drill down to the transaction level for visibility into spending; monitor and track your budget with data visualization; and easily spot trends. What's more, budget pools keep budgeting separate from accounting, empowering your administrators to manage and track spending the way you want to see it. By providing timely transaction data, Jenzabar EX Budget supports informed decision-making and helps bring your institution closer to accomplishing your strategic objectives.

Collaborative, Decentralized Environment

- Easily navigate within a personalized workspace environment to view notifications and create one-click access with links to your favorite URLs, files, and reports, as well as shared reports and links
- Leverage integration with Jenzabar CRM Staff and Jenzabar EX modules, including EX Purchasing to govern funds and spending
- Add important attachments and comments to a budget or line item for instant access to justifications and other supporting documentation
- Access contact information to collaborate with others while working on your budget
- Assign and distribute budgets quickly across campus
- Utilize role-based permissions to control user access to various functions
- Store budget data in the Jenzabar EX Database to make it accessible throughout your institution
- Prepare and deliver a variety of interactive and printed reports with Web-based reporting tools

Separate Budgeting from Accounting

- Allocate budget pools to group general ledger accounts by departments, jobs, and more
- Create user-friendly budget pool and line item names
- Manage pool structures by draft, active, or assigned status

The screenshot displays a web-based spreadsheet interface titled 'JENZABAR EX'. The main area contains a grid with multiple columns and rows of data. The columns include various budget categories and numerical values. The interface has a standard spreadsheet layout with a header row and several data rows. The data appears to be organized into sections or pools, with some rows highlighted in blue. The overall look is clean and professional, typical of a financial management application.

Operating Budget Worksheet

- Create, search, copy, export, and delete budget pool structures
- Review pool structures in an easy-to-read grid format

Set up, Create, and Manage Your Budget

- Tailor budget worksheets to display the information most relevant to you
- Create default or personalized budget layouts
- Create multiple budget scenarios
- View historical data and analyze prior year actuals to create new budget
- Perform standard grid functions such as filtering, roll-ups, computations, and column reordering
- View budget by type, month, quarter, year-to-date, or yearly periods; and by budgets, actual, variance, more

Budget JENZABAR EX MODULE

- View transaction history with drill-down to transaction level and display by graph or list
- Track budget status by draft, review, approve and ratify
- Review previous year budget and actual information to help create your new budget
- Undo and redo steps as needed
- Default data backup in case budget is accidentally deleted

Monitor and Adjust Your Budget

- Make adjustments to board-approved budgets
- Initiate, review, update, delete, and approve adjustments
- Carry over temporary adjustments or permanent adjustments to next year
- View pending adjustments submitted prior to approval
- Budget at a higher level to eliminate the need for tedious transfers between accounts

Streamline Operations with Jenzabar EX

Offered on the industry-leading Microsoft® SQL Server platform, Jenzabar EX enables every office on campus to access, update, and store crucial data more easily and efficiently. Authorized users share real-time information across administrative and academic departments, helping you to streamline operations and optimize your business processes.

- ▶ Shared database eliminates duplicate work, increasing administrative productivity and accuracy
- ▶ Powerful reporting tools provide end-user access to essential information and processes
- ▶ Student information is tracked from applicant stage through alumni/ae stage, supporting student success

From Admissions to Advancement, Jenzabar EX helps you deliver prompt, personalized service to prospects, students, alumni, families, and friends.

A Complete Set of Jenzabar EX Modules

Jenzabar EX offers a complete set of fully integrated modules to help manage your student information and business office data—each sharing a common database and standard user interface.

- ▶ Accounts Payable ▶ Accounts Receivable ▶ Admissions
- ▶ Advising ▶ Alumni Development ▶ **Budget** ▶ Financial Aid
- ▶ Fixed Assets ▶ General Ledger ▶ Non-Traditional Student
- ▶ Payroll & Personnel ▶ Purchasing ▶ Registration ▶ Student Life

The Jenzabar® Advantage

In today's competitive world, institutions of higher education need every advantage to achieve their mission and goals—from innovative software to strategic expertise and client-tailored services. Find it all in one place, delivered by a strong technology partner dedicated to your success: that's the Jenzabar advantage. Our family of fully integrated products includes:

- ▶ Award-winning, proven ERP systems ▶ Constituent relationship modules & award-winning campus portal ▶ Learning management system ▶ Retention management solution ▶ Institutional intelligence solutions ▶ Continuing education systems

Build Lifelong Relationships with Jenzabar

You can further extend the functionality of Jenzabar EX through our constituent relationship modules (CRMs), which let you offer Web-based self-service to all constituents. CRMs provide tight integration between Jenzabar EX and our Web portal, Jenzabar's Internet Campus Solution. From applicants to alumni, your constituents can access administrative and academic data anytime, anywhere via the portal—and the data they enter into any Jenzabar CRM is integrated with Jenzabar EX. Jenzabar gives your institution the power to build lifelong relationships with every constituent—so candidates become students, students become graduates, and alumni become donors.