

Blackbaud Financial Edge NXT Quick Start Guide

This Guide aims to assist legacy and new users with accessing and running existing reports in Blackbaud Financial Edge NXT, which is Tower Foundation's financial system. Colleges and Departments with donor funds typically have a contact who is familiar with the system and can help direct new users to existing financial reports. Please contact your Division Resource Officer or departmental Financial Manager for assistance.

Table of Contents

[Initial Access](#)

[Financial Edge NXT Invitation Process](#)

[Special Note for Legacy Users](#)

[Accessing Reports](#)

[Finding Existing Reports](#)

[Adding a Report to the Favorites List for Easy Access](#)

[Advanced Tips for Finding Reports](#)

[Adding Additional Information to the Report Screen](#)


[Sorting the Report Screen](#)

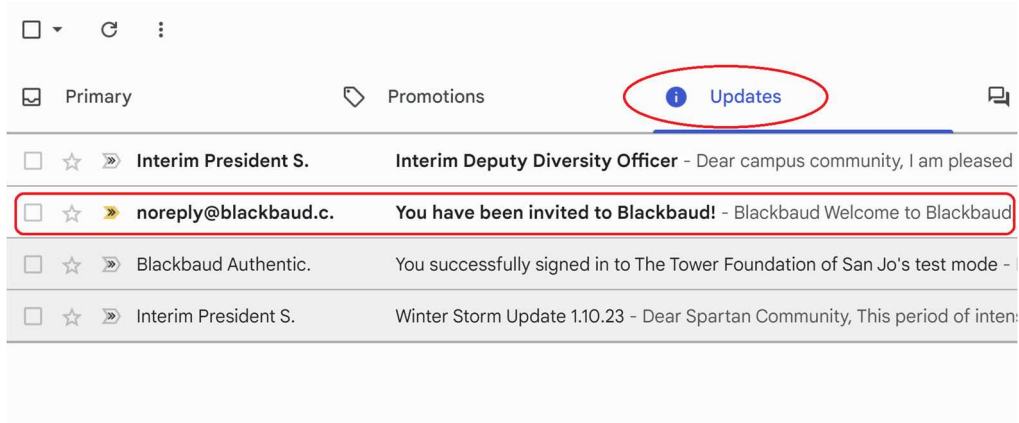
[Filtering the Report Screen](#)

Initial Access

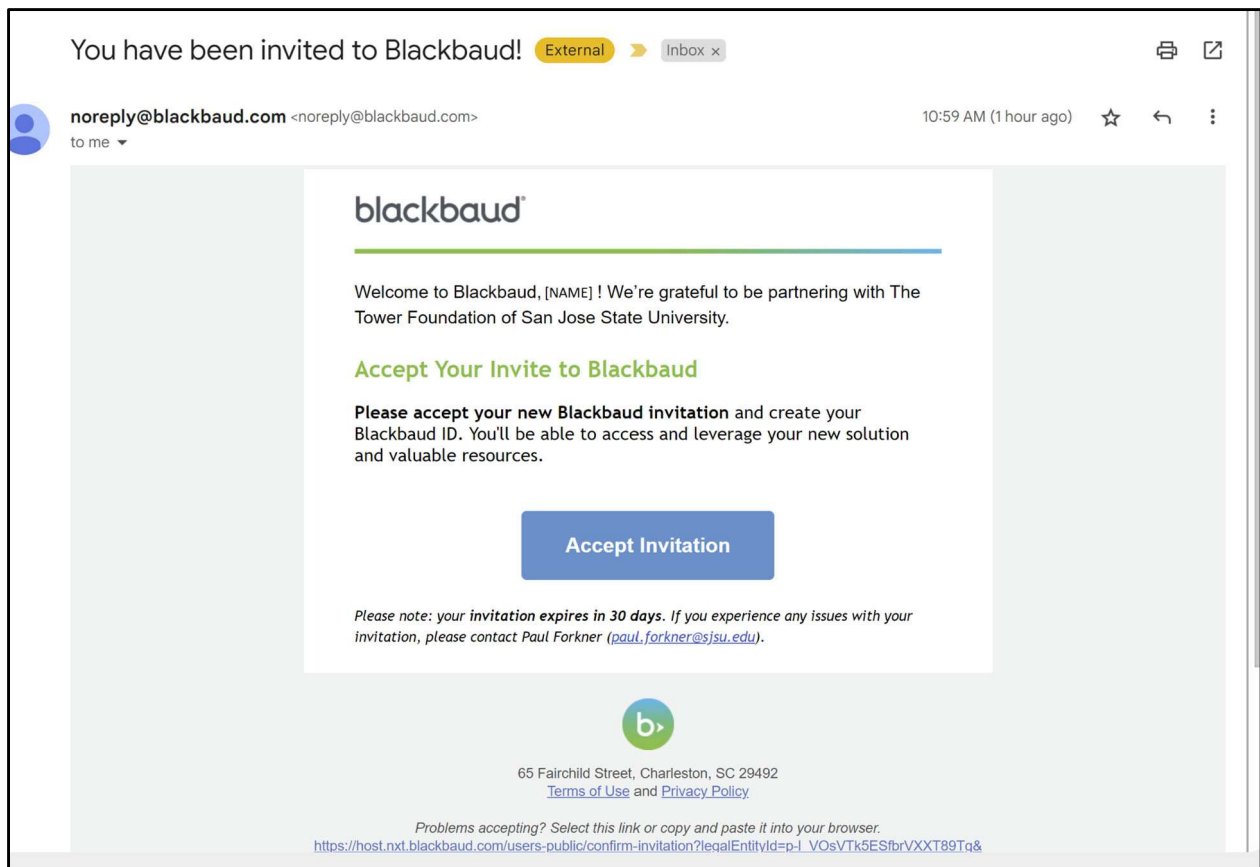
Financial Edge NXT Invitation Process

Look for an email from Blackbaud that contains your invitation to join Financial Edge NXT.

 **Please note: if your Gmail inbox includes the "Updates" tab, the invitation will appear there.**



Click on **Accept Invitation** to complete the enrollment process. If you are not already logged into one.sjsu.edu, you will be prompted to complete that process and authenticate via Duo.



Click on the **Sign in with the Tower Foundation** button

Sign in to accept invitation

Name@sjsu.edu

You must sign in to your Enterprise account with the email address above to accept this invitation.

Sign in with The Tower Foundation of



You should arrive at the Blackboard Financial Edge NXT homescreen.

Financial Edge NXT Home General ledger Reporting Analysis

Updates

What's next
What's next 1/12/2022
Review features and enhancements scheduled for upcoming releases.

Financial Edge NXT: Chat with Experts Live Q&A 1099 Processing
Resource 1/12/2022
Join us Jan. 19, (2pm ET) for a live Q&A session to help answer any 1099 questions.

Interactive 1099 Help
Resource 1/9/2022
Use these interactive 1099-MISC and 1099 NEC wizards for information about correcting 1099 boxes.

The Financial Post
Resource 1/6/2022
The latest Financial Edge NXT news on everything from current projects and initiatives to release information and much more!

Blackbaud University Training
Training 12/10/2022
View the Blackbaud University training options available for Financial Edge NXT web view.

1 2 3 4

 **Bookmark this URL to return to Financial Edge NXT:**
<https://host.nxt.blackbaud.com/fenxt-homepage/?envid=p-b76VAoZhu0mq6UNADPzm0w>

Special Note for Legacy Users

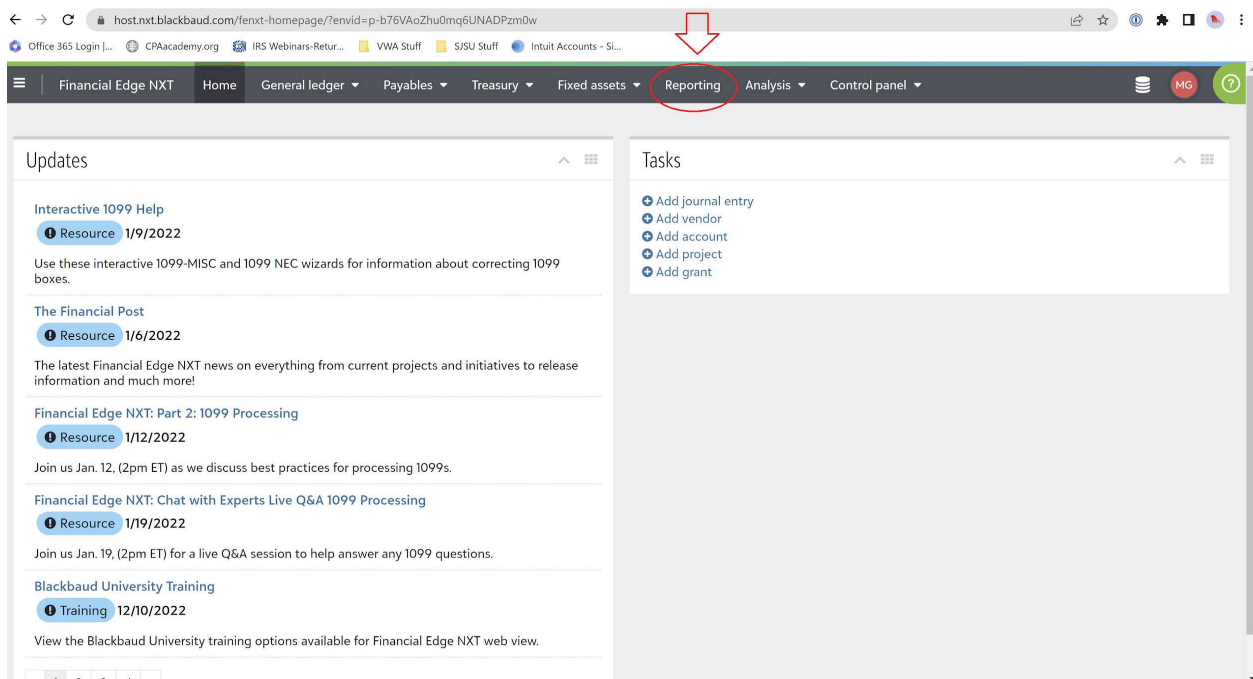
If you had access to Blackbaud Financial Edge prior to January 1, 2023, your user experience should be the same once you are in the Financial Edge system. The login process has been integrated with One.sjsu.edu, so you can access Financial Edge without signing into it separately. Just navigate to [url] to access the system.

If you typically select “Database View” after logging into Financial Edge, you downloaded Citrix Workspace at some point. The newer web interface, or Web View, doesn’t require the Citrix Workspace client and is the preferred method of interacting with the system going forward. When you login you are already in Web View. The guidelines below all describe how to use the Web View.

Accessing Reports

Departmental users login to the Financial Edge NXT system to access financial reports. This section describes the report access process, but does not discuss creating reports. Reports should only be created by a knowledgeable user to ensure they are accurate. Please contact your college Division Resource Officer, your departmental financial liaison or Tower Accounting (Thin Thandar Kyaw, 408-924-6517).

🖱️ Click on **Reporting** in the Financial Edge NXT home screen.



The Reporting home screen will open. The list of reports are hyperlinks. Clicking on a report name will open the report.

← → 🔄 host.nxt.blackbaud.com/fin-reporting/?envid=p-b76VAoZhu0mq6UNADPzm0w

Office 365 Login | CPAacademy.org | IRS Webinars-Retur... | VWA Stuff | SISU Stuff | Intuit Accounts - Si...

Financial Edge NXT | Home | General ledger | Payables | Treasury | Fixed assets | Reporting | Analysis | Control panel

Reports

All reports 212 | Recently run 1 | Frequently run 0 | Favorites 0

212 Records

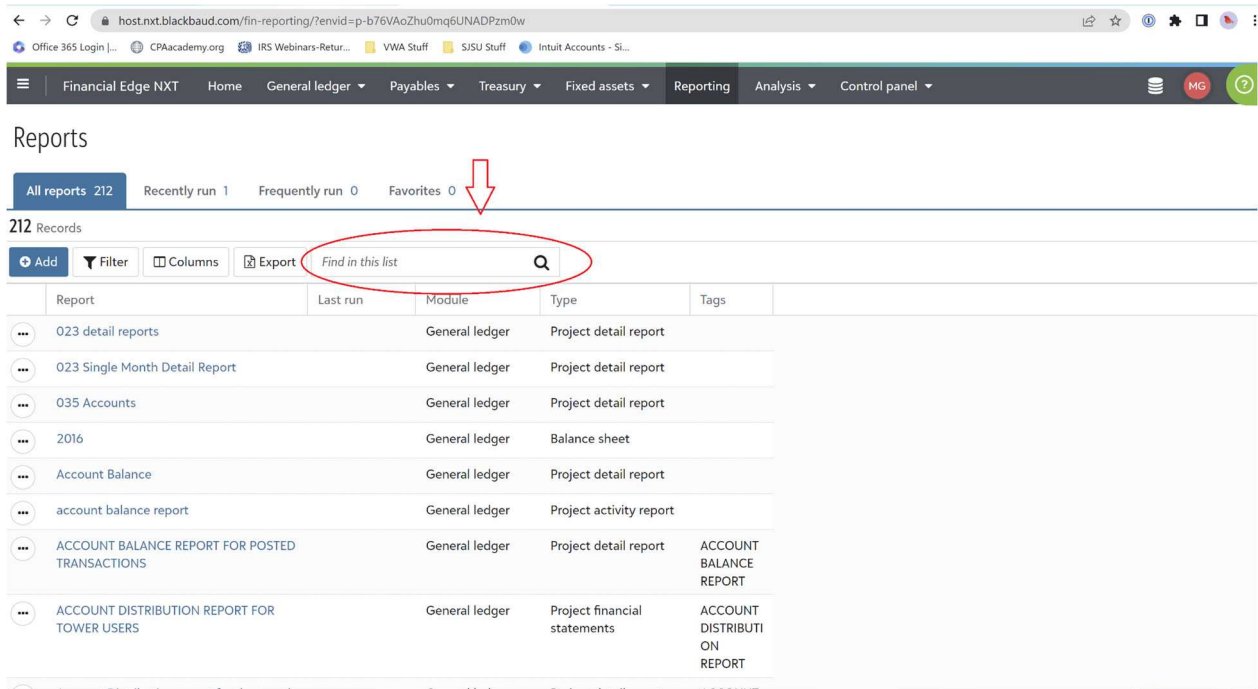
🔍 Add | Filter | Columns | Export | Find in this list 🔍

Report	Last run	Module	Type	Tags
023 detail reports		General ledger	Project detail report	
023 Single Month Detail Report		General ledger	Project detail report	
035 Accounts		General ledger	Project detail report	
2016		General ledger	Balance sheet	
Account Balance		General ledger	Project detail report	
account balance report		General ledger	Project activity report	
ACCOUNT BALANCE REPORT FOR POSTED TRANSACTIONS		General ledger	Project detail report	ACCOUNT BALANCE REPORT
ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements	ACCOUNT DISTRIBUTION REPORT

Finding Existing Reports

In this window, you can see the list of all reports created. The default sort is alphabetical by report name. Once a report has been created for you, perform a keyword search to find it and add it to your Favorites list (instructions follow).

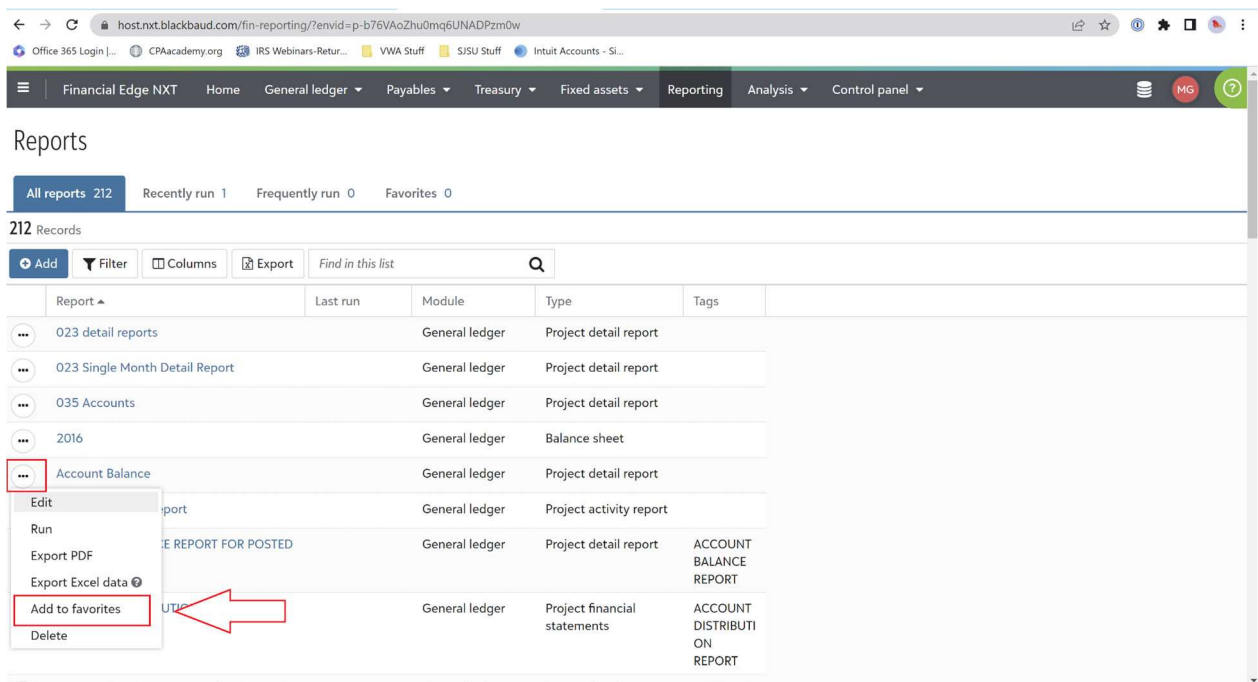
🔍 Enter a keyword in the **Find in this list** box. The search will only include values in the **Report** column, so you cannot search on the **Tags** field.



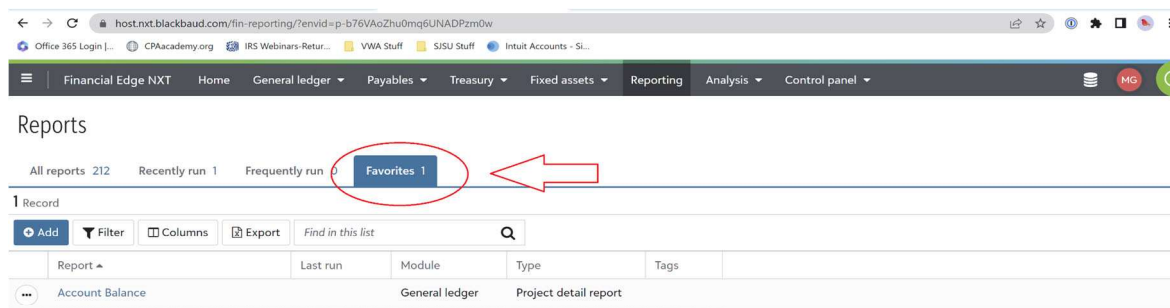
Adding a Report to the Favorites List for Easy Access

When you find your report(s), you can easily add them to a **Favorites** list.

Click on the ellipsis (...) to the left of the report you want to favorite. In the drop-down menu, select **Add to favorites**.



Select the **Favorites** tab at the top of the screen to see only your favorite reports:

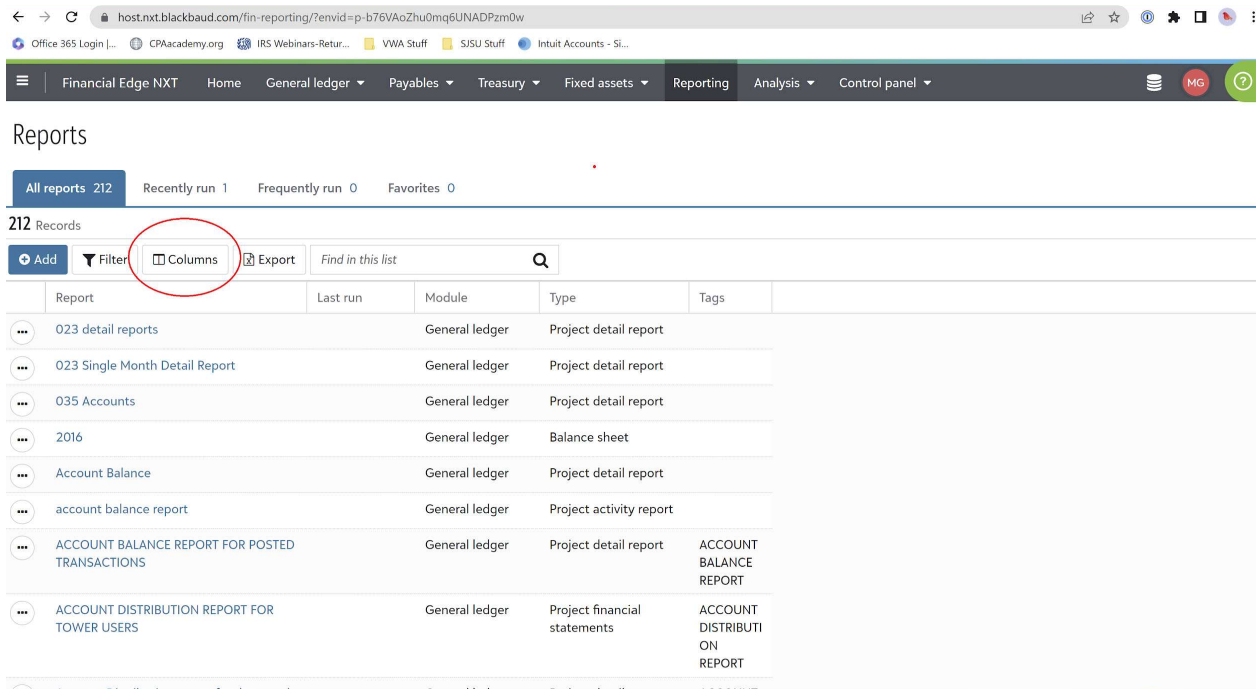


Advanced Tips for Finding Reports

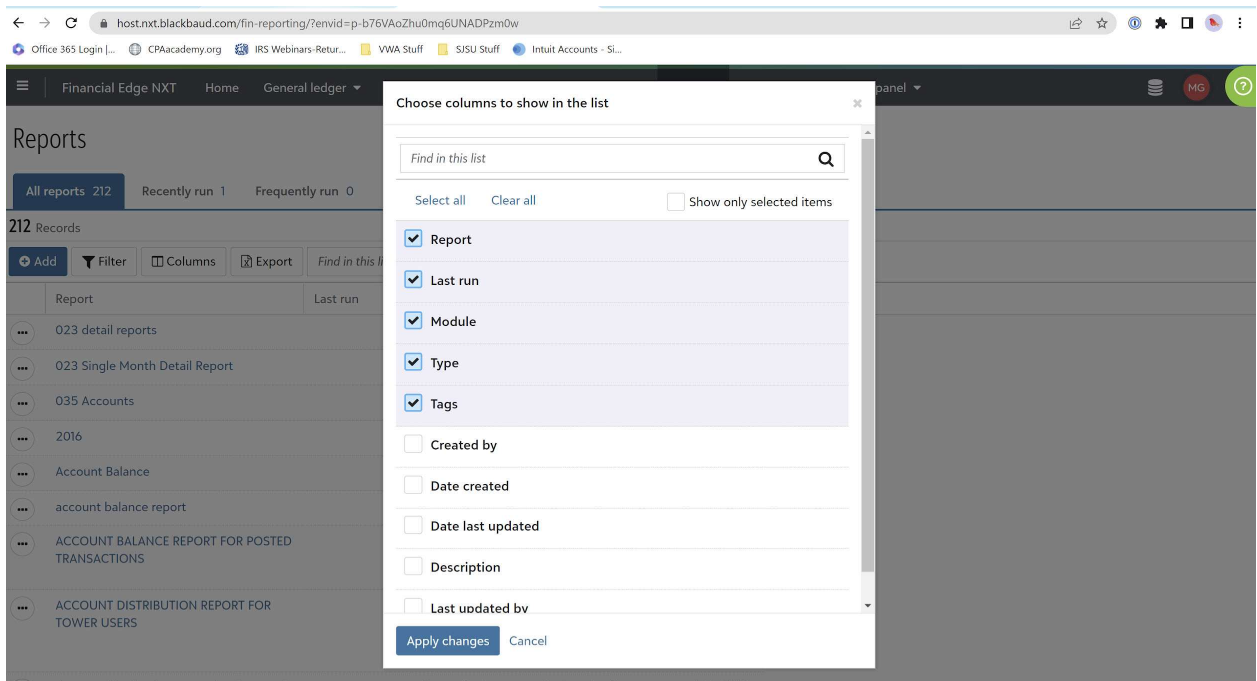
Adding Additional Information to the Report Screen

You can add more columns to the Reports home screen to help find existing reports.

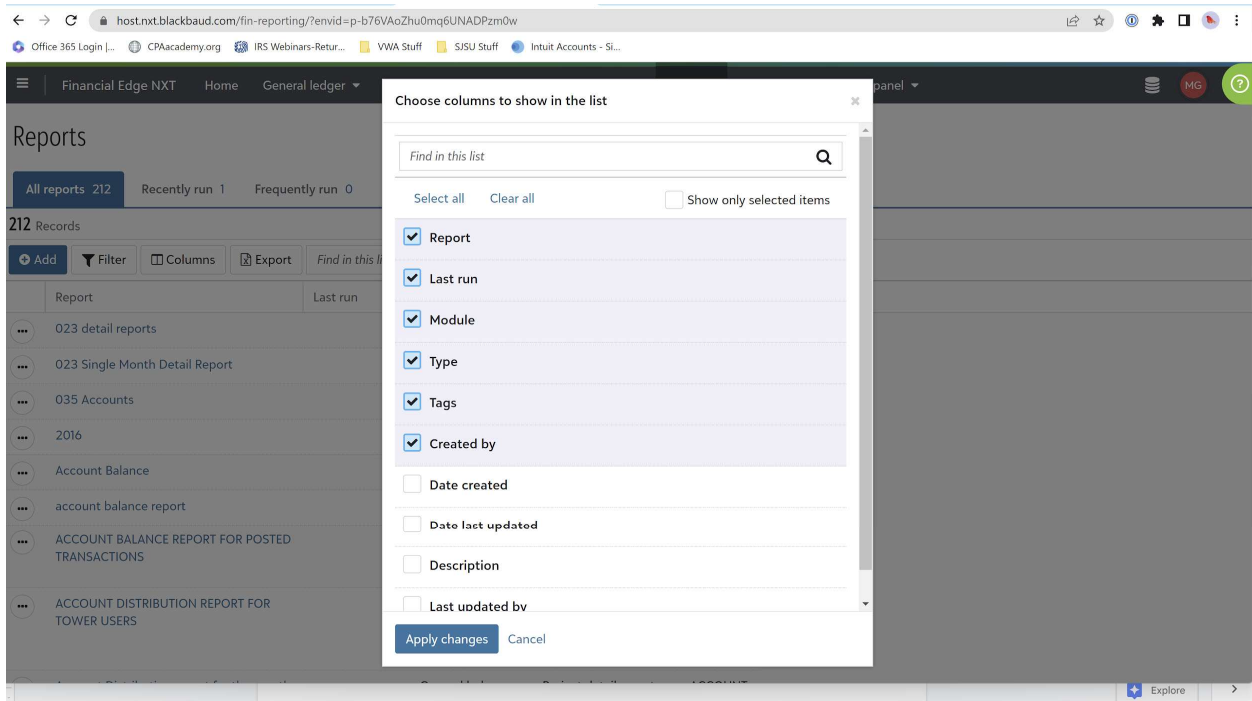
Click on **Columns**



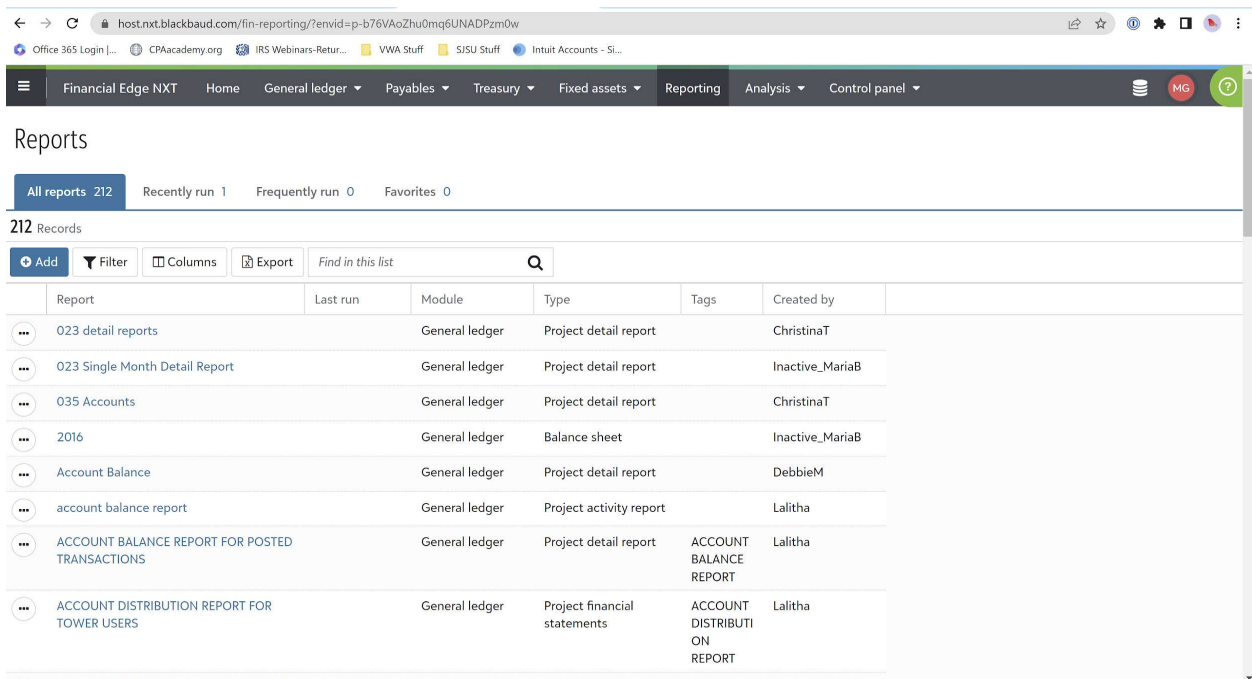
This will open a window with additional options:



Select the columns you want to add. In this example, we will add the **Created by** column.



Click on **Apply changes**. Now the Reports screen shows a new column at the end with the username of the report creator.



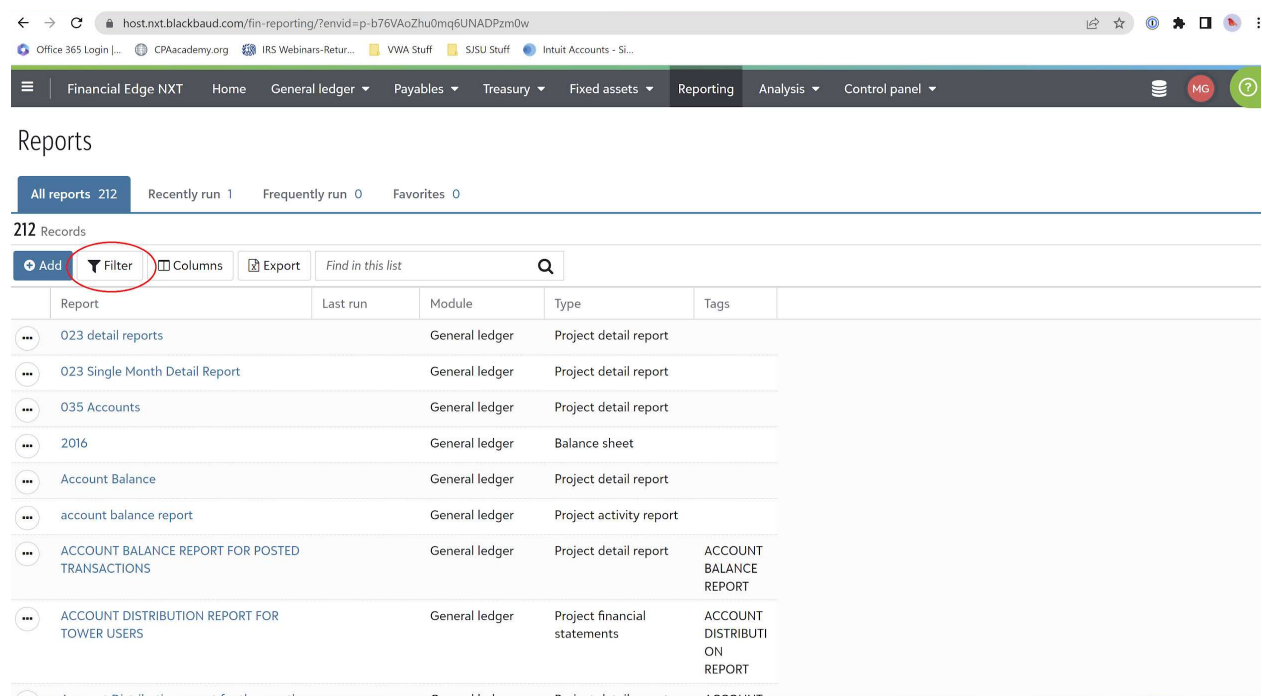
Sorting the Report Screen

Click on any of the headings in the Report screen to sort by that column. The first click will sort in ascending order. A second click will sort in descending order.

Filtering the Report Screen

The Report screen can be filtered to focus only on the types of reports you will access. The following steps will remove several reports used by Tower Foundation Accounting staff, which makes the list easier to navigate (i.e., shorter).

Click on **Filter**



The screenshot shows the Financial Edge NXT interface. The top navigation bar includes 'Financial Edge NXT', 'Home', 'General ledger', 'Payables', 'Treasury', 'Fixed assets', 'Reporting', 'Analysis', and 'Control panel'. The 'Reporting' section is active, displaying a 'Reports' screen with 212 records. The 'Filter' button is circled in red. Below the toolbar, a table lists various reports with columns for Report, Last run, Module, Type, and Tags.

Report	Last run	Module	Type	Tags
023 detail reports		General ledger	Project detail report	
023 Single Month Detail Report		General ledger	Project detail report	
035 Accounts		General ledger	Project detail report	
2016		General ledger	Balance sheet	
Account Balance		General ledger	Project detail report	
account balance report		General ledger	Project activity report	
ACCOUNT BALANCE REPORT FOR POSTED TRANSACTIONS		General ledger	Project detail report	ACCOUNT BALANCE REPORT
ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements	ACCOUNT DISTRIBUTION REPORT

Financial Edge NXT Home General ledger

Reports

All reports 215 Recently run 5 Frequently run 0

215 Records

Add Filter Columns Export Find in this list

Report	Last run
023 detail reports	
023 Single Month Detail Report	
035 Accounts	
035 Accounts for 5000	
2016	
Account Balance	1/9/2023
account balance report	1/9/2023
ACCOUNT BALANCE REPORT FOR POSTED TRANSACTIONS	General ledger Project detail report ACCOUNT BALANCE REPORT
ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS	General ledger Project financial statements ACCOUNT DISTRIBUTION REPORT
Account Distribution report for the month	General ledger Project detail report ACCOUNT Lalitha

Filters

Module
Show all

Type
Show all

Last used
Show all

Show sections Apply filters Clear all filters Cancel

In **Module**, select *General Ledger*

Financial Edge NXT Home General ledger

Reports

All reports 215 Recently run 5 Frequently run 0

215 Records

Report	Last run
023 detail reports	
023 Single Month Detail Report	
035 Accounts	
035 Accounts for 5000	
2016	
Account Balance	1/9/2023
account balance report	1/9/2023
ACCOUNT BALANCE REPORT FOR POSTED TRANSACTIONS	
ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS	
Account Distribution report for the month	

Filters

Module

- General ledger
- Show all
- General ledger
- Payables
- Treasury
- Fixed assets
- Show all

Module	Report	Account	User
General ledger	Project detail report	ACCOUNT BALANCE REPORT	Lalitha
General ledger	Project financial statements	ACCOUNT DISTRIBUTION REPORT	Lalitha
General ledger	Project detail report	ACCOUNT	Lalitha

 In **Type**, select *Project financial statements*

The screenshot shows the 'Reports' page in Financial Edge NXT. A 'Filters' dialog box is open, allowing users to filter reports. The 'Module' is set to 'General ledger' and the 'Type' is set to 'Project financial statements'. The background shows a table of reports with columns for Report, Last run, and user.

Report	Last run	User
023 detail reports		
023 Single Month Detail Report		
035 Accounts		
035 Accounts for 5000		
2016		
Account Balance	1/9/2023	Lalitha
account balance report	1/9/2023	Lalitha
ACCOUNT BALANCE REPORT FOR POSTED TRANSACTIONS		Lalitha
ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		Lalitha
Account Distribution report for the month		Lalitha

🖱️ Click on **Apply Filters**

Now the Reports screen shows a subset of total reports. The filters applied are shown above the column headings.

Reports

All reports 19 Recently run 0 Frequently run 0 Favorites 0

19 Records

+ Add
Filter
Columns
Export

Q

Filter: Module is General ledger X Type is Project financial statements X

Report	Last run	Module	Type	Tags	Created by
ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements	ACCOUNT DISTRIBUTION REPORT	Lalitha
Art ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements		DebbieM
Athl Distribution		General ledger	Project financial statements		JeffP
Athl Distribution JP		General ledger	Project financial statements		JeffP
Athl SIF Accounts JP		General ledger	Project financial statements		JeffP
CoE ACCOUNT DISTRIBUTION REPORT FOR TOWER USERS		General ledger	Project financial statements		KarenT
Deb		General ledger	Project financial statements		DebbieM